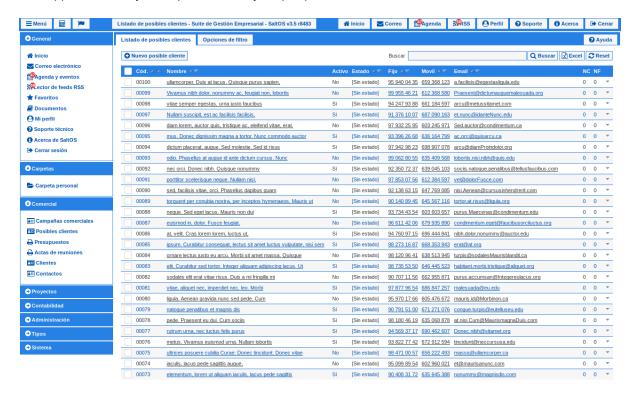
Potential customers

This application lets you keep track of all your prospects.



List of prospects

In the list of potential customers can find the most important pillars of registration:

- Ref.: Numeric code that identifies the potential client.
- Name: Name prospect
- Active: If enabled or not for commercial tasks, budgets, records, etc ...
- State: State in which there is the prospect.
- Landline: Main fixed telephone to contact.
- Mobile phone: Principal to contact mobile phone.
- Mail account: Primary email account to contact.
- NC: Number of comments entered on this prospect.
- NF: Number of files associated with this prospect.

Remember: The events can be arranged by dragging them to the user folder you want.

Listing Options

On each record you can perform a series of actions that are represented by the following icons:

- Q 🖋 🛍 Check / Edit / Delete Record.
- Download registration data in vCard format. (más info sobre VCARD)
- III Display QRCode with log data. (más info sobre QRCode)
- Download PDF with log data. (más info sobre PDF)
- **\$\rightarrow\$** Show data through-PDF Viewer.

This list also features the following:

• 🖈 Export list of all potential customers data to a file in Excel format.

Filter Options

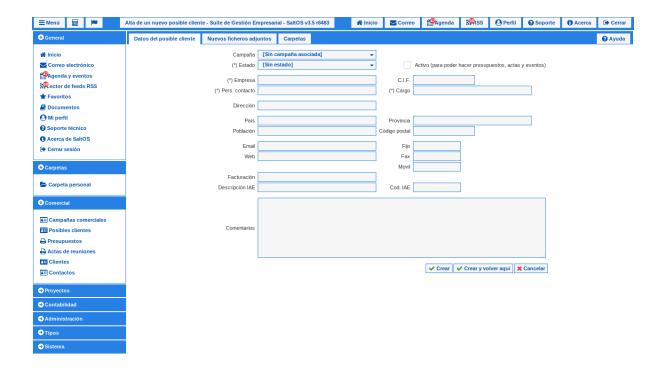
For more information about the filter options listed in the ayuda general.

Form potential customers

This is the application of potential customers, it can add, modify and view all data from the prospect classified in different tabs: main data, comments, file attachments, data on the registry modifications and assignments to folders.

Data Tab prospect

In this tab you can view and modify the main elements of prospect. Here we relate all information fields.



- Campaign (*): Commercial campaign that has earned this business contact.
- State (*): State where they are trade relations with this prospect.
- **Active:** It is a field that serves to indicate whether the application is active for budget acts and events within SaltOS
- Company (*): Trade name of the entity.
- N.I.F: Tax identification number provided by the public finances.
- Contact Persons (*).: Name of contact person with which you are doing commercial work.
- Position (*): Position of the contact person.
- Address: Address of the entity are used in legal documents such as invoices, contracts, etc ...
- Country: Country of the entity are used in legal documents such as invoices, contracts, etc ...
- County: Province of the entity are used in legal documents such as invoices, contracts, etc ...
- Population: Population of the entity are used in legal documents such as invoices, contracts, etc ...
- Postal Code: Postal code of the entity are used in legal documents such as invoices, contracts, etc ...
- Email: Contact primary email account is what will be displayed on all listings.
- Web: Contact Web master is that which will be displayed on all listings.
- Fixed Number: Fixed main contact is what will be displayed on all listings.
- Phone Number: Contact mainspring is what will be displayed on all listings.
- Fax Number: Main fax number is the one that will be displayed on all listings.
- Turnover: Range billing prospect
- Description IAE: Brief description of economic activity that the prospect is dedicated.

- Cod. IAE: Code of economic activity (más info sobre IAE).
- Comment: Comments on contact.

(*) Required when creating or modifying a prospect Campos.

Furthermore, in the first tab has a action buttons. to facilitate major tasks related to business contacts.

- **Add event:** Will take the form of new event for you to fill in the relevant information and relate directly with this prospect.
- **Add record:** Will take the form of new record so you can fill in relevant information and relate directly with this prospect.
- **Create Customer:** Will take the form of creating client with all data included in the record of the prospect.

Comments Tab

For more information about the filter options listed in the ayuda general.

Attachments tab

For more information about the filter options listed in the ayuda general.

New comments tab

For more information about the filter options listed in the ayuda general.

New Files Tab

For more information about the filter options listed in the ayuda general.

Registry Data Tab

For more information about the filter options listed in the ayuda general.

Tab Folders

For more information on Folder Options ayuda general.