Create Prospect Accounts and Leads (Sales CRM Workflow)

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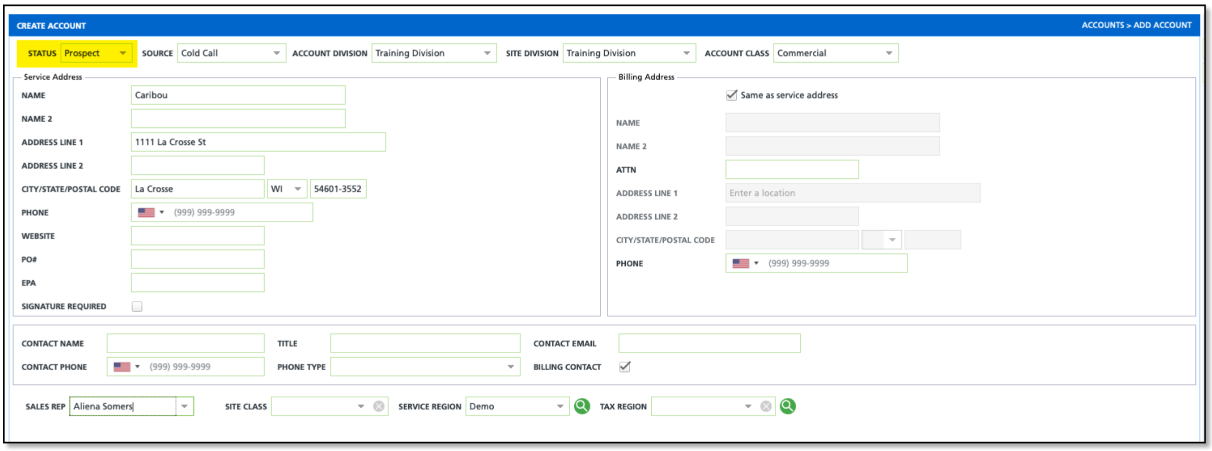
The initial phase of the Sales CRM Workflow involves the creation of a prospect account and a lead. This two-part process is outlined below and includes related article links to gain a comprehensive understanding of setup and functionality for each.

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.



Related Articles:

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

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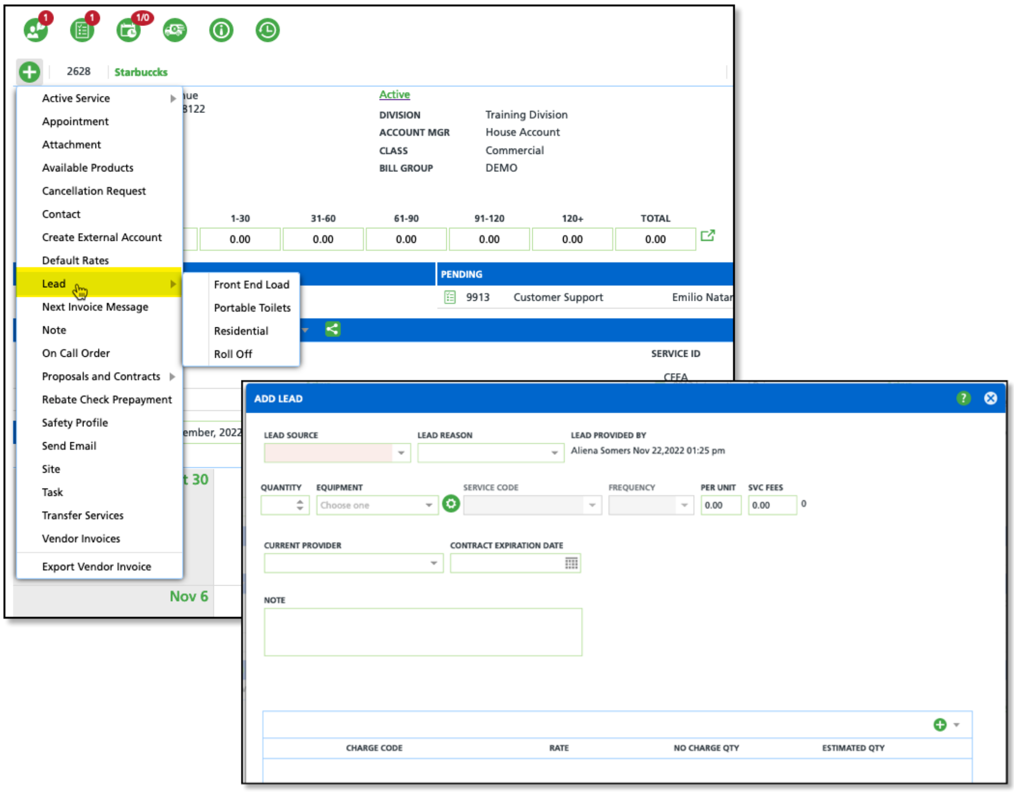
2. Create a Lead

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.



Leads are shared with the following tools in the Sales module:

- Pipeline Summary
- Pipeline Opportunities
- Pipeline Leads

Related Articles:

Add a Lead