REC+ PROSPECT MANAGER FEATURES

Introduction

Prospect Manager is a simple yet effective way to track and manage campaigns, prospects and quotes through the sales funnel to conversion. Use with Email Manager to send low cost campaigns and Real-time Leads to alert you at the exact moment prospects are opening your proposals.

USE WITH ANY WEBSITE

Prospect Manager can be used with any website as well as being fully integrated into REC+, which offers an upgrade path to build a website and add ecommerce.

KEEPING THINGS SIMPLE

Prospect Manager has been designed to be simple-to-use while giving flexibility via tags for adding your sales funnel statuses and for search on prospect and user records.

FUTURE-PROOFING YOUR WEB INVESTMENT

Your software is always kept up to date with the latest enhancements, security updates and software patches, avoiding costly upgrades in the future because you're always kept up to date with regular, tested updates.

MADE & SUPPORTED IN THE UK

The software development team is UK-based and have worked together on the product since the first line of code was written in 2008. Importantly for many clients, all support is UK-based by specialists who understand the web, online marketing and search engines and who communicate in plain English.

Visit: www.recplus.co.uk

Simple-to-use and set up
Designed to be quick to set up and easy to use

Customise Your Sales Funnel
Build your sales funnel and probabilities for forecasting

Add Prospects & Email Quotes
Add your prospects and send quote documents from the repository

Send Email Campaigns
Send out high volume low cost email campaigns with ease

Watch Important Quotes
Add Watchers to quotes so managers are aware of progress

Analyse & Search Using Tags
Add tags to prospects for custom analysis and search

See Timeline Of Activities
Know what activities have taken place for a prospect via the timeline

ENGINEERED FOR HIGH AVAILABILITY & SECURITY

We have engineered a resilient hardware environment with robust and proactive security protection which automatically mirrors your data across two geographic locations via a high speed fibre link as well as onto a long term data store.

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KEY FEATURES AT-A-GLANCE

- **Easy-To-Use**
  - Add your sales funnel statuses
  - Add users
  - Add tags for extra analysis and search, including campaigns
  - Add prospect records
  - Upload quote documents to the repository
  - Email quotes to prospective buyers
  - Receive email notifications when emails are opened
  - Capture email replies on the prospect record
  - Update prospect status as it moves through the sales funnel
  - See a timeline of activities for a prospect

- **Simple To Manage**
  - View performance on dashboards with configurable date ranges
  - Comprehensive on-screen search
  - Add Watchers to prospects to monitor progress through the funnel
  - Use revenue due dates on prospects for cash flow forecasting
  - Download prospect records to a CSV

- **Set Up Teams**
  - Set up sales agents in teams
  - Assign team leaders and sales managers
  - View performance based on individuals, teams and departments

- **Send Email Campaigns**
  - Design email campaigns with ease
  - Segment prospects into user groups for targeted emails
  - Send campaigns via low cost Mailgun & AWS accounts

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- Preview content prior to sending
- Send out in responsive design mode for mobile-friendliness
- Save campaigns as templates to save time in the future
- Track open and click rates

- **Capture Form Data, Create Triggers & Workflows**
  - Create forms to capture data on web pages
  - Preview forms as you build them
  - Create workflows and user-specific journeys by combining multiple form sessions together
  - Create and email triggers based on specific user form selections, such as sales teams being informed of prospects fitting your ideal customer profile
  - Easily view and administer form replies using filtering and edit facilities
  - Avoid spam by using Google Captcha to block robots

- **Control Administrator Access**
  - Control administrator access and rights
  - Determine which programs administrators can use
  - Set what actions administrators are allowed
  - Restrict administrator access to specific content only
  - Block repeated attempts to log in to the Admin Centre by unauthorised users

ADDITIONAL UPGRADES

- **REC+ Content Management System**
    - Create a fully featured website
    - Add and manage content pages
    - Add and organise your blog
    - And much more...

    See separate REC+ CMS Features document for full details

- **Ecommerce**
    - Sell products and take online payments
    - Manage orders
    - Feed into Google Adwords for online marketing
    - And much more...

    See separate REC+ Ecommerce Features document for full details