Beyond - How to Create a Prospect Record

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What is a Prospect?

Prospect records allow you to quickly record and manage potential new customers or contacts, making it easier for your sales team to collect the information they need. Prospect records include the ability to track basic information, log messages and save documents electronically.

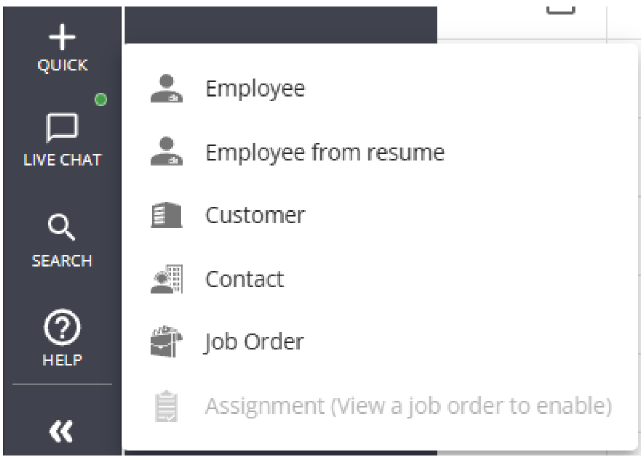
Note For **new** TempWorks clients as of 8/11/2023, Prospect functionality will be **disabled**. In the event you would like for this functionality to be enabled, please contact TempWorks Support.

Existing TempWorks clients **prior to** 8/11/2023 will continue to have access to this functionality. In the event you would like for this functionality to be disabled, and for your existing Prospect records to be converted to Customer records in mass, please contact TempWorks Support.

This article reviews:

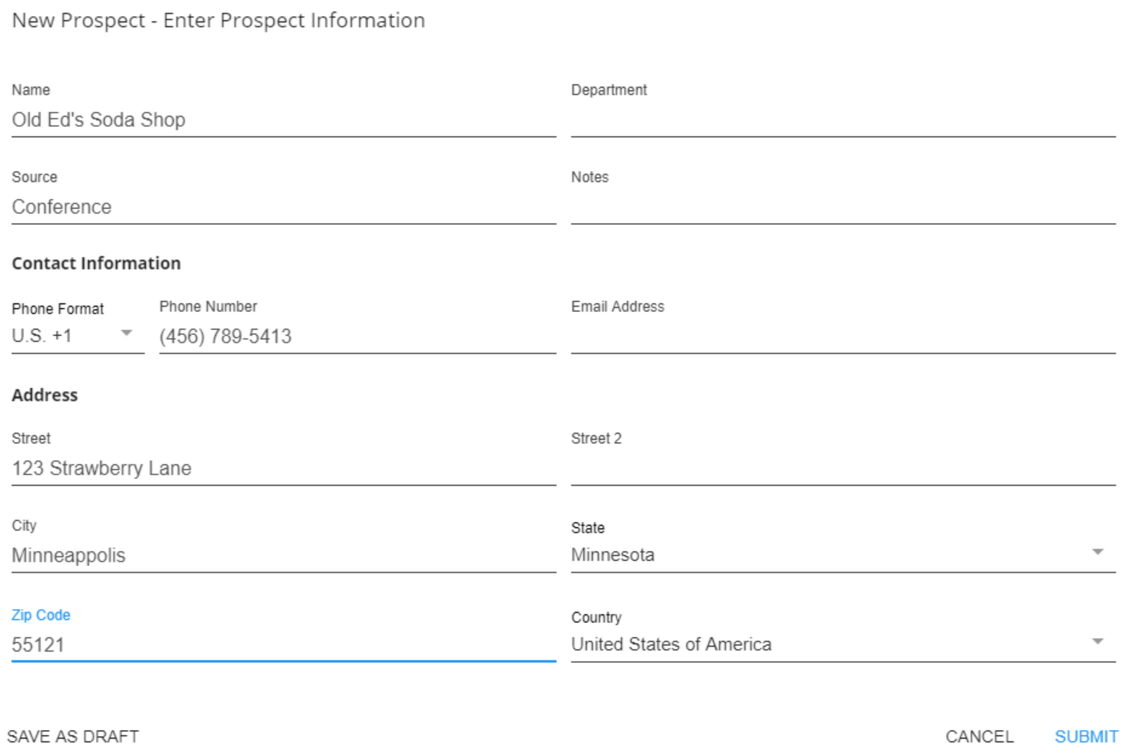
How to Create a Prospect Record

1. Select the "+ Quick" button at the left of Beyond and select "Prospect"



2. Enter information:
    - Name - name of company or contact (Required)
    - Department
    - Source - where did this contact come from

- Phone and/or email
- Address of business, if applicable



New Prospect - Enter Prospect Information

Name: Old Ed's Soda Shop	Department:
Source: Conference	Notes:

Contact Information

Phone Format: U.S. +1	Phone Number: (456) 789-5413	Email Address:

Address

Street: 123 Strawberry Lane	Street 2:
City: Minneappolis	State: Minnesota
Zip Code: 55121	Country: United States of America

SAVE AS DRAFT CANCEL SUBMIT

3. Select Submit

Configuration Alert

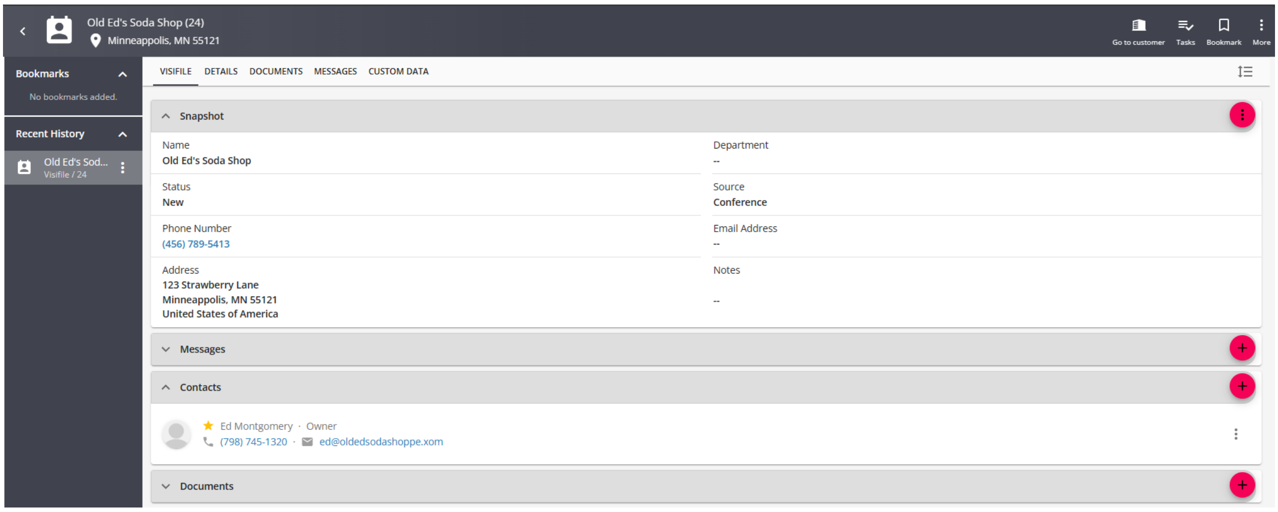
If you are utilizing Address Standardization configuration for Prospect records, there will be an additional step to verify the address against the USPS database. For more information, see Beyond - Address Standardization.

Prospect Record Overview

The prospect record is comprised of 5 tabs:

1. Visifile
2. Details
3. Documents
4. Messages
5. Custom Data

Visifile



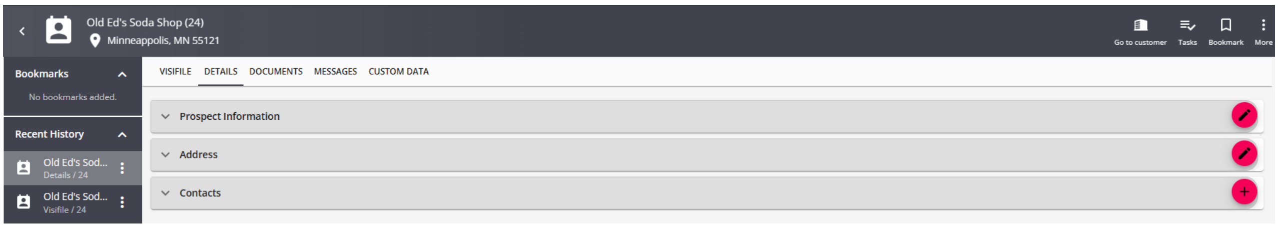
The prospect visifile, by default, has the following cards of information:

1. **Snapshot** - quick set of information
    - Select the  button and choose customize fields to add or remove different fields from this card
2. **Messages** - displays recent messages logged on this record
3. **Contacts** - displays a list of any contacts related to this prospect record
4. **Documents** - displays list of documents attached to this record

The prospect visifile, like all visifiles in Beyond, is customizable. For more information check out Beyond - The Visifile.

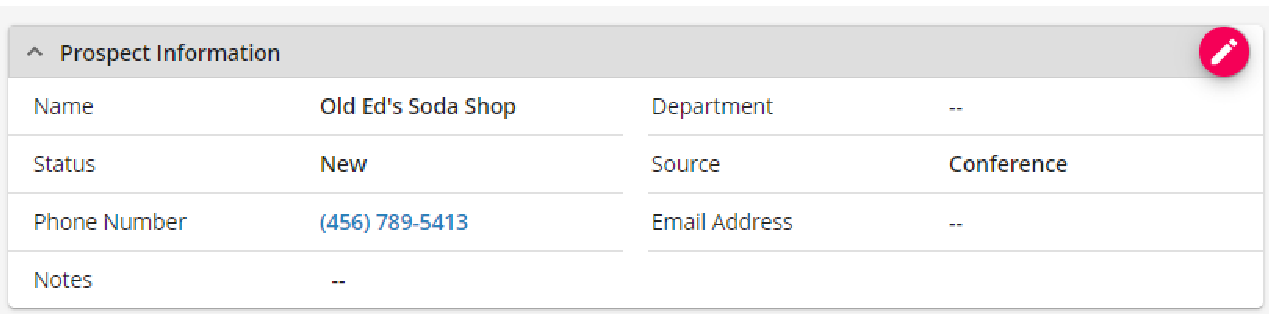
Details

This tab contains information including status, address, and more.



Prospect information

This card contains basic information including the prospect name, status, and contact methods.



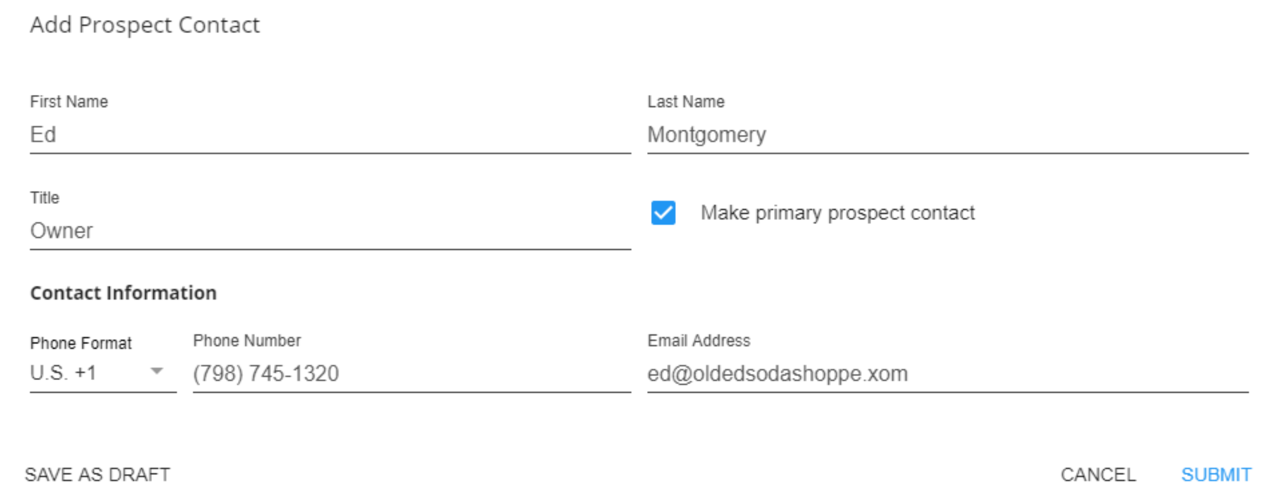
Address

This card contains the address for the prospect. To edit or add the address to a record select the button.

Contacts

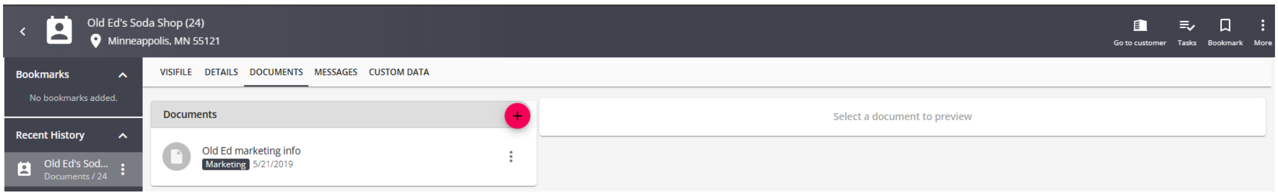
This card allows you to create contacts related to the prospect record. If the prospect you created is a business, this section will allow you to track people who work at this prospect and their contact information.

To Add a Contact



Documents

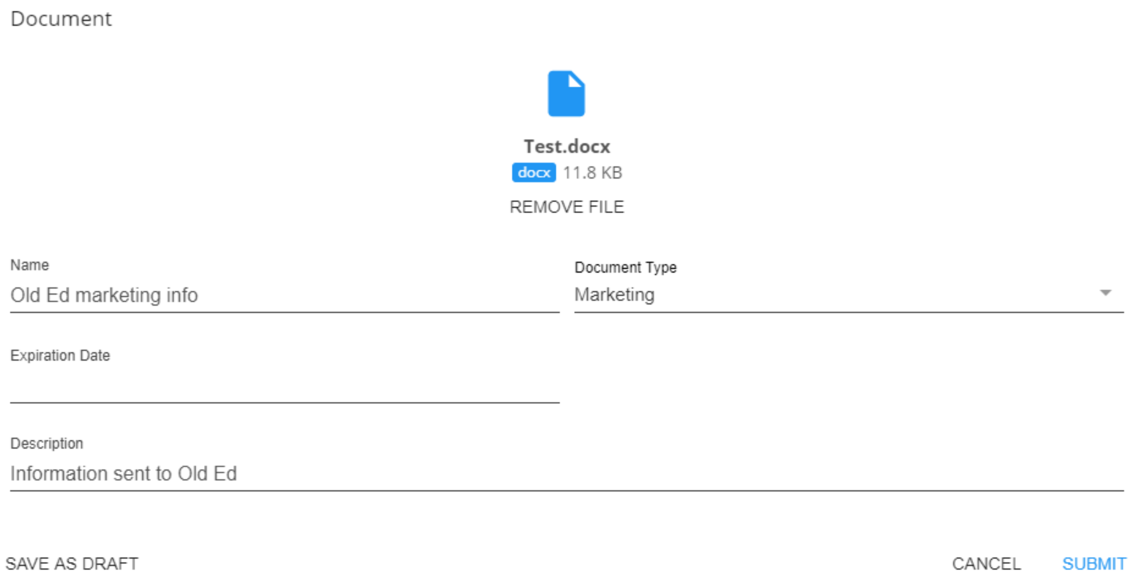
This tab allows you to drag and drop electronic documents to save with this prospect record. This includes scanned business cards, emails, or quotes related to this potential customer.



To Add a Document

1. Select the
2. Drag and drop or click to select a file from your computer
3. Enter the following information:
    - Name
    - Document Type
    - Expiration Date (optional)

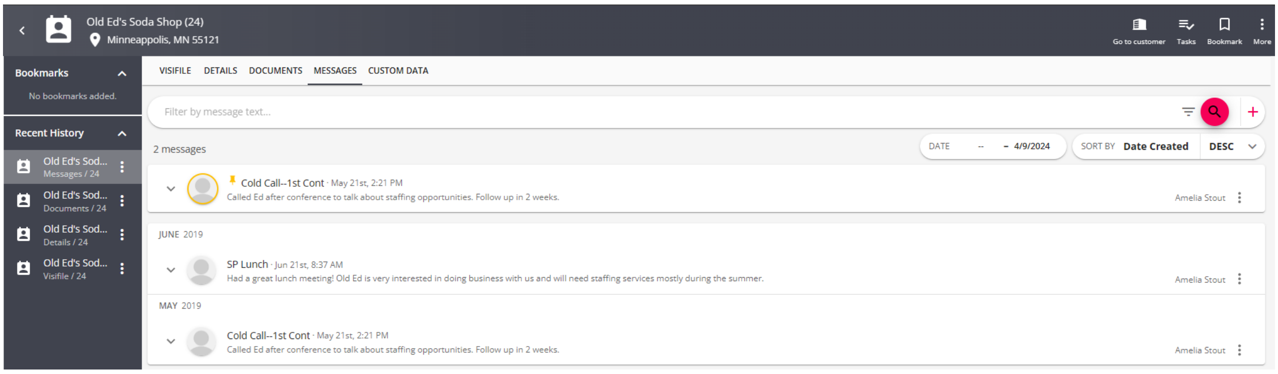
- Description



4. Select Submit

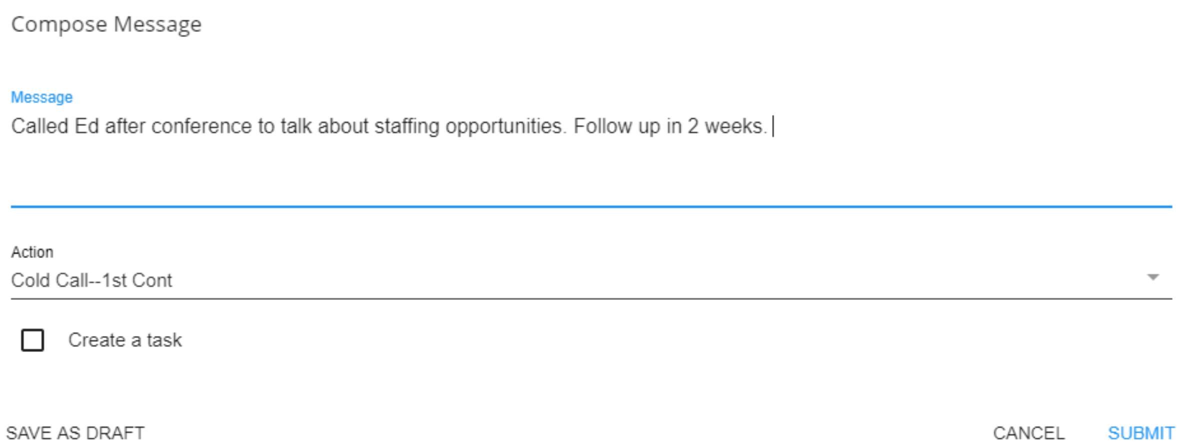
Messages

This tab allows you to see a complete history of messages logged on the prospect record.



To Log a Message

1. Select the + from the messages or visifile tab
2. Enter the message
3. Select a Message Action Code

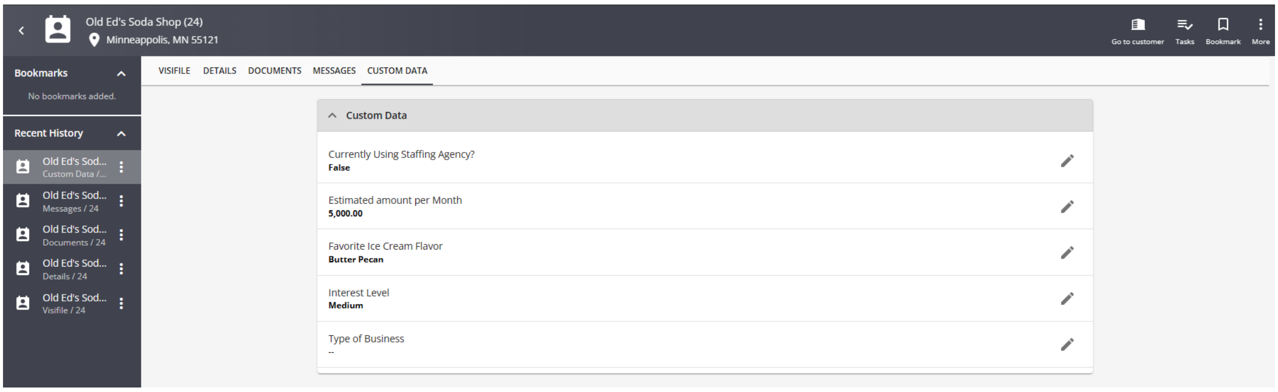


4. Select Submit

Note Message action codes available to prospects are set up by your administration. See Administrator Manual for more information.

Custom Data

This tab contains any additional fields you would like to track on a prospect's record.

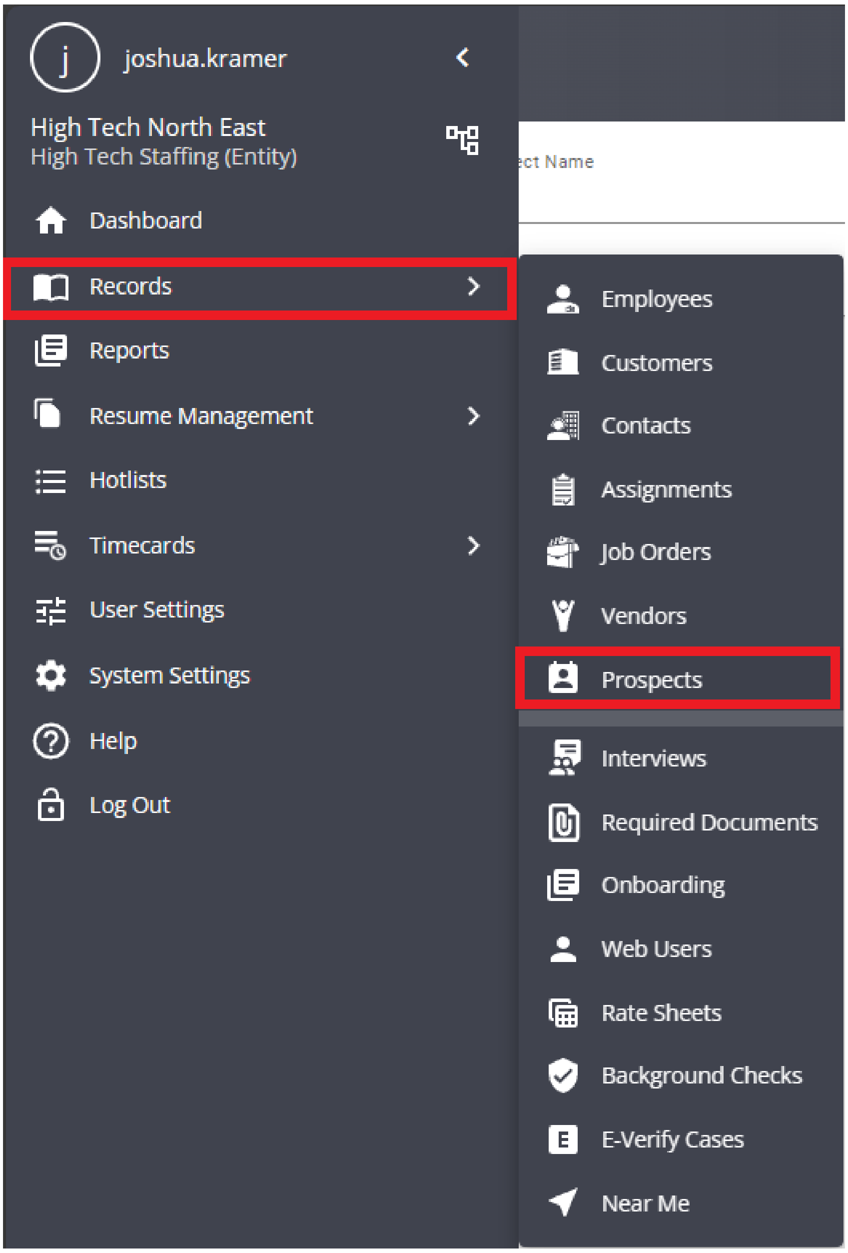


Select the next to the field you want to update.

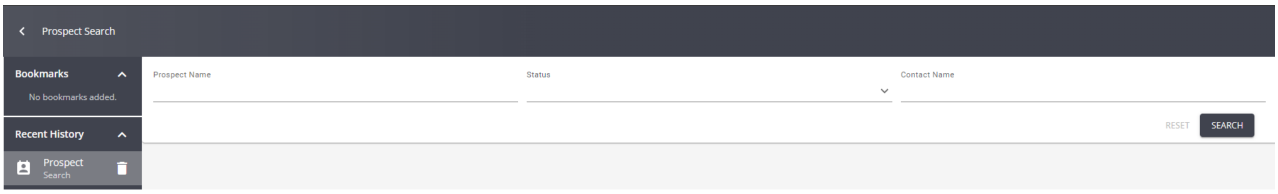
Note Custom Data fields available on the prospect record are set up by your administration. See How to Set up and Manage Custom Data for more information.

Searching for Prospects

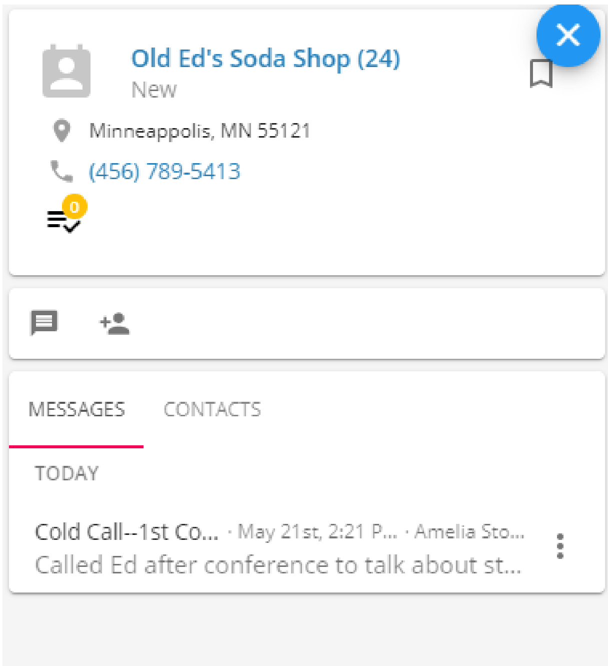
You can search for a prospect record by selecting PROSPECTS in the left or from within B Menu > Records > Prospects:



The prospect search screen has 3 options:

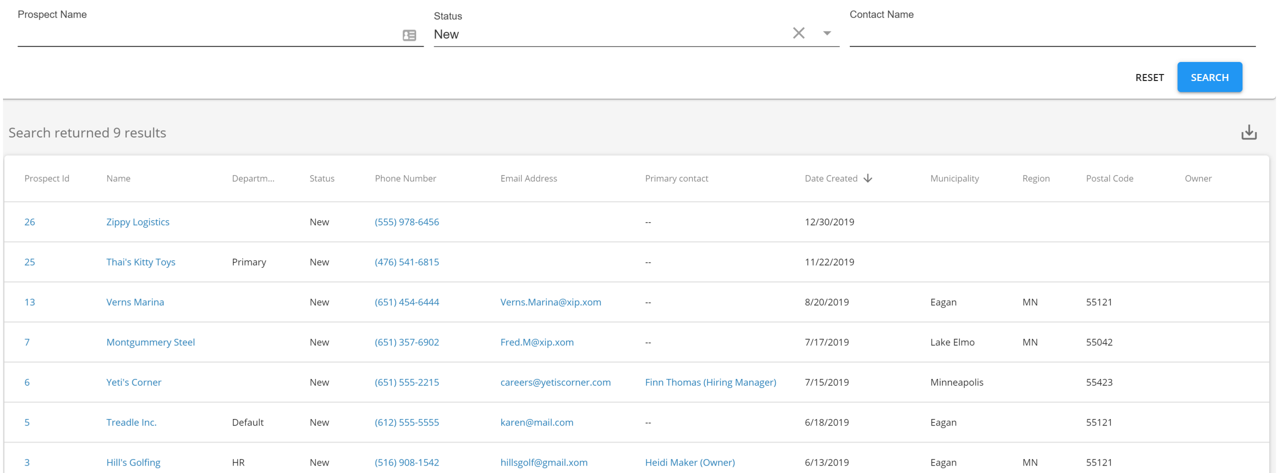


Right click on a search result to see a quick view of the record:



See Beyond - Quick View for more information on quick views.

In the example below, the user is looking for all Prospect records with the Status of New. Then by clicking on the column header titled Date Created is able to sort to see most recently created first:



Prospect Id	Name	Departm...	Status	Phone Number	Email Address	Primary contact	Date Created	Municipality	Region	Postal Code	Owner
26	Zippy Logistics		New	(555) 978-6456		--	12/30/2019				
25	Thai's Kitty Toys	Primary	New	(476) 541-6815		--	11/22/2019				
13	Verns Marina		New	(651) 454-6444	Verns.Marina@xip.xom	--	8/20/2019	Eagan	MN	55121	
7	Montgummery Steel		New	(651) 357-6902	Fred.M@xip.xom	--	7/17/2019	Lake Elmo	MN	55042	
6	Yeti's Corner		New	(651) 555-2215	careers@yetiscorner.com	Finn Thomas (Hiring Manager)	7/15/2019	Minneapolis		55423	
5	Treadle Inc.	Default	New	(612) 555-5555	karen@mail.com	--	6/18/2019	Eagan		55121	
3	Hill's Golfing	HR	New	(516) 908-1542	hillsgolf@gmail.xom	Heidi Maker (Owner)	6/13/2019	Eagan	MN	55121	

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