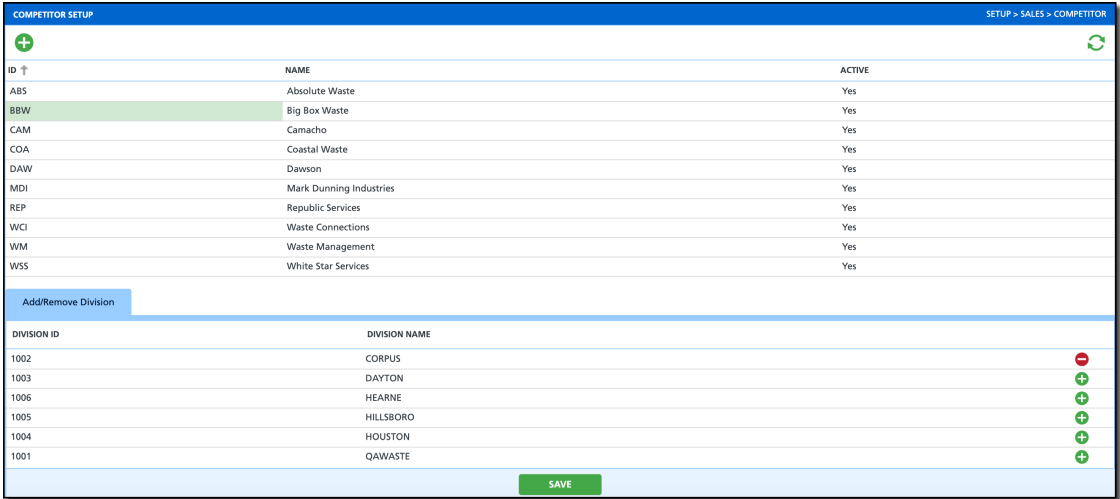


# Competitor Setup

Last Modified on 03/12/2024 2:57 pm EDT

Pathway: Setup > Sales > Competitor

Use the Competitor Setup tool to enter competitor details that can be used in lead and prospect tracking dashboard tools.



The screenshot shows the 'COMPETITOR SETUP' interface. At the top, there is a '+', a refresh icon, and the breadcrumb 'SETUP > SALES > COMPETITOR'. Below is a table of competitors with columns for ID, NAME, and ACTIVE. The 'BBW' row is highlighted. Below this is a section for 'Add/Remove Division' with a table of DIVISION ID and DIVISION NAME. A 'SAVE' button is at the bottom.

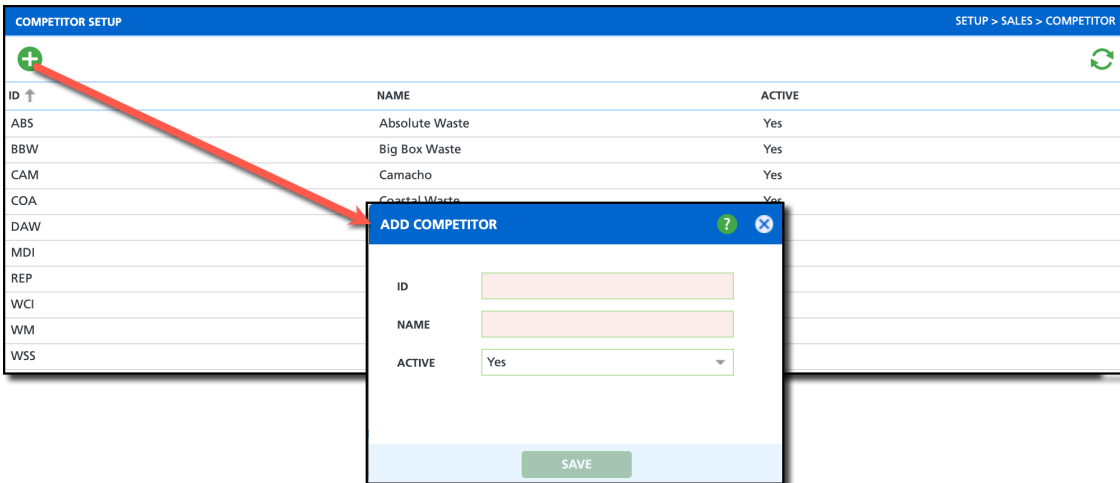
ID	NAME	ACTIVE
ABS	Absolute Waste	Yes
BBW	Big Box Waste	Yes
CAM	Camacho	Yes
COA	Coastal Waste	Yes
DAW	Dawson	Yes
MDI	Mark Dunning Industries	Yes
REP	Republic Services	Yes
WCI	Waste Connections	Yes
WM	Waste Management	Yes
WSS	White Star Services	Yes

DIVISION ID	DIVISION NAME
1002	CORPUS
1003	DAYTON
1006	HEARNE
1005	HILLSBORO
1004	HOUSTON
1001	QAWASTE

## Add a New Competitor

When new competitor information is added, it will display in the Current Provider list of options when adding a lead to a site.



The screenshot shows the 'COMPETITOR SETUP' interface with an 'ADD COMPETITOR' modal form open. A red arrow points from the '+' icon in the top left of the main table to the modal. The modal has fields for ID, NAME, and ACTIVE (a dropdown menu set to 'Yes'), and a 'SAVE' button at the bottom.

## Field Descriptions

Field	Description
ID	The ID the competitor is identified with.
Name	The name of the competitor.
Active	Controls if the competitor information will display in the Current Provider list when adding a lead and in the Leads dashboard. Only competitors marked 'Yes' display.

## Add Competitor Record

1. Click the **green +** to open the Add Competitor popup.
2. Enter the following competitor information:
  - Enter an **ID** for the competitor. ID will display in the Leads dashboard.
  - Enter the competitor's **Name**.
  - Set the active status of the competitor to either 'Yes' or 'No'.
3. Click **Save** and the competitor will be added to the list.

## Add/Remove Division

After entering the competitor information, use the 'Add/Remove Division' section to select the divisions where the competitor's information should be available as a selectable option. To assign a division to a competitor, choose the competitor from the upper grid, and the divisions will display in the lower grid. Use the toggle button associated with a division to add or remove it for a competitor.

□

---

### Related Articles:

[Add Lead](#)

[Pipeline Leads](#)

---