




How to Close a Prospect File

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, refund the Move-In Planner instead.

The system will:


-  Allow the user to close any open activities on the prospect's file
-  Change the **Status/Stage/Phase** to *Lose* or *Unqualified*
-  Change the **Prospect Status** to *Do Not Contact*, *Lost Lead*, or another appropriate Prospect Status

Step by Step

- 1 Navigate to the Prospect's profile page
- 2 Click the **Close Prospect** button at the top of the page
- 3 You will see a list of any open activities at the top of the Close Prospect page. A **Result** of *Not Applicable* is automatically set on all open activities. If you do not change this result, each task will be closed.

Please Complete the Following to Close a Prospect:

Subject	Priority	Type	Due Date	Related To	Set Result To
Follow-Up Call	Normal	Call	12/29/2016	Swarovsky, Svetlana (Svetlana Swarovsky)	Not Applicable
Return Cheque	Normal	Administrative	01/03/2017	Swarovsky, Svetlana (Svetlana Swarovsky)	Not Applicable



- 4 To keep any task open, change the **Result** to *None*

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Follow-Up Call	Normal	Call	12/29/2016	Swarovsky, Svetlana (Svetlana Swarovsky)	Not Applicable
Return Cheque	Normal	Administrative	01/03/2017	Swarovsky, Svetlana (Svetlana Swarovsky)	--None--



- 5 Select a new **Status**
- 6 Select a new **Prospect Status**. Note that the Prospect Status and Status should co-operate.
- 7 Select a **Reason Code** for closing the prospect file

- 8 Select a **Destination**, if applicable
- 9 Enter any **Reason for Loss Notes**, if applicable
- 10 Specify a **Competitor**, if applicable. Note that you need to have a competitor file already created before you are able to select one.
- 11 Specify a **Date Closed**
- 12 Verify the data and click **Close Prospect File**

Please Complete the Following to Close a Prospect:

Tasks 2 Open

Subject	Priority	Type	Due Date	Related To	Set Result To
▶ Follow-Up Call	Normal	Call	12/29/2016	▶ Swarovsky, Svetlana (Svetlana Swarovsky)	Not Applicable
▶ Return Cheque	Normal	Administrative	01/03/2017	▶ Swarovsky, Svetlana (Svetlana Swarovsky)	--None--

Status (Required)

Lost

Prospect Status (Required)

Lost Lead

Reason Code

Did not like building amenities

Destination

Moving in with relatives

Reason For Loss Notes

Competitor

Date Closed

12/29/2016

Close Prospect File
Cancel