

### 3– Fill out Fields

All Yellow fields are required

Select Prospect Status, degree of interest

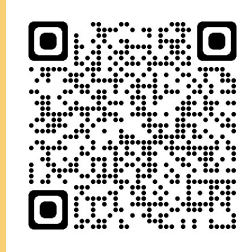
Address will save as the Service and Billing Address

When filling in an email address be sure to set it for Auto Quote if you want a quote to be emailed to them. Auto Invoice will set this email address as the one future invoices would go to as well.

Tap SAVE

(Cancel or Back arrow will NOT SAVE the prospect)

For more details visit  
<https://www.LongwellTech.com>



**Longwell Technologies**

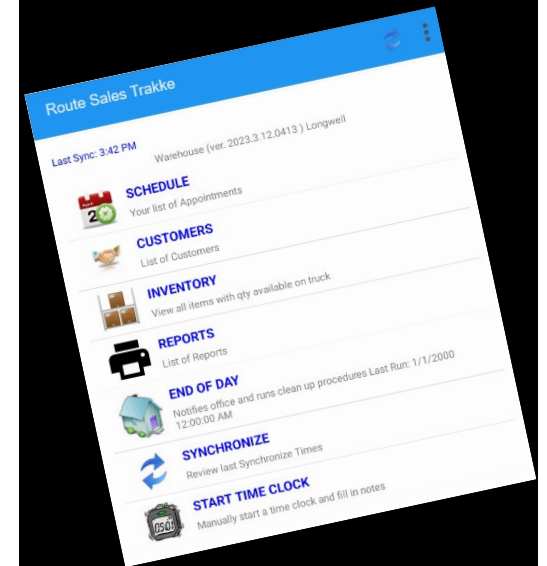
PO Box 192  
Trevor, WI 53179

Web: [www.LongwellTrakker.com](http://www.LongwellTrakker.com)

# Route Sales Trakker

## Quick Start

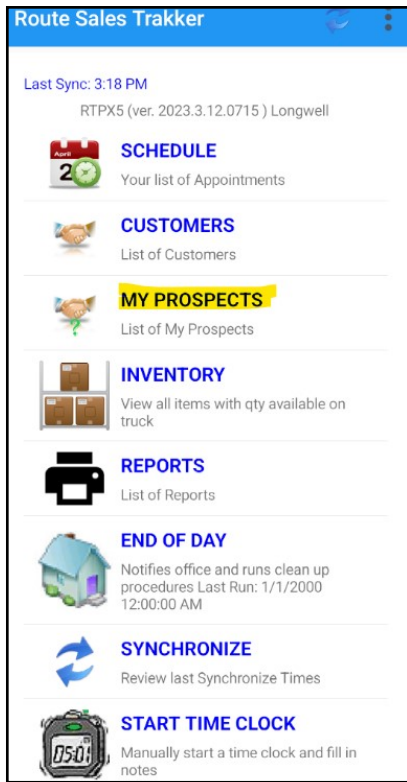
## Creating a Prospect



**Longwell Technologies, Inc.**

[www.LongwellTech.com](http://www.LongwellTech.com)

# 1– Open My Prospects



# 4– What's Next?

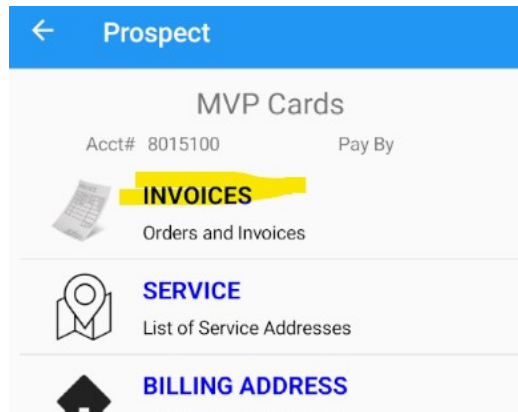
If there is no quote to create tap the back button to return to the main menu and continue your day

# 5– Create a Quote

Quotes can be created for Customer or Prospects.

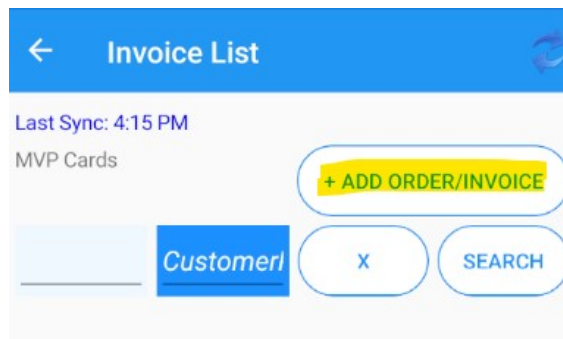
To create one for a Customer open the Customer List

To create one for a Prospect, open the Prospect



Tap Invoices

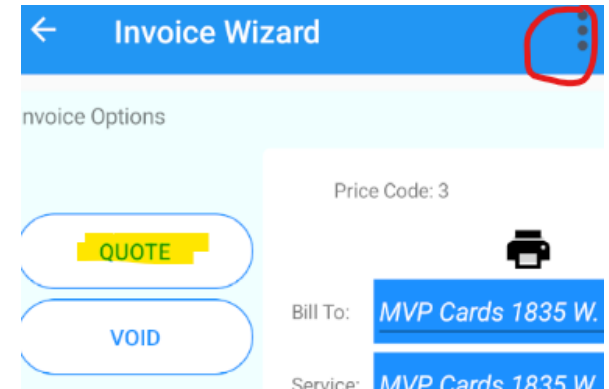
This will open the Invoice List Tap + Add Order/Invoice



# 6– Enter Products

Enter the products and services... as you would with a regular order/invoice

After everything is entered tap the 3 DOTs on the top



Confirm you want to Save as a Quote

Complete like you would a regular invoice, but no signature or payment information will be required

This will then bring you back to the Prospect list.

You can hit back to go return to the main menu and continue your day.

The quote will be uploaded to the Trakker Server in the Quoting Modules and the office's quoting processes will then be managed at the office.

# 2– Add New

