

Lead Conversion Mock-Up

Kim Schaeffges | October 18, 2019

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⬆

JOSH LEAD

★

CONVERT LEAD

Josh Lead

Cancel

Convert

* Record Owner

Cloud For Good Consultant

Q

☐ Send Email to the Owner

Contact

Create New: Josh Lead

⬆

View

Account

Create Household Account

⬆

Affiliated Account

Affiliate with Existing Account: Cloud for Good

⬆

Account Mapping Selection

Map Account fields to Affiliated Account : Cloud for Good

⬆

* Converted Status

Closed - Converted

▼

☐ Do not create a new Opportunity upon conversion.

Opportunity Name

Josh Lead

Opportunity Account

Contact Account

⬆

Opportunity Record Type

Select Opportunity Record Type

⬆

Converted Status is moved above checkbox

Opportunity Name is moved below checkbox

Hide Account Mapping Selection if Affiliated Account = None

Alternate Value: Map Account fields to Contact Account

Checking the box hides the Opportunity fields

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Affiliated Account

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