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## NPSP: Lead Conversion

The Nonprofit Starter Pack offers its own version of lead conversion, this KB article demonstrates the features and functionality

Visit a Lead and Click the Convert Button

A screenshot of the Salesforce NPSP Lead Detail page for a lead named "Bob Smith". The page is titled "Lead Bob Smith" and includes a "Show Chatter" button and a "Follow" button. Below these are tabs for "Open Activities", "Activity History", "Campaign History", and "HTML Email Status". The "Lead Detail" section contains fields for "Lead Owner" (Steve Anderson), "Name" (Bob Smith), "Company" (Self), "Title", "Lead Source", "Industry", "Annual Revenue", "Preferred Phone", "Phone", "Mobile", "Fax", "Preferred Email", "Email", "Website", "Lead Status" (Open - Not Contacted), "Rating", "No. of Employees", "Address", "Created By" (Steve Anderson, 10/28/2010 8:36 PM), and "Last Modified By" (Steve Anderson, 10/28/2010 8:36 PM). At the bottom of the "Lead Detail" section are buttons for "Edit", "Delete", "Convert", "Clone", and "Find Duplicates". A red arrow points to the "Convert" button. Below the "Lead Detail" section are sections for "Open Activities" (No records to display) and "Activity History" (Log A Call, Mail Merge, Send An Email).

The standard Convert button is overridden with the leadConvert Visualforce page

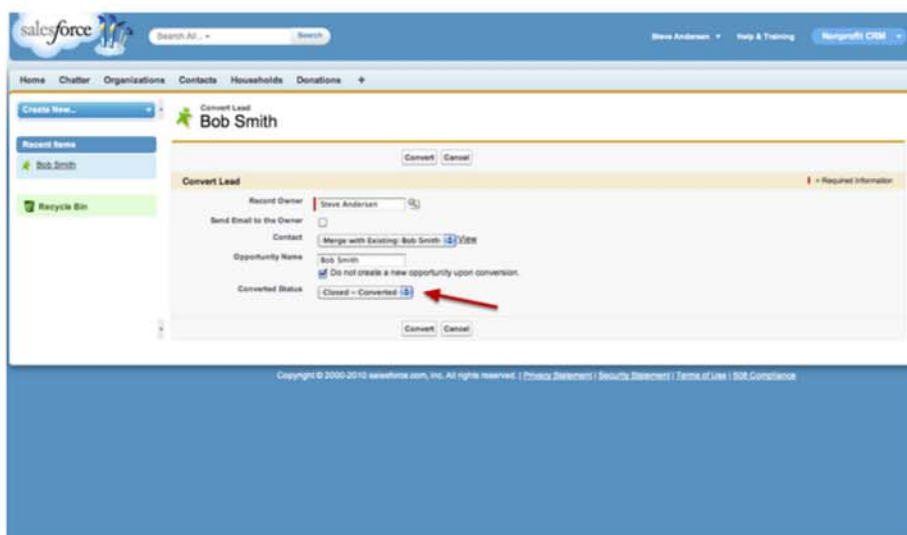
Choose If You Want to Merge to an Existing Contact or Create a New Contact

The screenshot shows the Salesforce NPSP 'Convert Lead' interface for a lead named Bob Smith. The form includes fields for Record Owner (Steve Anderson), Send Email to the Owner, Contact, Opportunity Name, and Converted Status. The Opportunity Name dropdown is open, showing options: 'Create New: Bob Smith' (highlighted with a red arrow), 'Merge with Existing: Bob Smith', and 'Do not create a new opportunity upon conversion'. The Converted Status is set to 'Closed - Converted'.

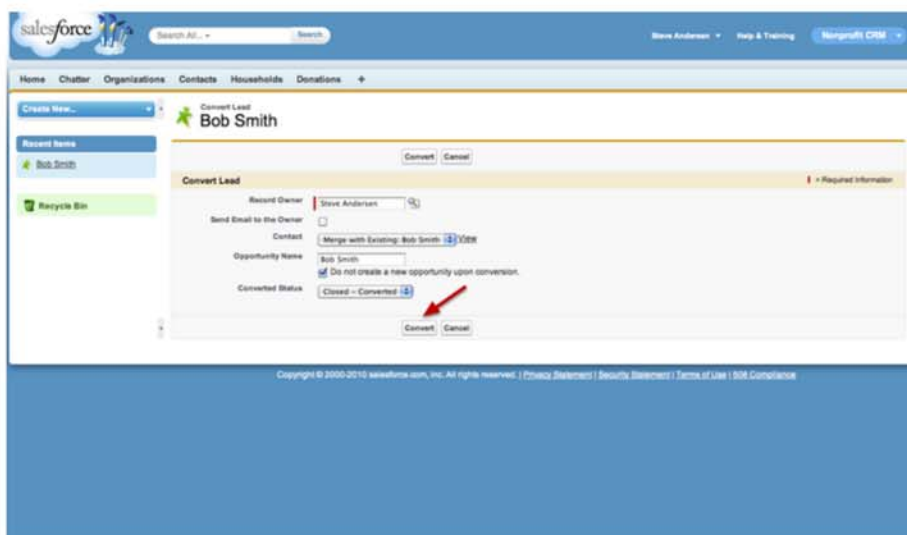
Choose If You Want to Create an Opportunity on Conversion, Naming it Appropriately

This screenshot shows the same 'Convert Lead' form, but with the 'Do not create a new opportunity upon conversion' checkbox checked. A red arrow points to this checkbox. The Opportunity Name dropdown is now closed, and the 'Converted Status' remains 'Closed - Converted'.

Choose the Converted Status for the Lead



Click Convert



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