# 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:

- 1. How to Create a Prospect Record
- 2. Prospect Record Overview
- 3. Searching for Prospects

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

	da Shop (24) opolis, MN 55121	EL ≂, D ÷ Go to customer Takka Bodomark Mo
Bookmarks ^ No bookmarks added.	VISIFILE DETAILS DOCUMENTS MESSAGES CUSTOM DATA	15
Recent History A	Name Old Ed's Soda Shop Status New Phone Number	Department Source Conference Email Address
	(456) 789-5413 Address 123 Strawberry Lane Minneappolis, MN 55121 United States of America	 Notes 
	V Messages	
	Contacts      Ed Montgomery - Owner     (798) 745-1320 -      ed@oldedsodashoppe.xom	:
	✓ Documents	•

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.

	da Shop (24) ppolis, MN 55121	Go to customer	<b>≕</b> ∕ Tasks		
Bookmarks A	VISIFILE DETAILS DOCUMENTS MESSAGES CUSTOM DATA				
No bookmarks added.	Prospect Information			0	
Recent History	<ul> <li>Prospect information</li> </ul>				4
Old Ed's Sod	✓ Address				
Old Ed's Sod	✓ Contacts	D ≕ D : Goto customer Tasis Boolman More 20 20 20 10 10 10 10 10 10 10 10 10 10 10 10 10			

#### **Prospect information**

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

<ul> <li>Prospect Informati</li> </ul>	on			0
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	Last Name
Ed	Montgomery
Title Owner	Make primary prospect contact
Contact Information	
Phone Format Phone Number	Email Address
U.S. +1 (798) 745-1320	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.

	ła Shop (24) opolis, MN 55121	De article and the second sec	
Bookmarks A	VISIFILE DETAILS DOCUMENTS MESSAGES CUSTOM DATA		
No bookmarks added.	Documents +	Select a document to preview	
Recent History A Old Ed's Sod Documents / 24	Old Ed marketing info Marketing 5/21/2019		

#### To Add a Document

- 1. Select the </u>
- 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

Document				
	- 1			
	Test	.docx		
	docx	11.8 KB		
	REMO	VE FILE		
Name		Document Type		
Old Ed marketing info		Marketing		~
Expiration Date				
Description				
Information sent to Old Ed				
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.

< 본		Soda Shop (24) appolis, MN 55121		<b>≡</b> √ 'asks I	D Bookmark	: More
Bookmarks	^	VISIFILE DETAILS DOCUMENTS MESSAGES CUSTOM DATA				
No bookma	arks added.	Filter by message text		Ŧ	٩	+)
Recent Histo	ry 🔨	2 messages DATE 4/9/2024 SORT	BY Date Creat	d	DESC	•
Messag		Cold Call-1st Cont · May 21st; 221 PM Called Ed after conference to talk about staffing opportunities. Follow up in 2 weeks.	Å	melia S	tout 🚦	
Old Ed	's Sod	JUNE 2019				
Old Ed Visifile /	l's Sod :	SP Lunch - Jun 21st, 8:37 AM Had a great lunch meeting! Old Ed is very interested in doing business with us and will need staffing services mostly during the summer.	4	melia S	tout 🚦	
		MAY 2019				
		Cold Call-1st Cont - May 21st, 2:21 PM     Called Ed after conference to talk about staffing opportunities. Follow up in 2 weeks.	Å	melia S	tout 🚦	

#### 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 Call1st Cont	~
Create a task	

#### 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.

<ul> <li>Old Ed's Soda Shop (24)</li> <li>Minneappolis, MN 55121</li> </ul>			💼 ☴, 口 : Go to customer Tasks Bookmark More
Bookmarks A VISIFILE DETAILS DOCUMENTS M	IESSAGES CUSTOM DATA		
No bookmarks added.	<ul> <li>Custom Data</li> </ul>		
Recent History A Old Ed's Sod Custom Data /	Currently Using Staffing Agency? False	1	
Old Ed's Sod : Messages / 24	Estimated amount per Month 5,00.00	1	
Did Ed's Sod : Documents / 24 Did Ed's Sod : Did Ed's Sod :	Favorite Ice Cream Flavor Butter Pecan	1	
Details / 24 • Old Ed's Sod : Visifile / 24	Interest Level Medium	i	
	Type of Business	i	

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:

Prospect Search			
Bookmarks	Prospect Name	Status	Contact Name
Recent History			RESET SEARCH
Prospect Search			

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 Name				Star			Contact Nan	ne			
										RESE	SEARCH
earch returi	ned 9 results										⊎
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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