

- ❑ 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*

The screenshot shows the Micro Key Millennium Series - MKM application interface. At the top, there is a ribbon menu with tabs for Menu, Receivables, Payables, Service, and Shortcuts. The 'Prospects' tab is selected, showing icons for Menu, Subscribers (F3), Prospects (Ctrl+F3), Auto Bill, Auto Draft, Post Receipts, Search, and Help. Below the ribbon, a 'Prospects' button is highlighted. The main window displays the 'Prospect: Young Hardware Supply Company' form. The form includes a Prospect ID field with the value '15', a navigation bar with icons for back, forward, search, and edit view, and a data entry section with fields for company name, address, contact information, and a comments section. The comments section contains the text 'This is an The Alert'. At the bottom, there is a 'History' section with a table header and a data table.

Prospect ID

Prospect: Young Hardware Supply Company

6600 W Main Street
St Cloud, FL 34777

Care Of: Accounting
Attention: Howard Young
Office Number: (407)955-3790 Ext. 201
Howard Young Cell: (407)955-3791 Ext. 0
Phone Alt 2: Ext.
Fax: (407)955-3795
Email: hyoung@younghardwaresupply.cc
County: Osceola

Comments
This is an The Alert

* Document Dal	Description	Document	Gross	Balance	Refund	Amount	Remain
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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: Resilient Flooring, Inc.

Proposals ▾

⏪ ⏩ 🔍 Browse View ⚙ History Options 👤 Prospect Options ☎ Calls 📞 Dial 📄 Documents External Ser

➕ Insert 💾 Save ↶ Cancel ⌂ Delete

Prospect ID: 16

Name: Resilient Flooring, Inc.

Care Of:

Street: 4400 US Hwy 441

City: Halopaw

County: Osceola

State: FL

Zip: 34799

Attention: Harry Richard

Sort Code:

Sales Person: Mercer~ Atlee E

Map Location:

Status: Proposal Sent

Pricing: Standard Pricing

Primary Telephone: (800)555-9824 Ext:

1st Alt Tel: (407)873-9271 Ext:

2nd Alt Tel: Ext:

Fax:

E-Mail: service@resflo.com

Pager Service ID:

Pager Unit:

Alert:

Comments: This is an **Edit Rich Text** field.
Prospect form showing a **different Form Style** than the **Main Form Style**.
The **Alert Box** is **Checked**

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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.

Prospect Search

Search Value: Search By: Prospect

Prospect	ProspectID	Street	City
▶ Frankly Happy Super Stores, Inc	19	1500 E West Ave.	Kissimmee
Masters~ Johnathon P.	22	1240 West Main Street	Kissimmee
Resilient Flooring, Inc.	16	4400 US Hwy 441	Halopaw
Roberson~ James D. & Christina J.	20	124 Main Street	St Cloud
Young Hardware Supply Company	15	6600 W Main Street	St Cloud

< Options ▾

Prospect Search Form

- ✓ The [History Options](#) Drop-Down Menu allows the User to:

Prospect: Frankly Happy Super Stores, Inc

Proposals ▾

History Options ▾ Prospect Options ▾

Prospect ID

Prospect

Frankly Happy Super Stores, Inc

1500 E West Ave.

Kissimmee, FL 34740

Care Of Frank Smiley

Attention Maintenance/Building Services

Filter ▸

History ▸

Hide Grid

All

Calls

Email

Jobs

Proposals

Work Orders

Prospect: Frankly Happy Super Stores, Inc

Proposals ▾

History Options ▾ Prospect Options ▾

Prospect ID

Prospect

Frankly Happy Super Stores, Inc

1500 E West Ave.

Kissimmee, FL 34740

Care Of Frank Smiley

Attention Maintenance/Building Services

Phone Primary 1(800)451-0040

Manager's Office (407)555-9222

Pharmacy Desk (407)555-9224 Ext.

Filter ▸

History ▸

Hide Grid

Last 30 Days

Last 60 Days

Last 90 Days

Last 120 Days

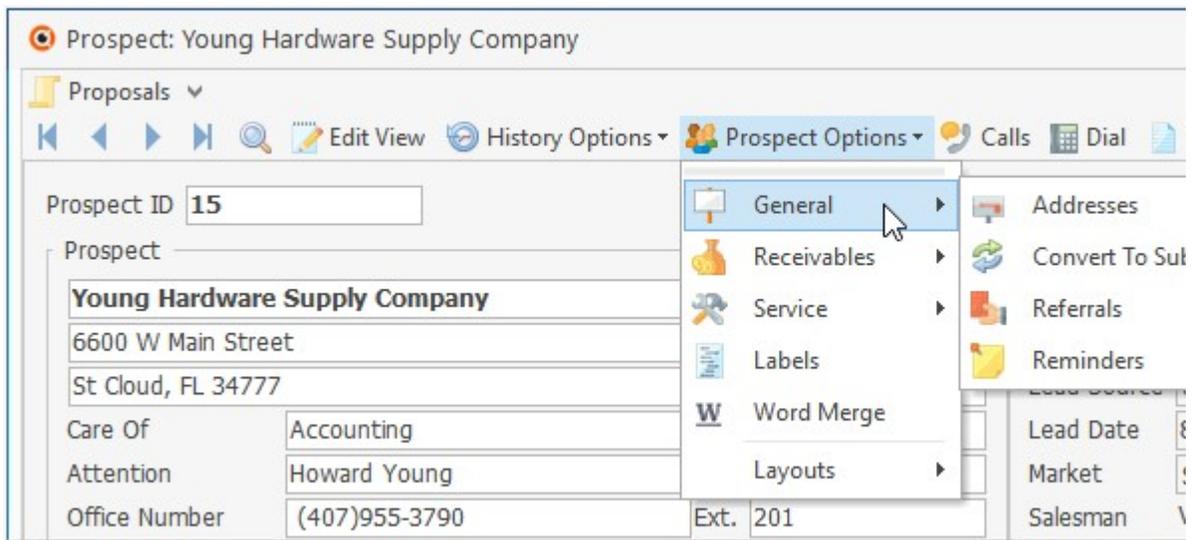
Last 6 Months

Last Year

All History

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: Frankly Happy Super Stores, Inc

Proposals ▾

⏪ ⏩ 🔍 📄 Edit View 🔄 History Options ▾ 👤 Prospect Options ▾ 📞 Calls 📅 Dial 📄 Document

Prospect ID

Prospect

Frankly Happy Super Stores, Inc

1500 E West Ave.

Kissimmee, FL 34740

Care Of

Attention

Phone Primary Ext.

Manager's Office Ext.

Pharmacy Desk Ext.

Fax

Email

County

Lead

Status

Lead Type

Lead Source

Lead Date

Market

Salesman

Comments

.....

History

Drag a column header here to group by that column

Document	Description	Document	Gross	Balance	Refund	Amount	Remaining
4/21/2015	Service Request	10620					
4/4/2016	Proposal	10117					
4/18/2016	Proposal E-Mailed to HappyFrank@FT	10103					

⏪ ⏩ ⏴ ⏵ 1 of 16 🔍 📄 📄

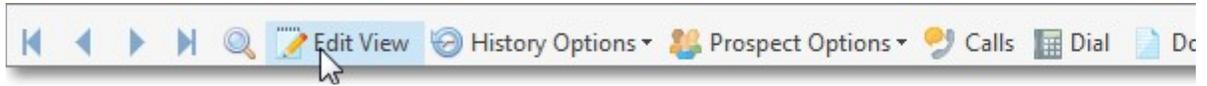
Last User To Edit Data : admin | Last Updated On : 3/2/2017 11:28:48 AM

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.

Navigation: Browse View | History Options | Prospect Options | Dial

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:

E-Mail:

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.