

CREATING PROSPECTS IN CALLTRAX NEXT

Prospects can be added to CallTrax NEXT, and subsequently ExecuTrax, all in real-time.

How it works:

- During Household Update the imported account(s) will be matched to Prospect.
- Importing matches by Household Name and Address.

* Any Referrals can be handled during DataPro (or by the User in CallTrax once Prospect is turned into a Household)

Step 1: From within CallTrax NEXT, search to see if the Prospect already exists:

The screenshot shows the Marquis ONE Customer Dashboard interface. At the top, there's a navigation bar with links for Dashboard, Discovery, Customer Dashboard (which is currently selected), Work List, and Administration. On the right side of the header, there are links for Marquis ONE, SUPPORT | HELP, Learning And Development, Log Out, and the CallTrax logo. Below the header, the main dashboard area has several sections: 'Customer Dashboard' (Household selected), 'Activity Summary', 'Household Customers' (No data available in table), 'Summary Information' (Accounts and Services, Assignments), 'Campaigns' (No data available in table), 'Marketing Notes' (No data available in table), 'Next Potential Product' (No Next Potential Product), and 'Work List' (Showing 12 of 12, with a row for Rodger Runolfsson). A central modal window titled 'Customer Search' is open, containing fields for Name, Phone Number, Social Security Number, Customer Number, and Account Number, along with a 'Search' button. A red callout bubble with the text 'User can search to see if a record is already in the system.' points to the Name input field in the modal.

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Step 2: If the individual is not found, the User can select Add a Prospect from the search results screen:

If the individual is not found, the User can select Add New, then select Prospect.

Note: The User can also add a Prospect from the Customer Dashboard:

The User can select Add New, then select Prospect to add the individual without doing a search.

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Note: Adding Name and Address to the contact information will improve the match results to the Account data when imported into ExecuTrax:

The User can type in the prospect's information.

Activity Log | Campaigns | Marketing Notes | Next Potential Product | Work List

Step 3: Add Log Activity to keep track of any interaction with the Prospect:

ZACHERY BERRY OLSON
Preferred:
481 Denwood Dr N
Gahanna, OH 43230

Date of Birth: (years)
No Mail Opt Out
Manager: Default
Branch: Default
Region: Default

Household Customers | Add New

Summary Information | Notes

Activity Summary | Add New Activity Log

Campaigns | Marketing Notes | Next Potential Product | Work List