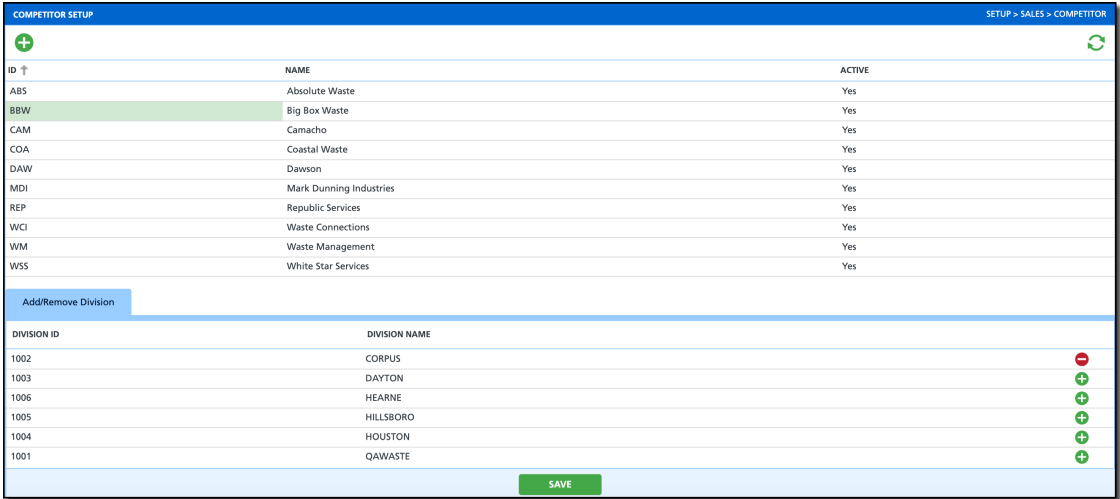# Competitor Setup

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.
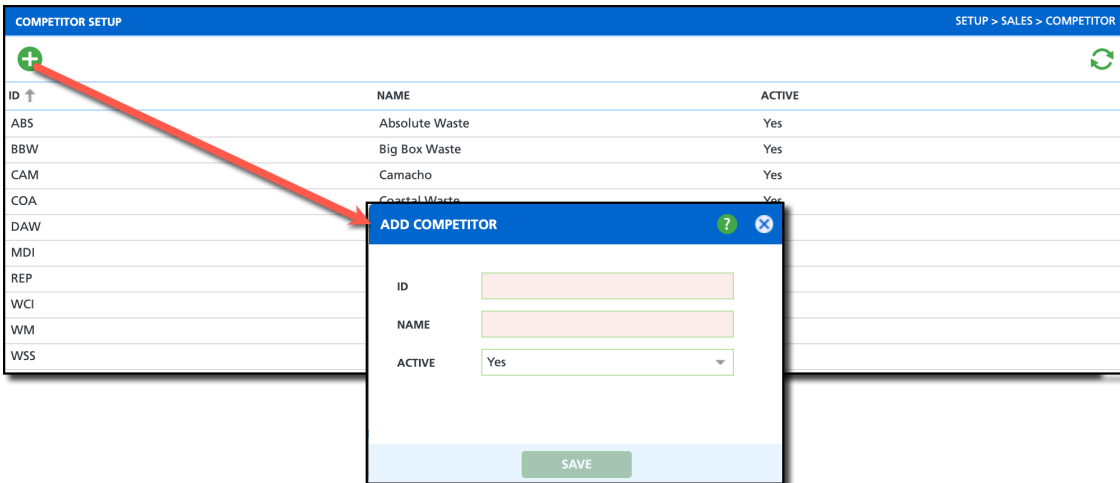
Add a New Competitor

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

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.

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Related Articles:

Add Lead
Pipeline Leads