Salesforce Lead Management Implementation Guide

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LEAD MANAGEMENT OVERVIEW

Success in sales starts by building a strong pipeline of leads. A lead is a prospect who is interested in your company.

Lead management helps your inside opportunity or telesales teams qualify leads before passing them on to sales. Sales reps get instant access to the latest prospects and ensures that leads are never dropped. You can:

- Acquire leads by importing, creating manually, or automatically capturing them from your website.
- Automatically assign leads using assignment rules based on geography, source, or other attributes.
- Easily convert leads that you identify as a real sales opportunities into an accounts, contacts, and opportunities.

Benefits of Lead Management

Managing your leads allows you to:

- Optimize your lead process from capture to close
- Prevent dropped leads
- Route leads from your website automatically
- Spend your marketing dollars more efficiently

PLANNING YOUR IMPLEMENTATION

Before you set up lead management, we recommend that you answer the following questions to ensure that you have all of the information you need to set up and use leads.

- Do you need to customize fields to meet your business needs?
- What information should be available on leads?
- Do you want to create email templates for lead assigment rules, auto-response rules, or to send to prospects who are interested in your company?
- How do you want to route incoming leads?
- Where are you planning to capture leads?
- Who should have access to leads?
- Do you have leads that you need to import into Salesforce?

Note: If you have Enterprise, Unlimited, or Performance Edition, you can create a complete single copy of your organization in a separate environment, called a sandbox, to test your changes before implementing them in your Salesforce organization. For details, see "Creating a Salesforce Sandbox" in the Salesforce online help.

Do you need to customize fields to meet your business needs?

Leads in Salesforce have default fields such as `Lead Source` and `Lead Status` but you may want to customize them to help you track your leads better. Additionally, you may want to create custom fields to meet your specific business needs.

Consider these suggestions for planning custom fields:

- Customize the `Lead Source` field. This field indicates the marketing channel used to get the lead. By default, the `Lead Source` field includes sources like Web, advertisement, and trade show. Your company may generate leads based on additional sources, which you may want to add to the `Lead Source` field. For example:
  - Email
  - Events
  - Purchased lists of leads
  - Leads captured from your website
- Customize the `Lead Status` field. This field indicates the state of the lead in the pre-sales process of turning a lead into an opportunity. Some default values for the `Lead Status` field include Open, Contacted, and Qualified. These values may not match your pre-sales process, so you may want to add additional values.
- Create custom fields: Salesforce provides standard lead fields, but you will likely want to track additional information specific to your business. Create a list of all the attributes you want to track. Then, prepare a list of all the custom fields you need to create for each attribute.
- Map custom fields: Salesforce automatically maps standard lead fields to standard account, contact, and opportunity fields when you convert a lead into an account, contact, and opportunity. Custom lead fields can be mapped to custom account, contact, or opportunity fields. Before converting a lead, create the appropriate custom account, contact, or opportunity fields. Then, set the appropriate mapping for the custom lead fields.

What information should be available on leads?

If you want to make some fields read only or required and hide other fields completely, customize your lead page layout.

Before customizing your lead page layout, think about how you plan to use it. Here are some things to consider:

- Fields that should be visible
- Fields that should be editable
- Fields that should be required
- Related lists that you want on the lead page layout
- Custom links that you want on the lead page layout

Do you want to create email templates for lead assigment rules, auto-response rules, or to send to prospects who are interested in your company?

To get started quickly, create text email templates using Salesforce merge fields. Merge fields are placeholders for variable text that you want replaced with data from your records.

Determine how many email templates you need. For example, you may need email templates for:

- Reps to use as introductions, company overviews, invitations to events, seminar invitations, or thank you notes
- Capturing leads online by sending email to people who submit forms on your website
- Sending your users a notification when they are assigned a new lead

Note: You may want to create folders to organize your email templates and ensure that they are available to the appropriate users.

How do you want to route incoming leads?

When incoming leads are imported or generated through your website, Salesforce automatically assigns them to users or queues. You can define assignment rules to ensure the leads go to the right owner.

Consider the following when planning assignment rules:

- How leads will be assigned, for example, based on territory, product interest, or on a lead assignment hierarchy
- If leads will be assigned to users or queues, which allow members of the queue to take ownership of the leads
- The lead attributes that determine how a lead is routed, for example, by geography

Where are you planning to capture leads?

If you already have a product inquiry page on your website where customers can enter contact information, you can easily customize the HTML and redirect the information to Salesforce using web-to-lead.

Consider the following when planning your Web-to-Lead implementation:

- Design a default email template that reflects your company brand and messaging to send to people who submit inquiries through your website.

- Set up auto-response rules that determine when to send custom lead-specific email templates.
- Consider custom lead fields that you want captured on your web page.

Who should have access to leads?

It may be important to your company to limit the visibility of leads. Select the sharing model that fits your desired level of visibility:

- Public Read/Write/Transfer: Users can view, edit, and transfer ownership of any record, regardless of owner
- Public Read/Write: Users can view and edit any record regardless of owner, but cannot change the record owner
- Public Read Only: Users can view any record but only edit ones they own
- Private: Only lead owners, their managers, and administrators have access to view and edit their leads

Do you have leads that you need to import into Salesforce?

If you have leads that aren't yet in Salesforce, you can import them so that all your leads are in one place. Importing your lead data into Salesforce is easy, regardless of what application you use.

Before you import your data from another source:

- Determine if you need to create custom fields to accommodate imported data that is not tracked in standard fields
- Decide if you want to use assignment rules, for example, to auto-assign leads when you import them.

CUSTOMIZE FIELDS

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

You may want to customize fields in Salesforce to support your specific process.

Customizing Standard Picklist Fields

To add or remove values from the standard picklist fields:

1. From the object management settings for leads, find the fields area.
   - If you're using Salesforce Classic, from Setup, enter *Leads* in the Quick Find box, then select **Fields**.
   - If you're using Lightning Experience, from Setup, at the top of the page, click **Object Manager**. Next, click **Lead** and then click **Fields & Relationships**.
2. Click **Edit** next to the picklist field you want to change.
3. Click **Edit** next to the picklist value you want to change.
4. Make any changes.
5. Click **Save**.

Note: Salesforce assigns the default lead status value to each lead generated from a website inquiry.

Creating Custom Fields

Create custom lead fields of any type. For example, you can create fields that contain text, dates, or picklist values. Consult the Salesforce online help for a comprehensive list of available custom field types.

To create custom fields:

1. From the object management settings for leads, find the fields area.
2. Click **New**.

   Tip: On custom objects, you can also set field dependencies and field history tracking in this section.

3. Choose the type of field and click **Next**. Consider the following.
   - Some data types are available for certain configurations only. For example, the `Master-Detail Relationship` option is available for custom objects only when the custom object doesn't already have a master-detail relationship.
   - Custom settings and external objects allow only a subset of the available data types.
   - You can't add a multi-select picklist, rich text area, or dependent picklist custom field to opportunity splits.
   - Relationship fields count towards custom field limits.
   - Additional field types may appear if an AppExchange package using those field types is installed.
   - The Roll-Up Summary option is available on certain objects only.

- Field types correspond to API data types.
- If your organization uses Shield Platform Encryption, ensure you understand how to encrypt custom fields using the Shield Platform Encryption offering.

4. For relationship fields, associate an object with the field and click **Next**.
5. Enter a field label.

   Salesforce populates `Field Name` using the field label. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. Use the field name for merge fields in custom links, custom s-controls, and when referencing the field from the API.

   Tip: Ensure that the custom field name and label are unique for that object.

   - If a standard and custom field have identical names or labels, the merge field displays the custom field value.
   - If two custom fields have identical names or labels, the merge fieldcan display an unexpected value.

   If you create a field label called *`Email`* and a standard field labeled `Email` exists, the merge field is unable to distinguish between the fields. Adding a character to the custom field name makes it unique. For example, *`Email2`*.

6. Enter field attributes and select the appropriate checkboxes to specify whether the field must be populated and what happens if the record is deleted.
7. In Enterprise, Unlimited, Performance, and Developer Editions, specify the field's access settings for each profile, and click **Next**.

Access Level	Enabled Settings
Users can read and edit the field.	**Visible**
Users can read but not edit the field.	**Visible** and **Read-Only**
Users can't read or edit the field.	None

Note:

- When you create a custom field, by default the field isn't visible or editable for portal profiles, unless the field is universally required.

8. Choose the page layouts that will display the editable field and click **Next**.

Field	Location on Page Layout
Normal	Last field in the first two-column section.
Long text area	End of the first one-column section.
User	Bottom of the user detail page.
Universally required	Can't remove it from page layouts or make read only.

9. For relationship fields, optionally create an associated records related list and add it to page layouts for that object.
   - To edit the related list name on page layouts, click **Related List Label** and enter the new name.

- To add the related list to customized page layouts, select `Append related list to users' existing personal customizations`.

10. Click **Save** to finish or **Save & New** to create more custom fields.

Enterprise, Unlimited, Performance, and Developer Edition users can further define field-level security to restrict user access to fields. Consult the Salesforce online help for more information about using field-level security.

Guidelines for Mapping Custom Fields for Lead Conversion

- The following Lead custom field types can only be mapped to custom fields of the same data type.
  - Checkbox
  - Currency
  - Date
  - Date/Time
  - Email
  - Geolocation
  - Encrypted (Classic)
  - Number
  - Percent
  - Phone
  - Multi-select Picklist
  - Long Text
  - Rich Text
  - URL
- Each target field can have only one source field mapped to it.
- You can map auto-number fields to field types text or text area.
- You can map text and text area fields to custom field types of text, text area, long text, and picklist. If you map to a picklist field, the picklist must be unrestricted.
- You can map custom picklist fields to custom field types of text, text area, and picklist (unrestricted), but not long text.
- When mapping between picklist and text fields, your data truncates if the source field value is longer than the target field allows.
- Custom lookup fields can be mapped to a lookup field pointing to the same object. For example, a lead custom lookup field pointing to the Account object can be mapped to a contact custom lookup field that also points to the Account object.
- When mapping custom lead fields, the selected account, contact, or opportunity field must be of equal or greater length.
- You can't delete lead, account, contact, or opportunity fields included in Lead Custom Field Mapping. To delete a field, first remove its mapping.
- You can't change the field type of a field that's included in Lead Custom Field Mapping. To change a field's type, remove its mapping first.
- You can't uninstall a package that references fields included in Lead Custom Field Mapping. Remove any mappings of referenced fields before uninstalling the package.
- When mapping lead custom number, currency, or percent fields, the target field must have the same length and number of decimal places.

Note: Do not map custom formula fields to other formula fields or any other type of field.

Map Custom Fields for Lead Conversion

When sales reps convert qualified leads, the information from the standard lead fields appears in standard fields for contact, account, and opportunity records. If you set up custom lead fields, you specify how that custom information converts to custom fields in accounts, contacts, and opportunities.

1. From the object management settings for leads, go to the fields section, then click **Map Lead Fields**.
2. For each custom lead field, choose a custom account, contact, or opportunity field into which you want the information inserted when you convert a lead. In Lightning Experience, a custom lead field can map to account, contact, and opportunity fields at the same time.
3. Save your work.

CUSTOMIZING LEAD PAGE LAYOUT

If you want to make some fields read only or required and hide other fields completely, customize your lead page layout.

To edit the page layout:

1. From the object management settings for leads, go to Page Layouts.
2. Click **Edit** next to the page layout name.
3. Make any desired changes.
4. Click **Save**.

For more detailed information about editing page layouts, see Customize Page Layouts with the Enhanced Page Layout Editor in Salesforce help.

CREATING EMAIL TEMPLATES

Create email templates to use in lead assignment rules, auto-response rules, or to send to prospects who are interested in your company. Use Salesforce to make these email templates match your company messaging.

Design simple email templates to get your users started using consistent messaging. Later, you can build HTML email templates based on a letterhead so that you can keep your company branding consistent Consult the Salesforce online help for instructions on creating an HTML email template or custom HTML email template.

1. Do one of the following:
   - If you have permission to edit public templates, from Setup, enter *Email Templates* in the Quick Find box, then select **Classic Email Templates**.
   - If you don't have permission to edit public templates, go to your personal settings. Enter *Templates* in the Quick Find box, then select **Email Templates** or **My Templates**—whichever one appears.
2. Click **New Template**.
3. Choose the Text template type, and click **Next**.
4. Choose a folder in which to store the template.
5. To make the template available for use, select the Available For Use checkbox.
6. Enter a name in Email Template Name.
7. If necessary, change the Template Unique Name.

   Note: This unique name refers to the component when you use the Lightning Platform API. In managed packages, this unique name prevents naming conflicts in package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With the Template Unique Name field, you can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.
8. If desired, choose a different character set from the Encoding dropdown list.
9. Enter a Description for the template. Both template name and the description are for your internal use only.
10. Enter a Subject for the message.
11. Enter the text of the message.
12. If desired, enter merge fields in the template subject and text body. When you send an email, these fields are replaced with information from your records.
13. Click **Save**.

Note: Click View Sample Template to follow a model of an email template.

Consult the Salesforce online help for more information on creating an HTML email template or custom HTML email template.

DEFINING ASSIGNMENT RULES

When incoming leads are imported or generated through your website, Salesforce automatically assigns them to users or queues.

Creating Lead Queues

A lead queue is a place to store unassigned leads. Leads can be manually assigned to queues or automatically assigned using assignment rules. Lead queues can have any number of members and members of the queue can take ownership of leads in that queue.If you want users to choose leads from a common place, set up lead queues and give membership to the appropriate users.

Lead queues are an efficient way of sharing leads if you are working in a private sharing model. For example, if you have several reps that cover the same territory, you may want to create lead queues for each territory. Then, make each rep a member of the lead queue for his or her territory so only the reps that cover a territory can pull leads from that territory.

To create a lead queue:

1. From Setup, enter *Queues* in the Quick Find box, then select **Queues**.
2. Click **New**.
3. Enter a label and queue name. The label is the name of the list view that users work from.
4. Choose whom to notify when new records are added to the queue.
5. If your org uses divisions, select the queue's default division. Cases inherit the division of the contact that they're related to. If a case doesn't have a contact, it's assigned to the default global division.
6. Add which objects to include in the queue.
7. Add queue members. Members can be individuals, roles, public groups, territories, connections, or partner users.

   Depending on your sharing settings, only queue members and users above them in the role hierarchy can take ownership of records in the queue.

   Note: Keep these considerations in mind when adding queue members:

   - To manage members of a queue that's mapped to a contact center for voice calls only, don't use the Queues page. Instead, use the Contact Center details page. For more information, see Manage Contact Center Queues in Salesforce and Your Contact Center.
   - If the **Grant Access Using Hierarchies** option is unchecked for a public group that you're adding to a queue, only queue members are added to the queue. If the option is checked, managers of those queue members are also added to the queue.
   - If you add a role and its subordinates to a queue, all users with that role and their subordinates are added as queue members. Anyone above that role is added as managers of the queue members.
   - Work can be routed to queue members only, not their managers.
   - Guest users can't be queue members.
   - After enabling digital experiences, all Roles and Subordinates members in queues are converted to Roles, Internal and Portal Subordinates members. Review queues that contain Roles, Internal and Portal Subordinates members, and replace them with Role and Internal Subordinates as required.

8. Save the queue.

9. If you want, set up assignment rules for your lead or case queues so that records that meet certain criteria are automatically added to a queue.

Selecting a Default Lead Owner

The default lead owner becomes the owner of a lead when no assignment rules apply. The default lead owner can be a user or a queue. Select a default lead owner so that no lead can fall through the cracks.

To select a default lead owner:

1. From Setup, enter *Lead Settings* in the Quick Find box, then select **Lead Settings**, and then click **Edit**.
2. Define the default lead owner and lead conversion settings.
3. Save your settings.

Creating Lead Assignment Rule

An assignment rule can consist of up to 3,000 rule entries, including 300 formula rule entries, which designate a lead assignee based on any lead criteria. For example, a rule entry can assign leads from people in western states to your West Coast sales rep. Another rule entry can assign all leads interested in a particular product to a queue of reps that know that product. Most companies only need one assignment rule, but during a holiday shutdown period or offsite meeting, you may want to temporarily switch to a different assignment rule. You can create several assignment rules, but only one can be active at a time.

To create a lead assignment rule:

1. From Setup, enter *Assignment Rules* in the Quick Find box, then select **Lead Assignment Rules**.
2. Click **New**.
3. Enter the name of the rule.
4. Select Set this as the active lead assignment rule to activate the rule immediately.
5. Click **Save**.
6. Click the name of the rule you just created.
7. Click **New** in the Rule Entries section.
8. Enter an order number that tells Salesforce when to fire the rule entry in relation to other rule entries.
9. Select the criteria that determines what attributes the lead must have before Salesforce applies the rule entry.
10. Choose the user or queue to be the assignee if the criteria is met.
11. Choose a notification template to be used when sending an email to the new lead owner.
12. Click **Save**.

Leads are processed through the rule entries in order until a match is found amongst the lead and the rule entry criteria. When Salesforce finds a match, it assigns the lead.

Examples of lead assignment rules:

Sort Order	Criteria	Assign to	Email?
1	[Promotion Code equals "Ad_Feb2003"]	Marketing	Yes

2	[Lead Type starts with “Partner App”]	Partner Queue	Yes
3	[State equals “CA, California”]	Susie Delaney	Yes
4	[Country equals “Italy, IT”]	Italian Queue	Yes

CAPTURING LEADS FROM YOUR WEBSITE

You may already have a product inquiry page on your website where potential customers can enter contact information. By customizing the HTML on your product inquiry page, you can redirect the information into Salesforce to automatically generate a lead. This process of capturing leads from your website is called Web-to-Lead.

Setting up Web-to-Lead

1. From Setup, enter *Web-to-Lead* in the Quick Find box, then select **Web-to-Lead**.
2. To enable or change Web-to-Lead settings, click **Edit**.
3. Optionally, select **Require reCAPTCHA Verification** to reduce spam and reject leads without verification.

   In orgs created after Winter '19, this setting is enabled by default.
4. Optionally, specify a **Default Lead Creator**. This user is listed as Creator when a Lead is created online. The default lead creator must have the Modify all Data and Send Email permissions and they must both be granted via a permission set or a user profile. Don't use a combination of a permission set and a user profile to grant these permissions to this user.
5. Optionally, specify a **Default Response Template** if you want to automate email replies to prospects. You can set up response rules to use different email templates based on the information prospects provide. If you do, the default response template is used when no auto-response rules apply. Templates must be marked *Available for Use*.
6. Click **Save**.
7. To create a form that captures prospect details on your website, click **Create Web-to-Lead Form**, and then select fields you want to include.
8. Select fields to include on your Web-to-Lead form. Use the Add and Remove arrows to move fields between the Available Fields list and the Selected Fields list. Use the Up and Down arrows to change the order of the fields on your form.
   - Select the `Campaign` field.
   - For organizations using multiple currencies, add the `Lead Currency` field if you add currency amount fields, otherwise all amounts are captured in your corporate currency.
   - Use a custom multi-select picklist to allow potential customers to express interest in several products.
   - For organizations using lead record types, select the `Lead Record Type` field if you want users to select a record type for Web-generated leads.
9. If your organization uses the Translation Workbench or has renamed tabs, select the language for the form labels displayed on your Web-to-Lead form. The source of your Web-to-Lead form is always in your personal language.
10. Specify the complete URL to direct users to after they submit their information and then click **Generate**. For example, you can use your company's home page for a thank you page.
11. If you want to add a reCAPTCHA widget to the lead submission form, select **Include reCAPTCHA in HTML**.
    - This setting is automatically selected and is read-only when **Require reCAPTCHA Verification** is enabled.

      Note: If **Include reCAPTCHA in HTML** is selected but **Require reCAPTCHA Verification** isn't, existing forms without reCAPTCHA keep working and continue to generate leads. We recommend that you enable **Require reCAPTCHA Verification** and then ensure that your HTML on your website includes the reCAPTCHA validation code.

- Specify the reCAPTCHA API Key Pair using the lookup.
- If you want to allow all traffic in the case that the Google reCAPTCHA servers aren't available, select **Enable server fallback**.

12. Copy the generated HTML code and provide it to your company's webmaster so they can incorporate it into your website.

13. Click **Finished**.

Setting up Web-to-Lead Auto-Response Rules

You may want to send incoming leads different email responses depending on their attributes. For example, leads who expressed interest in a particular product should receive an email template with information about that product. Set up Web-to-Lead auto-response rules that contain the attributes a lead must have to receive an email template. Auto-response rules can have multiple rule entries but only one Web-to-Lead auto-response rule can be active at a time.

Note: Auto-response rules are not available in Group Edition.

To set up Web-to-Lead auto-response rules:

1. From Setup, enter *Auto-Response Rules* in the Quick Find box, then select **Lead Auto-Response Rules**.

2. Click **New**.

3. Enter a name for the rule.

4. Select the Set this as the active Web-to-Lead Auto-Response rule box to make the rule the active auto-response rule. You can only have one active auto-response rule, but the rule can contain many rule entries.

5. Click **Save**.

6. Click the name of the rule that you just created.

7. Click **New** in the Rule Entries section.

8. Enter a number to indicate the order the rule entry should be processed in relation to other rule entries.

9. Select the attributes a lead must meet to receive this template.

10. Enter the email name and address of the sender.

11. Choose an email template to use when the selected attributes apply.

12. Click **Save**.

CUSTOMIZING THE LEAD SHARING MODEL

The sharing model for leads determines the access your users have to lead records.

Choosing a Lead Sharing Model

After determining the level of visibility your users should have, change your sharing model settings for leads.

To choose a lead sharing model:

1. From Setup, enter *Sharing Settings* in the Quick Find box, then select **Sharing Settings**.
2. Click **Edit** next to Organization Wide Defaults.
3. Choose a default access level for the lead object.
4. Click **Save**.

Note: Be aware of how your sharing model affects your lead queues. For example, in a Private sharing model, only queue members and their direct reports can view or take ownership of leads owned by a queue. In a Public Read/Write or Public Read Only sharing model, all users can view records owned by a queue but only queue members can take ownership of them. For more information about sharing models, see "Managing the Sharing Settings" in the Salesforce online help.

IMPORTING LEADS

Importing your lead data to Salesforce is simple, regardless of what application you use. If you use an application that allows you to export data into a comma separated values format (CSV), you can import that data into Salesforce.

Exporting your Data

Use your current third-party application to create an export file of your data; exporting your data takes place outside of Salesforce. The steps to export your data differ depending on the application you use. Consult the help for your application for specific instructions. For most applications, you can click **File** > **Export** to get started.

Preparing your Import File

When you have a CSV file, you can open it in an application like Excel to verify that the data is correct. You may need to create custom fields for any extra columns. You may also need to change the column headers so that your data easily maps to Salesforce fields.

Examples of field mappings:

Salesforce Field	Import File Label
First Name & Last Name	Full Name of First Name & Last Name
Lead Source	Lead Source
Mobile	Mobile Phone

For more information on preparing your import file and mapping fields, see the Salesforce online help.

Importing a File into Salesforce

After you have prepared your import file, you can import your data using the Data Import Wizard.

TRAINING USERS

Lead List Views

Show users how to see their open leads using the lead list views on the Leads tab. For example, they can use the My Unread Leads list view to see a list of new leads; leads are considered "unread" until the lead owner views or edits them.

Creating Leads

Show users how to create leads by clicking **New** on the Leads tab. If you have not disabled the Quick Create option in the sidebar, show users how to create leads in this manner.

Merging Duplicate Leads

Inform users that they can merge two or three duplicate leads into one record by clicking **Find Duplicates** on a lead detail page. Clicking **Merge Leads** allows them to select the values to include in the merged record.

Lead Status

After you have customized your lead status values, educate your users on what each status means. Outline a business process for your users so they know when to use each lead status during the life cycle of a lead.

Accepting Ownership of Leads from Lead Queues

When you create a lead queue, Salesforce automatically generates a list view on the Leads tab using the name of the queue. To view the leads in a queue, members can select the list view for the queue. The lead queue serves as the owner of the lead until a member of the queue manually takes ownership of the lead.

1. Select the queue list view from the Leads tab. The queue list view shows all of the leads in that queue.
2. Select the leads to accept. Accepting a lead will make you the owner of the lead.
3. Click **Accept**.

To change the ownership of a lead you own or have read/write sharing access to, click **Change** next to the `Lead Owner` field, and then specify the name of a user or queue. The **Change** link appears on the lead detail page, not the edit page. Select the `Send Notification Email` box to send an automated email to the new lead owner. If the new owner is a queue, Salesforce sends the email to all of the queue members.

If a lead has real sales potential within a reasonable period of time, convert the lead. Each time you convert a lead, schedule a follow-up task for the sales rep to contact the new account. Be sure the appropriate rep is the lead owner before converting it because you cannot change information on converted leads. The person converting the lead may get credit for the lead conversion if your organization rewards reps for converting leads.

If a lead has the same first name, last name, and account name as an existing contact, Salesforce prompts you to merge data with existing records or create new records. Select a matching account and click **View** to see account information for the matching records.

Lead Conversion

Based on your internal business process, train your users when to convert leads.

- Explain your lead conversion field mappings
- Inform users that information on converted leads is not available from the Leads tab
- Train users when and how to convert leads

If the `Enforce Validation and Triggers from Lead Convert` checkbox is selected on the Lead Settings page in Setup, the following operations occur when a lead is converted.

- Enforcement of universally required fields
- Enforcement of validation rules
- Workflow actions on leads such as field updates, automatic task assignments, and transfers
- Execution of Apex before triggers that fire before the insertion of accounts, contacts, or opportunities. In addition, execution of Apex before triggers that fire before the update of accounts or contacts. For more details, see "Managing Apex Triggers" in the Salesforce online help.

For more details about mapping lead fields, see Map Custom Fields for Lead Conversion on page 8. Custom lead fields that are not mapped to custom account, contact, or opportunity fields are not converted.

KEY REPORTS

Generate standard and customized reports to get up-to-the-minute statistics on lead generation and qualification. Your lead reports can help you analyze your most productive lead sources, reasons for won and lost leads, or the lifetime value of each lead.

The following lead reports are available by clicking the Reports tab and scrolling down to the Lead Reports folder:

- Lead Lifetime: The life of a lead from creation to closure
- Neglected Leads: Leads that need attention
- Lead Status: The status of leads
- Leads by Source: The sources of leads
- Lead History Report: The data history of lead fields
- Leads By Source: The effectiveness of lead sources
- Bounced Leads: Leads with bounced email addresses

FAQ

How do I assign leads to users and prevent other users from seeing them?

If you use a private sharing model, only the owners of a lead record can view or edit the lead record.

How do I mass transfer leads?

Administrators can mass reassign leads using the Mass Transfer tool from Setup by entering *Mass Transfer Records* in the Quick Find box, then selecting **Mass Transfer Records**.

Why can't I import leads?

You may not have the "Import Leads" permission. Users with the Administrator or Marketing User profiles have this permission.

How do I report on converted and unconverted leads?

To run a report that displays information on all converted and unconverted leads, create a custom lead lifetime report that includes *Converted equals True, False*. The Converted field is "False" for unconverted leads and "True" for converted leads. Make sure you have the comma between True and False to include lead records that are converted or unconverted.

Can I convert contacts back to leads?

No, but you can export contact information and then import it as lead records.

What happens to lead data when I convert it?

When you convert a lead, Salesforce creates an account, contact, and optionally an opportunity, using information from the lead you're converting. If the lead was also a campaign member, Salesforce associates the campaign member record with the new contact. The converted lead becomes a read-only record. If existing accounts and contacts share the names specified on the leads, you can choose to update the existing accounts and contacts. Salesforce adds information from the lead into empty contact fields; Salesforce doesn't overwrite existing account and contact data.

Salesforce attaches all activities from the converted lead to the resulting account, contact, and opportunity, except activities initiated from a Sales Engagement cadence. If you delete one of these activities from any of the resulting records, Salesforce also removes it from the other records. To restore an activity to all resulting records, remove it from the recycle bin. You can assign the owners of these new records, and schedule follow-up tasks. When you assign new owners, only the open activities are assigned to the new owner. If you have custom lead fields, that information can be inserted into custom account, contact, or opportunity fields. Your admin can also set up your custom lead fields to populate custom account, contact, and opportunity fields automatically. You can't view converted leads, unless your admin has assigned you the "View and Edit Converted Leads" permission. However, converted leads do appear in lead reports.

Salesforce updates the `Last Modified Date` and `Last Modified By` system fields on converted leads when picklist values included on converted leads are changed.

If I want to delete a value in the Lead Source field, what will happen to records with that value?

If you remove a picklist value, existing leads with that value are not affected. They continue to display the deleted value until you manually change it or mass replace the value. However, new leads cannot contain the deleted value because it will not be available in the Lead Source picklist field.

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