


How to Close a Prospect with the Close Prospect File Button

Sometimes it is necessary to close a prospect that is no longer a lead for your community. To do this, just navigate to their prospect page and click 'Close Prospect File'.

Prospect  **Adams, Brad (John & Elaine)**

[Customize Page](#) | [Edit Layout](#) | [Printable](#)

[Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Marketing Events Attended \[0\]](#) | [Tour Planner \[2\]](#) | [Move-In Planner \[0\]](#) | [Notes & Attachments \[0\]](#) | [Resident Wait List Management \[0\]](#) | [Prospect Competitors \[0\]](#) | [Prospect Relatives \[0\]](#) | [Incident Management \[0\]](#)

Prospect Detail

▼ **General**

Name	Adams, Brad (John & Elaine)	Community	Retirement - GTA
Inquirer First Name	Brad	Initial Contact Date	10/24/2011
Inquirer Last Name	Adams	Type of Inquiry	Phone Call
Inquirer's Prefix		Relationship to Prospect	Son
Inquirer's Phone 1	(416) 559-6589 John	Prospect Status	Urgent Need ASAP
Inquirer Phone Source 1	Home Phone	Initial Call	<input type="checkbox"/>
Inquirer's Email	frankl@infinite-analytics.com	Focus Prospect	<input checked="" type="checkbox"/>
Status - Home Services		Web Lead to Review	<input type="checkbox"/>
Offering Types			

▼ **Lead Source and Referral**

Primary Referral Type	Marketing Event	Services	
Lead Source	Word of Mouth	Referred by Contact	Babara Lew
Marketing Event	End of Summer BBQ	Referred by Resident	
		Referred by Employee	
		Referred by - Other	


On the next screen, make sure you choose **Lost** in the Status field.

NOTE: It is not necessary to close a prospect if they made deposits or have moved-in- the system does this automatically and updates their status.

▼ Prospect	
Prospect's Prefix	
Prospect's First Name	John
Prospect's Last Name	Adams
Spouse's Prefix	
Spouse's First Name	Elaine
Spouse's Last Name	Adams
Community	<u>iaRetirement - GTA</u>
▼ Please Complete This Section To Close A Lost Prospect	
Status	Lost
Prospect Status	-None- Initial Call
Reason Code	Deposit
Destination	Lost Moved-In Trial Conversion
Reason for Loss Notes	
Date Closed	9/28/2012 [9/28/2012]
Competitor	

The Prospect Status should generally be changed to Do Not Contact or whichever applies. The Reason Code should be applied, as well as the Destination field to the one that applies, as well as any additional notes in Reason for Loss Notes. Check the date and Save.

Notice how their Prospect page has been updated, both near the top, as well in its own section:

<div style="text-align: right;"> Edit Delete Clone Create Move-In Planner Close Prospect File </div>			
ne	Adams, Brad (John & Elaine)	Community	iaRetirement - GTA
ne	Brad	Initial Contact Date	10/24/2011
ne	Adams	Type of Inquiry	Phone Call
ifix		Relationship to Prospect	Son
e 1	(416) 559-8589 John	Prospect Status	Do Not Contact
e 1	Home Phone	Status	Lost
mail	frankl@infinite-analytics.com 	Focus Prospect	<input checked="" type="checkbox"/>
es		Web Lead to Review	<input type="checkbox"/>
es			

▼ Close File Information

Reason Code	Can't Afford	Date Closed	9/28/2012
Destination	Staying at home with services	Competitor	

▼ Other Information

If the Prospect made a deposit that now needs to be refunded, be sure to consult **How to Refund a Prospect with the Refund Button**.