QRG LD.1 – Leads in Salesforce

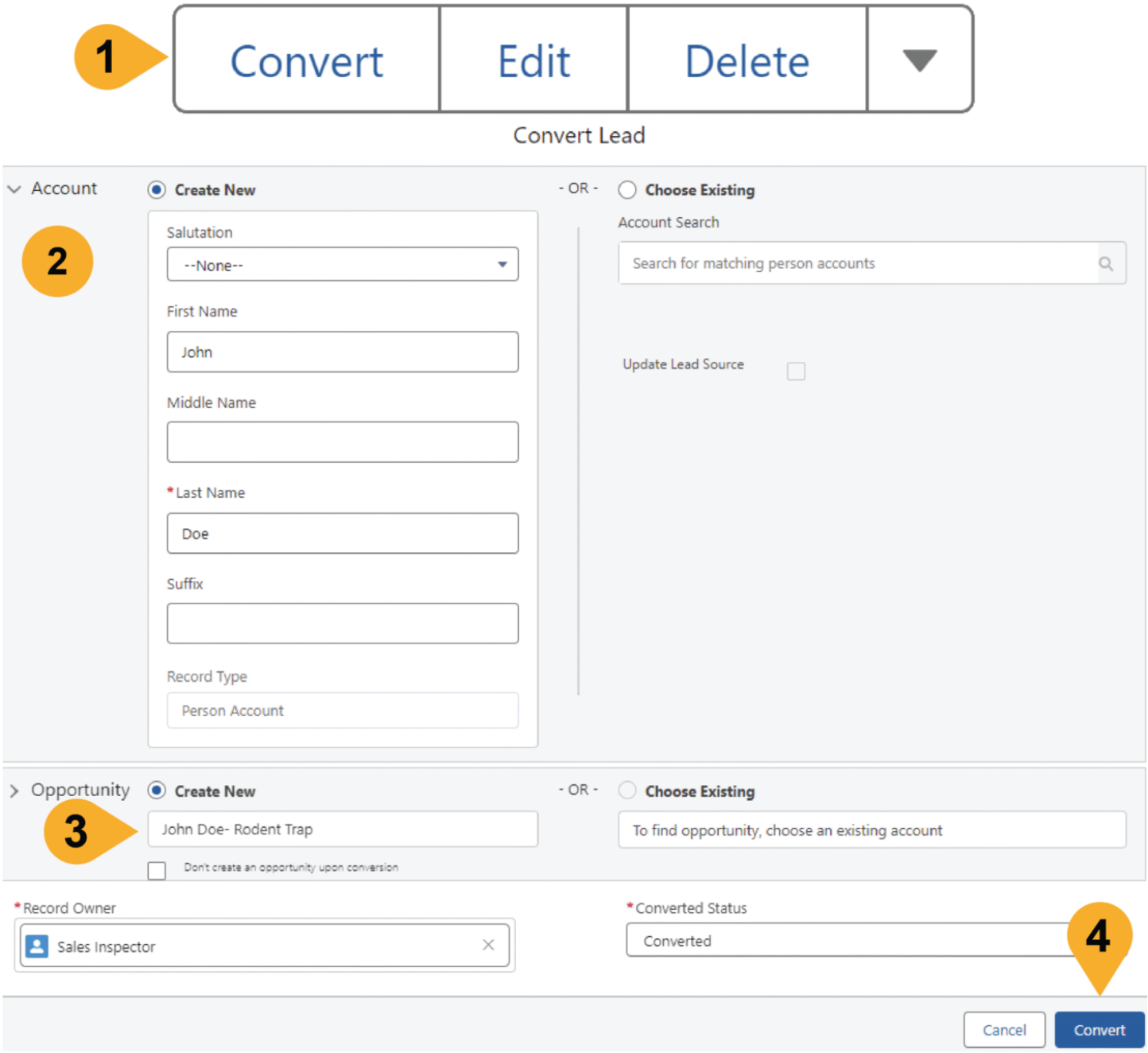
Quick Reference Guides · https://milo.masseyservices.com/docs/qrg-ld-1-leads-in-salesforce/

What They Are

A Lead is a sales prospect who has expressed interest in your product or company, or a prospect that you yourself have come across, but not yet contacted and qualified.

Creating A Lead

1. Click **Save**.
2. Open the Lead Object view.
3. Click **New** in the Quick Action ribbon.
4. Enter the required information for the Lead.



Updating Lead Status

Use the pencil to edit the Lead Status in the Details window in the Lead Record view.

Converting a Lead to an Opportunity

- Click **Convert** in the Quick Action ribbon inside the Lead Record view.

- Make any needed updates.
- Give the Opportunity a name after the dash.
  - Example: John Doe- Rodent Prevention
- Click **Convert**.

Important Note!!!

- Once converted, the Lead will cease to exist!

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