

Beyond - How to Create a Prospect Record

Last Modified on 08/29/2023 10:06 am CDT

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](#).

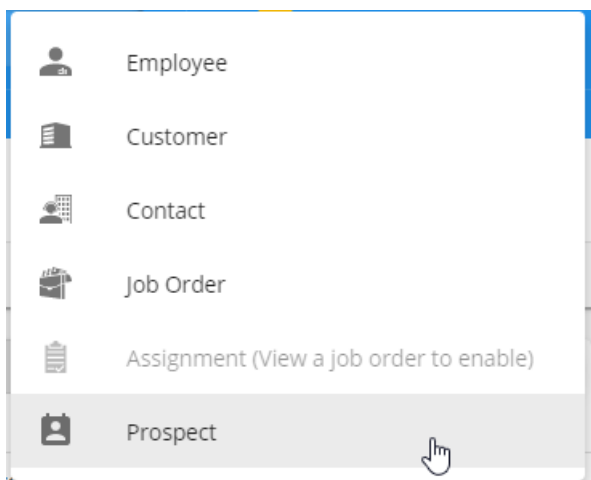
Existing TempWorks clients **prior to 8/11/2023** will continue to have access to this functionality. In the event you would like for this functionality to be disabled, and for your existing Prospect records to be converted to Customer records in mass, please contact [TempWorks Support](#).

This article reviews:

1. [How to Create a Prospect Record](#)
2. [Prospect Record Overview](#)
3. [Searching for Prospects](#)

How to Create a Prospect Record

1. Select the  button in the upper right of Beyond
2. Select Prospect



3. 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		Department
Old Ed's Soda Shop		
Source		Notes
Conference		
Contact Information		
Phone Format	Phone Number	Email Address
U.S. +1	(456) 789-5413	
Address		
Street		Street 2
123 Strawberry Lane		
City	State	
Minneapolis	Minnesota	
Zip Code	Country	
55121	United States of America	

SAVE AS DRAFT

CANCEL **SUBMIT**

4. 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

PROSPECT Old Ed's Soda Shop (24)


 **Old Ed's Soda Shop (24)**
Minneapolis, MN 55121



VISIFILE DETAILS DOCUMENTS MESSAGES CUSTOM DATA


Snapshot 



Name	Old Ed's Soda Shop	Department	--
Status	New	Source	Conference
Phone Number	(456) 789-5413	Email Address	--
Address	123 Strawberry Lane Minneapolis, MN 55121 United States of America	Notes	--


Messages 



TODAY

 Cold Call--1st Cont · May 21st, 2:21 PM · Amelia Stout
Called Ed after conference to talk about staffing opportunities. Follow up in 2 weeks. 

Contacts 


 ★ Ed Montgomery · Owner
(798) 745-1320 · ed@oldedsodashoppe.xom 

Documents 

 oldEd_Info.docx
Marketing 5/21/2019 

GO TO DOCUMENTS PAGE

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 Old Ed's Soda Shop (24) / Details

 **Old Ed's Soda Shop (24)**
 📍 Minneappolis, MN 55121


VISIFILE **DETAILS** DOCUMENTS MESSAGES CUSTOM DATA

Prospect information

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

^ Prospect Information 			
Name	Old Ed's Soda Shop	Department	--
Status	New	Source	Conference
Phone Number	(456) 789-5413	Email Address	--
Notes	--		

Address

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

^ Address 	
123 Strawberry Lane Minneappolis, MN 55121 United States of America	

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

Add Prospect Contact

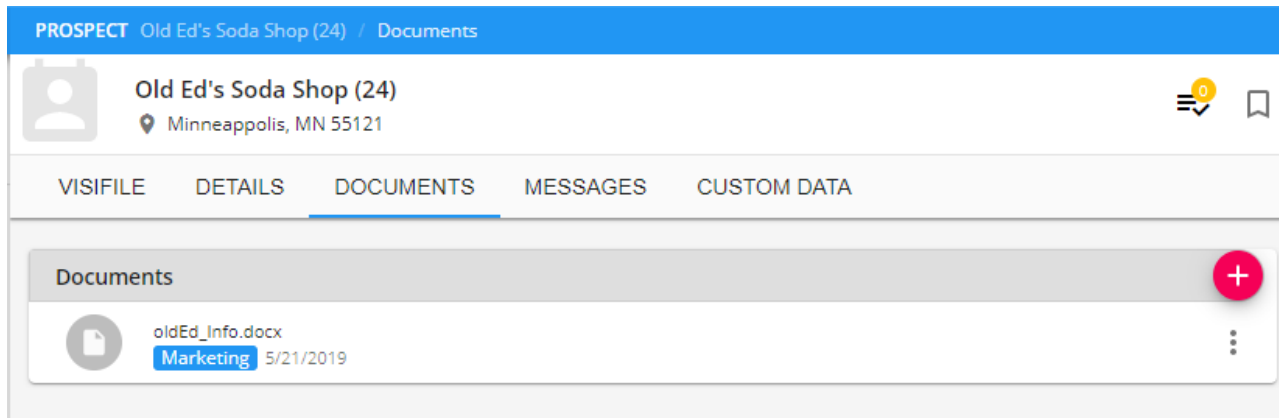
First Name Ed	Last Name Montgomery
Title Owner	<input checked="" type="checkbox"/> Make primary prospect contact
Contact Information	
Phone Format U.S. +1	Phone Number (798) 745-1320
	Email Address ed@oldedsodashoppe.xom

SAVE AS DRAFT


CANCEL **SUBMIT**

Documents

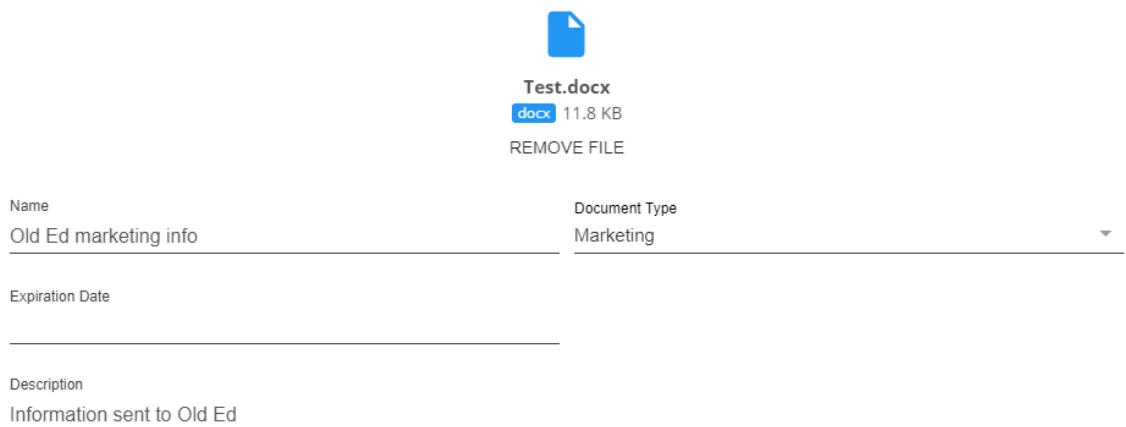
This tab allows you to drag and drop electronic documents to save with this prospect record. This includes scanned business cards, emails, or quotes related to this potential customer.



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:

Document



Test.docx
docx 11.8 KB
REMOVE FILE

Name
Old Ed marketing info

Document Type
Marketing

Expiration Date

Description
Information sent to Old Ed

SAVE AS DRAFT

CANCEL **SUBMIT**

4. Select Submit

Messages

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



Old Ed's Soda Shop (24)
Minneapolis, MN 55121



VISIFILE DETAILS DOCUMENTS **MESSAGES** CUSTOM DATA

Filter by message text...



1 messages

DATE -- - 5/21/2019

SORT BY **Date Created** **DESC** ▾

TODAY



Cold Call--1st Cont · May 21st, 2:21 PM · Amelia Stout
Called Ed after conference to talk about staffing opportunities. Follow up in 2 weeks.



To Log a Message

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

Compose Message

Message

Called Ed after conference to talk about staffing opportunities. Follow up in 2 weeks. |

Action

Cold Call--1st Cont ▾

Create a task

SAVE AS DRAFT

CANCEL **SUBMIT**

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.



Old Ed's Soda Shop (24)

Minneapolis, MN 55121



VISIFILE

DETAILS

DOCUMENTS

MESSAGES

CUSTOM DATA

^ Custom Data

Currently Using Staffing Agency?

False

Estimated amount per Month

5,000.00

Favorite Ice Cream Flavor

Butter Pecan


Interest Level

Medium

Type of Business


--

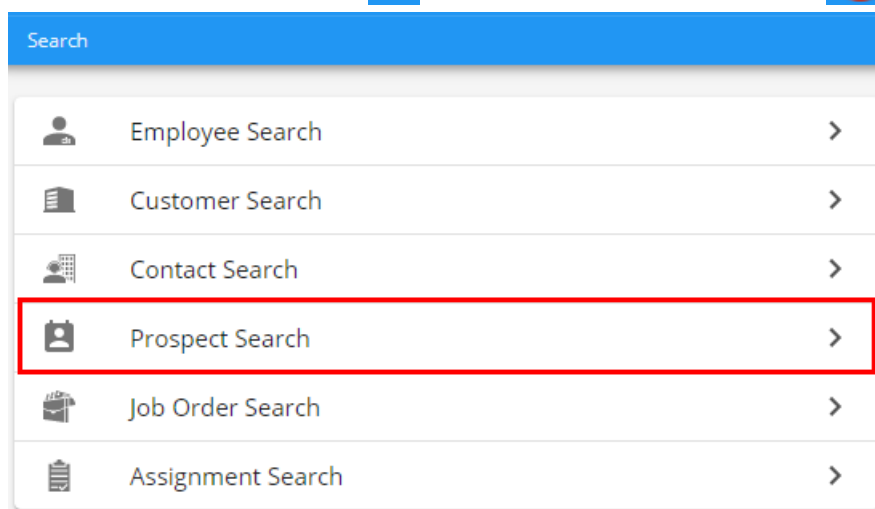


Select the  next to the field you want to update.

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  in the upper left or from within the  menu > Search:



The prospect search screen has 3 options:

