# Add a Lead

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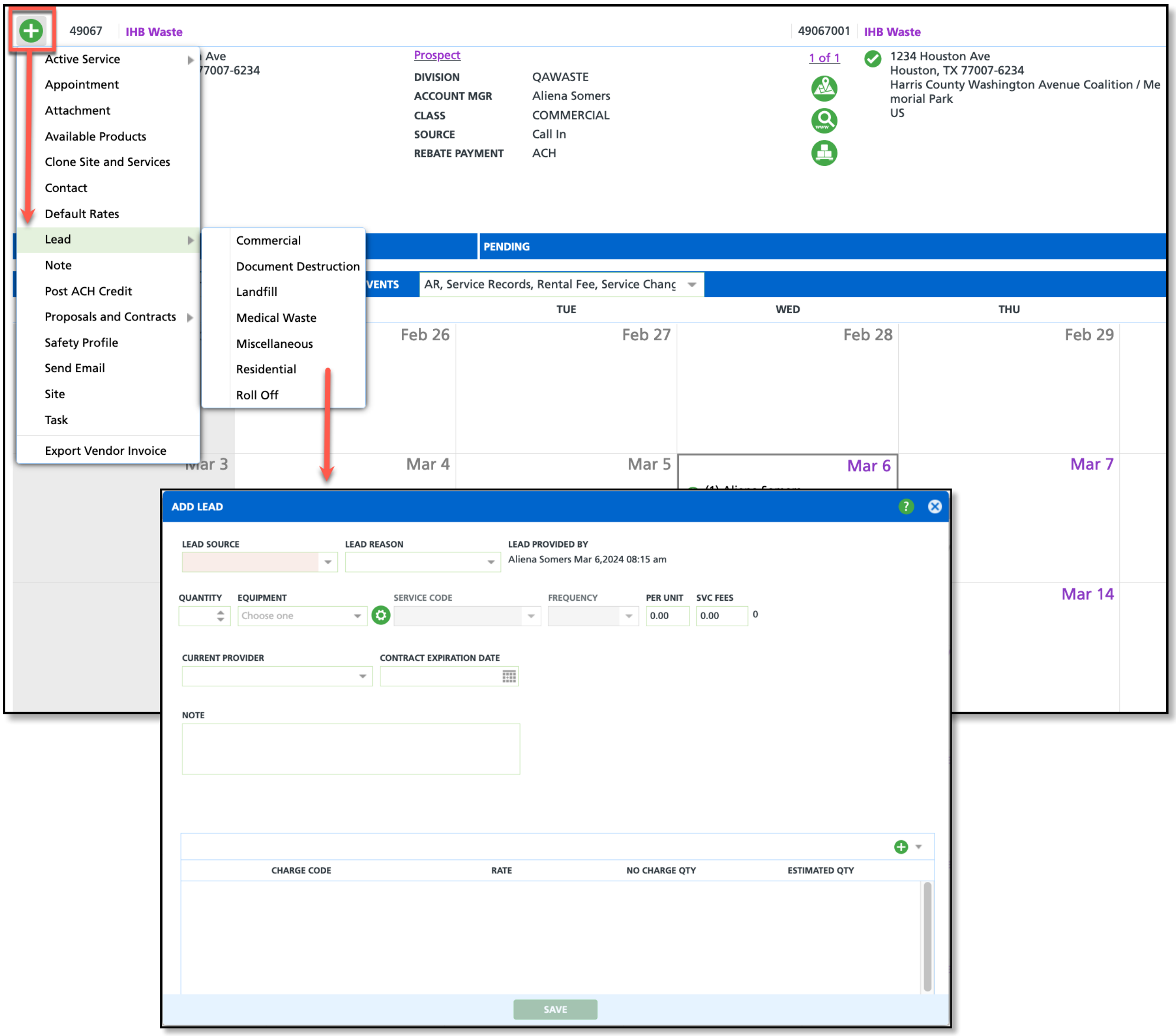
**Pathway:** *Accounts (Search) > Account > Account Menu > Lead*

Add a lead to a prospect account to effectively manage and followup on future sales opportunities. Leads added here are shared with many of the CRM tools available in the Sales module.




## Permissions

The following permissions are required to add leads to an account:

| Permission ID | Permission Name |
|---:|---|
| 5 | View Account |
| 6 | View Site |
| 65 | User Activities, Leads, and Opportunities |

## Prerequisite

Before a lead can be created, the prospect account must exist first. Review the following article on creating a new prospect account.

- Add New Prospect Account

### Field Descriptions

| Field | Description |
|---|---|
| Lead Source | How the lead originated. *Examples: Referral, Cold Calling, Social Media and etc.* |
| Quantity/Equipment | Indicates the type of the equipment they are currently using and how many. |
| Service Code/ Frequency | Indicates the type of service and they are receiving and the frequency of the service. |
| Per Unit | Indicates the rate the prospect is currently paying for the equipment. |
| SVC Fees | Calculation based on the value entered in the Quantity field multiplied by the value entered in the Per Unit field. |
| Current Provider | Records who the current provider (competitor) is for the prospect. Current Provider information is shared with many of the tools available in the Sales module. This field is set up in *Setup > Sales > Competitor.* |
| Contract Expiration Date | Records the date the lead's contract with their current provider will expire. This date is shared with many of the tools available in the Sales module. |
| Note | Option to record any notes about the lead that will help with future referencing purposes. |

# Add a Lead

Once a lead has been added into the system it is shared with many of the tools available in the Sales module.

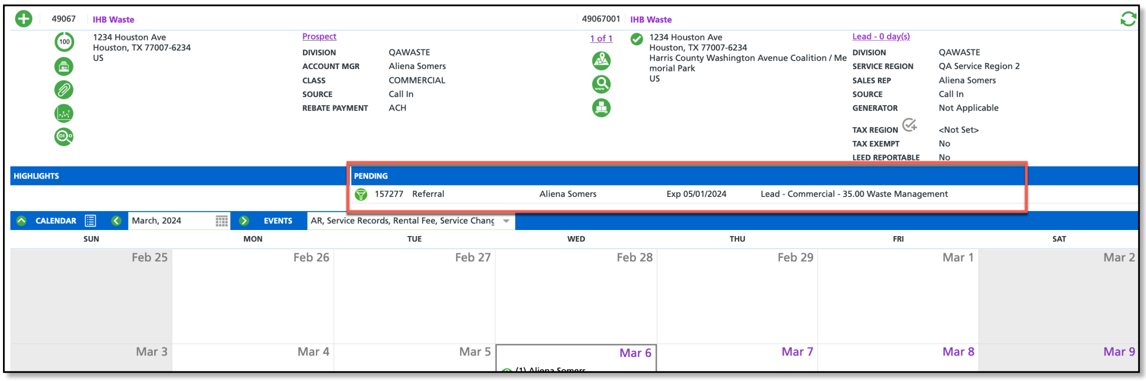
1. Create a Prospect Account to record the lead to.
2. From the account's menu (green '+' icon), select *Lead* from the list of options and then select the line of business.
3. When the 'Add Lead' popup window displays, minimally complete all required fields. Required fields are highlighted in red.
    - Because lead information is shared with CRM tools such as Contract Expiration and Sales Pipelines (Pipeline Leads and Pipeline Opportunities), it is important to capture as much information as possible for future opportunities.
4. Click Save when finished.
5. Stay active on the lead by creating a Task or an Appointment for future followup.

# Edit a Lead

Added leads display in the Pending section of the account. To edit, double click on the lead to display the Edit Lead popup editor. After edits are complete, click 'Save' and the lead will be updated with the new information.

> A Note field is available when a lead is created and again when editing. Optional: when editing, consider

recording the reason for the edit.




## Related Articles

Pipeline Leads
Pipeline Opportunities
Contract Expiration