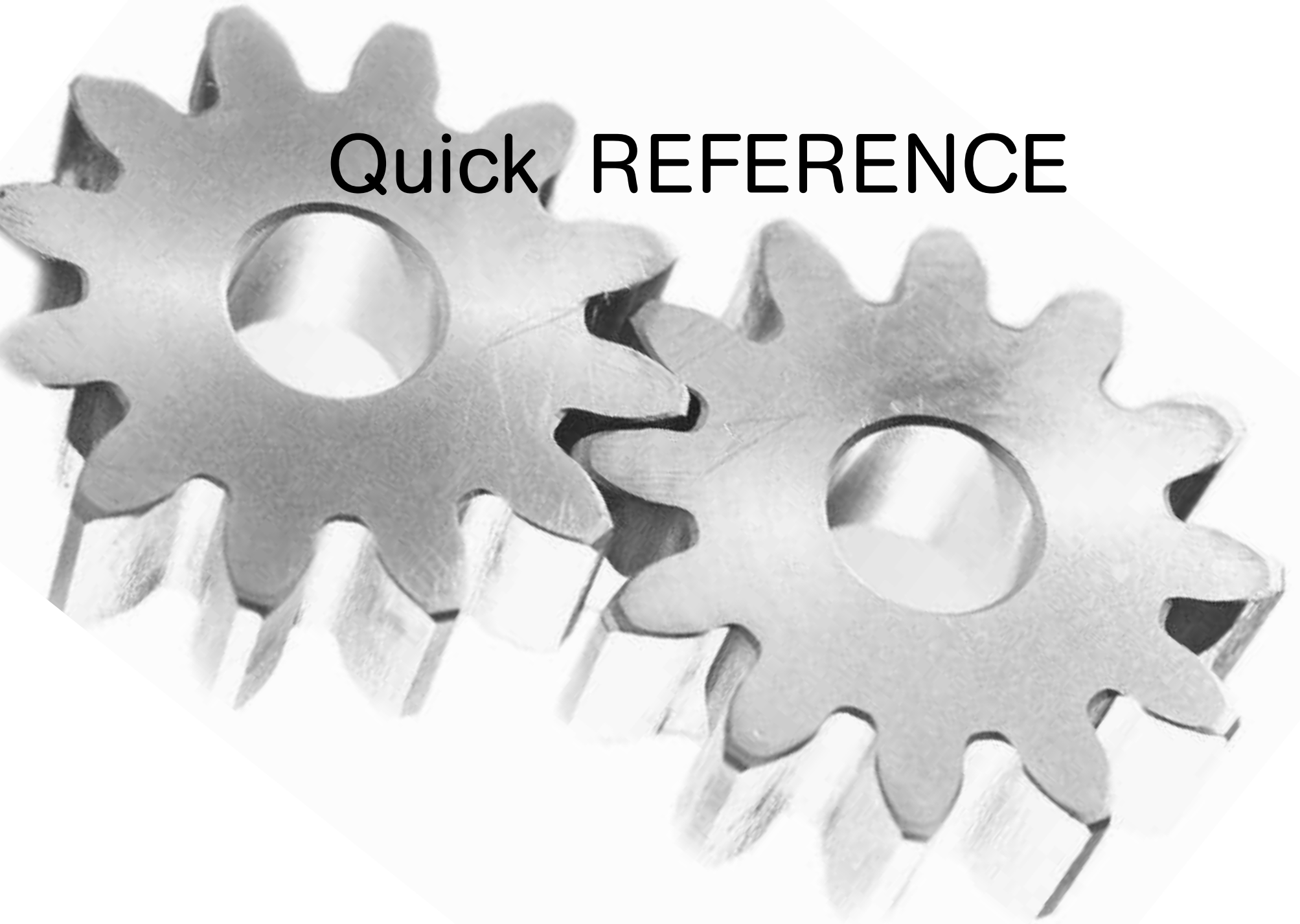


Quick REFERENCE





1.0 Leads

The Leads feature is where information on prospective clients is managed.

Select Leads
from the Sales menu





1.0.b Lead List View

Click any column header to sort the list by the selected field. (The field currently selected will be underlined.)

By default, the list is sorted alphabetically by “company” name.

The buttons and fields at the foot of the screen provide alternative ways to display the leads according to a particular criteria.

To edit a lead or view more details, double-click anywhere on a summary line to display the Lead Detail screen.

| <u>company</u> | last | first | telephone | sales rep | next appt. | last called | calls due | status |
|------------------------|------------|----------|----------------|-----------|------------|-------------|-----------|----------|
| A. G. Arts | Ahara | Jenn | (514) 578-1214 | Kelly | 00/00/00 | 6/20/05 | 6/30/05 | Prospect |
| A. J. Brothers | Kinsella | Tony | (613) 556-1212 | Taylor | 7/29/05 | 6/20/05 | 7/27/05 | Prospect |
| A. R. Productions | Nesta | Anna | (415) 270-8923 | Mitchell | 00/00/00 | 6/29/05 | 7/28/05 | Prospect |
| Abel Services | Byrne | Colin | (615) 270-8979 | Kelly | 00/00/00 | 5/18/05 | 7/28/05 | Prospect |
| Advanced Knowledge | Ng | Ray | (415) 555-3472 | Kim | 00/00/00 | 00/00/00 | 7/29/05 | Prospect |
| B. B. B. Inc. | Benitez | Rafael | (704) 995-3400 | Kelly | 00/00/00 | 9/12/03 | 00/00/00 | Dormant |
| B.T. Productions | Pisano | Joanne | (613) 427-5000 | Kelly | 8/19/05 | 6/29/05 | 00/00/00 | Prospect |
| Bach from the Dead | Lax | Sharon | (809) 455-8891 | Taylor | 8/30/05 | 6/10/05 | 00/00/00 | Prospect |
| Back Issues | McCleod | Jurgen | (904) 812-6050 | Mitchell | 00/00/00 | 5/22/05 | 00/00/00 | Worked |
| Balaclava | Stuart | Graham | (905) 278-8872 | Kelly | 00/00/00 | 9/8/04 | 9/8/05 | Prospect |
| Baracuda | Schamis | Pat | (613) 867-2255 | Kim | 7/5/05 | 7/5/05 | 7/20/05 | Prospect |
| Barn Doors | Gregory | Arnold | (615) 521-3324 | Kelly | 8/16/05 | 6/27/05 | 00/00/00 | Prospect |
| Barometer Readings | Gantz | Leah | (514) 270-4000 | Mitchell | 00/00/00 | 7/1/05 | 7/21/05 | Prospect |
| Barrella Posters | Smith | Tanya | (705) 341-9910 | Taylor | 00/00/00 | 3/5/05 | 00/00/00 | Dormant |
| Bart's Exchange Center | Ji-Sung | Park | (905) 250-1133 | Kelly | 00/00/00 | 00/00/00 | 8/25/05 | Prospect |
| Beagle Art | Griffen | David | (903) 450-3678 | Taylor | 8/22/05 | 7/10/05 | 00/00/00 | Customer |
| Best Travels | Clydesdale | Frida | (555) 555-1212 | Kim | 00/00/00 | 00/00/00 | 8/31/05 | Prospect |
| Best Tributes | Gudjohnsen | Eidur | (905) 288-5124 | Taylor | 00/00/00 | 7/1/05 | 00/00/00 | Customer |
| Better Grooming | Ng | Andrew | (809) 270-2588 | Taylor | 00/00/00 | 9/12/03 | 8/8/05 | Prospect |
| Black Sheep Brewery | Boycott | Geoffrey | (206) 521-0868 | Kelly | 00/00/00 | 7/10/05 | 00/00/00 | Prospect |
| Blastrer Productions | Ganguly | Sachin | (514) 270-5566 | Mitchell | 00/00/00 | 00/00/00 | 8/23/05 | Prospect |
| Caber Tossing School | Kerr | Hamish | (905) 250-5566 | Kelly | 00/00/00 | 00/00/00 | 8/31/05 | Prospect |
| Cara Caledonia Glass | Hoffman | Jay | (905) 290-3488 | Kim | 00/00/00 | 00/00/00 | 8/19/05 | Prospect |
| Carton Design | Waks | Noah | (905) 278-5005 | Mitchell | 00/00/00 | 5/28/05 | 00/00/00 | Dormant |

find company first last found 2092

change save set find set calls due all records search sort new exit



1.2.c Lead Detail: Profiling

The profile categories can also be used as a tool to manage leads. The “List” screen shots (below) are three examples of how the profiling function can be used.

To view a “List” for a particular profile category, click the profile title box.



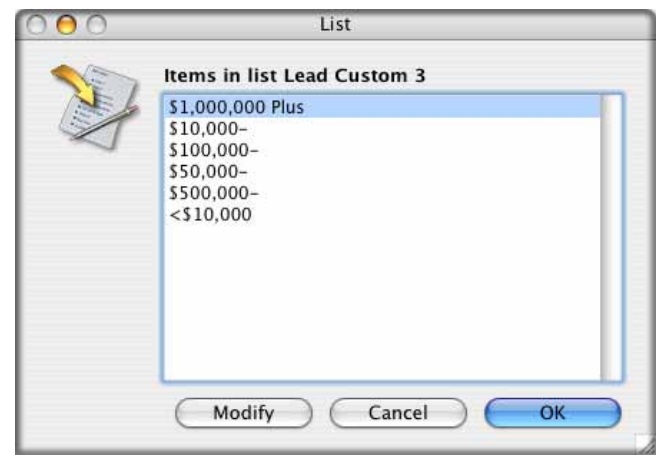
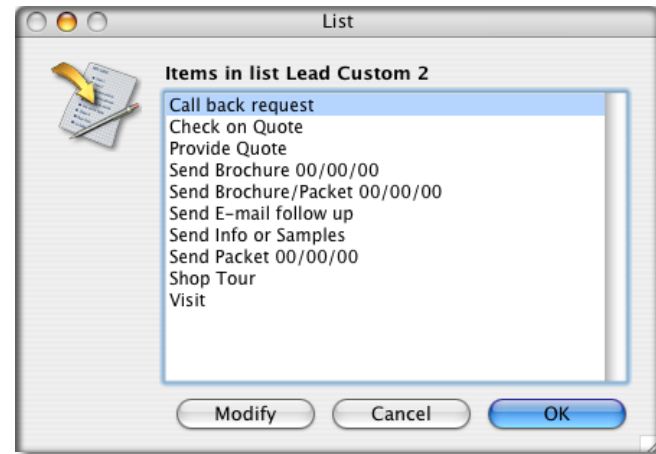
| | |
|------------|---------------|
| Region | Orders/year |
| US Midwest | 1,000 - 5,000 |

The items in the screen shot (top right) fall under a profile category of “**Next Event**”. Reports can be generated listing, for example, all leads that are due to receive the latest brochure

A profile category can be used to log the “**Last Event**”. The list of available items for this category could be something like in the screen shot (bottom left).

And a profile category of “**Sales-to-Date**” may be useful depending on marketing strategy. The list of available items for this category could be something like in the screen shot (bottom right).

Note that items can be added to or removed from a list using the “Modify” button.





1.0.d Lead List View

Leads can be found that match search criteria entered in one of the three “find” fields.

For example, type “B” in the “company” box, press the “Tab” or “Enter” key, and all leads with a company name starting with “B” will be displayed.

Or, type “Smith” in the “last” box, press the “Tab” or “Enter” key, and all leads with a last name of Smith will be displayed.

| | | | | | | | |
|----------------------|---------|------|----------------|----------|----------|----------|----------|
| Cara Caledonia Glass | Kerr | Jay | (905) 290- | Kim | 00/00/00 | 00/00/00 | 8/31/ |
| Carton Design | Hoffman | Noah | (905) 278-5005 | Mitchell | 00/00/00 | 5/28/05 | 00/00/00 |

find company first last found 2092

change save set find set calls due all records search sort new exit

There are several ways to display leads according to a particular criteria. Any group of leads can be saved as a “set” and then quickly retrieved when needed. This is achieved using the “save set” and “find set” buttons.

For example, using the Query Editor (see - forthcoming - “Common Features: Query Editor”), a group of leads - from a particular region with annual sales above \$50,000 and an interest in outdoor signage - could be created and then saved as a set. This information can then be quickly retrieved whenever needed using the “find set” button.

Quick Report Editor:

At any time use Command R (for Mac) or Control R (for PC) to open the Quick Report Editor. (See - forthcoming - “Common Features: Quick Report Editor” for summary information, or the Quick Reports Editor section on the Support: Documentation page of the TQT Web site for more detailed information.)

The Quick Report Editor generates reports for whichever group of leads is selected at the time that the editor is opened.