

Potential customers

This application lets you keep track of all your prospects.

Listado de posibles clientes - Suite de Gestión Empresarial - SaltOS v3.5 r8483											
Inicio Correo Agenda RSS Perfil Soporte Acerca Cerrar											
General											
Listado de posibles clientes Opciones de filtro Ayuda											
Nuevo posible cliente											
Buscar											
Cód.	Nombre	Activo	Estado	Fijo	Móvil	Email	NC	NF			
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00084	ornare lectus justo eu arcu. Morbi sit amet massa. Quisque	No	[Sin estado]	98 120 96 41	638 513 945	turpis@sodalesMaurisblandit.ca	0	0			
00083	elit. Curabitur sed tortor. Integer aliquam adipiscing lacus. Ut	Si	[Sin estado]	98 735 53 50	646 445 523	habitant.morbi.tristique@aliquet.org	0	0			
00082	sodales elit erat vitae risus. Duis a mi fringilla mi	No	[Sin estado]	90 707 11 56	662 955 871	purus.accumsan@Integerevulacus.org	0	0			
00081	vitae. aliquet nec. imperdiet nec. leo. Morbi	Si	[Sin estado]	97 877 96 54	686 847 257	malesuada@eu.edu	0	0			
00080	liqua. Aenean gravida nunc sed pede. Cum	No	[Sin estado]	95 970 17 66	605 478 672	mauris.id@Morbinon.ca	0	0			
00079	natoque penatibus et magnis dis	Si	[Sin estado]	90 791 51 00	671 271 076	conque.turpis@eutelluseu.edu	0	0			
00078	pede. Praesent eu dui. Cum sociis	Si	[Sin estado]	98 180 46 19	635 068 878	at.nisi.Cum@Mauris magnaDuis.com	0	0			
00077	rutrum urna. nec luctus felis purus	Si	[Sin estado]	94 569 37 17	690 462 607	Donec.nibh@sitamet.org	0	0			
00076	metus. Vivamus euismod urna. Nullam lobortis	Si	[Sin estado]	93 822 77 42	672 912 594	incidunt@neccursusa.edu	0	0			
00075	ultrices posuere cubilia Curae. Donec tincidunt. Donec vitae	No	[Sin estado]	98 471 00 57	656 222 493	massa@ullamcorper.ca	0	0			
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00073	elementum. lorem ut aliquam iaculis. lacus pede sagittis	Si	[Sin estado]	90 408 31 72	635 645 388	nonummy@magnisdis.com	0	0			

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:

- : Check / Edit / Delete Record.
- : Download registration data in vCard format. ([más info sobre VCARD](#))
- : Display QRCode with log data. ([más info sobre QRCode](#))
- : Download PDF with log data. ([más info sobre PDF](#))
- : 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.

Alta de un nuevo posible cliente - Suite de Gestión Empresarial - SaltOS v3.5 r6483

Inicio Correo Agenda RSS Perfil Soporte Acerca Cerrar

General

- Inicio
- Correo electrónico
- Agenda y eventos
- Receptor de feeds RSS
- Favoritos
- Documentos
- Mi perfil
- Soporte técnico
- Acerca de SaltOS
- Cerrar sesión

Carpetas

- Carpeta personal

Comercial

- Campañas comerciales
- Posibles clientes
- Presupuestos
- Actas de reuniones
- Cientes
- Contactos

Proyectos

Contabilidad

Administración

Tipos

Sistema

Datos del posible cliente

Campaña [Sin campaña asociada]

(*) Estado [Sin estado]

☐ Activo (para poder hacer presupuestos, actas y eventos)

(*) Empresa

(*) Pers. contacto

C.I.F.

(*) Cargo

Dirección

País

Provincia

Población

Código postal

Email

Fijo

Web

Fax

Movil

Facturación

Descripción IAE

Cod. IAE

Comentarios

Crear Crear y volver aquí Cancelar

- **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](#).