

How to Close a Prospect (Lost Sale)

Description

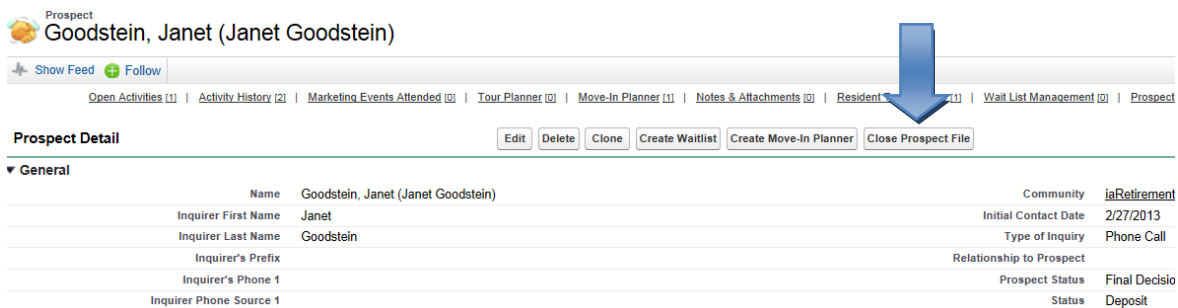
Use this function when a prospect is no longer a potential resident and has not left a deposit. If the prospect has left a deposit, see *How to Refund a Deposit from the Move-In Planner*.

The system will:

-  Change the **Prospect Status** to *Do Not Contact*
-  Change the **Sales Stage** to *Lost*

Step by Step

- 1** Go to the prospect's profile and click **Close Prospect File**



Prospect
Goodstein, Janet (Janet Goodstein)

Show Feed Follow

Open Activities (1) | Activity History (2) | Marketing Events Attended (0) | Tour Planner (0) | Move-In Planner (1) | Notes & Attachments (0) | Resident (1) | Wait List Management (0) | Prospect

Prospect Detail Edit Delete Clone Create Waitlist Create Move-In Planner Close Prospect File

▼ General

Name	Goodstein, Janet (Janet Goodstein)	Community	iaRetirement
Inquirer First Name	Janet	Initial Contact Date	2/27/2013
Inquirer Last Name	Goodstein	Type of Inquiry	Phone Call
Inquirer's Prefix		Relationship to Prospect	
Inquirer's Phone 1		Prospect Status	Final Decision
Inquirer Phone Source 1		Status	Deposit

- 2** Click **Status** and select **Lost**
- 3** Click **Prospect Status** and select the appropriate response, typically *Do Not Contact*
- 4** Click **Reason Code** and **Destination** to indicate why the prospect is lost and where he or she went
- 5** Enter **Reason for Loss Notes** if more detail is required
- 6** Specify **Date Closed** as the date you were notified of the lost sale
- 7** Specify **Competitor** if applicable
- 8** Review your information and check **Confirm Closing the Prospect File**
- 9** Click **Save**

▼ Prospect

Prospect's Prefix	
Prospect's First Name	John
Prospect's Last Name	Sawyers
Spouse's Prefix	Mrs.
Spouse's First Name	Mary
Spouse's Last Name	Sawyers
Community	iaRetirement - GTA

▼ Please Complete This Section To Close A Lost Prospect

Status	Lost <input type="button" value="▼"/>
Prospect Status	Do Not Contact <input type="button" value="▼"/>
Reason Code	Moved Elsewhere <input type="button" value="▼"/>
Destination	Moving to long term care <input type="button" value="▼"/>
Reason for Loss Notes	<input type="text"/>
Date Closed	2/25/2013 <input type="button" value="▼"/> [3/10/2013]
Competitor	Mr.Sleazy Seniors Paradi <input type="button" value="▼"/>
Confirm Closing the Prospect File	<input checked="" type="checkbox"/>

The updated information is displayed on the **Prospect Profile | Close File Information** section

▼ Close File Information			
	Reason Code	Moved Elsewhere	Date Closed
	Destination	Moving to long term care	2/25/2013
			Competitor
			Mr.Sleazy Seniors Paradise
▼ Other Information			