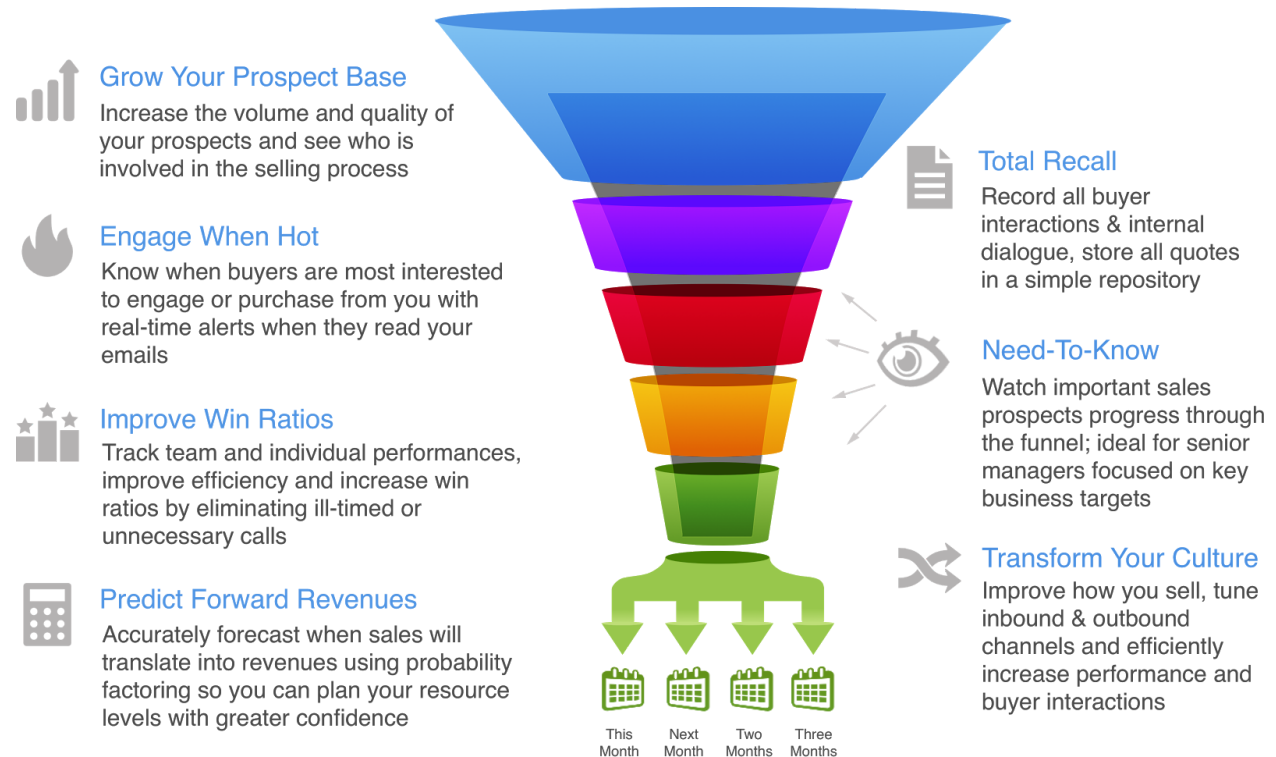


# PROSPECT MANAGER

## The simple way to manage your sales prospects

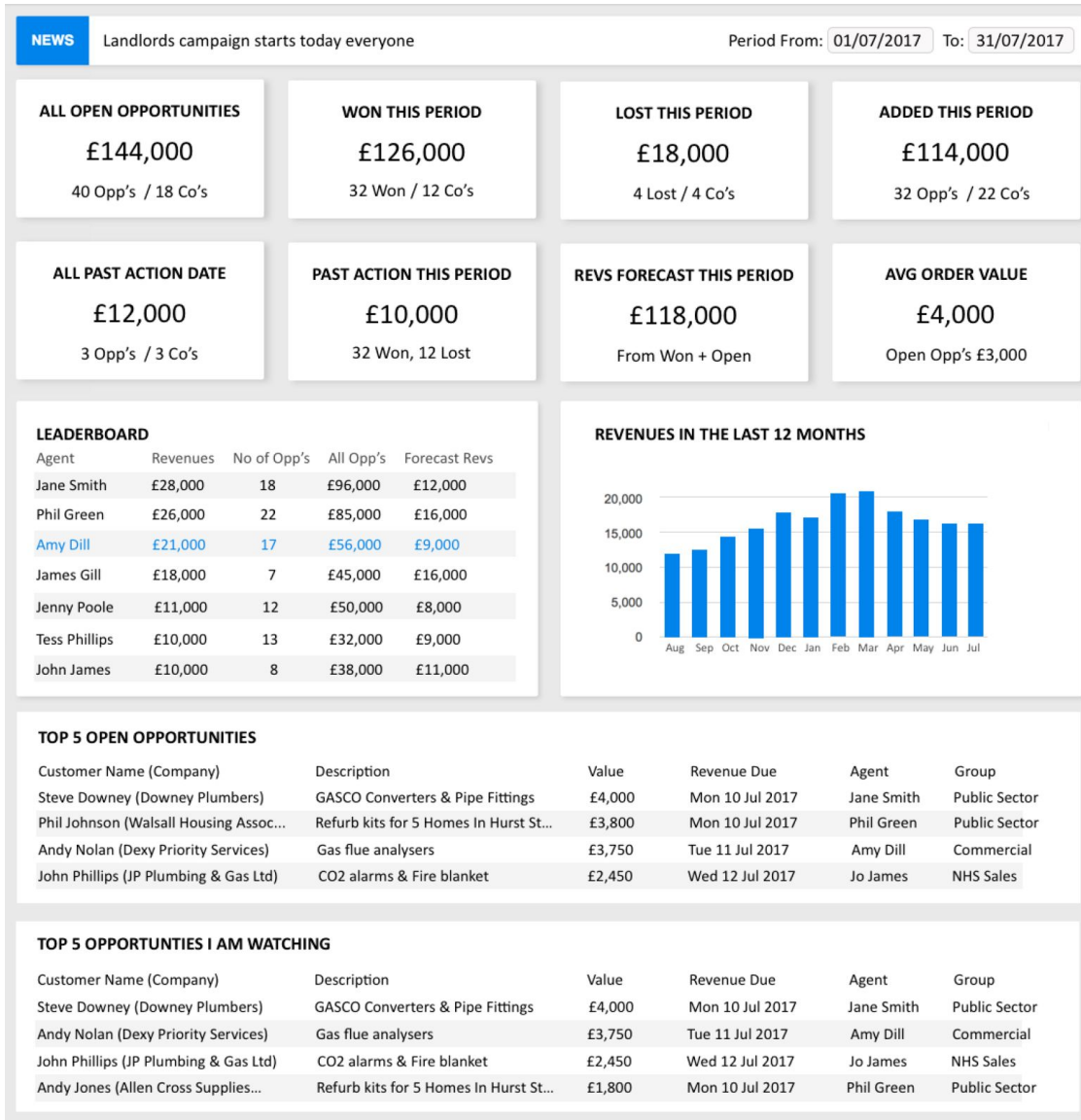
Track and manage campaigns, prospects and quotes through your sales funnel to conversion. Send low cost email campaigns and receive alerts when prospects open proposals.



## Key Features

- Add prospect records, assign to owners, tag to campaigns, tag users
- Record sales revenue and when it will turn up
- Add watchers so they are informed as the prospect progresses
- Mark important prospect records for easier tracking
- Add next action dates and reminders so you never forget a call
- Upload and store proposals and email them to prospects
- Easily search by salesperson, dates, revenue, margin, tags and groups
- See a timeline of all prospect records and comments on the user's record
- View individual, team and overall sales performance on dashboards
- Send low-cost bulk email campaigns
- Receive alerts when prospects read your emails
- Record email interactions on each prospect for a full picture of what's said
- View a timeline of activity for each prospect to avoid nuisance calling

# Use Dashboards To Manage Your Opportunities & Agent Performance



## Configurable Search Via Tags & Groups

### Prospect Manager

[+ Add Prospect](#)

Open Won Lost All

Quick Search (Each field is optional)

ID	<input type="text"/>	Date From	<input type="text" value="dd/mm/yyyy"/>	Rev. Date From	<input type="text" value="dd/mm/yyyy"/>
Customer / Company	<input type="text"/>	Date To	<input type="text" value="dd/mm/yyyy"/>	Rev. Date To	<input type="text" value="dd/mm/yyyy"/>
Sales Owner	<input type="text" value="All"/>	Value Min	£ <input type="text"/>	Margin Min	<input type="text"/> %
Status	<input type="text" value="All"/>	Value Max	£ <input type="text"/>	Margin Max	<input type="text"/> %
Source	<input type="text" value="All"/>	Campaigns	<input type="text" value="All"/>	Services	<input type="text" value="All"/>

Sort By  Value  Important  Next Action Date

[Find](#)

[Clear All Fields](#)