

# Edit/Export Prospect Information



## Quick Start Guide for Manager Users

The Edit/Export Prospect Information feature allows you to perform three different tasks:

- Change Prospects' Sales Status
- Reassign Prospects to Another Salesperson
- Export Prospect Information

Each task gives you the opportunity to either make changes to multiple prospects at one time or to gather information about multiple prospects at one time.

### Change Prospects' Sales Status

The purpose of the Change Prospects' Sales Status task is to update the sales status of one or more prospects based on specific criteria selected by you. For example, if you want all prospects assigned to a specific salesperson to be moved from one status to another, you can change them all at one time using this feature.

#### To complete the Change Prospects' Sales Status task:

1. Click the **Settings** tab.
2. From the **Batch Activities** section, click **Edit/Export Prospect Information**.
3. Select **Change Prospects' Sales Status**, and click **Next**.
4. In **Step 1: Select Dealership/Salesperson Information**, select the **Dealership** (if applicable) and the **Salesperson(s)** whose prospects' status need updated. Click **Proceed to Step 2 of 5**.

**From:**  
Select the current dealership and salesperson(s) of the prospect(s) you want to change.

**Dealership:**

**Salesperson(s):**   
Agner, Ed  
BDC User, AVV  
Braunbeck, Ed  
Courter, Keith

5. In **Step 2: Select Sales Statuses**, select the **Current Sales Status** of the prospects and the **New Sales Status** of the prospects, and click **Proceed to Step 3 of 5**.

**From:**  
Select the current sales status for the chosen users' prospects.

**Current Sales Status:**

**Note:** To move all prospects from the sales status sub-folders, select the main group name from the list of folders.

**To:**  
Select the sales status where you want the prospects to move. The dealership and salesperson do not change.

**New Sales Status:**

**Warning:** Sales processes based on sales status will not trigger when prospects are moved to a new status using this method.

#### Important Note:

- Prospects moved to a new status by the Edit/Export process will not trigger sales processes based on sale statuses.
- The New Sales Status **cannot** be a group (ACTIVE, ALL LOST, etc.). If you select a group, the prospects will not update correctly.

- In **Step 3: Find Prospects**, choose your search criteria to find the prospects whose status you want to change, and **click Proceed to Step 4 of 5**.
- In **Step 4: Select Prospects**, select the prospects whose status you want to change, and **click Proceed to Step 5 of 5**.

**Step 4: Select Prospects**

**Search Results:**  
From the search results, select the prospect(s) whose sales status you want to change.  
Showing 1 through 12 of 12

Check All   Uncheck All   Check Visible   Uncheck Visible

Name	Vehicle	Action	Source	Status
<input checked="" type="checkbox"/> <a href="#">Brown, Ashley</a>	2005 Subaru Outback		AutoUSA	FirstResponse
<input checked="" type="checkbox"/> <a href="#">Cooper, Audrey</a>	2005 Toyota Camry		Toyota	FirstResponse
<input checked="" type="checkbox"/> <a href="#">Flores, Janice</a>	2005 BMW X3		WhosCalling.com	FirstResponse

**Important Notes:**

- All prospects are selected by default. If you do not want to change a status, clear the check box next the prospect's name, or use the Check and Uncheck buttons that display above the Search results to select and clear check boxes.
- Click the column headers to sort the Search Results. By default, the results are sorted by last name

- In **Step 5: Confirm and Complete**, click **Change Sales Status** to change the prospects' status.

**Step 5: Confirm and Complete**

Click **Change Sales Status** to move 3 prospect(s) in AVV Chrysler Dodge Jeep from **FirstResponse** to **Second Response**.

Back   Cancel   Change Sales Status

- When the change is complete, click **Cancel** to return to the **Settings** page, or click **Start New/Edit Export** to begin a new edit or export.

**Finished!**

Click **Start New Edit/Export** to begin another edit or export. Click **Cancel** to return to the Settings page.

Cancel   Start New Edit/Export

## Reassign Prospects to Another Salesperson

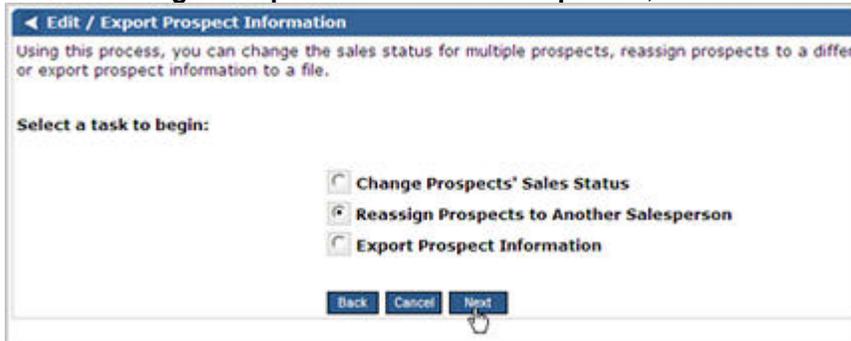
The purpose of the Reassign Prospects to Another Salesperson task is to update the Salesperson assignment of one or more prospects based on specific criteria selected by you. For example, if you have a salesperson

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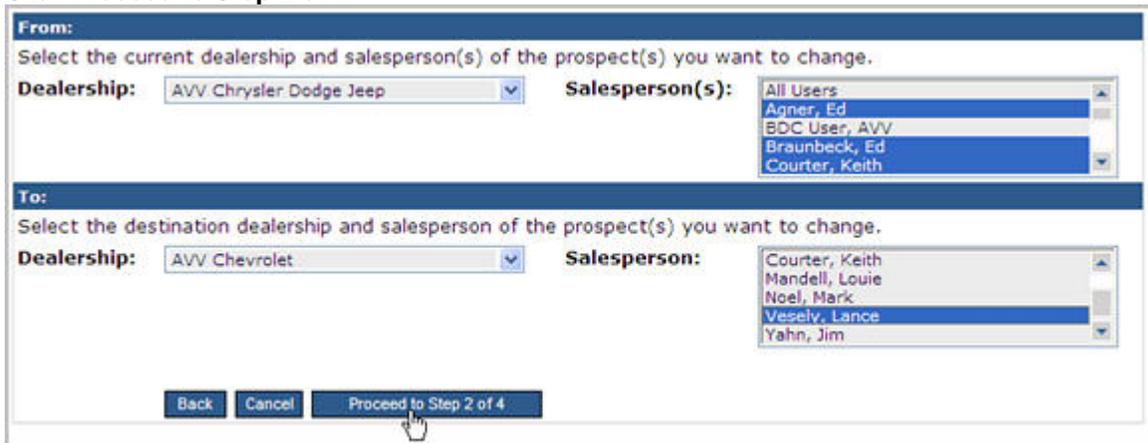
who is taking on a new role in the dealership and no longer will work directly with prospects, you can reassign all prospects to another salesperson at one time.

**To complete the Reassign Prospects to Another Salesperson task:**

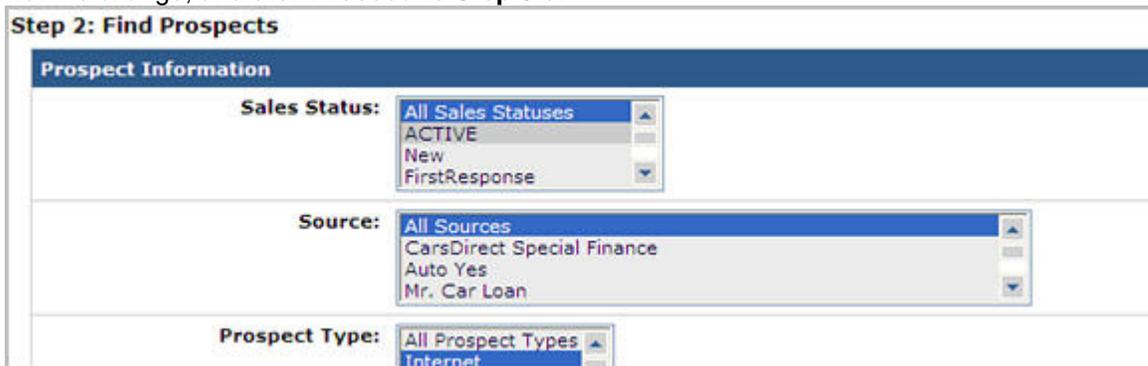
1. Click the **Settings** tab.
2. From the **Batch Activities** section, click **Edit/Export Prospect Information**.
3. Select **Reassign Prospects to Another Salesperson**, and click **Next**.



4. In **Step 1: Select Dealership/Salesperson Information:**
  - a. In the **From** section, select the **Dealership** (if applicable), and the **Salesperson(s)** whose prospects you want to move.
  - b. In the **To** section, select the **Dealership** (if applicable), and the **Salesperson** to which the prospects will be assigned. You can only reassign prospects to one salesperson at a time.
5. Click **Proceed to Step 2 of 4**.



6. In **Step 2: Find Prospects**, choose your search criteria to find the prospects whose assignment you want to change, and click **Proceed to Step 3 of 4**.



7. In **Step 3: Select Prospects**, select the prospects whose assignment you want to change, and click **Proceed to Step 4 of 4**.

**Step 3: Select Prospects**

**Search Results:**

From the search results, select the prospect(s) whose sales status you want to change.

Your search returned a total of 134 records. Showing 1 through 20 of 134 [1] 2 3 4 5 6

Check All Uncheck All Check Visible Uncheck Visible

Name	Vehicle	Action	Source	Status
<input checked="" type="checkbox"/> Alvarez, Joyce	2005 Buick Park Avenue		AutoTrader	New
<input checked="" type="checkbox"/> Arnold, Roger	2005 Honda Accord		Honda Motors	60 Day Pros

**Important Notes:**

- All prospects are selected by default. If you do not want to change a status, clear the check box next the prospect's name, or use the Check and Uncheck buttons that display above the Search results to select and clear check boxes.
- Click the column headers to sort the Search Results. By default, the results are sorted by last name.

8. In **Step 4: Confirm and Complete**:

- If applicable, select a new sales status for any prospects whose status will not match when it is reassigned (The list of sales statuses only appears when a new status needs selected, and this typically occurs when reassigning from a salesperson in one dealership to a salesperson in another dealership).
- Click **Reassign Prospects**.

**Step 4: Confirm and Complete**

You have chosen to reassign 20 prospect(s). The sales status of 20 of these prospect(s) does not match an existing sales status in the destination dealership. Please select a new sales status for these prospect(s) and click **Reassign Prospects**.

30 Day Prospect

Back Cancel Reassign Prospects

9. When the reassignment is complete, click **Cancel** to return to the **Settings** page, or click **Start New/Edit Export** to begin a new edit or export.

**Finished!**

Click **Start New Edit/Export** to begin another edit or export. Click **Cancel** to return to the Settings page.

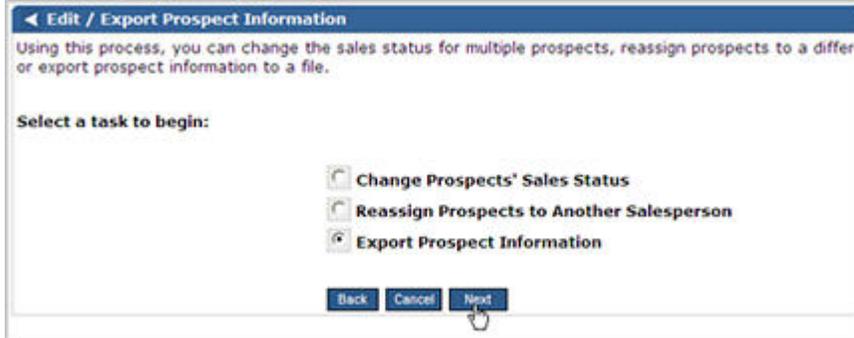
Cancel Start New Edit/Export

## Export Prospect Information

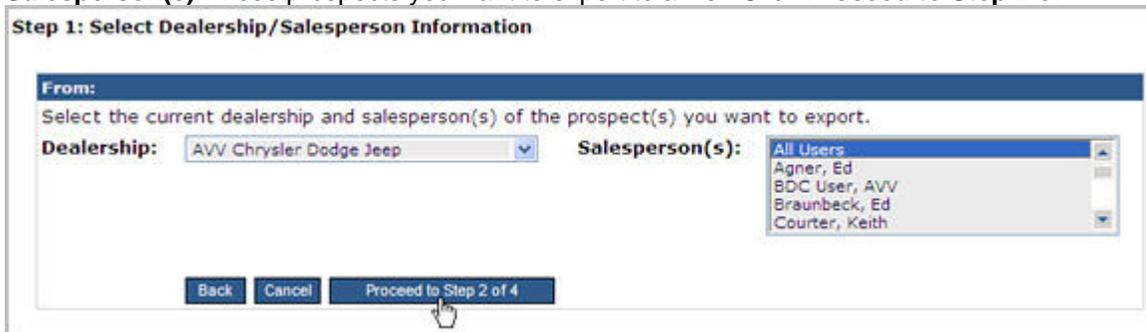
The purpose of the Export Prospect Information task is to create a file that includes prospect information for one or more prospects.

To complete the Export Prospect Information task:

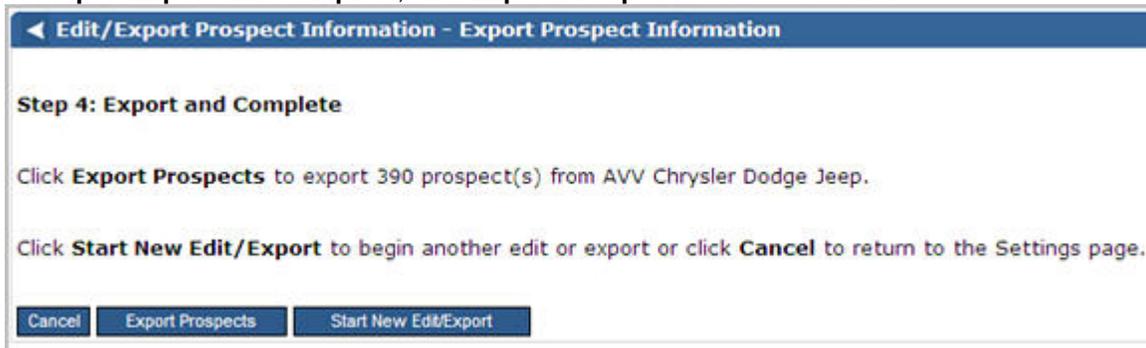
1. Click the **Settings** tab.
2. From the **Batch Activities** section, click **Edit/Export Prospect Information**.
3. Select **Export Prospect Information**, and click **Next**.



4. In **Step 1: Select Dealership/Salesperson Information**, select the **Dealership** (if applicable) and the **Salesperson(s)** whose prospects you want to export to a file. Click **Proceed to Step 2 of 4**.



5. In **Step 2: Find Prospects**, choose your search criteria to find the prospects you want to export, and click **Proceed to Step 3 of 4**.
6. In **Step 3: Select Prospects**, select the prospects for the export, and click **Proceed to Step 4 of 4**.
7. In **Step 4: Export and Complete**, click **Export Prospects** to create the file.



8. Click **Save** to save the file.

### Important Note:

- It is best to choose Save instead of Open when exporting prospects. If you save the file, you can open it outside of Web Control and work with data more easily.

9. Click **Cancel** to return to the **Settings** page, or click **Start New/Edit Export** to begin a new edit or export.

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