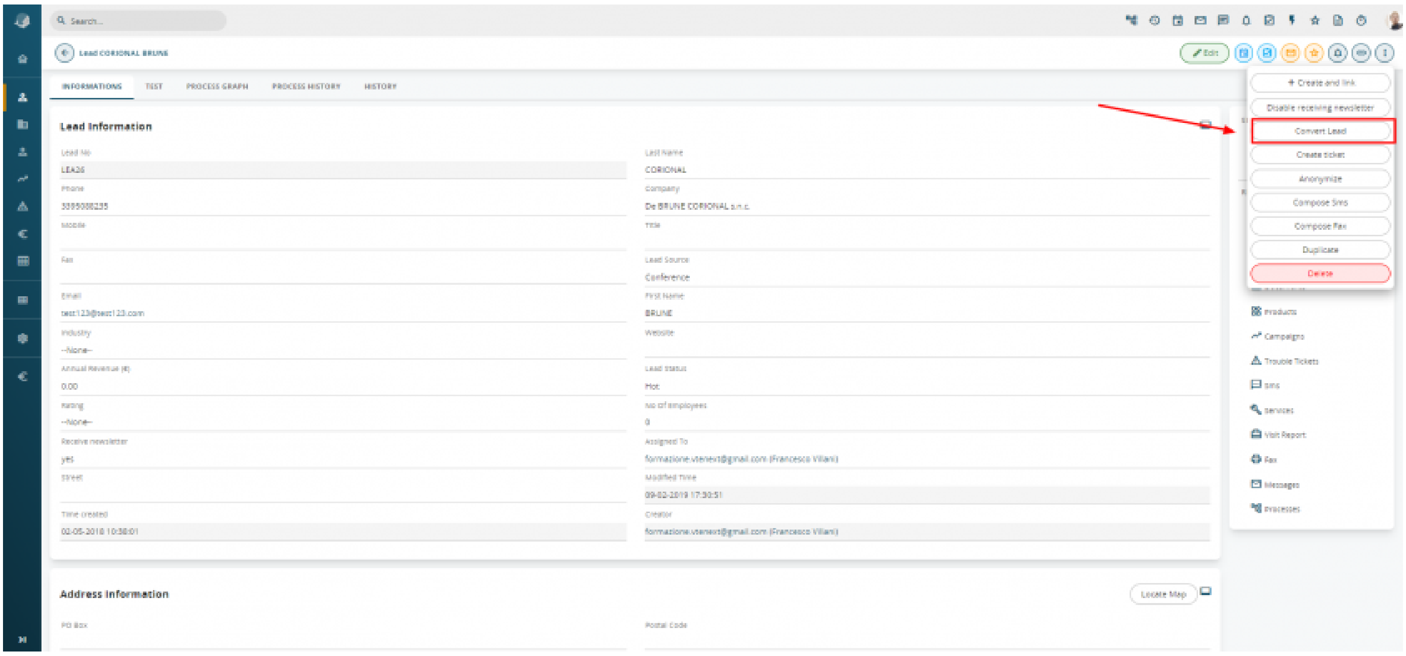
3.1.2 Lead conversion

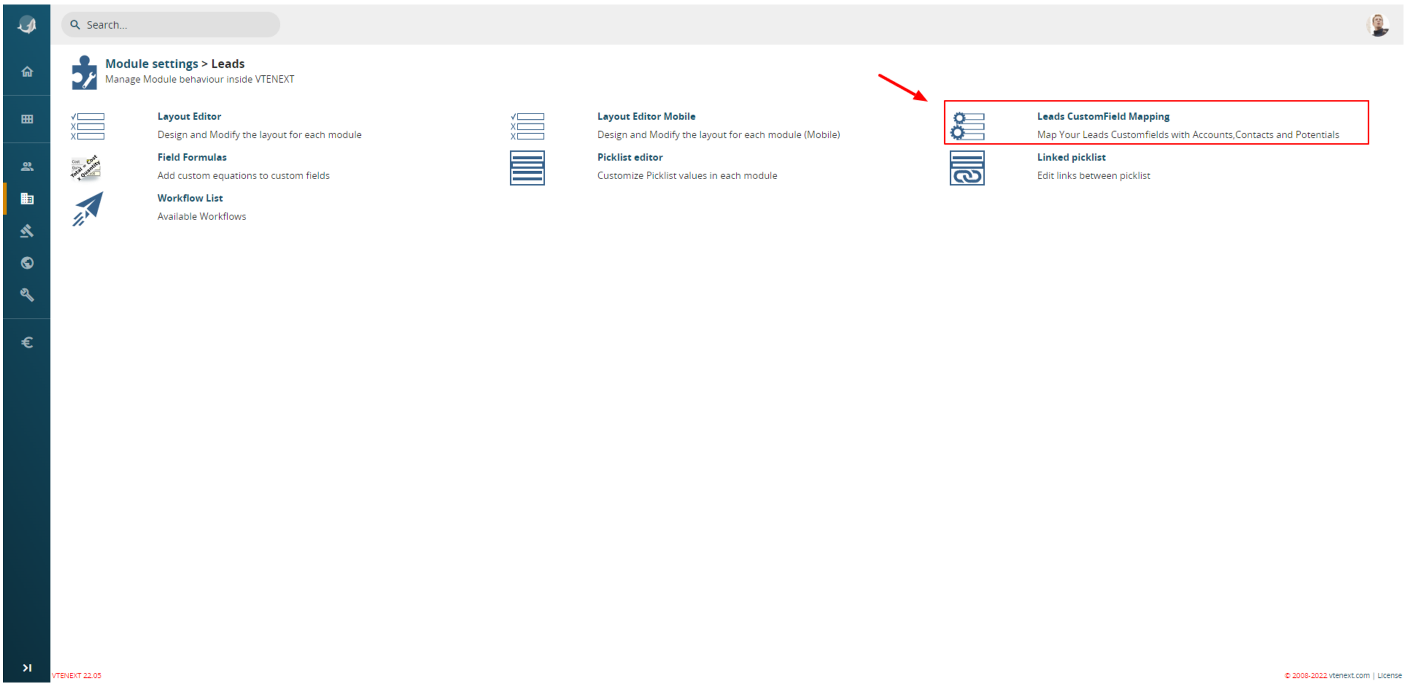
A show of interest from the lead in relation to your proposal corresponds to the opening of a commercial negotiation. Before the offer is generated, the lead must be converted into:

- **a Contact** with the data of the physical person (name, surname, email, mobile phone…)
- **an Account** containing the company name (VAT number, registered office, sector…) [optional]
- **a sale Opportunity**, i.e. the negotiation (amount, closing date…) [optional]



All information previously collected for the Lead will be available, after conversion, in the Contacts, Accounts, and/or Potential Modules, based on their contents and the mapping defined during the configuration phase. (Please view chapter **17.7.2 Custom fields mapping for Leads conversion**)

N.B.: table fields are not supported in Lead conversion and therefore cannot be mapped



To convert a lead, just click on Convert Lead in the Other button. The conversion panel allows you decide whether to:

- create the account, the contact and/or the potential, by activating or deactivating the corresponding flag;
- enter the commercial negotiation data in the potential: Potential Name, Expected Closing Date, Sale status, Amount;
- the elements initially related to the lead will be transferred to the account or to the contact.

When you save the data, an account, a contact related to the account and a potential will be created, depending on the options selected.

N.B.: The original lead will be deleted in order to avoid duplicates.

Revision #3
Created 25 May 2022 17:25:53 by Alberto
Updated 20 September 2022 15:40:59 by Alberto