

## SALES RABBIT STATUS KEY

### PRE APPROACH:

<b>NEW</b>	New Lead = a house you place on the map without pre-approach
<b>am</b>	Daytime = prospect is best to catch during the day hours
<b>pm</b>	Evenings= prospect is best to catch during the evening hours
<b>XX</b>	Non-Prospect = house/business that we won't go to (elderly, empty house/building, group home)
<b>REF</b>	Referral = referral prospects to catch

### CALLS (stats tracked):

<b>C-am</b>	Call-am Callback = call where you need to go back in the morning for B2B / daytime for residential
<b>C-pm</b>	Call-pm Callback = call where you need to go back in the afternoon for B2B / evening for residential
<b>C-No</b>	Call-Not Interested = call where you approached and they weren't interested; you crossed them off
<b>C-AP</b>	Call-Appointment = call where you have a specific appointment date/time set with prospect

### DEMOS (stats tracked):

<b>D-No</b>	Demo-Not Interested = demo and not interested
<b>FP\$</b>	Demo-Family Protected = demo and family protected/1+policy sold
<b>D-FU</b>	Demo-Follow Up = demoed and follow-up is needed
<b>B2B\$</b>	Demo-B2B Account "Yes" = you got a "yes" to do an enrollment for a business
<b>RSVC</b>	Demo-Reserviced = you reserviced a previous client and demoed them

### PREVIOUS CLIENTS:

<b>MyCL</b>	My Client List = uploaded existing personal active client/reservice
<b>ACTV</b>	Active Client = client in your territory that isn't yours
<b>TERM</b>	Termed Client = uploaded from terminated client list from FHL

### DATAGRID:

<b>BZDG</b>	Business DataGrid = an uncategorized business that Sales Rabbit automatically imports and maps once an area/territory is drawn AND assigned to an agent; includes pre-populated information from REFERENCE USA
<b>DG</b>	DataGrid = an uncategorized house that Sales Rabbit automatically imports and maps once an area/territory is drawn AND assigned to an agent

## FIELDS KEY and INSTRUCTIONS

**SPECIAL NOTE:** Whatever is entered or uploaded under "First Name" will be the name that shows up on the pin tag on your map (ie Company name, Policyholder, etc.)

**Below are the CUSTOM FIELDS specific to us; other fields within a contact are permanent to Sales Rabbit**

### General:

Spouse  
Referred By/Relationship

### BZDG fields (Info specific for the Business "NEW" and "BZDG" datagrid pins):

Executive First Name = first name of the manager/owner of a business  
Executive Last Name = last name of the manager/owner of a business  
Executive Title = title of the manager/owner of a business  
Location Employee Size  
Primary SIC Description = industry of a business  
Primary SIC CODE = industry code in REFERENCE USA specific to that business

### Reservice Custom Fields (Info specific for uploaded reservice lists pins):

Agent  
Policy #  
Coverage  
ICU Coverage  
Modal  
ACDay  
Mode  
Eff Date  
ROP MDate  
Potential ROP\$  
County  
PTDate  
Active/Termed