What to do with Prospect Data?

You can export the query from here, but it is far more useful to use this page as a way to locate your prospects within Slate. Note the Ref column which is the 9-digit Slate ID.

Clicking on a row will bring up a summary of that row and allow you to go directly to the record via Lookup Record.

Note: you have a direct link back to your query at the top of the page.

Click on the Timeline tab and look for Form Submitted to find the inquiry form. Click on it to view a summary.

You can track communication with the prospect by creating a new Interaction.

Click on the Form Submitted and edit the field called Response to close the inquiry. This is shown on the original query and will allow you to track which prospects have been contacted.