



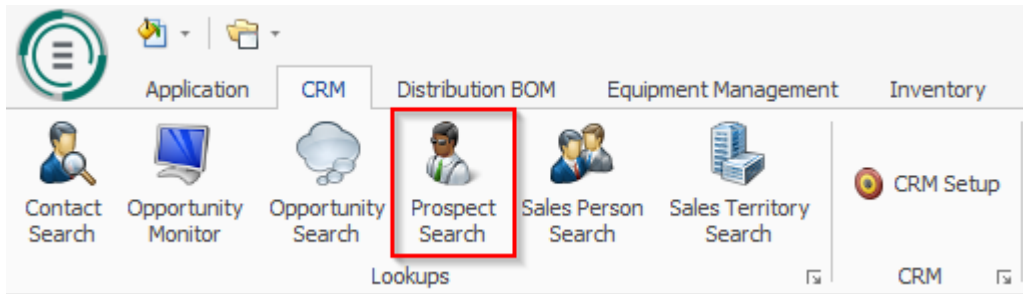
CRM Prospect

Megan De Freitas - 2024-11-22 - CRM

Overview

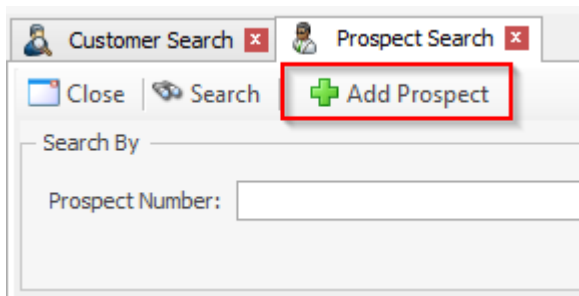
The CRM Prospect functionality in SalesPad Desktop allows you to easily manage your database of prospective customers. Keeping a database of prospective customers allows your salespeople to monitor them more efficiently and effectively.

To get started, click the **Prospect Search** button in the CRM tab.

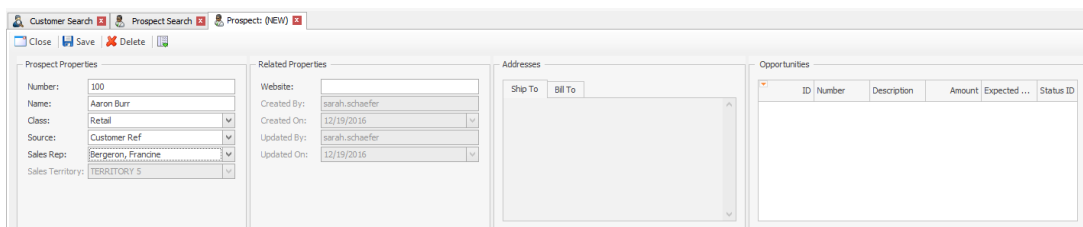


Create and edit a Prospect

To create a new prospect, click the **Add Prospect** button in the upper left-hand corner of the Prospect Search tab.



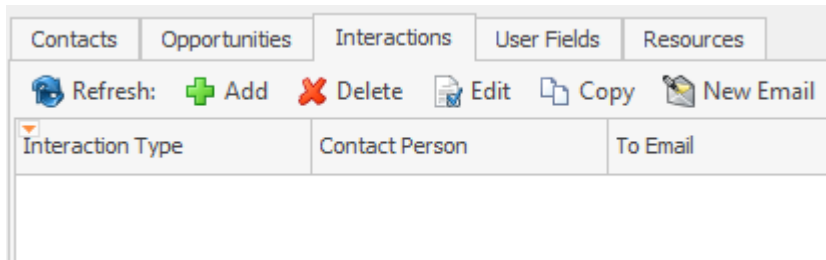
The Prospect (NEW) tab will open. Fill out the information fields in the top portion of this tab.



For more information on Prospect Class and Source setup, please reference our [CRM Setup](#) documentation.

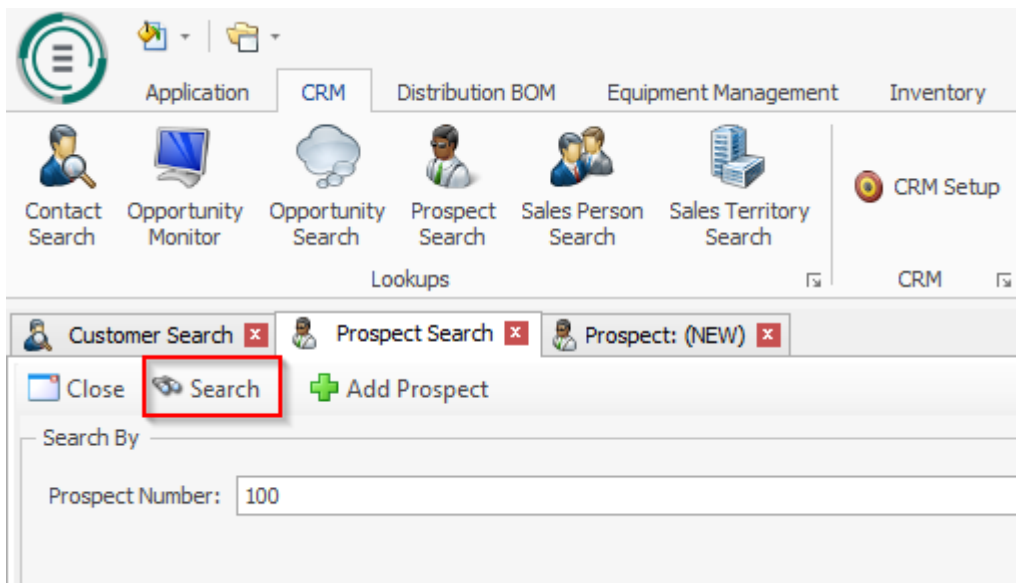
The bottom portion of the Prospect (NEW) tab contains tabs for entering contacts,

opportunities, interactions, userfields, and resources pertinent to this prospect.

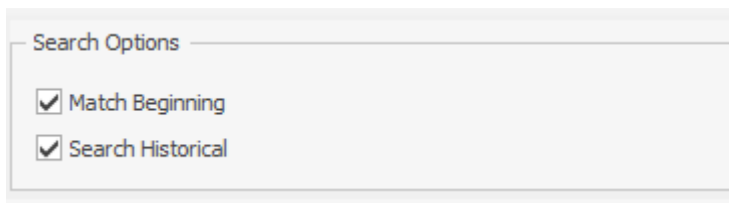


Search for a Prospect

To search for an existing prospect, type your search criteria into the Prospect Number field and click the **Search** button in the upper left-hand corner of the Prospect Search tab, or hit the **Enter** key.



To display only search results that begin with your search criteria, or to allow historical prospect search results to display, check the corresponding box in the Search Options field to the right of the Prospect Number field.



Security and Settings

CRM Prospect Class - Allows a user to view and edit CRM Prospect Classes

CRM Prospect Source - Allows a user to view and edit CRM Prospect Sources