
Salesforce

Leads

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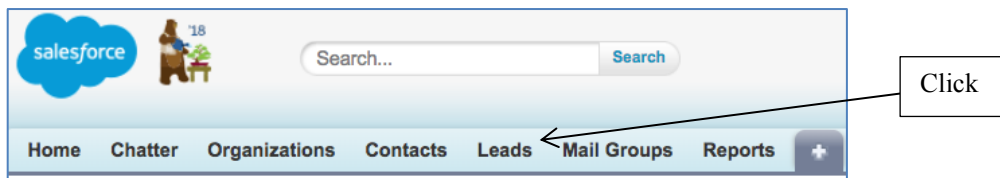
1 Overview

A way to organize your contacts and follow-up with new contacts is to use the Leads feature. Leads allow you to create a relationship with a contact or find more information before converting that contact to a contact list. Typically, that contact list that you convert the lead over to will be your county's contacts, but in some instances that contact may be better suited to be managed in a different organization.

Some leads also appear from integrations with other apps, including Cvent and Qualtrics. For example, when a new contact signs up for an event through Cvent they will first go to your leads so you are properly notified about the new contact.

2 View Leads

1. Log into your Salesforce account and click the **Leads** tab from the top menu.



2. Select the view for your county's leads from the **View** drop-down, and then click **Go**.

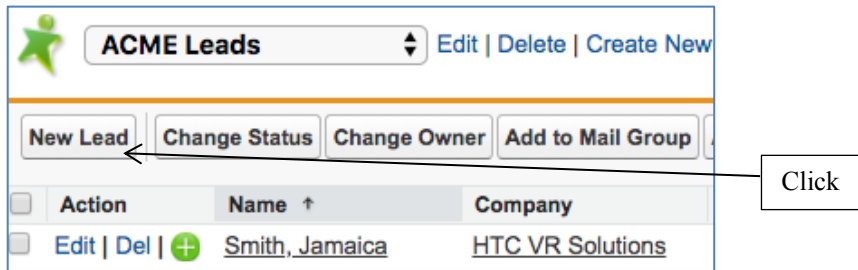


3. You will then see a list of your leads. Starting out you won't have any leads until you start adding them.
4. You can view any lead by clicking on the name of the lead.

Note: You can edit and delete Leads the same way you would edit or delete Contacts. Please refer to the user guide on Contacts for information on editing and deleting.

3 Add a New Lead

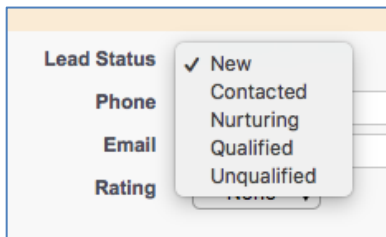
1. Click the **New Lead** button in your lead list.



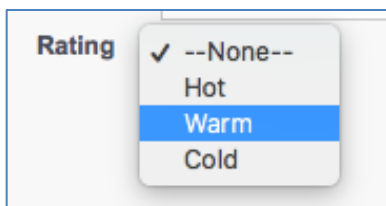
2. Fill out any info for the new lead.

Note: The **Last Name**, **Company**, and **Account** fields are the only required fields. **Company** can be the company the new lead works for. You do not need to put your county or Organization Name into the **Company** field – add that to the **Account** field.

3. For the **Lead Status** field leave the drop-down as **New**. You can change this status at any time. For example, you can change the status to **Qualified** once you're ready to convert the lead to your contacts.



4. You can also change the **Rating** to reflect the relationship with the lead at this point. For example, you can select **Warm** if you feel that the lead will most likely become a contact.



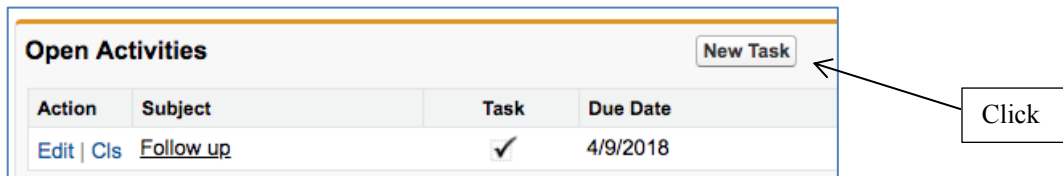
- Click the **Save** button to add the new lead.

Note: You can click **Save & New** if you want to continue adding new leads.

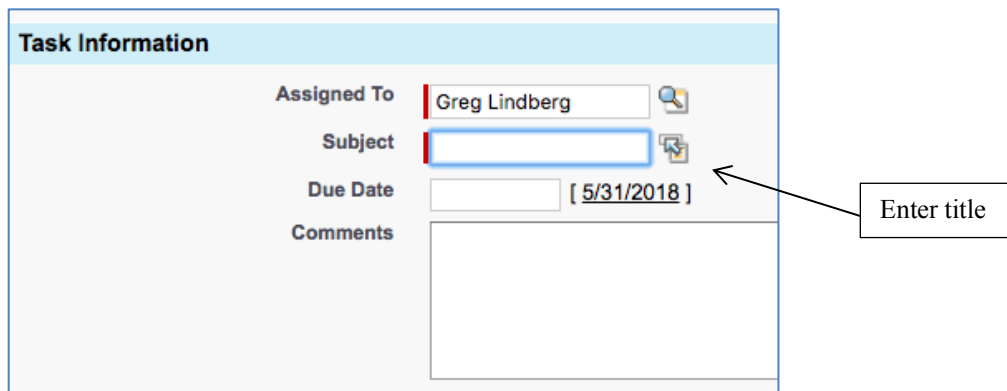
4 Follow up with a Lead

You can set tasks to have reminders so that you continue to follow up with your leads.

- Select the lead that you want to follow up with, and then scroll down to the **Open Activities** section.
- Click **New Task**.



- Enter a title for your task into the **Subject** field. Optionally, enter a due date and comments.



- Mark the status and priority, however you prefer, for the particular lead (ex. In progress; low).

- Set the date to be reminded to follow up on the task you created. These reminders will appear on the dates you set them for when you log into Salesforce.

- Click **Save**.

Note: You also can choose to add an attachment to your task.

5 Convert a Lead

When you have completed following up with your lead you can choose to move the lead to your contact list. From there you can manage the lead like you would any other contact.

- Select the lead that you want to convert.
- Click the **Convert** button at the top of the page.

- Leave your name as the record owner.
- Select your county or account you want to send the lead to in the **Organization Name** field.
- In the **Opportunity Name** field select the checkbox for *Do not create a new opportunity upon conversion*.
- “Qualified” will be selected for **Converted Status**.

7. In the **Task Information** section, enter a title for the task you want to create in the **Subject** field. This will be the task letting you or others in your team know that the lead has been moved over to a contacts list.
8. Enter in a due date and comments for your task.
9. In the **Additional Information** section, select the **Status** and **Priority** for the lead conversion.
10. Click **Convert** at the bottom of the page and then the lead will be moved over to the contact list that you specified.

