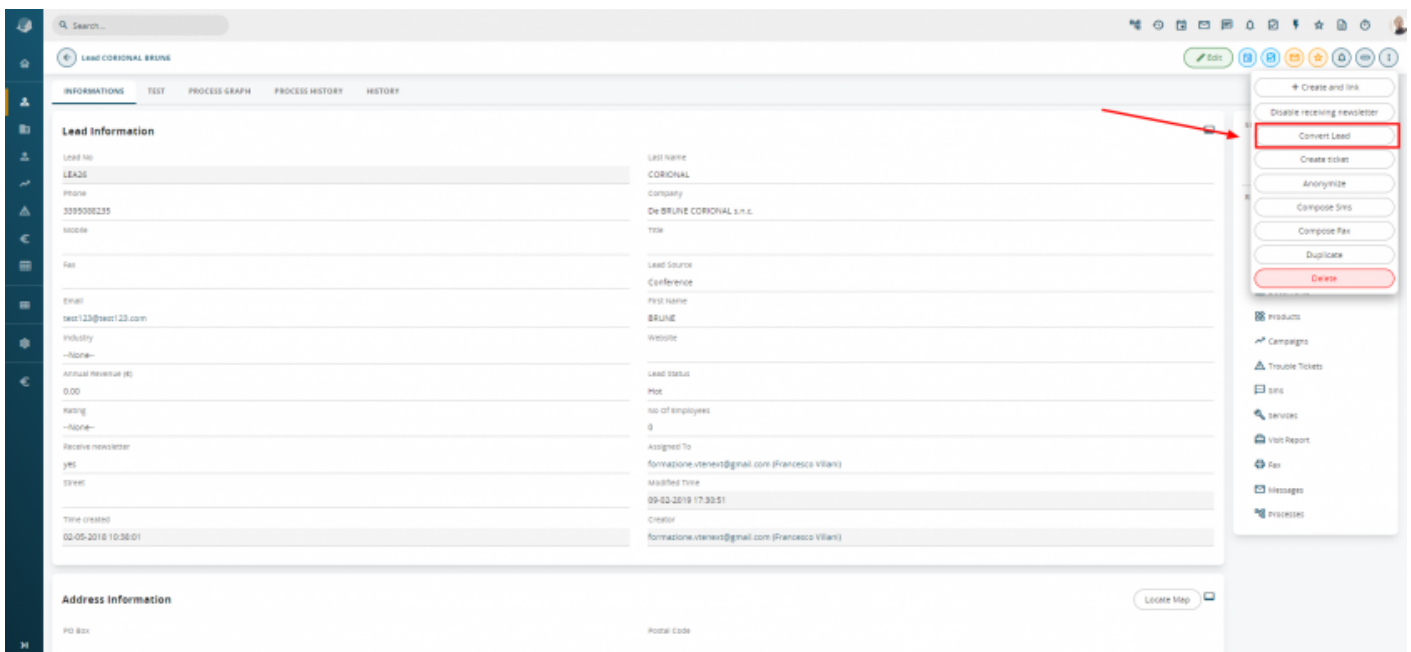


3.1.2 Lead conversion

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]



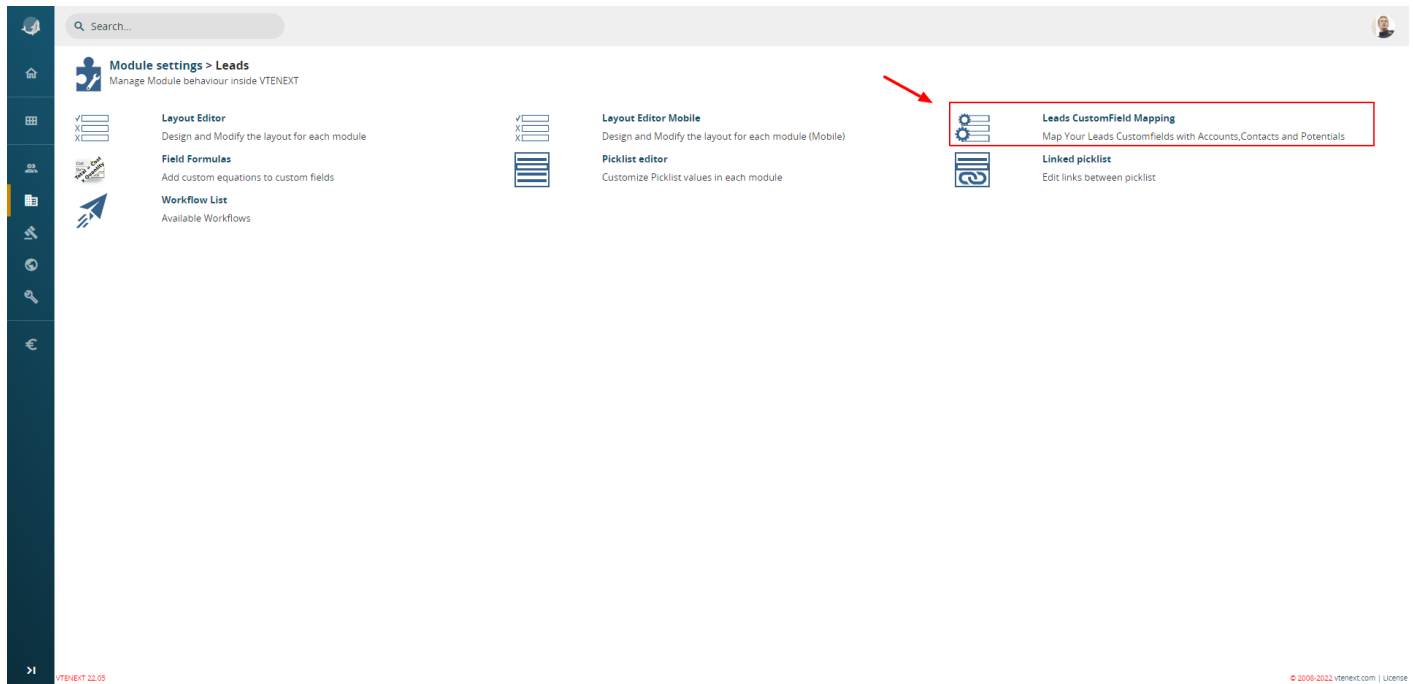
The screenshot shows a CRM interface for lead management. The main panel displays 'Lead Information' for a lead named 'CORONAL'. The lead has a lead ID of 'LEA26', a phone number '3395008235', and an email 'test123@test123.com'. The lead source is 'Conference' and the lead status is 'Hot'. The lead is assigned to 'formazione.vt@vt.com (Francesco Villani)'. The lead was created on '02-05-2018 10:36:01'. A red arrow points to the 'Convert Lead' button in the right-hand sidebar. The sidebar also contains buttons for 'Create and link', 'Disable receiving newsletter', 'Create ticket', 'Anonymize', 'Compose SMS', 'Compose Fax', 'Duplicate', and 'Delete'. Below the main panel, there is an 'Address Information' section with fields for 'PO Box' and 'Postal Code'.

Lead Information	
Lead ID	LEA26
Phone	3395008235
Email	test123@test123.com
Industry	--None--
Annual Revenue (€)	0.00
Rating	--None--
Receive newsletter	yes
Created	02-05-2018 10:36:01
Last Name	CORONAL
Company	De BRUNE CORONAL s.n.c.
Lead Source	Conference
First Name	BRUNE
Website	
Lead Status	Hot
No. of employees	0
Assigned To	formazione.vt@vt.com (Francesco Villani)
Modified Time	09-02-2019 17:30:51
Creator	formazione.vt@vt.com (Francesco Villani)

Address Information	
PO Box	
Postal Code	

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