

NPSP: Convert a Lead to a Contact

The Nonprofit Success Pack includes a Lead conversion utility that provides specialized functionality.

To convert a Lead to a Contact:

1. In the Nonprofit Success Pack, navigate to the page for the Lead you want to convert, and then click the Convert button.

Ms Shelly Brownell

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed Click to add topics

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Open Activities (0) | Activity History (0) | Campaign History (0) | HTML Email Status (0)

Lead Detail

Edit Delete **Convert** Clone Find Duplicates

Lead Owner	David Habib [Change]	Phone	(408) 326-9000
Name	Ms Shelly Brownell	Mobile	
Company	Western Telecommunications Corp.	Fax	
Title	SVP, Technology	Email	shellyb@westerntelecom.com
Lead Source	Partner Referral	Website	

2. Enter the field values on the page as necessary to convert your Lead into a Contact, and possibly a Household.

Convert Cancel

Convert Lead ! = Required Information

Record Owner David Habib

Send Email to the Owner ☐

Contact Create New: Shelly Brownell View

Account Name Create Household Account

Affiliated Account Name Affiliate with Existing: Western Telecommunications Corp.

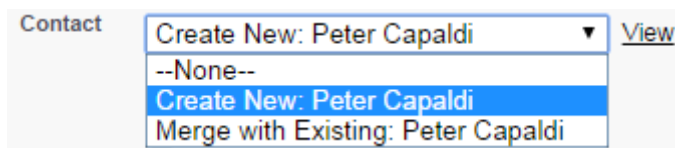
Opportunity Name Shelly Brownell

☒ Do not create a new Opportunity upon conversion.

Converted Status Closed - Converted

- **Record Owner:** Select the owner of the new or merged Contact and Household Account.
- **Send Email to the Owner:** Check this box if you want to send an email to the new owner with a link to the new Contact.
- **Contact:** Includes these options . . .
 1. **Create New:** Select this option to create a new Contact. If you create a new Contact from this Lead, Salesforce also creates a new Household Account for the Contact, or allows you to specify an Organizational Account.
 2. **Merge with Existing:** The NPSP Lead Conversion utility also attempts to find an exact-match (not case-sensitive) Contact in the system, searching for either the email address or the Lead's full name (both First Name and Last Name). If the utility finds potential matches, you'll see them listed in the Contact picklist as an existing Contact. Select Merge with Existing if you want to merge the Lead into an

existing Contact record.



- **Account:** Includes these options . . .
 1. **Create Household Account:** Select this option if you want to create a new Household Account for the new Contact.
 2. **Attach to Existing:** Select this option if the Lead's Company matches an existing Organizational Account, and you want the Contact to use that for their Account.
 3. **Create New Account:** Select this option to create a new Organizational Account using the Lead's Company, and to have the Contact use that for their Account.

NOTES:

- If you choose to merge the Lead into an existing Contact, these choices are not displayed, since the Contact's Account will not be changed.
- If the Company name value on the Lead is "self", the full name of the Lead, or blank, the Account and Affiliated Account options are not displayed on the Lead Convert page.
- **Affiliated Account:** Includes these options . . .
 1. **None:** No Affiliation between the Contact and Account will be created.
 2. **Affiliate with Existing:** Select this option if the Lead's Company matches an existing Organizational Account, and you want to create an Affiliation between the Contact and Account.
 3. **Affiliate with New Account:** Select this option if you want to create an Affiliation between the Contact and a new Organizational Account, created from the Lead's Company.
- **Opportunity Name / Do not create a new opportunity:** If you want to create a new Opportunity (Donation) for the Contact after converting the Lead, deselect the **Do not create a new Opportunity upon conversion** checkbox, and enter a name for the Opportunity. The new Donation record will use the default Record Type for the user who converts the Lead.
- **Converted Status:** If you're utilizing multiple Lead Status values in your organization, select the appropriate value based on your business process.

3. Click the **Convert** button to start the Lead convert process.

When completed, the page displays the newly converted or merged Contact. If you elected to create a new Opportunity as well, you can find the new record by scrolling down to the Donations related list on the Contact page.



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(/_ui/core/userprofile/UserProfilePage?u=00580000005PdCIAAK) contributed by Michael Sitar
Idealist Consulting

