❑ The entrance to the **Prospect Tracking System** is through this **Prospect** *Form*.
- This Micro Key Millennium Series™ *Application Desktop* - the **MKMS Desktop** - has a several module *Tabs* with each *Tab* having its own **Ribbon Menu**.
- The **Prospect** *Form* has its own **Ribbon Menu** which offers access to the Edit View *Icon*

Prospects Form
This *Help File Page* was last *Modified* on 01/03/2018

9/30/2014	Proposal	10080
10/11/2014	Service Request	10608
10/13/2014	Proposal	10082

1 of 26

Last User To Edit Data : DBA   Last Updated On : 1/16/2017 4:15:05 PM

User : Admin   Comm Link : local   Node Addr :

MKS **Desktop Ribbon Menu - Receivables** *Tab* **- Prospect**
Form **with its Ribbon Menu**

❑ *Understanding* the components on the **Prospects** *Form*:
1. The **Prospects** *Form* contains the **Prospect** related information and has its own Ribbon Menu.
2. **Add or Remove Buttons** option (*Down-Arrow* ▾ at the top of this *Form*) which allows each *User* to **Customize the Quick Access Tool Bar**.
3. That **Ribbon Menu** has many *Icons* which provide access to specific functions used by and/or for the **Prospect Tracking System**.

   a. **Navigation** - Record movement *Icons*, **Edit View**, **Search**, **History Options** and **Prospect Options** (see the brief overview below of the **Prospect Options** *Menu* chapter)
   b. **Actions** *Icons* - **Calls**, **Dial**, **Documents**, **External Services**, **Favorites**, **Filter**, **Reports** and **Email**.

4. The **Edit View** option is used to add, update and delete all **Prospect** related information for the currently selected **Prospect** record.

Prospect *Form* with Edit View *displayed*

- **Navigation** *Options*:
  - ✓ Record movement - Offers the standard First, Previous, Next, and Last *Icons*

  - ✓ The **Search** *Icon* opens the Prospect Search dialog which is used to locate and select a specific Prospect record.

✓ The **History Options** *Drop-Down Menu* allows the **User** to:

1. **Filter** - Set (Filter) what **Prospect** related information will be shown in the *Prospect History Grid.*
2. **History** - Identify the *Date Range* to further filter the *Prospect History Grid* by when **Prospect** related information selected above was created.
3. **Hide Grid** - Hide the History Grid.

✓ **Prospect Options** *Menu* provides access to many **Prospect** specific *functions*:
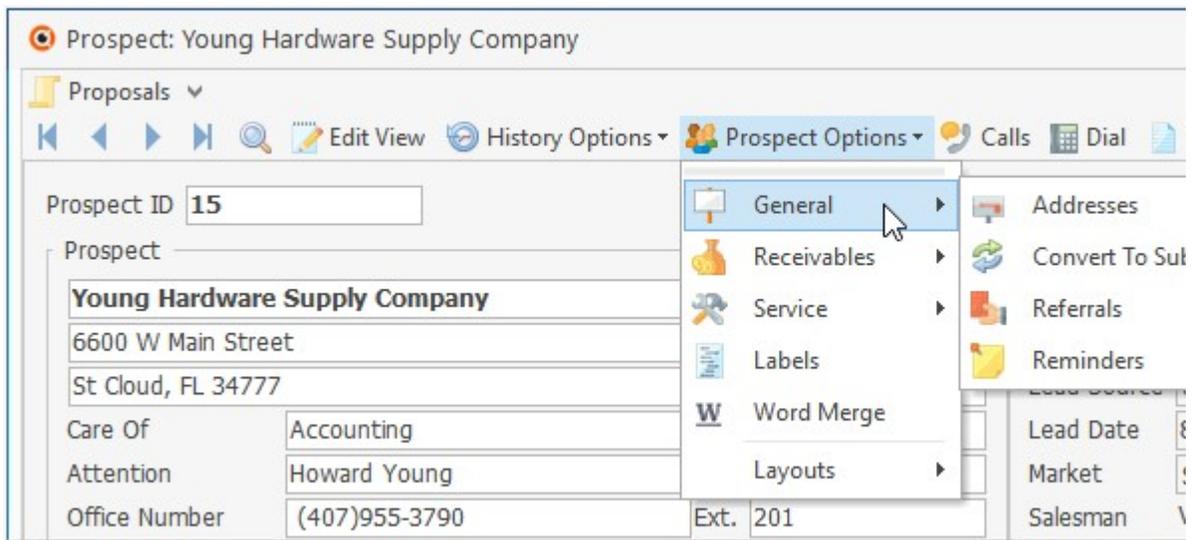
- **Prospect Options** - *Menus* & *Sub-Menu* options:
  1. **General** *sub-menu* - This List (shown above) provides access to various other *Forms* and *Processes* that are used throughout *MKMS* by several different modules including, in some cases, the **Prospect Tracking** module:
     a. **Addresses** - Define an **Alternate Mailing Address** for this **Prospect**.
     b. **Convert to Subscriber** - **Convert** the currently selected **Prospect** record to a **Subscriber** (and once it is converted to **Subscriber**, and optionally convert any related **Proposals** to **Invoices**.
     c. **Referrals** - This *Form* is used to record who **Referred** this **Prospect** to your *Company*.
     d. **Reminders** - Look-up, Add, Edit, and/or Complete a **Reminder Item**, or Reschedule a selected **Reminder Item**.
  2. **Receivables** *sub-menu* - There is only one option:
     a. **Proposals** - This *Form* is used to create a **Proposal** for this **Prospect**.
  3. **Service** *sub-menu*- There is only one option:
     a. **Work Orders** - This *Form* is used to create a **Work Order** for this **Prospect**.
  4. **Labels** - This *Form* is used to create mailing **Labels** for this **Prospect**.
  5. **Word Merge** - This *form* is used to define instructions for a **Word Merge** process.
  6. **Layout** - This *Form* gives the *System Administrator* the ability to change the sequence in which information is displayed on the **Prospects** *Tab*, as well as determining what information is displayed on the the **Prospects** *Tab.*

- **Actions** *Options*:

  1. **Calls** - *Click* **Calls** to document a *Telephone Contact* with this **Prospect**.
  2. **Dial** - *Click* **Dial** to dial the *Primary* telephone number via your modem (located below in the **Prospects** *Tab*).
  3. **Documents** - *Click* the **Documents** *Icon* to have access to the **Document** stored for this **Prospect**.

Prospect *Form* **- Ribbon Menu - Actions - Document** *Icon* **-
Documents** *Form*

   ✓ *Click* the **Documents** *Icon* to open the **Documents** *Form* (see instructions in the
      Documents chapter for complete information on using this feature).
4. **External Services** - *Click* the small down arrow ▾ on the **External Service** *Icon* to display the
   Drop-Down Selections list of previously defined **External Services**.
5. **Favorites** - *Click* the **Favorites** option to identify a *Favorite* **Prospect** which may then then be
   selected using the **Favorite** *Icon's Down Arrow* to open a *Drop-Down Selections List* to
   instantly display a previously identified *Favorite* **Prospect** record.
6. **Filter** - Provides the ability to apply or un-apply a **Prospect** **Filter** to the **Prospects** *Form*
7. **Reports** - *Click* the small down arrow ▾ on the **Reports** *Icon* to display the *Drop-Down
   Selections* list from which the **Prospect Information Report** *dialog* may be opened.
8. **EMail** - *Click* the **Email** *Icon* to open the *Email Dialog* (e.g., using **Outlook**©, or whatever *Email*
   protocol is being used) to send an Email to this **Prospect**.
   ▪ The Email option will activate your Email utility (e.g., Outlook®, etc.) and insert the Email
      Address(es) identified for this Prospect.

Entering a New Prospect

❑ This **Prospects** *Form's* **Edit View** *Icon* opens the **Edit View** *dialog* where a new **Prospect** record may be entered, or an existing one, edited.

- *Entering* a *New* **Prospect** record
  - ✓ Open the **Prospects** *Form* by *Pressing* `Ctrl+F3` (or by *Clicking* the **Prospects** *Icon* on the **Receivables** *Tab's* **Ribbon Menu**)
  - ✓ Then, *Click* the **Edit View** *Icon.*
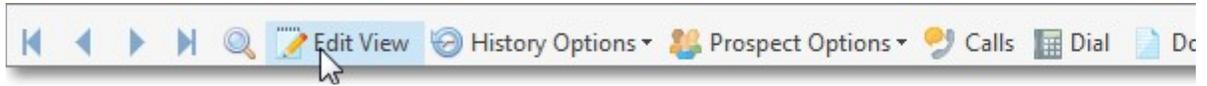
  - ➢ *Note*: To return to the regular **Prospects** *Form* (the Browse View), *Click* that **Browse** *Icon* (which replaces the **Edit View** *Icon*).

- **Edit View** on the **Prospects** *Form* is where the Prospect's information is entered and/or modified.

Prospect: Roberson~ James D. & Christina J.   _ ▢ ▮

|◀ ◀ ▶ ▶| 🔍 🖉 Browse View   🔄 History Options ▾   👥 Prospect Options ▾   ▦ Dial

⊕ 🖫 ↶ ⊖

Field	Value
Prospect ID	20
Name	Roberson~ James D. & Christina J.
Care Of	
Street	124 Main Street
City	St Cloud
County	Osceola
State	FL
Zip	34745
Attention	Jim
Sort Code	
Sales Person	Victoria Ferro
Map Location	
Status	Initial Contact
Pricing	
Primary Telephone	(407)555-2229 Ext
1st Alt Tel	Ext
2nd Alt Tel	Ext
Fax	
EMail	
Pager Service ID	
Pager Unit	
Alert	☐
Comments	Nice Home, nice people.

Last User To Edit Data : |Last Updated On :

Prospects *Form* - Edit View

- To return to the regular **Prospects** *Tab* (the Browse View), *Click* the **Browse View** *Icon*.

❖ See the **Edit View on the Prospects Form** chapter for complete information on how to enter a new **Prospect** record.