Summary

A lead is a prospect or potential opportunity. As an administrator, you can import leads from a file or set up Web-to-Lead to create leads from your company's website.

Lead Queues

- Use lead queues to manage lead distribution
- Create queues for different teams and assign different reps as members of each queue
- Queue members can take ownership of leads that are in queues of which they are a member

Assigning Leads

You can automatically assign imported or Web-generated leads to users or queues using lead assignment rules based on region, product, or other lead criteria. To get started with lead assignment rules:

- From Setup, enter `Assignment Rules` in the `Quick Find` box, then select **Lead Assignment Rules**.
- To set rules and rule entries:
  - Create one rule for each lead creation method; for example, Web-to-Lead and lead import may require two separate rules.
  - Within each rule, create separate rule entries for each assignment criteria, such as product, region, or area of expertise. For example, the lead import rule can have entries for "State equals CA, WA" and "State equals AZ, NM".
  - Only one rule can be active at a time. Select `Set this as the active lead assignment rule` for the rule you want to enabled.
  - Instruct your users to select `Assign Lead using active Assignment Rule` when entering a new lead manually, or the active assignment rule will not be applied.

To change lead owners:

- To change the owner of a single lead, click **Change** next to the `Lead Owner` field on the lead detail page.
- To change the lead owner for multiple leads, view a lead list view, select the boxes next to the leads, and click **Change Owner**.
- You can also transfer ownership of multiple leads. From Setup, enter `Mass Transfer Records` in the `Quick Find` box, select **Mass Transfer Records**, and then click **Transfer Leads**.

Web-to-Lead

You can capture leads directly from your website using Web-to-Lead. With Web-to-Lead, you can capture up to 500 leads per day. To increase this limit, contact Salesforce. To get started with Web-to-Lead:

1. From Setup, enter `Lead Settings` in the `Quick Find` box, then select **Lead Settings**, then click **Edit**.
2. Set the `Default Lead Owner` and select the checkbox to notify the default lead owner automatically when a lead is assigned to him or her. The default lead owner is the owner of any leads that are not auto-assigned by lead assignment rules.
3. From Setup, enter `Web-to-Lead` in the `Quick Find` box, then select **Web-to-Lead**, then click **Edit**.
4. Enable Web-to-Lead for your organization.
5. Create Web-to-Lead email auto-response rules to determine which emails to send to prospects when they submit information online.

6. Specify the `Default Lead Creator` who will be listed as the creator of leads captured online, then click **Save**.

7. Click **Create Web-to-Lead Form**, select the fields to include in the form, and specify a URL that users will be taken to after submitting the form.

8. Click **Generate**, then copy the generated HTML code and send it to your corporate webmaster. Your webmaster can customize it for your site, but should not change any of the form elements.

Importing Leads

Custom Fields and Mapping

- Set up custom fields for imported data that does not match standard fields
- Create custom fields for non-standard fields to be filled in with Web-to-Lead
- When converting leads, you can map custom lead fields to custom fields in opportunities, contacts, or accounts

Administrators and users with the "Import Leads" permission can import a file of up to 50,000 leads via the Data Import Wizard in Setup. Individual users can create but not import leads. To import leads:

1. Follow the on-screen instructions to export your data from its current source and label each column in the file with the correct field name.

2. A lead assignment rule can automatically assign leads to users or queues based on values in lead fields. Alternatively, a `Record Owner` field in the import file can determine lead ownership for each imported lead.

3. Without a lead assignment rule or `Record Owner` field, imported leads are automatically assigned to the administrator doing the import.

4. The Import Queue shows the status of the import. You will be notified by email when your import is complete—it may take up to 24 hours.

5. Marketing users with the "Marketing User" profile can also import new leads by selecting **Add Members - Import File** from the **Manage Members** drop-down button on a campaign detail page.