

AccuprimeFlow for cold callers

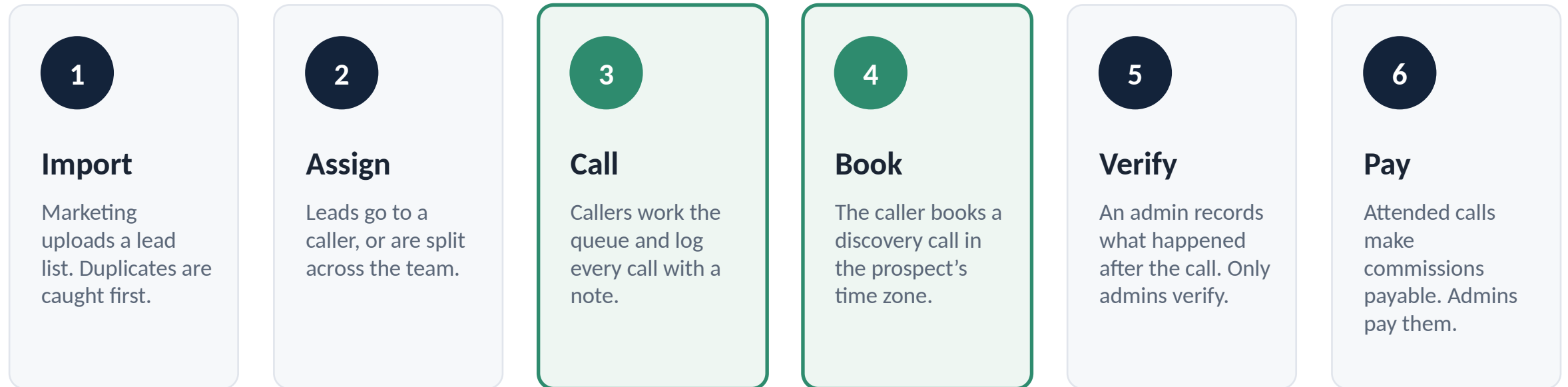
How to work your leads, log every call and book discovery calls.



How a lead moves through AccuprimeFlow



Your part is the middle of the journey: calling, and booking the discovery call.



Only admins verify discovery calls. Callers and marketing never mark a call attended; commissions become payable only after an admin does.

Sign in



1

Go to www.accuprimeflow.com and click Sign in.

- Use your Accuprime work email.
- First time? Use the temporary password from your welcome email, then choose your own (at least 10 characters).
- Forgot it? Click "Email me a password reset link", or ask your admin.



Outbound calling for Accuprime Financials

Work email

Password

Sign in

[Email me a password reset link](#)

My day

My day

ET 6:24 PMCT 5:24 PMPT 3:24 PM

Ruth's day

Friday, September 25, business time (EDT). Prospects callable right now: MT, MT (AZ), PT, AKT, HT.

3

Callbacks due today, 1 overdue

1

Discovery calls today

4

New prospects to call

0

Calls logged today

Start calling (2 ready now)

Overdue callbacks1

Summit Family Clinic

Tom Becker

(312) 555-1003

3:24 PM PT

Was due Fri, Sep 25, 3:24 PM EDT

Callbacks later today2

Ridgeview Pediatrics

Lena Ortiz

(312) 555-1004

5:24 PM CT

8:24 PM EDT (7:24 PM theirs)

Northshore Wellness

Grace Kim

(312) 555-1005

6:24 PM ET

8:24 PM EDT (8:24 PM theirs)

Discovery calls today1

Harbor Cardio Group

Dana Reyes

(312) 555-1000

6:24 PM ET

9:24 PM EDT · [Meeting link](#)

New prospects4

Momentum Coaching

Ethan Ward

(312) 555-1012

4:24 PM MT

Strong fit

Riverbend Vision

Nora Quinn

(312) 555-1009

5:24 PM CT

Strong fit

Oakline Coaching

Chris Doyle

(312) 555-1010

6:24 PM ET

Potential fit

Elevate Leadership Co

Maya Brooks

(312) 555-1011

5:24 PM CT

Potential fit

2

Start here every shift. It tells you what to do first.

- Overdue callbacks at the top: call these first.
- Callbacks due later today, and today's discovery calls with the meeting link.
- New leads you can call right now, in their own time zone.
- "Start calling" walks you through them one by one.

My queue

My queue

ET 6:24 PMCT 5:24 PMPT 3:24 PM

Your open prospects. Callbacks come first, then prospects you haven't tried yet, then the ones you tried longest ago.

Search

Status

Category

Fit

Sort

☐ Callable now (9–5 their time, weekdays)

Company, contact, email or phone

All open

All

Any

Priority

Company / contact	Status	Last call	Next	Their time	Attempts	Category
Summit Family Clinic Tom Becker, Owner	• Callback set	Call back needed Sep 23, 2026, 6:24 PM	Fri, Sep 25, 3:24 PM	3:24 PM PT	0 / 6	Healthcare
Northshore Wellness Grace Kim, Owner	• Callback set	Call back needed Sep 23, 2026, 6:24 PM	Fri, Sep 25, 8:24 PM	6:24 PM ET	0 / 6	Healthcare
Ridgeview Pediatrics Lena Ortiz, Owner	• Callback set	Call back needed Sep 23, 2026, 6:24 PM	Fri, Sep 25, 8:24 PM	5:24 PM CT	0 / 6	Healthcare
Bright Physio Mark Ellison, Owner	• Appointment set	Not called yet	—	5:24 PM CT	0 / 6	Healthcare
Elevate Leadership Co Maya Brooks, Owner	• Assigned	Not called yet	—	5:24 PM CT	0 / 6	Coaching
Harbor Cardio Group Dana Reyes, Owner	• Appointment set	Not called yet	—	6:24 PM ET	0 / 6	Healthcare
Lakeside Dental Priya Shah, Owner	• Appointment set	Not called yet	—	4:24 PM MT	0 / 6	Healthcare
Momentum Coaching Ethan Ward, Owner	• Assigned	Not called yet	—	4:24 PM MT	0 / 6	Coaching
Oakline Coaching Chris Doyle, Owner	• Assigned	Not called yet	—	6:24 PM ET	0 / 6	Coaching
Riverbend Vision Nora Quinn, Owner	• Assigned	Not called yet	—	5:24 PM CT	0 / 6	Healthcare
Clearwater Dermatology Hannah Lee, Owner	• In progress	Left voicemail Sep 23, 2026, 6:24 PM	—	4:24 PM MT	0 / 6	Healthcare
Maple Grove Chiropractic Victor Hale, Owner	• In progress	Left voicemail Sep 23, 2026, 6:24 PM	—	3:24 PM PT	0 / 6	Healthcare

3

All your open leads, already in the right order.

- Callbacks first by time, then leads never called, then the longest since last try.
- Filter by category, time zone, or "callable now".
- Attempts show how close a lead is to closing as unreachable.

Open a prospect

Lakeside Dental

Priya Shah, Owner

(312) 555-1002 4:24 PM their time (MT)

Appointment set

LOG A CALL

Unconnected attempts: 0 of 6.

Not connected

Left voicemail

No answer, no voicemail

Reached gatekeeper, no decision maker

Wrong or disconnected number

Connected, not moving forward

Not interested

Already has an accountant or in-house team

Too small / not a fit

Do not call

Connected, moving forward

Call back needed

Appointment set

Interested, can't proceed yet

Note (what the next caller needs to know)

Who you spoke to, what they said, what happens next

0 / 10 characters minimum

Save outcome

Caller: Ruth Lagahit

CONTACT

Phone (312) 555-1002

Email priya@example.com

Their time 4:24 PM MT (from area code)

QUALIFICATION

Category Healthcare

Fit Potential fit

Finance team Unknown

4

Click a company to open it in the middle of the screen.

- Their local time is shown next to the phone number.
- Contact details, qualification notes and every earlier call are here.
- Open "Script" to see your call script beside the prospect.

Log every call

Lakeside Dental

Priya Shah, Owner

(312) 555-1002 4:24 PM their time (MT)

Appointment set

LOG A CALL

Unconnected attempts: 0 of 6.

Not connected

Left voicemail

No answer, no voicemail

Reached gatekeeper, no decision maker

Wrong or disconnected number

Connected, not moving forward

Not interested

Already has an accountant or in-house team

Too small / not a fit

Do not call

Connected, moving forward

Call back needed

Appointment set

Interested, can't proceed yet

Note (what the next caller needs to know)

Left a voicemail with Priya, will try again Thursday morning

60 / 10 characters minimum

Save outcome

Caller: Ruth Lagahit

CONTACT

Phone (312) 555-1002

Email priya@example.com

Their time 4:24 PM MT (from area code)

QUALIFICATION

Category Healthcare

Fit Potential fit

Finance team Unknown

5

Pick what happened, write a note, save.

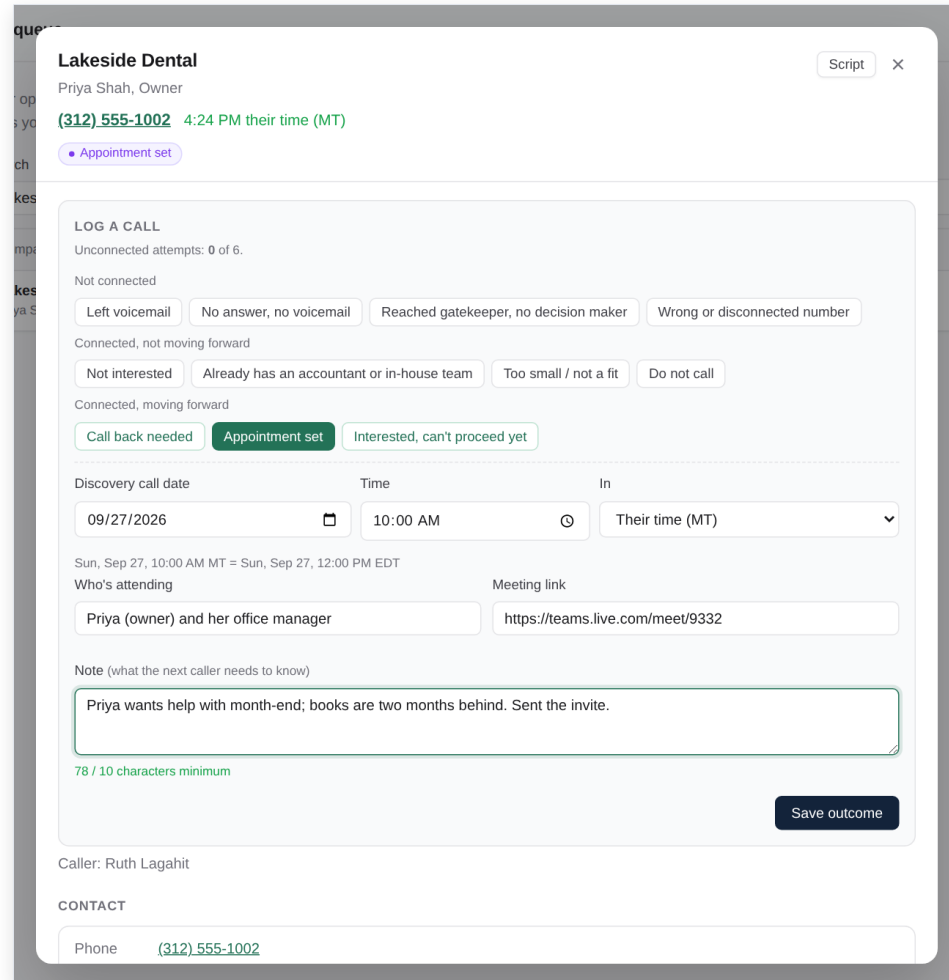
- Not connected: voicemail, no answer, gatekeeper, wrong number.
- Connected: not interested, has an accountant, not a fit, do not call.
- Moving forward: call back, appointment set, interested but not yet.
- The note must be at least 10 characters. Write what the next person needs to know.

Book a discovery call

6

Choose "Appointment set" and fill in the details.

- Enter the date and time in the prospect's own time zone; AccuprimeFlow shows it in Eastern too.
- Add who is attending and the meeting link.
- Save: admins and you get an email straight away.
- Send the prospect their confirmation yourself, as the team does today.



The screenshot shows the 'LOG A CALL' form for 'Lakeside Dental' with owner 'Priya Shah'. The phone number is '(312) 555-1002' and the time is '4:24 PM their time (MT)'. A purple pill indicates 'Appointment set'. The form has sections for 'LOG A CALL' with various status buttons (e.g., 'Left voicemail', 'Not interested', 'Appointment set'), a 'Discovery call date' section with date, time, and time zone fields, a 'Who's attending' section with a text input, a 'Meeting link' section with a text input, and a 'Note' section with a large text area. A 'Save outcome' button is at the bottom right. The caller is listed as 'Ruth Lagahit'.

Lakeside Dental Script X

Priya Shah, Owner

(312) 555-1002 4:24 PM their time (MT)

Appointment set

LOG A CALL

Unconnected attempts: 0 of 6.

Not connected

Left voicemail No answer, no voicemail Reached gatekeeper, no decision maker Wrong or disconnected number

Connected, not moving forward

Not interested Already has an accountant or in-house team Too small / not a fit Do not call

Connected, moving forward

Call back needed Appointment set Interested, can't proceed yet

Discovery call date Time In

09/27/2026 10:00 AM Their time (MT)

Sun, Sep 27, 10:00 AM MT = Sun, Sep 27, 12:00 PM EDT

Who's attending Meeting link

Priya (owner) and her office manager https://teams.live.com/meet/9332

Note (what the next caller needs to know)

Priya wants help with month-end; books are two months behind. Sent the invite.

78 / 10 characters minimum

Save outcome

Caller: Ruth Lagahit

CONTACT

Phone (312) 555-1002

Your appointments

7

Every discovery call you booked, grouped by day.

- Upcoming, Past or All.
- Eastern time with the prospect's time beside it, the meeting link and the result.
- "To verify" means the time has passed and an admin still needs to record what happened.

Appointments					
Your discovery calls. Times are EDT, with the prospect's own time beside it.					
Upcoming Past All					
Today					
9:24 PM EDT	Harbor Cardio Group Dana Reyes	(312) 555-1000	Owner and office manager	Meeting link	Scheduled
Tomorrow					
8:24 PM EDT 7:24 PM CT theirs	Bright Physio Mark Ellison	(312) 555-1001	Owner and office manager	Meeting link	Scheduled
1-2 of 2 Previous Next					

Call script

Call script

ET 6:24 PMCT 5:24 PMPT 3:24 PM

Your own script. It opens beside each prospect while you call, with {first_name}, {company}, {category} and {my_name} filled in for them.

Script

Hi {first_name}, this is {my_name} calling from Accuprime Financials.

I work with {category} businesses like {company} that want their books and month-end reporting handled by a dedicated offshore team.

Is keeping your books up to date something you handle yourself right now, or do you have someone on it?

If it helps, we can set up a 20-minute discovery call with our team to see where we could save you time. Would later this week work?

Preview for a sample prospect

Hi Dana, this is Ruth calling from Accuprime Financials.

I work with healthcare businesses like Reyes Dental Group that want their books and month-end reporting handled by a dedicated offshore team.

Is keeping your books up to date something you handle yourself right now, or do you have someone on it?

If it helps, we can set up a 20-minute discovery call with our team to see where we could save you time. Would later this week work?

Last saved Sep 25, 2026, 6:24 PM.

Save script

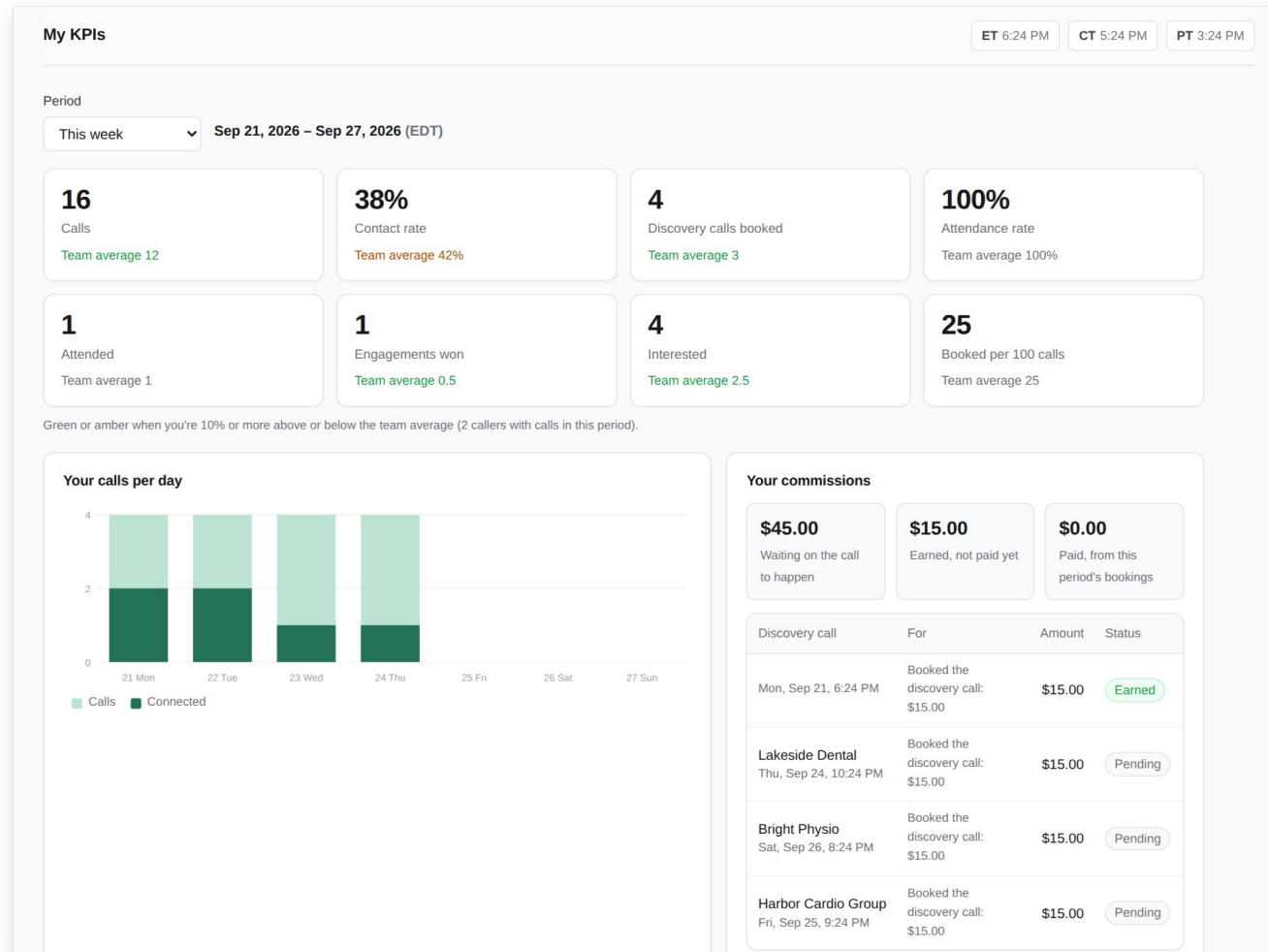
Start again from the starter script

8

Write your script once; it fills itself in.

- Use {first_name}, {company}, {category} and {my_name}.
- The preview shows exactly what you'll say to a real prospect.
- Open it from any prospect with the Script button.

My KPIs



9

How you're doing, against the team average.

- Calls, contact rate, discovery calls booked and attendance.
- Green means 10% or more above the team average; amber means below.
- Pick today, this week, this month or your own dates.

My commissions

10

You earn when the prospect actually attends.

- Waiting: the discovery call is booked but hasn't been verified yet.
- Earned: an admin verified that the prospect attended. It will be paid.
- No-show: no commission. The lead comes back to you to follow up.
- Only admins verify. You can't mark your own calls attended.

My commissions

ET 6:24 PMCT 5:24 PMPT 3:24 PM

Your commissions: what's waiting on a discovery call, what you've earned but haven't been paid yet, and what's been paid.

\$45.00

Waiting on discovery calls

3 bookings not yet verified

\$15.00

Earned, not paid yet

1 commission

\$0.00

Paid this year

0 commissions

Commission report

Discovery call	For	Amount	Status	Date
Lakeside Dental Thu, Sep 24, 10:24 PM	Booked the discovery call: \$15.00	\$15.00	Waiting	Sep 25, 2026, 6:24 PM
Bright Physio Sat, Sep 26, 8:24 PM	Booked the discovery call: \$15.00	\$15.00	Waiting	Sep 25, 2026, 6:24 PM
Harbor Cardio Group Fri, Sep 25, 9:24 PM	Booked the discovery call: \$15.00	\$15.00	Waiting	Sep 25, 2026, 6:24 PM
Mon, Sep 21, 6:24 PM	Booked the discovery call: \$15.00	\$15.00	Earned	Sep 23, 2026, 6:24 PM

Rules to remember

Eastern time

Every date, report and email uses Eastern time. The clocks at the top show ET, CT and PT.

Six tries

After six unanswered attempts a lead closes as unreachable. Callbacks and real conversations don't count.

Notes matter

Every call needs a note of at least 10 characters. Write it for the next person who calls.

Do not call

If a prospect asks not to be called, log "Do not call". They're never called or imported again.

Book in their time

Enter the discovery call in the prospect's time zone. The screen shows both times before you save.

Admins verify

Only an admin records whether the discovery call happened. That's what makes your commission payable.

Questions?

Your admin for accounts, passwords and anything that looks wrong.

Help page www.accuprimeflow.com/help.html

Build number in your account menu. Include it when you report a problem.