

Why Convert a Lead?

1. To Create a Contact.
2. To Create an Opportunity.

Leads aren't associated with anything in Salesforce. They are independent of other records. It provides better visibility within salesforce to convert the Lead to a Contact and/or an Opportunity. A Contact or Opportunity is mapped to an Account which helps better connect information.

All information captured in the Lead record is transferred to the Contact record EXCEPT the Chatter feed. So, if there's enough important activity to post something to Chatter about the Lead then it's better to convert early in the screening process so that the Chatter dialogue is not lost.

Converting a lead is **SIMPLE!!** Here are the steps:

Start Convert Process

Press "Convert" at the top of the lead page

Lead Detail

Edit Delete **Convert** Clone Find Duplicates

Lead Owner: Doug Hartje [Change]

To: Doug Hartje

Name: Mitchell Ackerson

Company: Boeing

Title: Flight Test Operations, BT&E MMO

Date Created: 3/15/2016 3:20 PM

Duplicate Lead: ☐

Lead Status: Unqualified

Phone: (480) 258-9583

Email: mitchell.d.ackerson@boeing.com Gmail

▼ Email Information

Subject: ----- Forwarded message -----

Email Body: From: "Ackerson, Mitchell D"

Website Lead (Voice): ☐

Website Lead (Email): ☒

Step 1 - Add to Existing/Create New Account

Click the magnifying glass to add the lead to an existing account or create a new account

Convert Lead

Record Owner: Doug Hartje

Send Email to the Owner: ☐

Account Name: --None--

Opportunity Name: Boeing-

☐ Do not create a new opportunity upon conversion.

Converted Status: Qualified

View

Check for Existing Account

Create a New Account

Lookup

Search...

Go New

You can use *** as a wildcard next to other characters to imp

Recently Viewed Accounts

Account Name
2014 Win True Up - ECG Semi
Acist Medical Systems, Inc.

Lookup

Search...

Go New

You can use *** as a wildcard next to other characters to ir

Recently Viewed Accounts

Account Name
2014 Win True Up - ECG Semi
Acist Medical Systems, Inc.

Step 2 - To create or not create an Opportunity - That is the question

Convert Lead

Record Owner: Doug Hartje

Send Email to the Owner: ☐

Account Name: --None--

Opportunity Name: Boeing-

☐ Do not create a new opportunity upon conversion.

Converted Status: Qualified

If you're creating an opportunity, edit the Opportunity Name field

If you're not creating an opportunity, check the box saying "Do not create". This will still create a Contact assigned to the selected Account.

Step 3 - If you created an Account, Fill out all important fields

Make sure to fill out Parent Account, Market, Address, Strategy Summary, etc...

Account Detail [Edit] [Delete] [Sharing]

▼ Additional Information

Number of Registered Partis	9	Account Owner	Lauree LeTan [Change]
Account Name	Boeing - Mesa [View Hierarchy]	Executive Sponsor	
Parent Account	Boeing Defense, Space and Security	Manufacturers Rep	
Market	Mil/Aero	Website	http://www.boeing.com/defense
Account Record Type	Customer [Change]	Strategy Summary	Continue efforts to get approvals on Kings product. Focus on Ralph and Angie to get this moved through the cycle.
Annual Revenue		Key Platforms	Home of AH-64 Apache program, also build harnesses for other Boeing aircraft - C-17, F-15, F/A-18
Winchester Annual Revenue	\$200,000	Description	MCDONNELL DOUGLAS / HELICOPTER SYSTEMS
Total Open opportunity value	\$485,300	House Account?	☐
Total # of Open opps	7	Account Rating	12
Total opportunity value WON	\$0		
Total # of wins	0		

▼ Address Information

Billing Address	5000 E McDowell Mesa, AZ 85215 UNITED STATES	Shipping Address	5000 E MCDOWELL RD BLDG 543 RECEIVING DOCK MESA, AZ 85215 United States
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