Prospect module

Quick reference guide

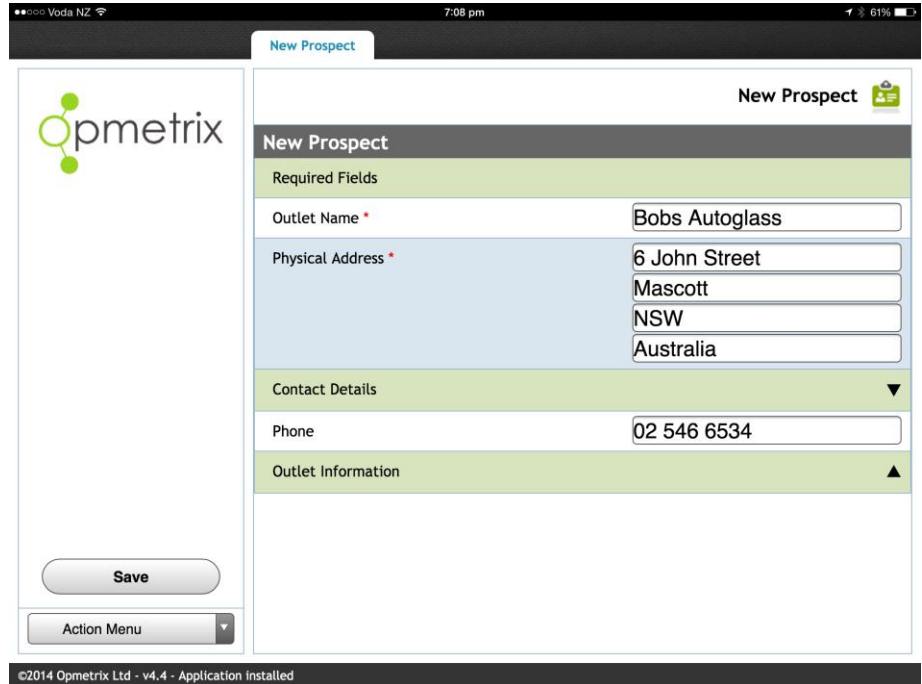Opmetrix app version 4.10 onwards

Contents

Introduction

The prospects module in Opmetrix enables field users to add new prospects and record activities including contacts, call notes and surveys.

Head office reporting can track the number of new prospects each field member adds and all prospect activities can be reported.

Head office

Business process considerations

The Opmetrix prospects module aims to add and record prospects out in the field.

Transactions such as orders and invoices can be entered for prospects. These transactions are held in the Opmetrix system and released once the new customer has been added into your accounting software.

What it does:

- Add prospects in the field
- Add calling card notes to prospects
- Add contacts to a prospect
- Complete a survey for a prospect
- Enter a quotation or order for a prospect

What happens when a prospect becomes a 'live' customer?

If a prospect becomes a live customer, Opmetrix has a migration option to move prospect data including call notes, contacts and transactions.

The following process is recommended:

1. Add the new customer into the accounting system.
2. Migrate the prospect information to the 'live' customer.
3. Manually release any held orders so they import into your accounting system and can be processed.

Setting up prospects

Field users can add prospect name, address and other contact details.

The default information captured is:

Default Fields	
Outlet Name	Compulsory
Address Line 1	Compulsory
Address Line 2	
Address Line 3	
Address Line 4	
Phone Number	

The following additional fields can be enabled. The Opmetrix support team is available to configure these optional settings for you. Contact support@opmetrix.com

Optional Fields
Email Address
Postcode
Fax Number
Note (100 Characters)
Price Level (1-8)
Prospect requires Order Number
Category (1-6)

Prospect transaction types

The transaction types you use in your system (e.g. orders, invoices) can be enabled for prospects. Quotations can also be enabled.

Transactions entered for prospects do not automatically export to your accounting system. Instead they will appear in the Opmetrix CMS reporting suite with the status 'pending'.

Once you have migrated the prospect to a 'live' accounting customer, you can release these pending transactions.

■	To Export	ID		Outlet ID	Outlet	Type	Deliv Date	Synchronised	Device	Time Taken	Total ($)
☐	Pending	...	Dis	0BV00013	Bobs Autoglass	Quote	27/09/2014	27/09/2014 19:09:14	Demo	0:00:45	475.00
☐	Pending	...	Dis	0BZ00074	ABC HARDWARE	Quote	27/09/2014	27/09/2014 11:16:02	CubeDemo	0:02:30	750.00
☐	Will be exported	...	Dis	1027	Bi-Lo Jewelstown	Order	27/09/2014	27/09/2014 11:05:10	CubeDemo	0:01:20	879.40
☐	Will be exported	...	Dis	1035	PriceLock Annandale Hotel	Order	26/09/2014	26/09/2014 18:16:57	CubeDemo	0:01:53	1434.43
☐	Will be exported	...	Dis	1036	PriceLock Australian Hotel	Order	26/09/2014	26/09/2014 13:37:52	Rod	0:00:13	426.15
☐	Will be exported	...	Dis	1036	PriceLock Australian Hotel	Order	26/09/2014	26/09/2014 13:37:52	Rod	0:07:20	1270.85
☐	Will be exported	...	Dis	1036	PriceLock Australian Hotel	Order	26/09/2014	26/09/2014 13:37:51	Rod	0:03:02	907.53
☐	Will be exported	...	Dis	1035	PriceLock Annandale Hotel	Quote	25/09/2014	26/09/2014 18:16:59	CubeDemo	0:01:07	219.42
☐	Will be exported	...	Dis	1035	PriceLock Annandale Hotel	Invoice	25/09/2014	26/09/2014 18:16:58	CubeDemo	0:00:15	1434.43
☐	Will be exported	...	Dis	1051	Harold Park Hotel	Quote	25/09/2014	26/09/2014 13:00:38	Rod	0:00:18	459.40
☐	Will be exported	...	Dis	1096	Caltex Balmoral	Order	25/09/2014	26/09/2014 13:00:38	Rod	0:07:45	66.75
☐	Will be exported	...	Dis	1051	Harold Park Hotel	Order	25/09/2014	26/09/2014 13:00:37	Rod	0:34:38	459.40
☐	Will be exported	...	Dis	1036	PriceLock Australian Hotel	Order	25/09/2014	25/09/2014 15:56:52	Rod	0:06:57	943.53
☐	Will be exported	...	Dis	1043	Dry Dock Hotel	Order	25/09/2014	25/09/2014 13:11:10	Rod	0:05:35	1931.65
☐	Will be exported	...	Dis	1096	Caltex Balmoral	Order	25/09/2014	25/09/2014 12:59:39	Rod	0:02:07	783.46
n/a	**13**	**All**		*n/a*	*n/a*	*n/a*	*n/a*	*n/a*	*n/a*	**1:15:45**	**12441.40**
	To Export	ID		Outlet ID	Outlet	Type	Deliv Date	Synchronised	Device	Time Taken	Total ($)

Prospects are set to **price level 1** when they are added. They assume the same 'rights' as active customers e.g. price override and discount override.

Allocating prospects to field users

When a prospect is added in the field it needs to be assigned to the correct field user, and ensure the prospect is only visible to that specific user.

Opmetrix does this automatically by using the staff code set in the primary allocation of that user's login. It is therefore important that all device logins have primary allocation set.

To check allocations for a field user:

1. Select the Admin button from the top menu
2. Select Login Maintenance
3. Set the Login Type to 'Device' to display only field users
4. Select edit to view a user's configuration
5. Ensure that the Primary App Allocation is set to the user's default staff code as highlighted below

Opmetrix CMS reporting filters

In order to report on new prospects and prospect activities you need to apply filters to reports in the Opmetrix CMS.

By default, no prospect data is shown in reports unless a filter is applied. This ensures all reports show active live results.

Prospect filters

Prospect data can be included in all report results or it can be filtered to exclusively show prospect only results. This is done using the Outlet Type filter.

Example 1

To include prospect quotations in transaction print and export report.
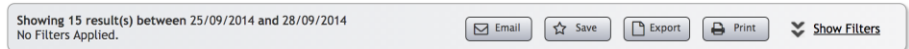
1. Select the report from the reports menu
2. Select Show Filters from the filter bar
3. Select New outlet and set the filter to *** ALL ***
4. Select Apply to view all results

Note:

The filter can be set to prospect only, or if a field user has removed a prospect you can still report on the lost prospects activity by setting the outlet filter to 'Lost Prospects'.

Prospect reporting

New outlet log

The new outlet log on the reports tab displays new prospects added for each field user.

Changing the Outlet Filter to 'Lost Prospects' will also allow reporting on prospects that have been lost.

Other useful prospect reports

The following reports may be useful to track prospect activity:

Time in store
Filter to prospects and review how much time the field team spend servicing prospects against live customers.

Call coverage
Filter to prospects and check that prospects are being called on regularly.

Call cards
Use the Call Card Log and Gallery to review notes on prospects.

Sales reports
Use the transaction and product reports to view quotations and products quoted.

Budgets
Filter to prospects and see totals of quotations accumulated for prospects.

Surveys
Filter to prospects and see surveys completed for prospects.

# Migrating prospects & releasing transactions

Migrate the prospect

Only Opmetrix administrators have access to the prospect migration tool. Select the **Prospects Report** from the reports menu and filter to show **new prospects**. Now select the **Migrate Icon** (pencil) beside the prospect you wish to migrate.
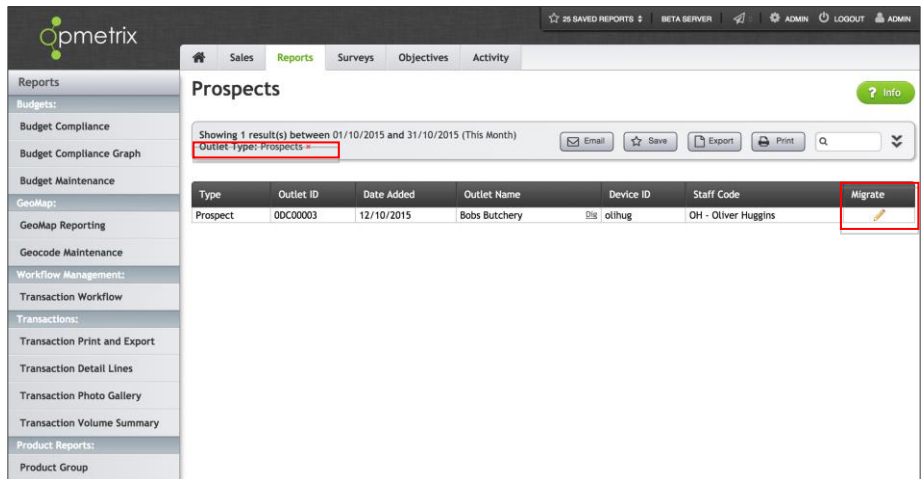
Select the customer you wish to merge the prospect into and select Migrate Now. All CRM data including contacts, call notes, photos and any sales transaction such as quotes or orders are moved from the prospect to the selected live customer.
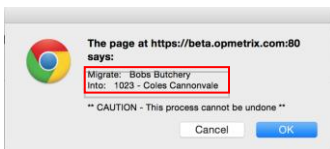
Tip: A prospect migration cannot be reversed. Read the warning carefully before proceeding.
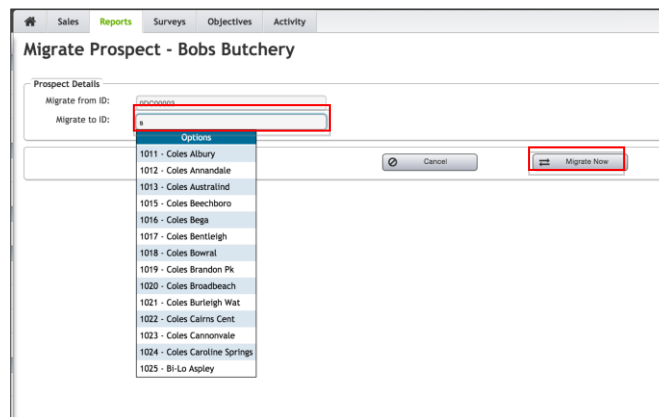
When finished, the original prospect is automatically deleted.

Releasing sales transactions

Any sales transactions (e.g. orders) can be released and exported to your accounting system as they now belong to a live customer.

Navigate the transaction print and export report and apply a filter to show 'pending' transactions. You can do this by typing 'pending' into the smart search box.

Note: The pending transaction will have the 'live customer' name not the 'prospect' name if it was different.

Tag the pending transaction (or multiple transactions) you wish to release and select Tag for Export. These transactions will be exported on the next scheduled export to your accounting system.

# Mobile users

Using prospects in the Opmetrix field app

The prospects module in Opmetrix enables field users to add new prospects and record activities including contacts, call notes and surveys.

What it does:

- Add prospects in the field
- Add calling card notes to prospects
- Add contacts to a prospect
- Complete a survey for a prospect
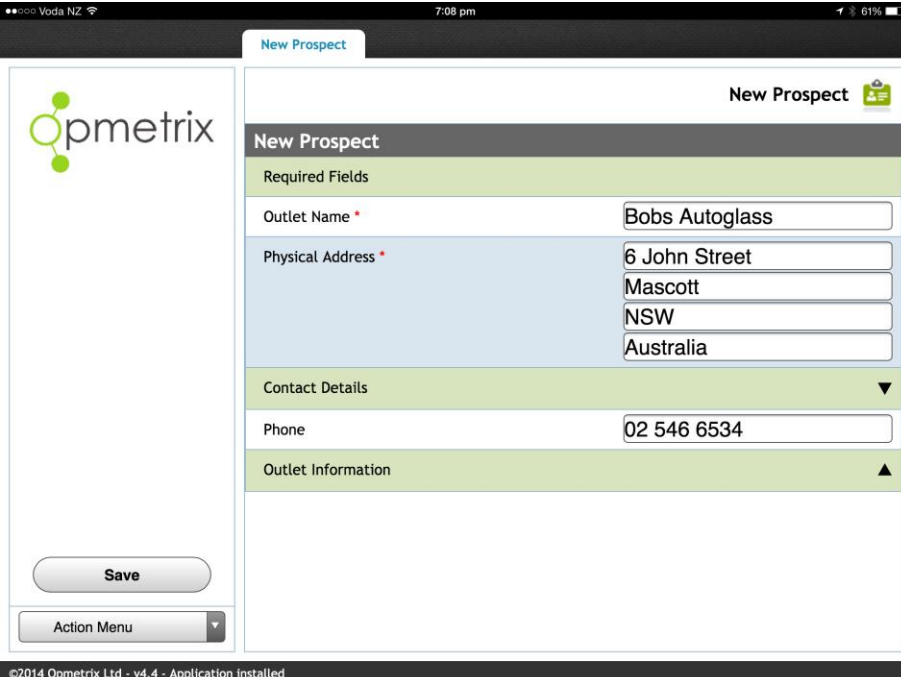- Enter a quotation or order for a prospect (if enabled)

Adding a prospect

Prospects are added to the Opmetrix app by selecting **New Prospect** on the Store Select screen.
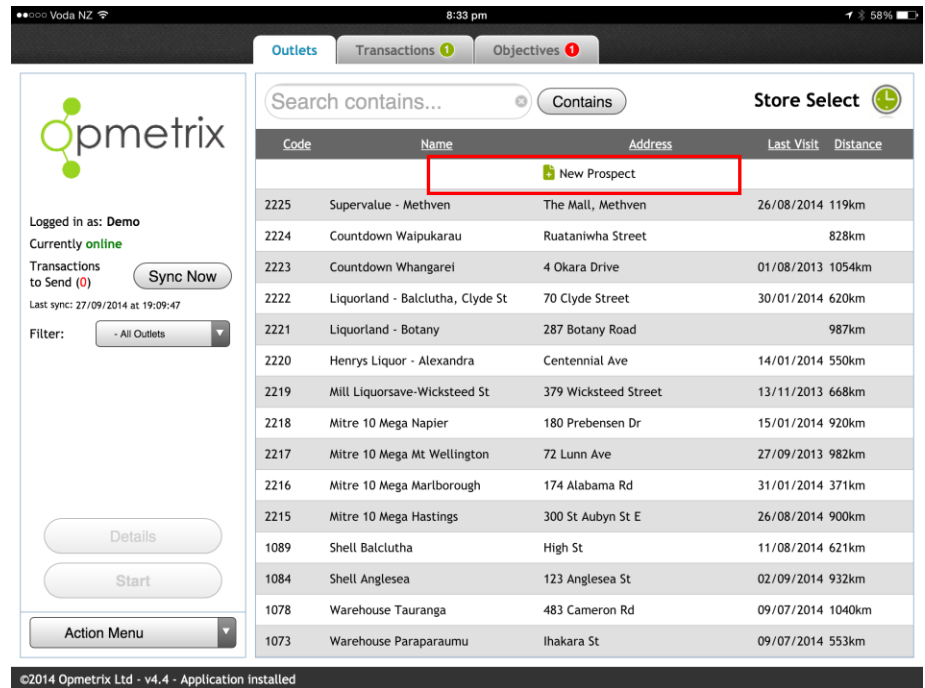
Entering prospect details

Prospect details can be completed – the prospect must have an outlet name and physical address. Select **save** to store the prospect.

Note: There is no re-edit option when adding a prospect, therefore details must be completed carefully.

An accurate physical address should be entered, as Opmetrix converts this address to a geo-code and advises the distance and a map of the prospects location.

Prospects list

Use the **filter** selection to switch between **All Outlets** (live customers) and **Prospects.**
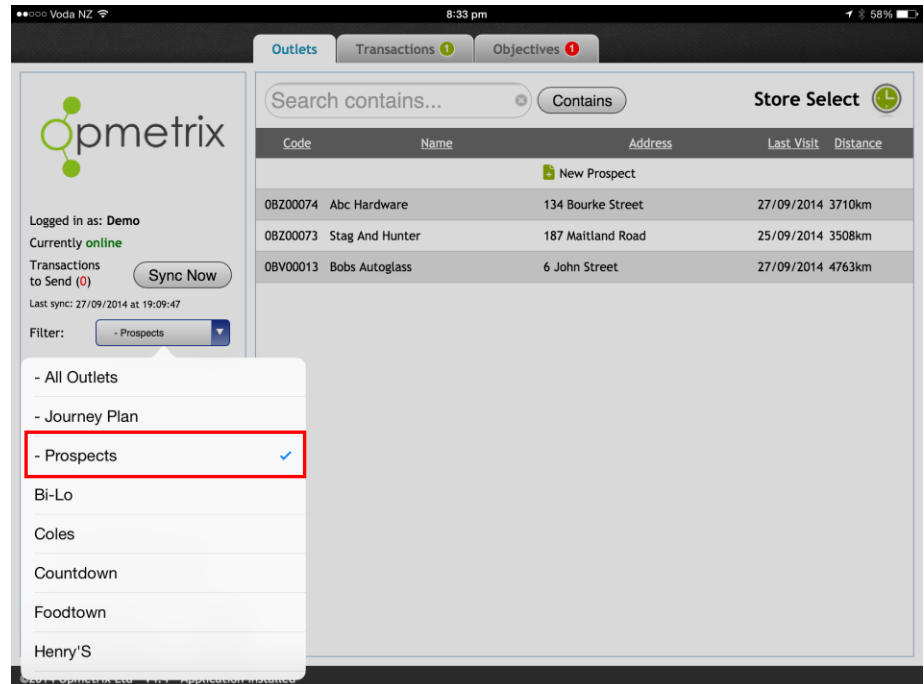

Prospects are just like standard customers in Opmetrix. Select **Start** to begin a store call for the selected prospect.

The activities you can record for a prospect are:

1. Contacts
2. Review call notes
3. Add calling cards
4. Complete surveys (if available)
5. Enter quotations or orders (if enabled)

Removing a prospect

If a prospect is no longer valid it can be removed and will no longer appear in your prospects list.
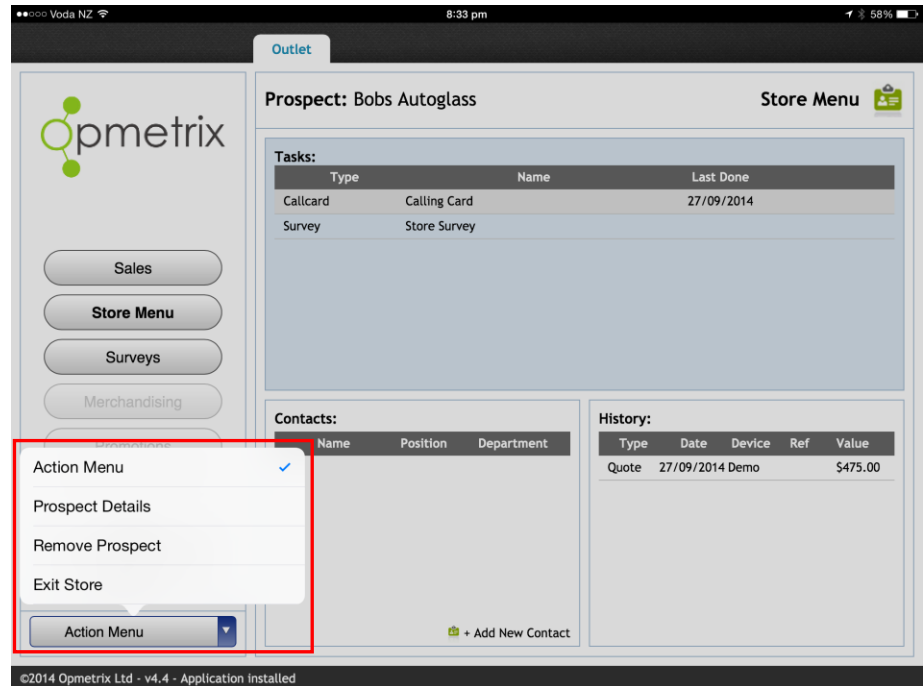
To remove a prospect (and associated contacts and call history), start a store visit for the prospect then select **Remove Prospect** from the **Action Menu**.