

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.

The screenshot shows the 'CREATE ACCOUNT' form in a CRM system. The form is titled 'CREATE ACCOUNT' and 'ACCOUNTS - ADD ACCOUNT'. It features a top navigation bar with 'STATUS' set to 'Prospect', 'SOURCE' as 'Cold Call', 'ACCOUNT DIVISION' as 'Training Division', 'SITE DIVISION' as 'Training Division', and 'ACCOUNT CLASS' as 'Commercial'. The form is divided into two main sections: 'Service Address' and 'Billing Address'. The 'Service Address' section includes fields for NAME (Caribou), NAME 2, ADDRESS LINE 1 (1111 La Crosse St), ADDRESS LINE 2, CITY/STATE/POSTAL CODE (La Crosse, WI, 54601-3552), PHONE ((999) 999-9999), WEBSITE, PO#, EPA, and a 'SIGNATURE REQUIRED' checkbox. The 'Billing Address' section has a 'Same as service address' checkbox checked, and fields for NAME, NAME 2, ATTN, ADDRESS LINE 1 (with a placeholder 'Enter a location'), ADDRESS LINE 2, CITY/STATE/POSTAL CODE, and PHONE ((999) 999-9999). Below these sections are fields for CONTACT NAME, TITLE, CONTACT EMAIL, CONTACT PHONE ((999) 999-9999), PHONE TYPE, BILLING CONTACT (checked), SALES REP (Aliena Somers), SITE CLASS, SERVICE REGION (Demo), and TAX REGION.

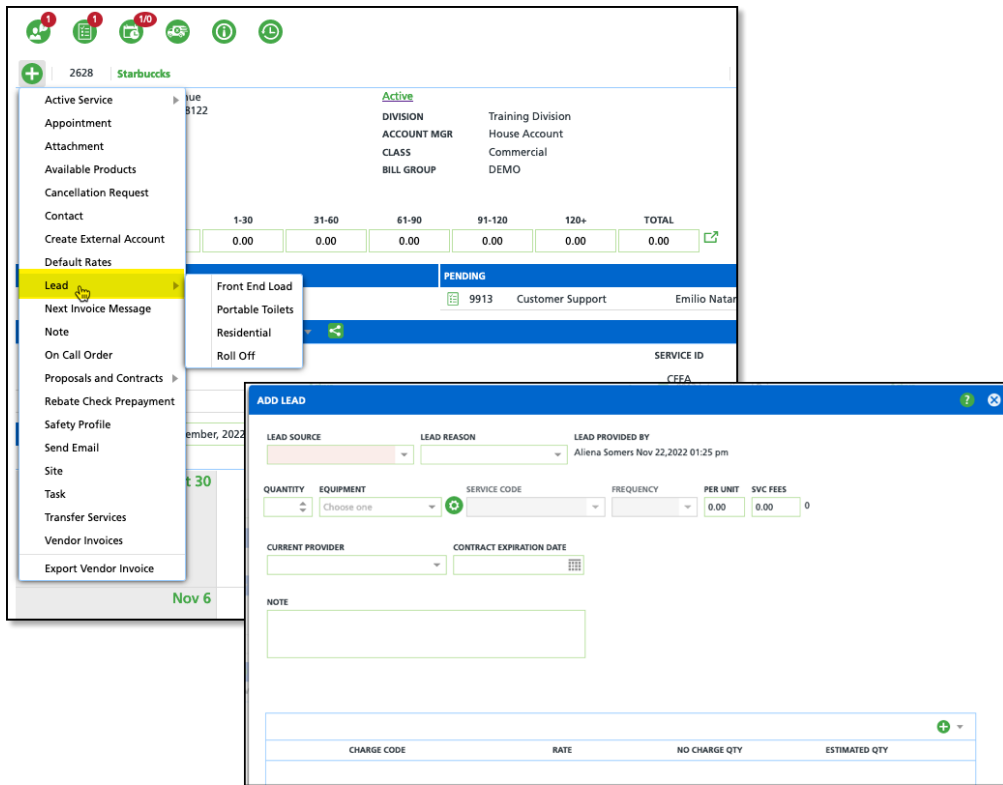
Related Articles:

- [Create Account: Screen Field Descriptions](#)
- [Create a New Prospect Account](#)
- [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.



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

- [Pipeline Summary](#)
- [Pipeline Opportunities](#)
- [Pipeline Leads](#)

Related Articles:

[Add a Lead](#)