



Prospects Application: A 'Cheat Sheet' for Users

Save Prospects Application (Excel Attachment) to Local Directory:

1. Open the email
2. Save the attachment to your own directory:
3. Delete the email (so it can't be reused accidentally)
4. Always work on the Prospects Application from the directory to which it was saved.

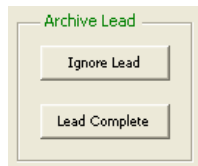
Enable Macros: The Prospects Application uses what is called Visual Basic code (VBA). In order for this code to run you will need to click **"Enable Macros"** when the Microsoft Security Message pops-up.

Record Navigation



At the bottom of the Prospects Application are the record navigation buttons. The buttons allow you to move through the customer records.

Archiving Leads



To remove a lead from the visible form use the "Archive Lead" functions.

Ignore Lead: Click this button if you have not used the lead AND don't intend to use it.

Lead Complete: Click this button only if you have used the lead. You will need to input a Lead Outcome in order to be able to click this button.

Contact History

The Call Attempts section is used to log what has happened during each attempted contact. When an item is selected from the drop-down box a date and time will automatically appear next to the box so that you can be reminded when it happened. This section is used for a contact history, it doesn't have to be used and it won't be stored when results are submitted.

Lead Quality

Allows you to feedback your view on the quality of the leads that you have been given. This information is used to improve lead quality in subsequent campaigns. You are encouraged to rate as many leads as possible. If extra information is needed please input comments in the Notes Field.

Lead Outcome

When a lead has been used (or 3 call attempts made without success) then you should enter an outcome for the lead. Even if you haven't made contact this information is important because it has an influence on contact rules (so we don't over-solicit a customer), Data Quality exercises and calculations for attributed sales.

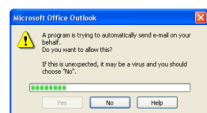
Lead Filter

The lead filter allows you to limit the customers seen on the form to only those customers that meet certain criteria. When a lead is selected the customers shown will all have the same lead description and have similar characteristics.

Search Forms *(launched by clicking the magnifying glass buttons)*

Enter search criteria in the text box for a **Customer Search**, or use the drop-down boxes for the **Account Balance Search** and then press the blue button. If results are found the navigation buttons on the search form will turn green and will take over from the main Prospects Application navigation buttons. Close the search form using the **"X"** button in the top right corner. When you close the form all of the records will be shown again.

Submit Results



The submit results button only needs to be pressed once per Campaign (i.e. once per Prospects cycle). As soon as it is pressed any remaining leads will be locked and cannot be used. The submit results button collects all of the lead information entered by the user and sends it in an email back to the Marketing Department. After the button is pressed a Microsoft Security message will pop-up and ask the user for permission to send the email. **"A program is trying to automatically send e-mail on your behalf"... click "YES"**. This completes the Prospects process.