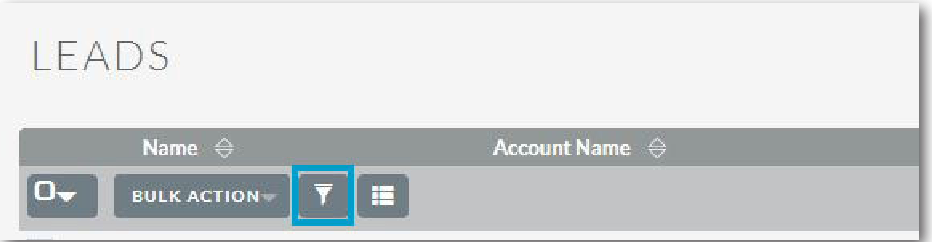
fibreCRM | HEART OF THE PRACTICE

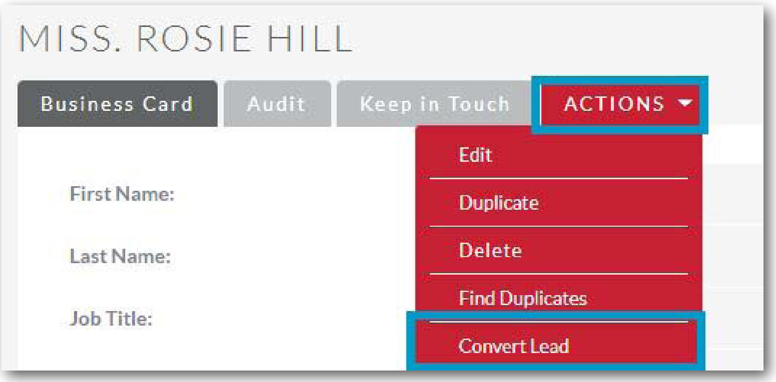
Visit support.fibrecrm.com for more info or contact your CRM Manager

Converting a Lead

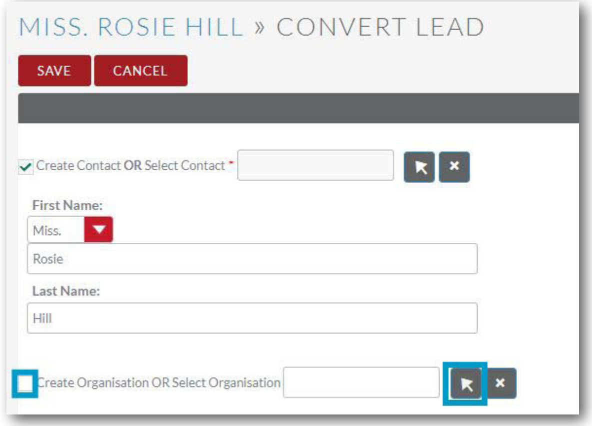
1. When a **Lead** record has been qualified in, it is ready to be converted. This means that from the **Lead** record; **Person, Organisation** & **Opportunity** records can be created for that Lead – or linked if the Person or Organisation already exist within the CRM. To convert a Lead, navigate to the correct record in the **Leads Module** by using the **Search Filter**.



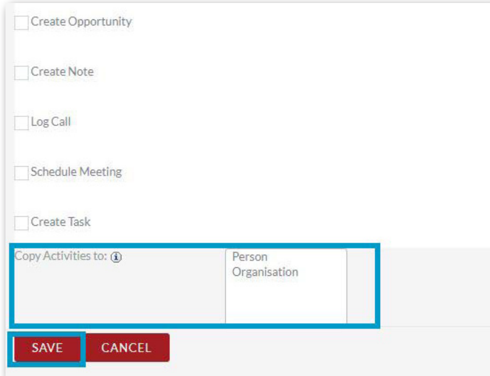
2. In the **Actions Menu** select **Convert Lead**



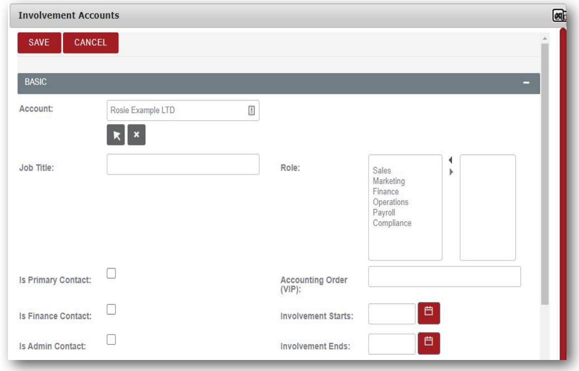
3. On the **Lead Conversion Screen** select the tick box if the Lead will be a new a Person/Organisation. The information from the Lead Record will be pulled through. If the Lead is related to an existing Person/Organisation record untick the tickbox and use the **Select Arrow** button to select the existing record.



4. You can also **Create an Opportunity** by selecting the tickbox. Enter all the required information about the **Opportunity**. **Notes** and **Tasks** can also be created. The **Copy Activities To** box will show you what actions will be executed. If the details are all correct, hit **Save.**



5. The involvement pop up box will appear where you can create the **Involvement** between the Organisation and Person record.



6. You'll then be able to view the newly created records from the **Converted Lead.**