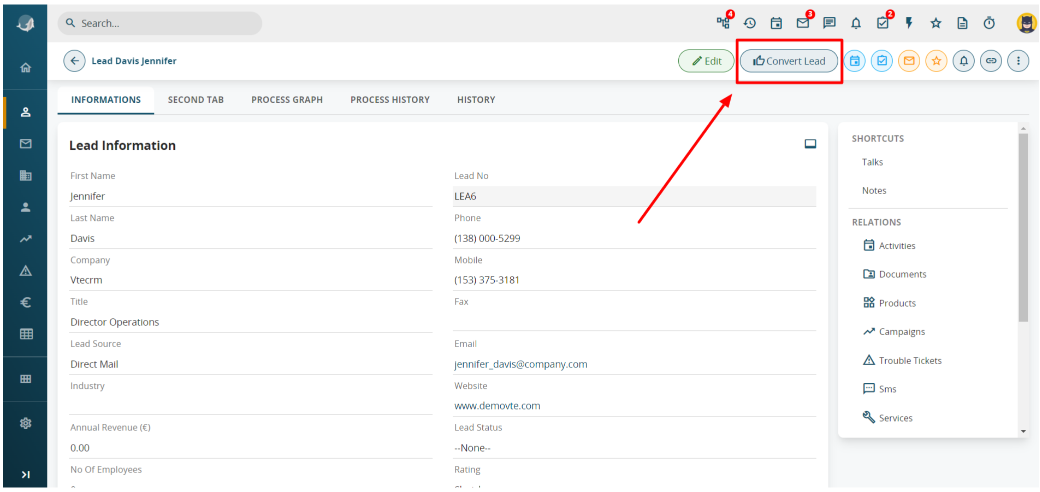
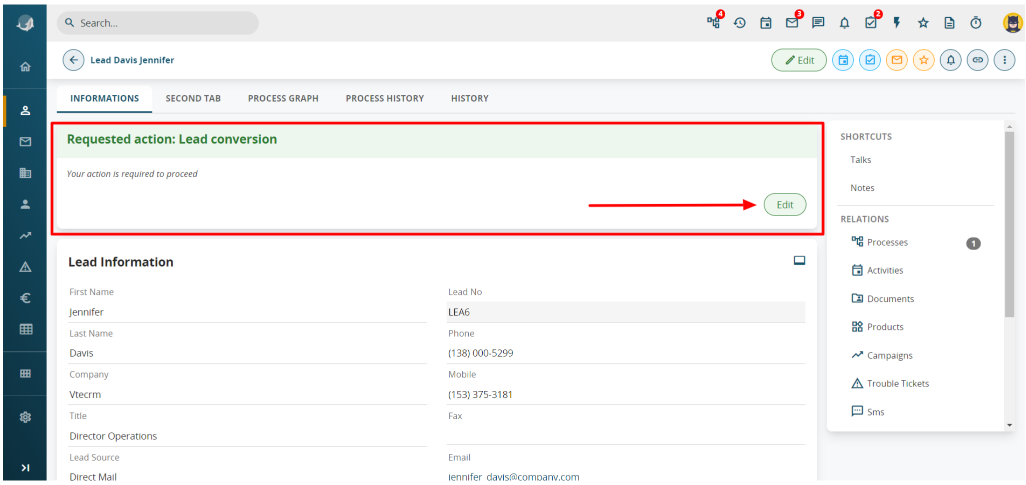
3.1.2 Lead conversion

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:

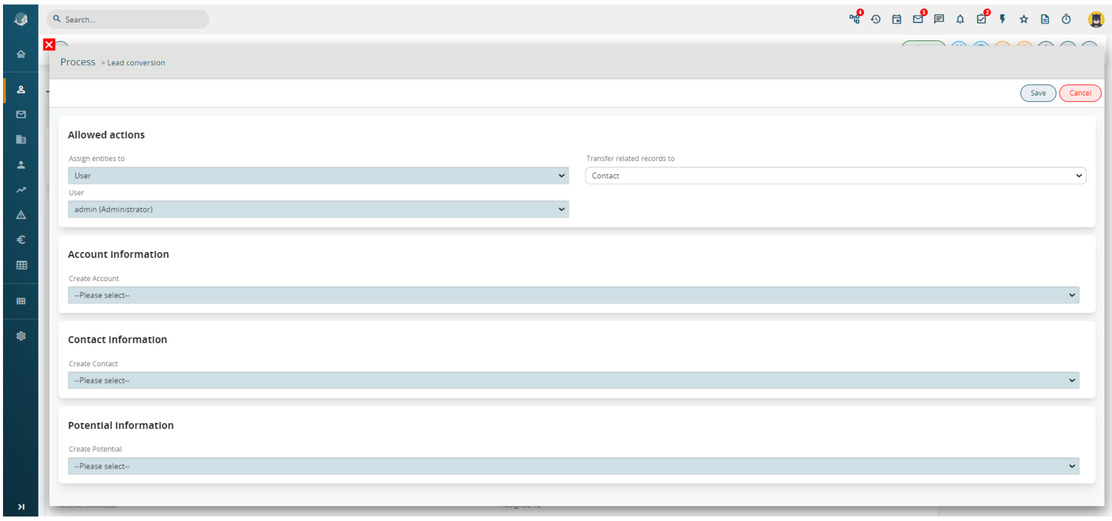
- **a Contact** with the data of the physical person (name, surname, email, mobile phone...)
- **an Account** containing the company name (VAT number, registered office, sector...) [optional]
- **a sale Opportunity**, i.e. the negotiation (amount, closing date...) [optional]



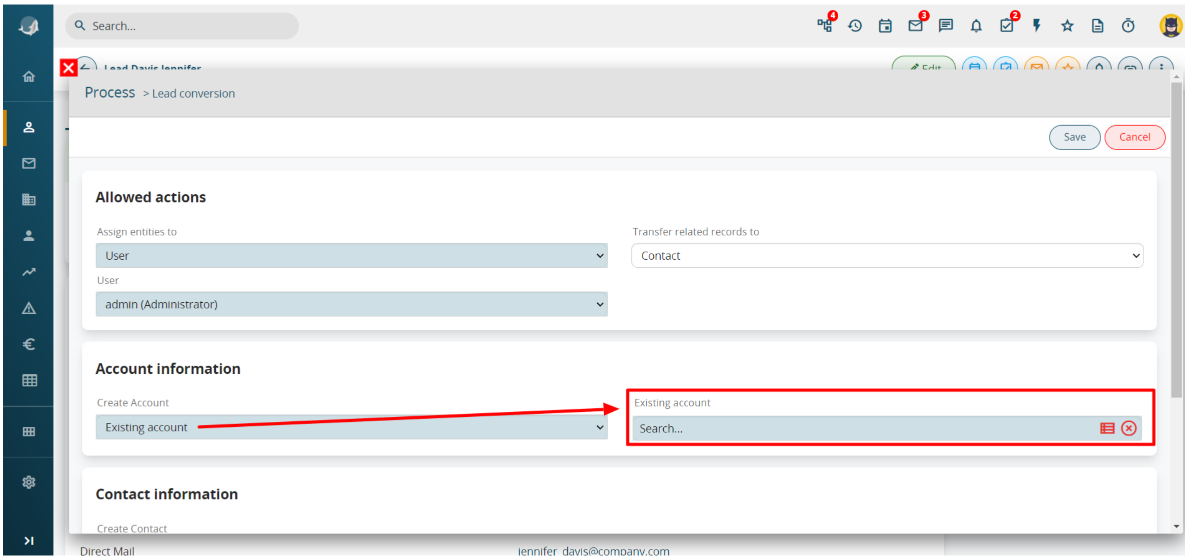
By clicking the "Convert Lead" button which is located in the upper-right side of every lead detail view a process you be lauched. This process allows the user to choose which entity have to bre created and you can also add every information you need before converting the lead.



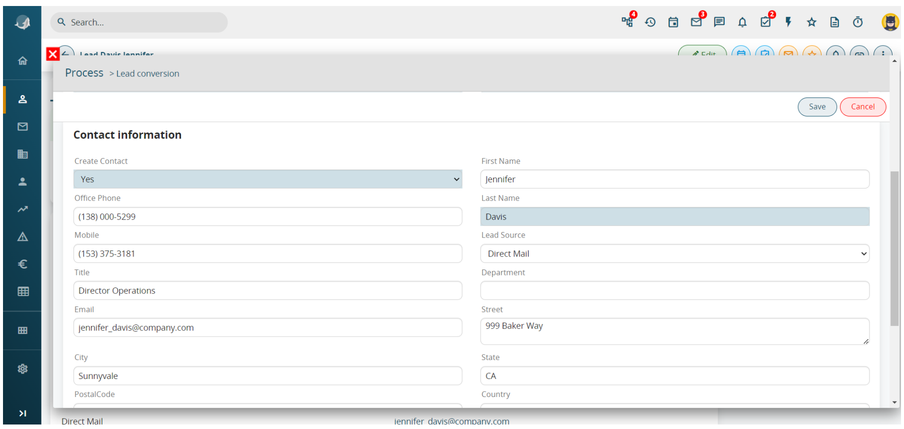
To open the converting pop-up you need to click the button "Edit" located in the green banner.



For each of the three blocks (**Account Information**, **Contact information** and **Potential information**) you can choose if create the entity or not. Also, for the Account information you can select an **existing account** so the contact and potential you are creating will be linked to that account instead of creating a new one



PAY ATTENTION: The profiles limitation (talking about the accounts, contacts and potentials fields) are valid also in this process.



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 **3.1.3 Lead Conversion Process**)

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