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:

MARQUIS			Marquis ONE SUPPO	ORT HELP ng And Development Log Out	M
Dashboard Discovery Customer Dashboard Work List				CALL TRAX	C.
Customer Dashboard Household Individual				Search	
No Customer available Activity Summary	Customer Search	× 9 -	Campaigns		*
User can search to see if a record is already in the system. Household Customers No deta available in table Add New 3	Name Phone Number Social Security Number Customer Number Account Number Search		Campaign Group No 1 Marketing Notes No	b II Description data available in table data available in table	*
	0		Next Potential Prod		
Summary Information			Work List		^F 12
Accounts and Services			Name Iî	Subject ↓†	<u>î</u>
Assignments			Rodger Runolfsson	Follow up on application results, if	

CREATING PROSPECTS IN CALLTRAX NEXT

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

MA	R	QUIS	5									Marquis O	NE SUPI Lear	PORT HELP ning And Develo	pment Log (out M
															CALLTR	AX
Customer D	ashboa	ırd	Ho	usehold Indi	vidual										Search	
No	o Cust	Show 10	∼ entr	ies			Custon	ner Search	If the ind found, t	ividual i he User	is not can			Add New 👻	× Description	* IT
	l	Custom Abigail Elza	ner ⊥: a Bayer	Household Abigail Elza B	lt ayer	Contacts (Kory Kyra Wyman Nicholas R Strojny Richard Strojny	SSN 100-01-7738	Numbe C00000001	select Ad select	ld New, Prospe	then ct.	Branch Downtown	Active	Prospect	'	
		Kory Kyra \	Nyman	Abigail Elza B	ayer	Nicholas R Strojny Richard Strojny	100-02-8788	C00000028788	(614) 555- 3021	Columbus	ОН	Downtown	Active			*
Household (Guste											Pre	vious Ba	Next Close		
Sun	nmary :	Information			-		0)	_			Next Po	tential Protection (Contraction (Contraction)) State	oduct Ict	C Showing	12 of 12
Ac	counts a	and Services										Nar Rodger Re	ne lî unolfsson	Follow up on app	bject plication results,	a A

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

MARQUIS									Marquis ONE	SUPPORT HELP Learning And Deve	elopment Log Out	Μ
■ Dashboard Discovery Custom	er Dashboard	Work List	Administra	tion							Call trax	K
Customer Dashboard	ousehold Ir	ndividual								Add New 👻	Search	
HUBERT SCHILLER O Ø	Activity Sum Due Date	nmary Activity	Status 👔	Contact Name	Assigned For	Product / Service	The User can sel	ect Ac	dd New,	Prospect	Description	*
(614) 555-2335 HubertOttoSchiller@gomarquis.com Date of Birth: 04/20/1961 (60 years)	10/15/2021 0	Email 📑	To Be Done	Hubert Otto Schiller	Anthony Martin	Credit Card	the individual w	spect /ithou	to add t doing	Auto Ru	noff August 2020	-
No Mail Opt Out	10/14/2021 0	Email	To Be Done	Hubert Otto Schiller	Adele Perkins	Auto Loan	a sear	ch.				
Branch: Southwest Region: South Franklin	10/11/2021	Meeting	Done	Hubert Otto Schiller	Sandra Wellborn		Meeting to review Mortgage Application	1	Marketing N	otes		*
Household Customers 🛛 😤	10/10/2021 9	Referral	Processing	Hubert Otto Schiller	Sandra Wellborn	Mortgage	Interested in a Mortgage		Top 10% Most	Profitable HHs		
Hubert Otto Schiller Add New	10/10/2021 9	Pipeline	To Be Done	Hubert Otto Schiller	Sandra Wellborn	Mortgage	Mortgage Loan for Hubert Schiller					
Pat Schiller	05/01/2021	Phone Call 📰	Done	Hubert Otto Schiller	David Welsz	Credit Card	Lost credit card and concerned about potential fraud					
	01/01/2021	Email	Done	Hubert Otto	David Weisz		Happy Birthday - customer	-	Next Potent	ial Product		
					0				No Next Potentia	al Product		

CREATING PROSPECTS IN CALLTRAX NEXT

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

MARQUIS		Marquis ONE SUPPORT HELP
■ Dashboard Discovery Customer Dashboard Work List		CALL TRAX
Customer Dashboard Household Individual		Search
The User can type in the prospect's information.	Edit Contact	Campaigns Campaign Group Campaign Group Description No data available in table
	No Mail Head of household Opt out	Marketing Notes
Household Customers No data available in table Add New 🔸	Address //	No data available in table
	State ZIP	
	Phone Primary D	Next Potential Product No Next Potential Product
Summary Information Accounts and Services	Date Of Birth Date Of Birth	Work List Image: Showing 10 of 10 Name Subject Image: Amage: Showing 10 of 10
Assignments Field Groups	Save Cancel	Ivy Jameson Happy Birthday email - customer Tremblay outreach Enllew Lie confirmation phone call for

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

MARQUIS								Marquis ONE	SUPPORT HELP Learning And Deve	lopment Log Out
Dashboard Discovery Custor	mer Dashboard	Work List	Administra	ation						CALL TRAX
Customer Dashboard	Prospects									Search
ZACHERY BERRY OLSON	Activity Sun	nmary					Add New Activity Log	Campaig	ns	*
Preterred: 481 Denwood Dr N Gahanna, OH 43230	Due Date ↓	Activity 👔	Status 👔	Contact Name Iî	Assigned For ↓1	Product / Service	⊥r Subject ⊥r E	Campaig	Group ↓î	Description
Date of Birth: (years)	10/30/2021	Email	To Be Done	Zachery Berry Olson	Craig Scotts	Auto Loan	Follow up on Auto Loan		No data available ir	n table
No Mail Head of household Opt Out	10/28/2021 🖣	Referral	To Be Done	Zachery Berry Olson	Craig Scotts	Auto Loan	Auto Loan interest			
Manager: Branch: Default Region: Default	10/28/2021	Phone Call	To Be Done	Zachery Berry Olson	Craig Scotts	Auto Loan	Interested in Auto Loan options - follow up			
								Marketing	lotes	~
Household Customers 🛛 🛸							•		No data available in	n table
Zachery Berry Olson Add New +				The user	can now					
Contacts				add Log	Activity					
contacts				add Log	Activity.					
Dulin-smith										
								Next Poten	tial Product	
					•			No Next Potent	ial Product	
Summary Information	Notes							Work List		Showing 12 of 12
Field Groups								Nerve	11.1	titut It 🔺

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