# **Create Prospect Accounts and Leads (Sales CRM Workflow)**

Last Modified on 07/07/2023 10:43 am EDT

The initial phase of the Sales CRM Workflow involves the creation of a prospect account and a lead. This two-part process is outlined below and includes related article links to gain a comprehensive understanding of setup and functionality for each.

## 1. Create a Prospect Account

#### Pathway: Accounts > Add Account

Within the Add Account editor, two options are provided when adding a new account: Active and Prospect. Prospect accounts refer to accounts that have not yet signed an agreement or contract and are currently in the sales pipeline. Once a contract has been signed, the prospect account can be converted to an active account within the system. For detailed instructions on setting up a prospect account, please refer to the Related Articles section below.

CREATE ACCOUNT		ACCOUNTS > ADD ACCOUNT								
STATUS Prospect 👻	SOURCE Cold Call   ACCOUNT DIVISION Training Division   SITE DIVISION Training	ng Division 👻 ACCOUNT CLASS Commercial 👻								
Envice Address     Billing Address										
NAME	Caribou	Same as service address								
NAME 2		NAME								
ADDRESS LINE 1	1111 La Crosse St	NAME 2								
ADDRESS LINE 2		ATTN								
CITY/STATE/POSTAL CODE	La Crosse WI 👻 54601-3552	ADDRESS LINE 1 Enter a location								
PHONE	• (999) 999-9999	ADDRESS LINE 2								
WEBSITE		CITY/STATE/POSTAL CODE								
PO#		PHONE (999) 999-9999								
EPA										
SIGNATURE REQUIRED										
CONTACT NAME	TITLE CONTACT EMAI	L								
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SALES REP Allena Someni v SITE CLASS v 💿 SERVICE REGION Demo v Q TAX REGION v 💿 Q										

#### **Related Articles:**

- Create Account: Screen Field Descriptions
- Create a New Prospect Account
- Additional Account Setup
- Add Contacts

## 2. Create a Lead

Pathway: Accounts > Search > Accounts Menu (Green '+' Icon)

Once the prospect account is created, the next step is to add a lead. Leads are essential for keeping track of potential opportunities and predicting future revenue. After adding a lead, it will be synchronized with other CRM tools within the Sales module. For detailed instructions on creating a lead for a prospect account, refer to the Related Articles section below.

Appointment Attachment Available Products Cancellation Request	iue 8122			Active DIVISION ACCOUNT MC CLASS BILL GROUP	Training R House A Commer DEMO	ccount					
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Default Rates							л	-			
Lead 🔪 🕨	Front I	End Load			PENDING	rtomor Support	F	lio Nata			
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Transfer Services					•			0.00			
Vendor Invoices		CURRENT	PROVIDER		CONTRACT EXPIRAT	ON DATE					
Export Vendor Invoice				Ŧ		1111					
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Leads are shared with the following tools in the Sales module:

- Pipeline Summary
- Pipeline Opportunities
- Pipeline Leads

### **Related Articles:**

Add a Lead