

CREATING PROSPECTS IN CALLTRAX NEXT

Prospects can be added to CallTrax NEXT, and subsequently ExecuTrax, all in real-time.

How it works:

- During Household Update the imported account(s) will be matched to Prospect.
- Importing matches by Household Name and Address.

* Any Referrals can be handled during DataPro (or by the User in CallTrax once Prospect is turned into a Household)

Step 1: From within CallTrax NEXT, search to see if the Prospect already exists:

The screenshot displays the Marquis CallTrax NEXT interface. At the top, the Marquis logo is on the left, and navigation links for 'Marquis ONE', 'SUPPORT | HELP', 'Learning And Development | Log Out', and the 'CALLTRAX' logo are on the right. The main navigation bar includes 'Dashboard', 'Discovery', 'Customer Dashboard', 'Work List', and 'Administration'. The 'Customer Dashboard' is active, with sub-tabs for 'Household' and 'Individual'. A 'Customer Search' modal is open in the center, featuring input fields for 'Name', 'Phone Number', 'Social Security Number', 'Customer Number', and 'Account Number', along with a 'Search' button. A red callout bubble points to the modal with the text: 'User can search to see if a record is already in the system.' The background shows various data tables such as 'Household Customers', 'Campaigns', 'Marketing Notes', 'Next Potential Product', and 'Work List', all of which currently display 'No data available in table'. A red arrow icon is visible at the bottom center of the dashboard.

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Step 2: If the individual is not found, the User can select Add a Prospect from the search results screen:

MARQUIS Marquis ONE | SUPPORT | HELP Learning And Development | Log Out **M**

Dashboard Discovery **Customer Dashboard** Work List Administration **CALLTRAX**

Customer Dashboard Household Individual Search

Customer Search

Show 10 entries

Customer	Household	Contacts	SSN	Custom Number	Branch	Hour	Prospect
Abigail Elza Bayer	Abigail Elza Bayer	Kory Kyra Wyman Nicholas R Strojny Richard Strojny	100-01-7738	C00000001	Downtown	Active	
Kory Kyra Wyman	Abigail Elza Bayer	Nicholas R Strojny Richard Strojny	100-02-8788	C000000028788	(614) 555-3021 Columbus OH	Downtown	Active

Previous Next Back Close

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Summary Information Accounts and Services Assignments

Next Potential Product No Next Potential Product

Work List Showing 12 of 12

Name	Subject
Rodger Runolfsson	Follow up on application results, if

If the individual is not found, the User can select Add New, then select Prospect.

Note: The User can also add a Prospect from the Customer Dashboard:

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Dashboard Discovery **Customer Dashboard** Work List Administration **CALLTRAX**

Customer Dashboard Household Individual Search

HUBERT SCHILLER
Preferred: 1852 Iris Ct
Grove City, OH 43123
(614) 555-2335
HubertOttoSchiller@gomarquis.com
Date of Birth: 04/20/1961 (60 years)

Manager: Sandra Wellborn
Branch: Southwest
Region: South Franklin

Household Customers
Hubert Otto Schiller Add New Prospect

Contacts
Pat Schiller

Activity Summary

Due Date	Activity	Status	Contact Name	Assigned For	Product / Service
10/15/2021	Email	To Be Done	Hubert Otto Schiller	Anthony Martin	Credit Card
10/14/2021	Email	To Be Done	Hubert Otto Schiller	Adele Perkins	Auto Loan
10/11/2021	Meeting	Done	Hubert Otto Schiller	Sandra Wellborn	Meeting to review Mortgage Application
10/10/2021	Referral	Processing	Hubert Otto Schiller	Sandra Wellborn	Mortgage Interested in a Mortgage
10/10/2021	Pipeline	To Be Done	Hubert Otto Schiller	Sandra Wellborn	Mortgage Mortgage Loan for Hubert Schiller
05/01/2021	Phone Call	Done	Hubert Otto Schiller	David Weisz	Credit Card Lost credit card and concerned about potential fraud
01/01/2021	Email	Done	Hubert Otto	David Weisz	Happy Birthday - customer

Marketing Notes
Top 10% Most Profitable HHs

Next Potential Product
No Next Potential Product

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The User can select Add New, then select Prospect to add the individual without doing a search.

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Note: Adding Name and Address to the contact information will improve the match results to the Account data when imported into ExecuTrax:

The User can type in the prospect's information.

Step 3: Add Log Activity to keep track of any interaction with the Prospect:

The user can now add Log Activity.

Due Date	Activity	Status	Contact Name	Assigned For	Product / Service	Subject
10/30/2021	Email	To Be Done	Zachery Berry Olson	Craig Scotts	Auto Loan	Follow up on Auto Loan
10/28/2021	Referral	To Be Done	Zachery Berry Olson	Craig Scotts	Auto Loan	Auto Loan Interest
10/28/2021	Phone Call	To Be Done	Zachery Berry Olson	Craig Scotts	Auto Loan	Interested in Auto Loan options - follow up