The prospect database is setup with custom data fields divided into sections. Add or upload prospects and set up a transfer process to distribute prospects as sales leads.

Prospect Administration

Setup
Setup prospect administration by adding custom fields to hold data. Fields can be text, lookup, select, date, numbers or text areas. The database can be displayed in sections to better organize the fields.

Add and Manage
Site administrators can add new prospects that can be added individually or uploaded in bulk. Prospects can also be added by filling out forms on the portal.

Notes and Tasks
Attach a note to the prospect record. Create a task and set a reminder date, then send that note to another administrator on the site. Notes are created by the site if data is changed in the record.

Transfer Process
Set up the business rules to determine how a prospect is transferred to a portal member. Decided if one or more than one member receives the prospect, the process to accept that transfer, and how many prospects can be given to a member in a 30-day timeframe. Require the member to update the prospect status or have the prospect go back into the queue for redistribution.