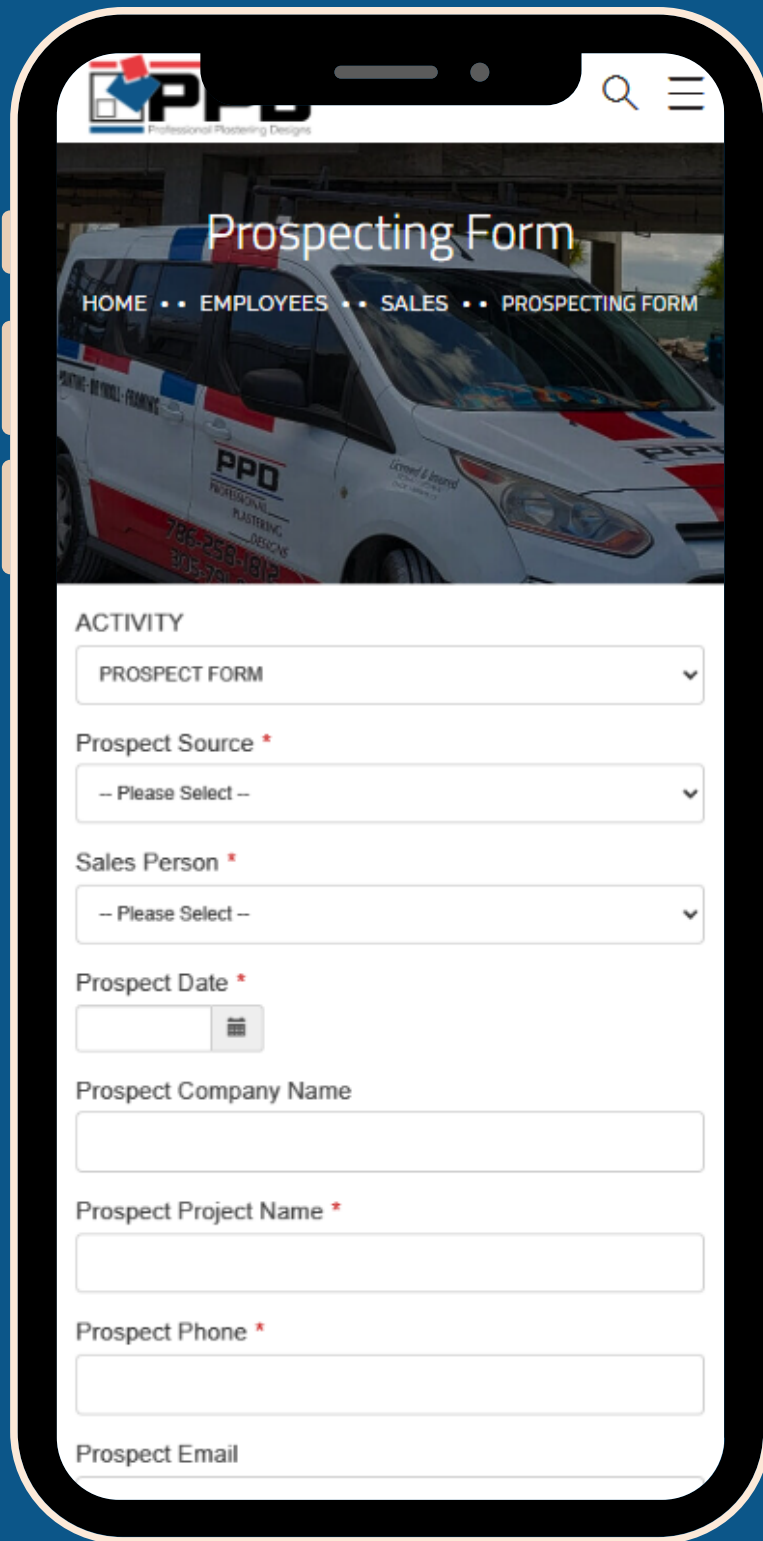


HOW TO REGISTER YOUR PROSPECT

1

Go to the following link
<https://bit.ly/3vWE6qA>
and fill out the form



The image shows a smartphone screen displaying the PPD website's 'Prospecting Form'. The website header includes the PPD logo and navigation links: HOME, EMPLOYEES, SALES, and PROSPECTING FORM. The form itself is titled 'ACTIVITY' and contains the following fields:

- ACTIVITY: PROSPECT FORM (dropdown menu)
- Prospect Source * (dropdown menu: -- Please Select --)
- Sales Person * (dropdown menu: -- Please Select --)
- Prospect Date * (calendar icon)
- Prospect Company Name (text input)
- Prospect Project Name * (text input)
- Prospect Phone * (text input)
- Prospect Email (text input)

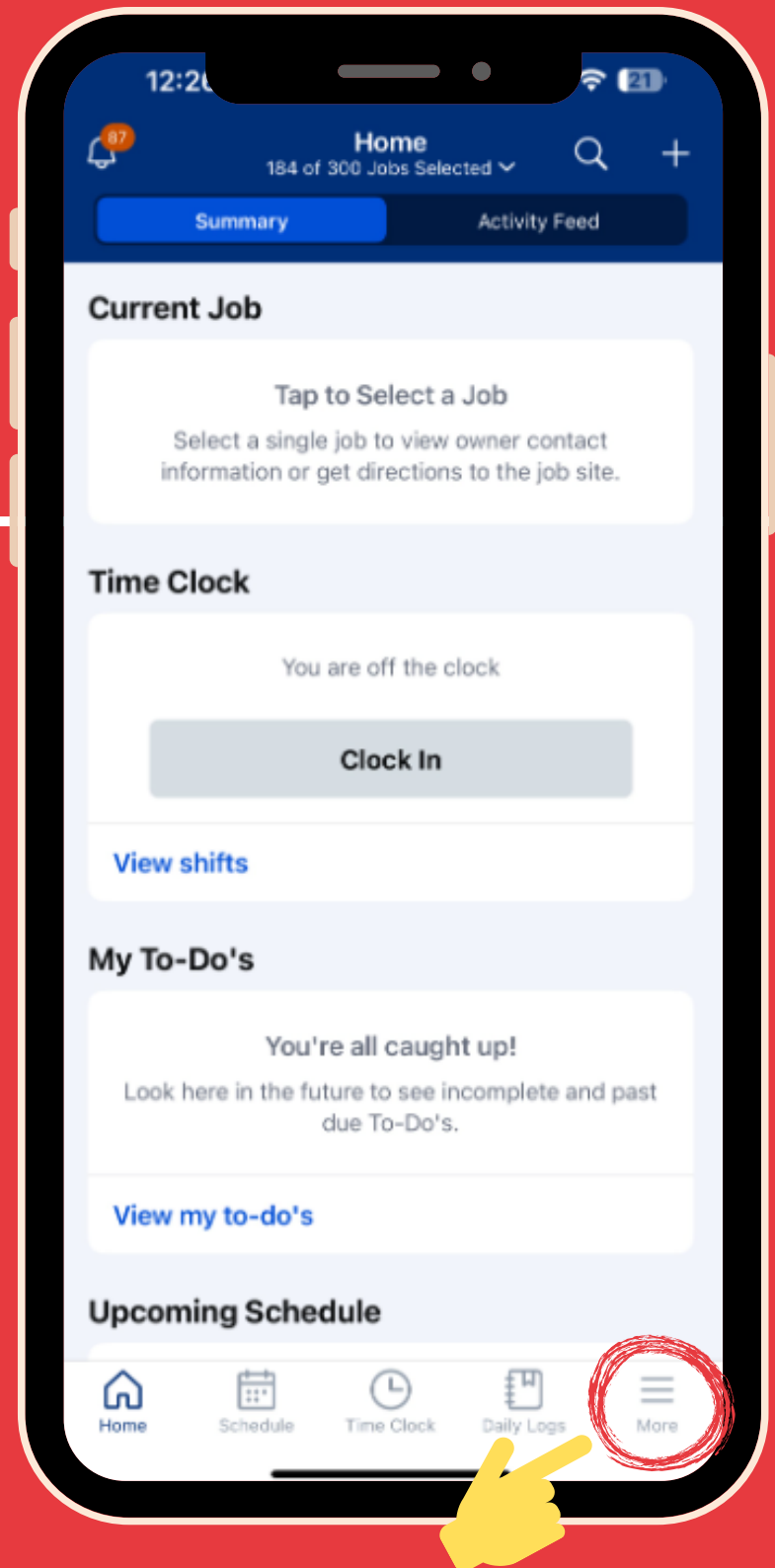


VERIFY THE INFORMATION

2

Go to **buildertrend.net** or the **App** on your mobile device

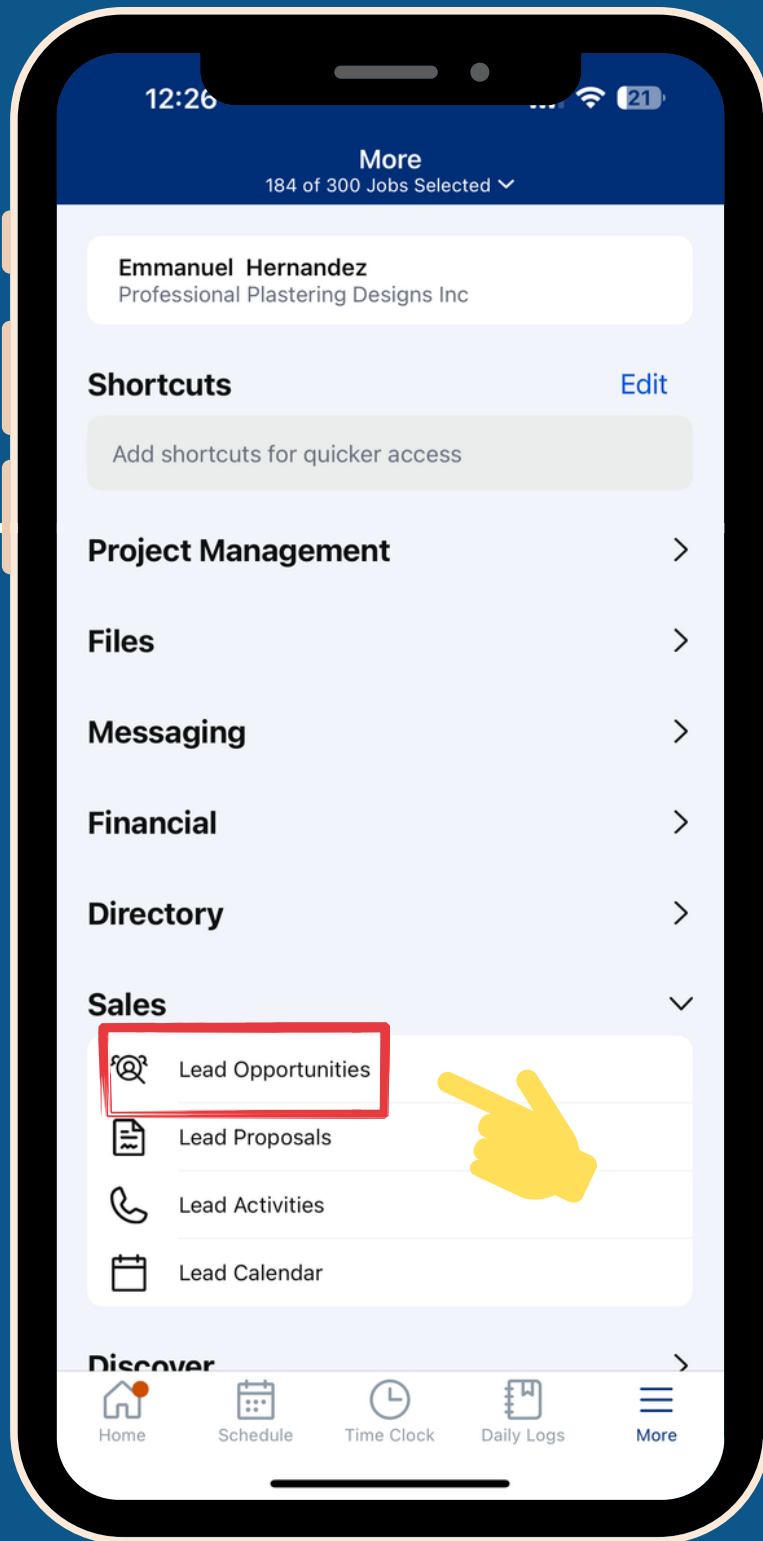
Click "more"



SALES SECTION

3

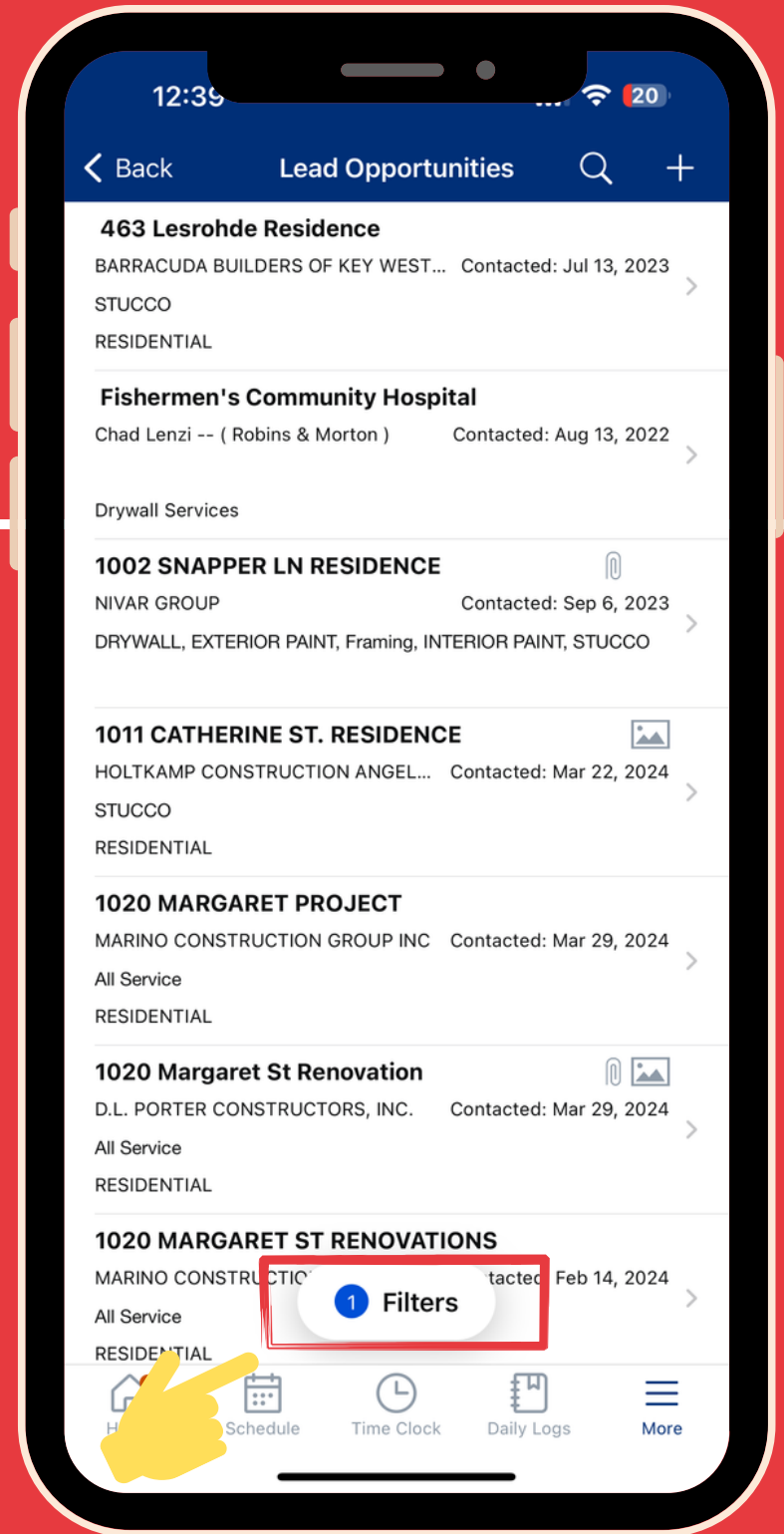
Click on "sales" > "Lead Opportunities"



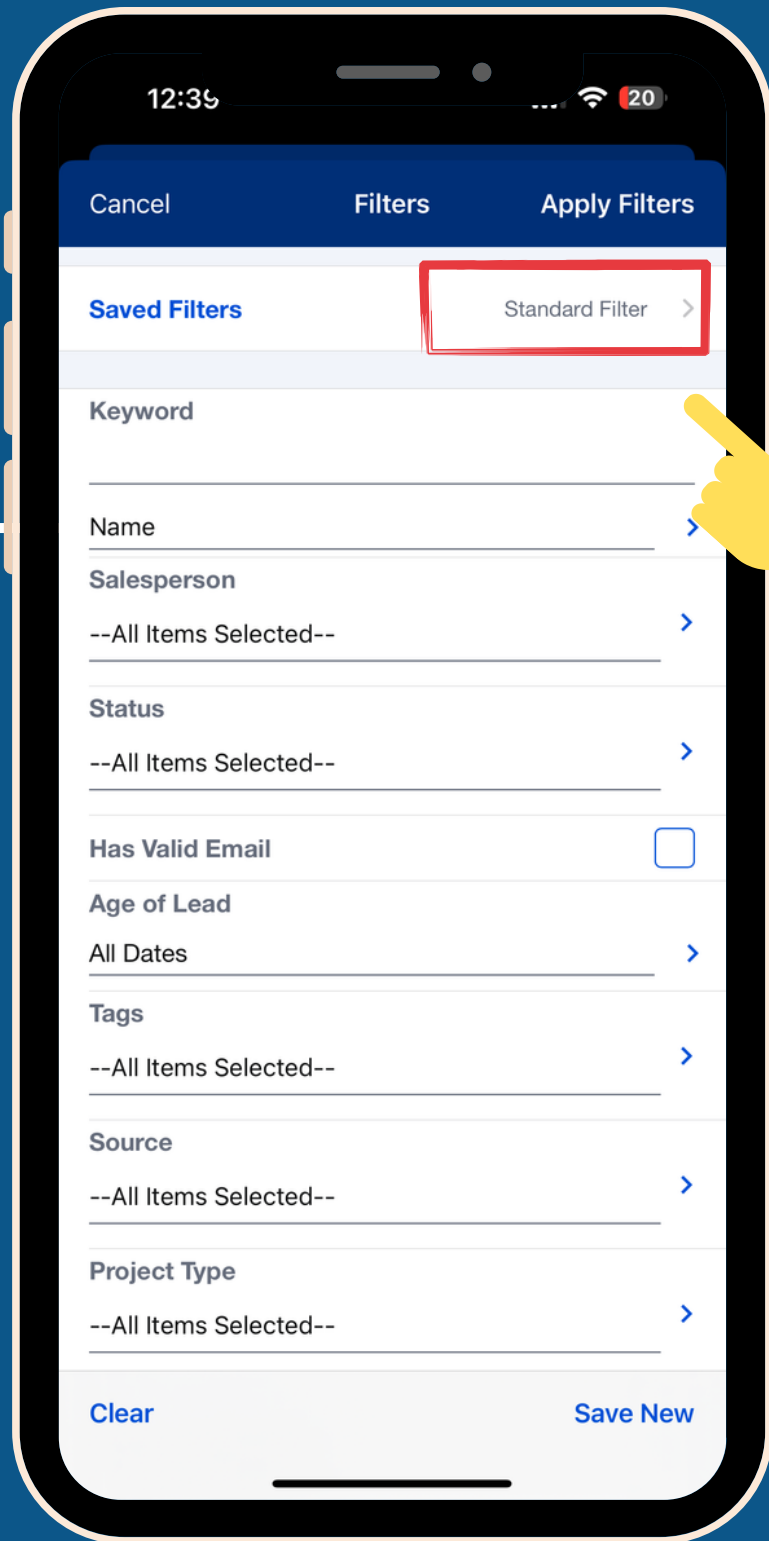
FILTER PROJECTS

4

Click on "Filters"



SEE "CUSTOM FILTERS"



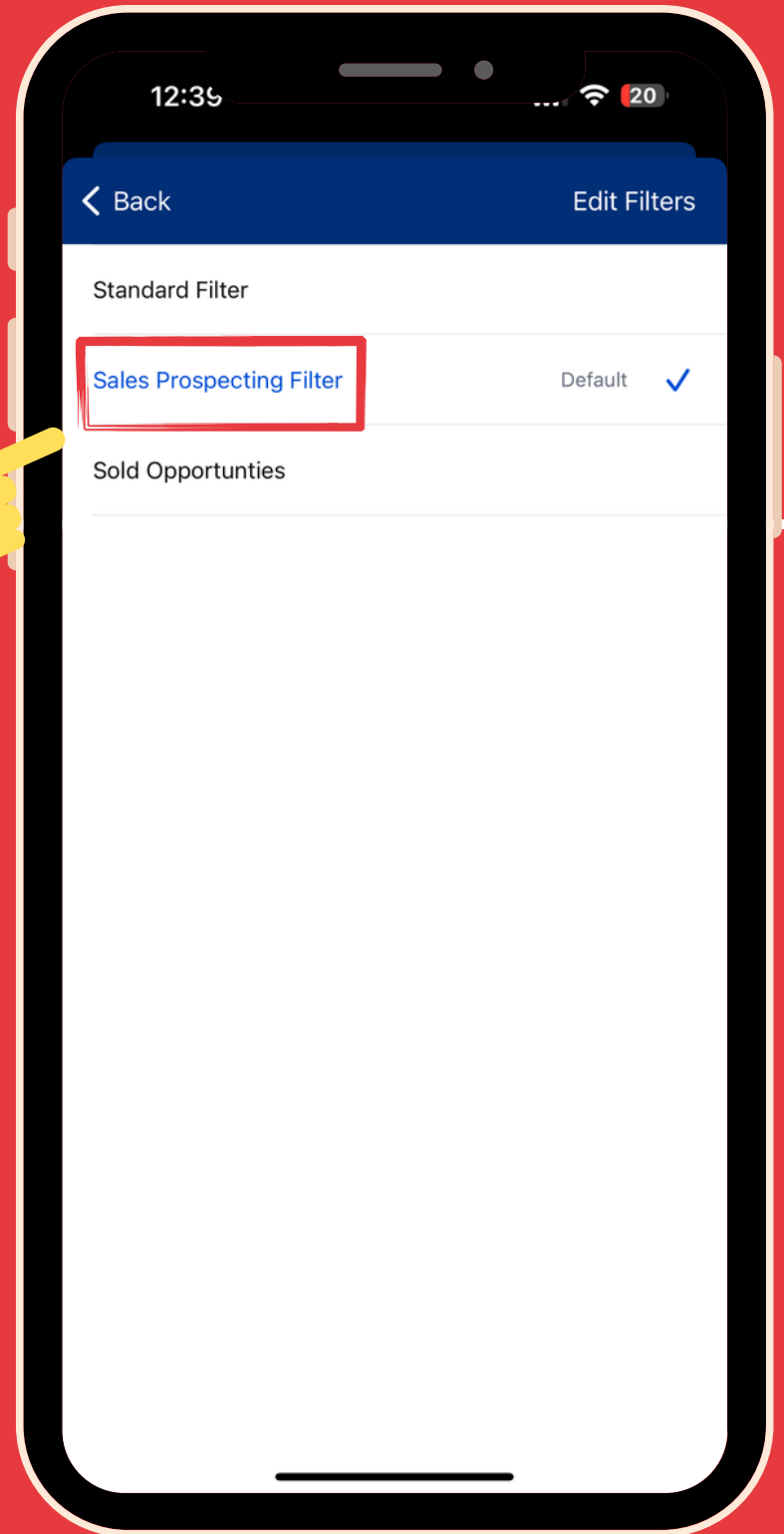
5

Click on "Saved Filters"



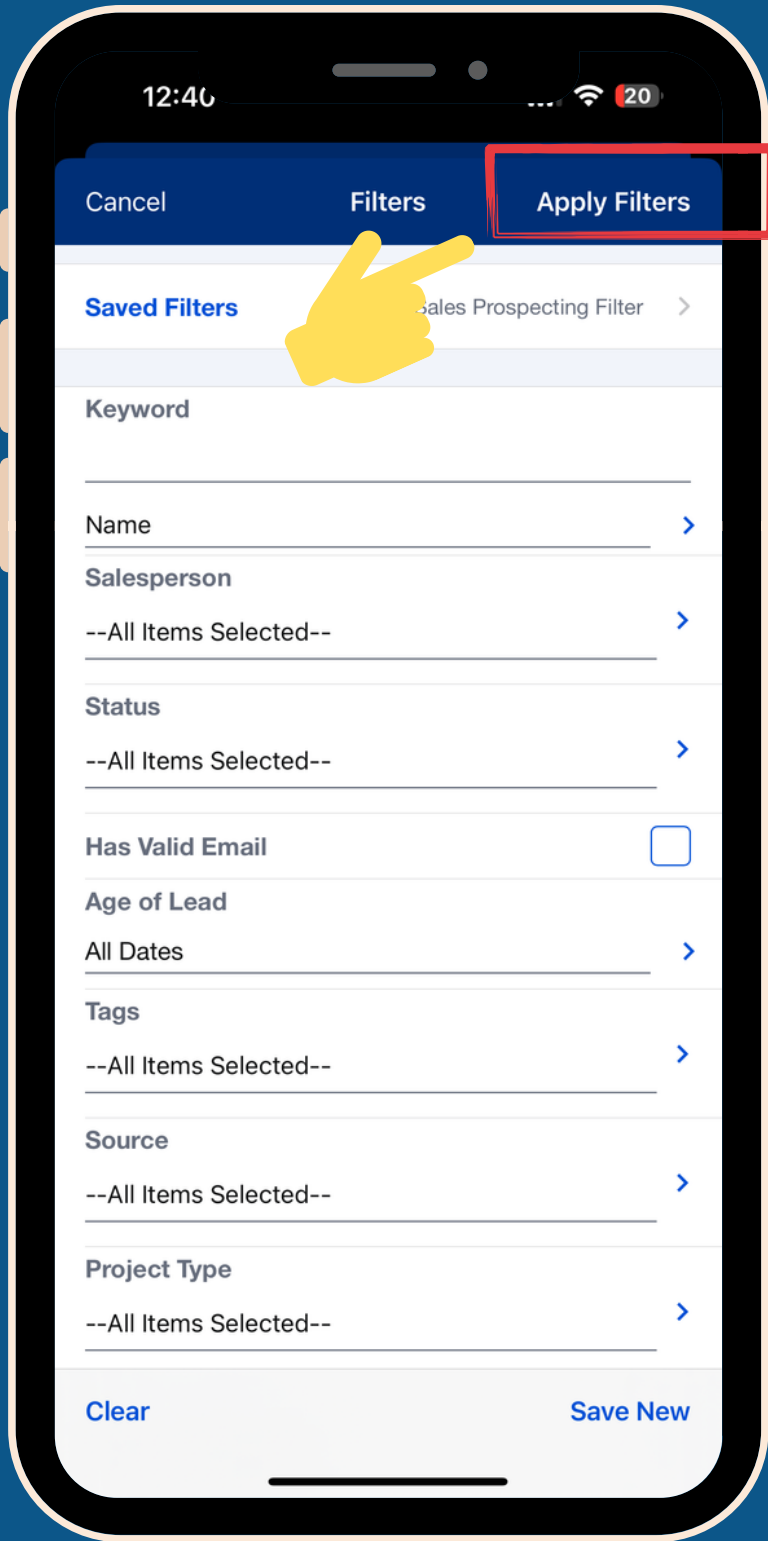
SELECT FILTER

6



Select "Sales
Prospecting Filter"





APPLY FILTER

7

Select "Apply Filters"



PROJECT RESULTS

8

On this screen you will see your filtered projects!

