# **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:

- Check / Edit / Delete Record.
- III: Download registration data in vCard format. (más info sobre VCARD)

- 🗉: Display QRCode with log data. (más info sobre QRCode)
- P: Download PDF with log data. (más info sobre PDF)
- \B: Show data through-PDF Viewer.

This list also features the following:

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

## **Filter Options**

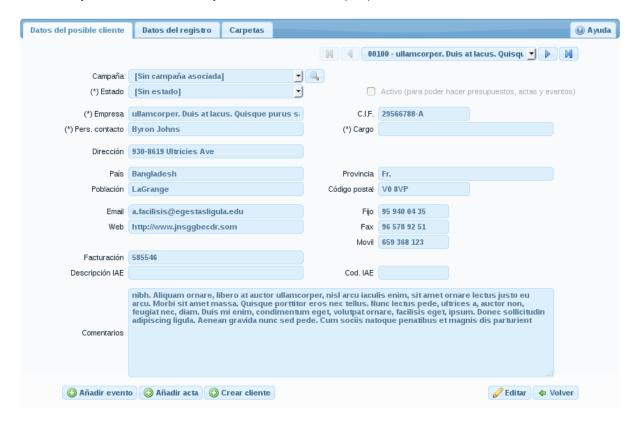
For more information about the filter options listed in the ayuda general.

# 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.