

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.

CREATE ACCOUNT ACCOUNTS > ADD ACCOUNT

STATUS: Prospect SOURCE: Cold Call ACCOUNT DIVISION: Training Division SITE DIVISION: Training Division ACCOUNT CLASS: Commercial

Service Address

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:
SIGNATURE REQUIRED:

Billing Address

Same as service address
NAME:
NAME 2:
ATTN:
ADDRESS LINE 1: Enter a location
ADDRESS LINE 2:
CITY/STATE/POSTAL CODE:
PHONE: (999) 999-9999

CONTACT NAME: TITLE: CONTACT EMAIL:
CONTACT PHONE: (999) 999-9999 PHONE TYPE: BILLING CONTACT:

SALES REP: Aliena Somers SITE CLASS: SERVICE REGION: Demo TAX REGION:

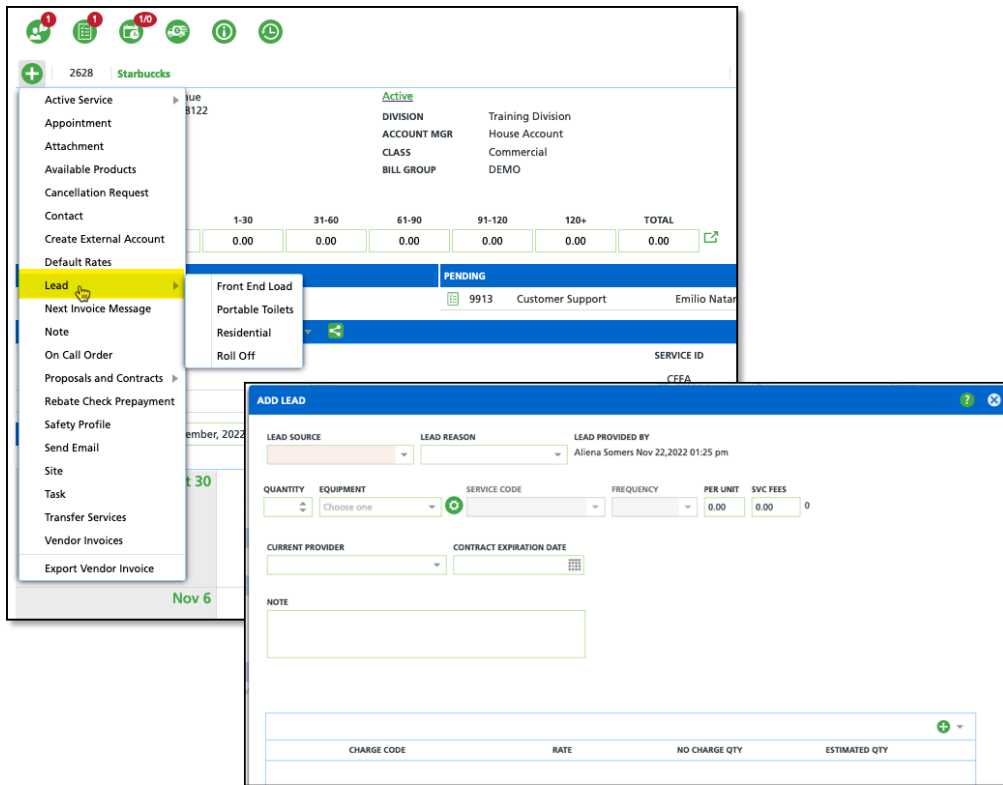
Related Articles:

- [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.



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

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

Related Articles:

[Add a Lead](#)