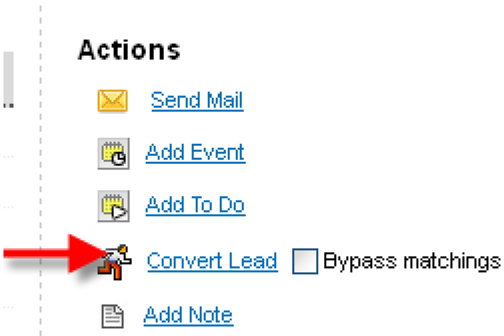
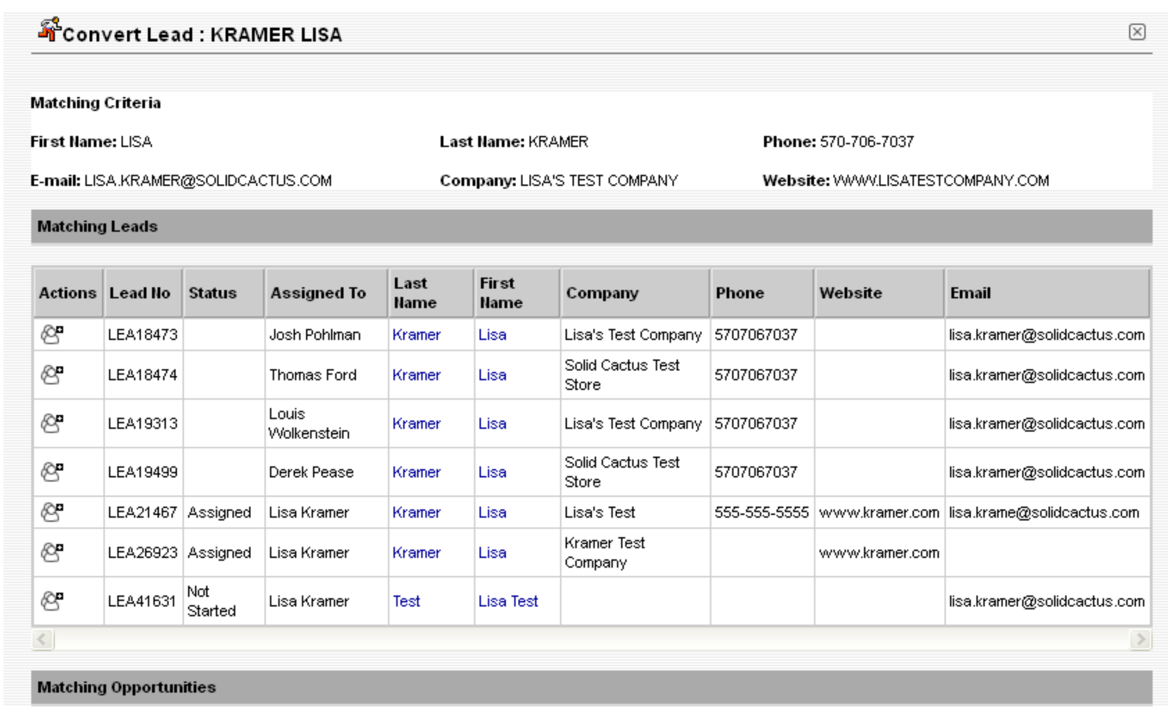
vTiger - Converting a Lead

- Click “Convert Lead” under Actions on the right hand side of the screen



- By default, the system will look for any matching or duplicate records *NOTE: Duplicate in this case is defined as any field that may be similar to data entered in your lead record i.e. N/A that was entered for email.*



Convert Lead : KRAMER LISA

Matching Criteria

First Name: LISA **Last Name:** KRAMER **Phone:** 570-706-7037

E-mail: LISA.KRAMER@SOLIDCACTUS.COM **Company:** LISA'S TEST COMPANY **Website:** WWW.LISATESTCOMPANY.COM

Matching Leads

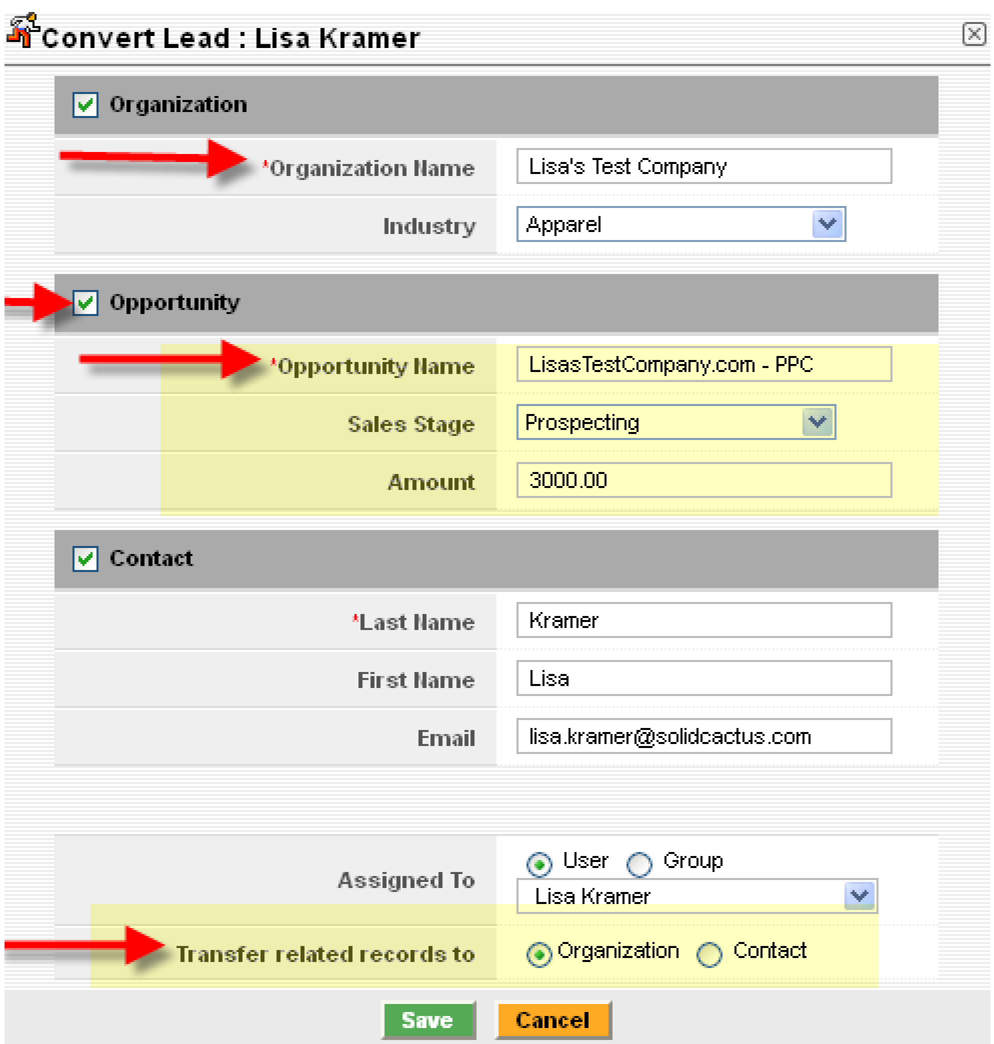
Actions	Lead No	Status	Assigned To	Last Name	First Name	Company	Phone	Website	Email
	LEA18473		Josh Pohlman	Kramer	Lisa	Lisa's Test Company	5707067037		lisa.kramer@solidcactus.com
	LEA18474		Thomas Ford	Kramer	Lisa	Solid Cactus Test Store	5707067037		lisa.kramer@solidcactus.com
	LEA19313		Louis Wolkenstein	Kramer	Lisa	Lisa's Test Company	5707067037		lisa.kramer@solidcactus.com
	LEA19499		Derek Pease	Kramer	Lisa	Solid Cactus Test Store	5707067037		lisa.kramer@solidcactus.com
	LEA21467	Assigned	Lisa Kramer	Kramer	Lisa	Lisa's Test	555-555-5555	www.kramer.com	lisa.krame@solidcactus.com
	LEA26923	Assigned	Lisa Kramer	Kramer	Lisa	Kramer Test Company		www.kramer.com	
	LEA41631	Not Started	Lisa Kramer	Test	Lisa Test				lisa.kramer@solidcactus.com

Matching Opportunities

- If a duplicate Opportunity is found and belongs to someone else (this should be researched prior to actual lead conversion) and you are not taking on the lead, Lead Status would be marked as "Duplicate"

- If a duplicate Lead is found and belongs to you already, you have the ability to mark that record as a "Duplicate" by clicking the  when the matching records show up and then continue to work off of your current lead by hitting the "Continue" button.

- If no duplicates are found you will be taken right to the "Convert Lead" Box



- **<u>Organization Name:</u>** If an Organization Name was filled in on the Lead level, it will by default exist when you go to **convert NOTE: Typically you do not know an "Organization Name" when speaking to a lead who is just signing up for a domain, after seeing the confusion it is causing upon conversion when trying to find a record in search, it will be mandatory to have this filled in on the Lead level with at least the prospect's name as the "Organization Name"**
- **<u>Opportunity</u>:** An "Opportunity" MUST exist upon conversion. You will have to check the box next to Opportunity in order to make it exist and create an Opportunity record for you once converted (this is how the original campaign information carries from a lead to your Opp. This is also where you will name your Opportunity. At this point in the sales discussion (qualified lead) you should know why you are converting this lead. You will use the following naming convention on ALL Opportunities:
    - **DomainName.com - Feature/Service you are pitching**
        - **i.e. LisasTestCompany.com – PPC**
        - **i.e. John Smith – Storefront Design *(if there is no Business or domain yet)**

  You should also know at this point an estimated value of the service being pitched to fill in an Amount as well as your Sales Stage (this will start your pipeline info for you)

- **<u>Contact:</u>** If First Name, Last Name and Email are all filled in on the lead before converting, then this info will automatically populate.
- **<u>Transfer Related Records to:</u>** As an operational process and to have all of our information flow uniformly since you will now be adding an Organization name - you will choose the "Organization button and the related record will be transferred to the "Organization"

    - Your lead record will no longer exist and will now become an "Organization" with the following flow: **Organization>Contact>Opportunity**

    - You will need to manually find your Opportunity (which will now be "Related to" an Organization. You will now work from your Opportunity to manage your pipeline.