Add a Prospect Quick Start Guide for All Users

Check for Existing Prospects

Prospects are added to the Web Control system when an email lead is received and parsed. You see these leads on the Web Control Prospects screen. In addition to receiving leads via email, you may also add prospects the system manually. When adding a prospect, the system checks that you are not duplicating an existing prospect. This check is part of the Prospect Entry process. You may add a prospect from either the Web Control Home page or the Prospects page.

- From the Prospects section, click Add Prospect from the links on the left navigation.
- 2. On the **Prospect Entry** screen, type the prospect's information.
 - **NOTE:** For a broader search, complete fewer of the search fields.
- 3. Click Check for Existing Prospects.
- 4. When the **Prospect Search Results** display, the system states that no matching prospects were found or displays possible matches.
 - If the prospect was not found, you can add the prospect by clicking the Add Prospect button, or you can search again by clicking the Search Again button.
 - If possible matches are found, you can choose to look at the record details by clicking the **Details** button or edit the record by clicking the **Edit** button. If none of the records exactly matches the prospect you want to enter, you can add the prospect by clicking the **Add Prospect** button.

bect Entry			3
Name:			Reverse Phone Lookup
First:	Peggy	Phone:	614 - 039 - 7088 90
Last:	Prospect	Email:	pprospect@demoaddre
Address:			
Street:	123 Main St.	Driver License:	
City:	Columbus	Social Security #:	
State:	он		
Zip Code:	43085		
	Only show P Search (Search)	rospects from the last Current Dealership Only M Dealerships	0 🛩 days
	Deck for Er	isting Prospects Scan	License



Pressent Details	Results: 1 to 1 of 1
Prospert, Pappy 123 Main 54. Columbus, OH 43005 Day phone (614)033-7000 pprospert@damoaddress.com	Dynais Ed

Add a New Prospect

When you choose to add a new prospect, the Edit Prospect page appears so you can add more information about the prospect.

1. On the **Edit Prospect** screen, type information in as many fields as possible.

Notes:

- The red Asterisks indicate Required fields.
- All the fields except Type may be edited later.

Info	Vehicles	Trade-ins	Contact	Family				
Save Cancel		Click t	Save to fin	alize the prospe	ict.			
(Fields marked	t * are required	1.)						
Name:					Phone:			
	Title:					Day	(614)039-7888	90
	•First:	Peggy				Eve	91	
	Middle:				Email:			
	*Last:	Prospect				Primary	; pprospect@demo	address.
	Nickname:					Alt :	l:	
Address:						Alt	2:	
(Home)	Street:	123 Main St	6					
	City:	Columbus			*Type:	Walk-in	~	
	State:	OH			New/Used:	New	~	
	ZipCode:	43085	60		*Source:	Newspap	er.	
	Country:					1115.25		
Vehicle:					*Assigned:	Ed Braun	beckManager	~
	Finance:	~			1810			-
	Year:	2006			*Status:	New	~	
	Maker	Chaurolat		-		-		

For Assistance, contact AVV Technical Support at 614-839-7888 or send an email to <u>WebControlSupport@avv.com</u> August 2006 page 1 of 2



- Click Save to save the record. The system assigns a unique Prospect ID to the record.
- 3. When the **Notes** screen displays, complete the form to add a note to the record.
- 4. Click Save Record.
- 5. Select the next step by clicking a button from the list of actions. The choices include:
 - View Details This option takes you to the Prospect detail page.
 - Schedule Next Action This option takes you to the Schedule Next Action page.
 - Send an Email This option takes you to the Send Email page.
 - Write a Letter This option takes you to the Create Letter page.
 - Make a Phone Call This option takes you to the Phone Call Record page.
 - Write a Note This option takes to you the Notes page.
 - Close Details Window This option closes the Prospect Details window.
- 6. After completing the selected action or closing the Prospect Details window, you can also select from another set of actions or choose to print forms.

	Name: Peggy Prospect Address: 123 Main St., Columbus, Of Phone: day: (614)839-7588 Email: pprospect@demoaddress. Vehicle: 2006 Chevrolet TraiBlazer	1 43085 com
ype of Record: • Meeting Notes	⊖General Notes ⊖Fax	OLetter
Vhat was sent: ax Number	Select an Item: 💌	
lotes: leeting notes go he	re	13
Ser	id an Email	
Ser Wri Make Wr Close D ps://webcontrol.av	Id an Email te a Letter a Phone Call ite a Note retails Window rv.col Thternet	
Ser Wri Make Close D ps://webcontrol.av	Id an Email te a Letter a Phone Call ite a Note retails Window v.col Internet ction for: Peggy Prospect The prospect	entered has been created.
Ser Wri Make Wr Close D Close D close the Next A	Id an Email te a Letter a Phone Call ite a Note retails Window v.col Internet ction for: Peggy Prospect The prospect Next Actions See Details Future Action Edit Prospect Add Prospect / Search	entered has been created.