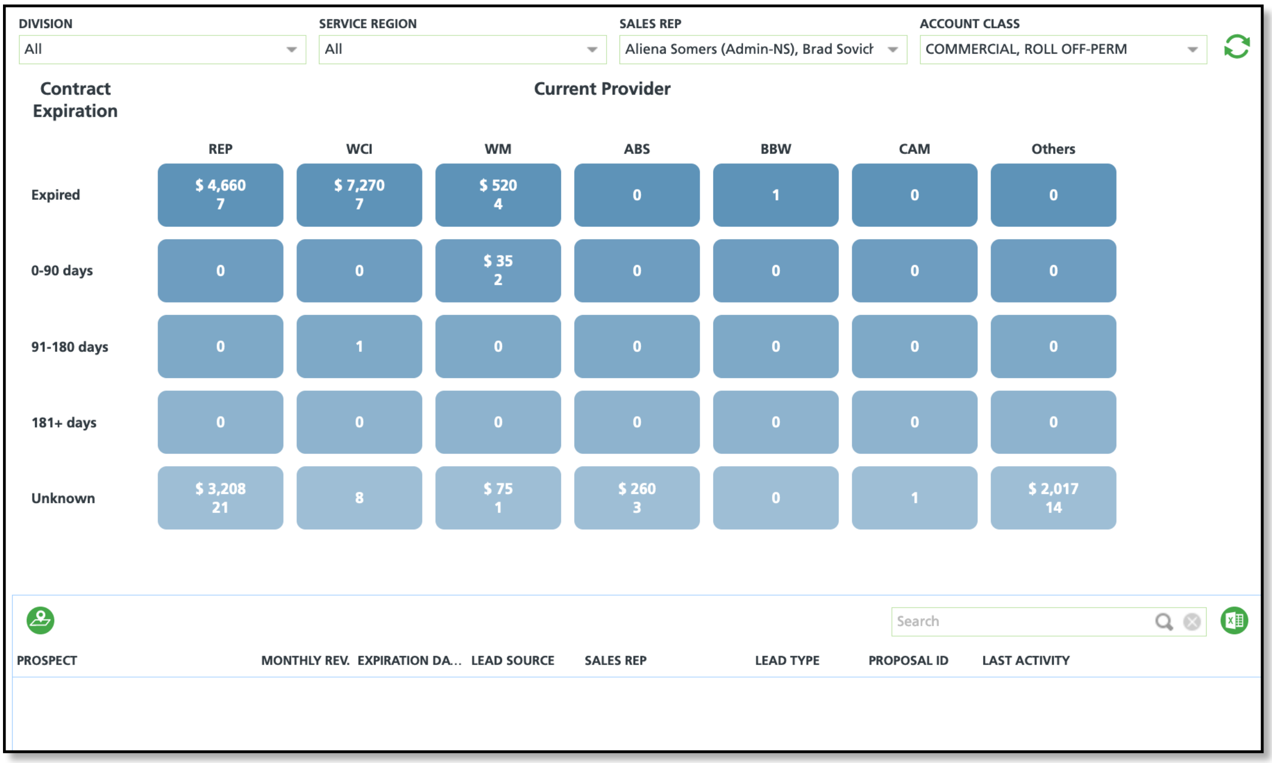
# Pipeline Leads

Last Modified on 03/19/2024 4:19 pm EDT

**Pathway:** *Sales > Pipeline > Leads*

The Pipeline Leads tool provides sales representatives with the information they need to identify and target new customers based on previously collected prospect information. This tool only includes leads who's information has been collected but have not received a proposal, quote or contract.




## Permissions

The following permissions are required to view and use the Leads Pipeline screen:

| Permission ID | Permission Name |
|---|---|
| 65 | User Activities, Leads, and Opportunities |

## Filter Options

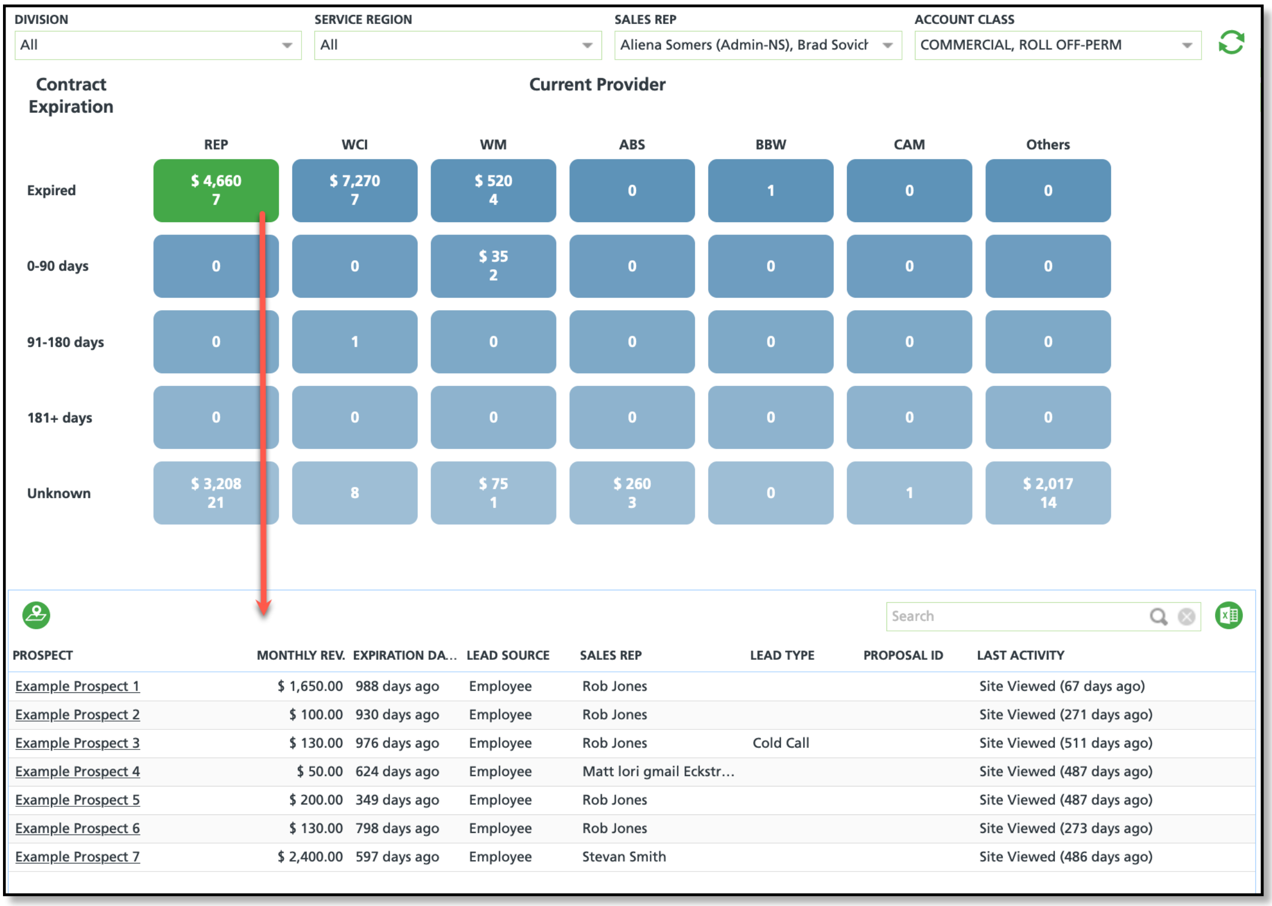
Filtering options are available and narrow down what displays on the screen. Filter options include: Division, Service Region, Sales Rep, and Account Class.

| Filter Type | Description |
|---|---|
| Division | The division assigned to the prospect account. |
| Service Region | Indicates the region where the prospect accounts are located. |

| Filter Type | Description |
|---|---|
| Sales Rep | Filters by the Sales Representative who created the lead. |
| Account Class | Filters by the account class the prospect account was assigned - Government, Residential, Commercial, Broker, and etc. |

## Understanding the Pipeline Leads Grid

The Pipeline Leads grid breaks down prospect leads by competitor and contract expiration and includes the monthly revenue amount the prospect is paying to their current provider. Select a cell within the grid to view details for each of the leads it includes.




## Field Descriptions

The following fields display when a cell is selected from the upper grid.

| Field Descriptions | Descriptions |
|---|---|
| Prospect | The name of the prospect (lead) account. Click on the name of the prospect to be taken to the account. |
| Monthly Revenue | The monthly amount paid by the lead to their current provider. |

| Field Descriptions | Descriptions |
|---|---|
| **Expiration Date** | The expected date the prospect leads contract with the current provider will expire. |
| **Lead Source** | How the lead originated. This is identified when the lead is created in the system. |
| **Sales Rep** | The sales representative managing the prospect account. |
| **Lead Type** | N/A |
| **Proposal ID** | The proposal identification number. |
| **Last Activity** | The most recent activity completed on this account. |