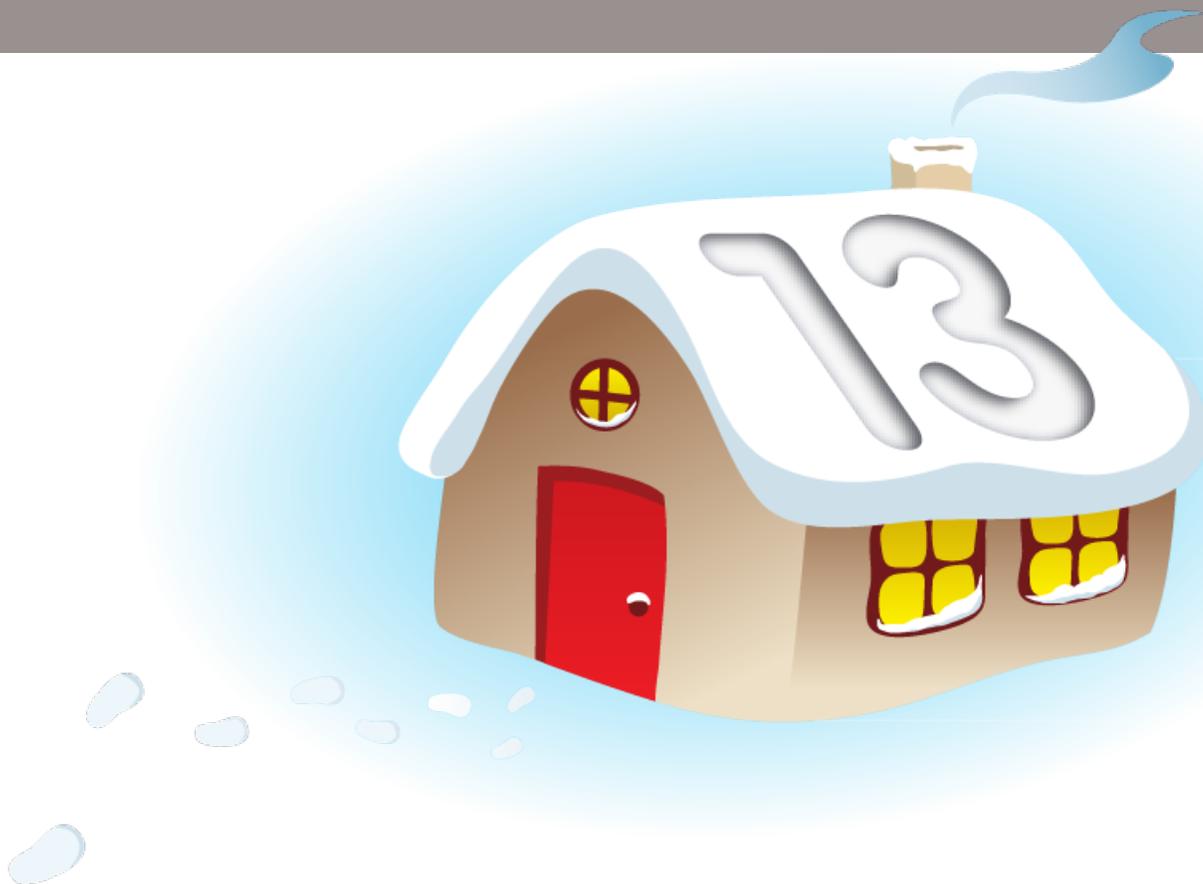




Salesforce.com: Winter '13

Salesforce Lead Management Implementation Guide



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Lead Management Overview

Success in sales starts by building a strong pipeline of leads. A lead is a prospect who is interested in your company.

Lead management helps your inside opportunity or telesales teams qualify leads before passing them on to sales. Sales reps get instant access to the latest prospects and ensures that leads are never dropped. You can:

- Acquire leads by importing, creating manually, or automatically capturing them from your website.
- Automatically assign leads using assignment rules based on geography, source, or other attributes.
- Easily convert leads that you identify as a real sales opportunities into an accounts, contacts, and opportunities.

Benefits of Lead Management

Managing your leads allows you to:

- Optimize your lead process from capture to close
- Prevent dropped leads
- Route leads from your website automatically
- Spend your marketing dollars more efficiently

Planning Your Implementation

Before you set up lead management, we recommend that you answer the following questions to ensure that you have all of the information you need to set up and use leads.

- Do you need to customize fields to meet your business needs?
- What information should be available on leads?
- Do you want to create email templates for lead assignment rules, auto-response rules, or to send to prospects who are interested in your company?
- How do you want to route incoming leads?
- Where are you planning to capture leads?
- Who should have access to leads?
- Do you have leads that you need to import into Salesforce?



Note: If you have Enterprise or Unlimited Edition, you can create a complete single copy of your organization in a separate environment, called a sandbox, to test your changes before implementing them in your Salesforce organization. For details, see “Creating a Salesforce Sandbox” in the Salesforce online help.

Do you need to customize fields to meet your business needs?

Leads in Salesforce have default fields such as `Lead Source` and `Lead Status` but you may want to [customize](#) them to help you track your leads better. Additionally, you may want to [create custom fields](#) to meet your specific business needs.

Consider these suggestions for planning custom fields:

- Customize the `Lead Source` field. This field indicates the marketing channel used to get the lead. By default, the `Lead Source` field includes sources like `Web`, `advertisement`, and `trade show`. Your company may generate leads based on additional sources, which you may want to add to the `Lead Source` field. For example:
 - ◇ Email
 - ◇ Events
 - ◇ Purchased lists of leads
 - ◇ Leads captured from your website
- Customize the `Lead Status` field. This field indicates the state of the lead in the pre-sales process of turning a lead into an opportunity. Some default values for the `Lead Status` field include `Open`, `Contacted`, and `Qualified`. These values may not match your pre-sales process, so you may want to add additional values.
- [Create custom fields](#): Salesforce provides standard lead fields, but you will likely want to track additional information specific to your business. Create a list of all the attributes you want to track. Then, prepare a list of all the custom fields you need to create for each attribute.
- [Map custom fields](#): Salesforce automatically maps standard lead fields to standard account, contact, and opportunity fields when you convert a lead into an account, contact, and opportunity. Custom lead fields can be mapped to custom account, contact, or opportunity fields. Before converting a lead, create the appropriate custom account, contact, or opportunity fields. Then, set the appropriate mapping for the custom lead fields.

What information should be available on leads?

If you want to make some fields read only or required and hide other fields completely, [customize your lead page layout](#).

Before customizing your lead page layout, think about how you plan to use it. Here are some things to consider:

- Fields that should be visible

- Fields that should be editable
- Fields that should be required
- Related lists that you want on the lead page layout
- Custom links that you want on the lead page layout

Do you want to create email templates for lead assignment rules, auto-response rules, or to send to prospects who are interested in your company?

To get started quickly, [create text email templates](#) using Salesforce merge fields. Merge fields are placeholders for variable text that you want replaced with data from your records.

Determine how many email templates you need. For example, you may need email templates for:

- Reps to use as introductions, company overviews, invitations to events, seminar invitations, or thank you notes
- Capturing leads online by sending email to people who submit forms on your website
- Sending your users a notification when they are assigned a new lead



Note: You may want to create folders to organize your email templates and ensure that they are available to the appropriate users.

How do you want to route incoming leads?

When incoming leads are imported or generated through your website, Salesforce automatically assigns them to users or queues. You can [define assignment rules](#) to ensure the leads go to the right owner.

Consider the following when planning assignment rules:

- How leads will be assigned, for example, based on territory, product interest, or on a lead assignment hierarchy
- If leads will be assigned to users or queues, which allow members of the queue to take ownership of the leads
- The lead attributes that determine how a lead is routed, for example, by geography

Where are you planning to capture leads?

If you already have a product inquiry page on your website where customers can enter contact information, you can easily customize the HTML and redirect the information to Salesforce using [web-to-lead](#).

Consider the following when planning your Web-to-Lead implementation:

- Design a default email template that reflects your company brand and messaging to send to people who submit inquiries through your website.
- Set up auto-response rules that determine when to send custom lead-specific email templates.
- Consider custom lead fields that you want captured on your web page.

Who should have access to leads?

It may be important to your company to limit the visibility of leads. [Select the sharing model](#) that fits your desired level of visibility:

- Public Read/Write/Transfer: Users can view, edit, and transfer ownership of any record, regardless of owner
- Public Read/Write: Users can view and edit any record regardless of owner, but cannot change the record owner
- Public Read Only: Users can view any record but only edit ones they own
- Private: Only lead owners, their managers, and administrators have access to view and edit their leads

Do you have leads that you need to import into Salesforce?

If you have leads that aren't yet in Salesforce, you can import them so that all your leads are in one place. [Importing your lead data into Salesforce](#) is easy, regardless of what application you use.

Before you import your data from another source:

- Determine if you need to create custom fields to accommodate imported data that is not tracked in standard fields
- Decide if you want to use [assignment rules](#), for example, to auto-assign leads when you import them.

Customizing Fields

You may want to customize fields in Salesforce to support your specific process.

Customizing Standard Picklist Fields

To add or remove values from the standard picklist fields:

1. Click **Your Name** > **Setup** > **Customize** > **Leads** > **Fields**.
2. Click **Edit** next to the picklist field you want to change.
3. Click **Edit** next to the picklist value you want to change.
4. Make any changes.
5. Click **Save**.



Note: Salesforce assigns the default lead status value to each lead generated from a website inquiry.

Creating Custom Fields

Create custom lead fields of any type. For example, you can create fields that contain text, dates, or picklist values. Consult the Salesforce online help for a comprehensive list of available custom field types.

To create custom fields:

1. Click **Your Name** > **Setup** > **Customize** > **Leads** > **Fields**.
2. In Custom Fields & Relationships, click **New**.



Tip: You can also set field dependencies and field history tracking on custom objects in this section.

3. Choose the type of field and click **Next**. Consider the following.
 - Some data types are available for certain configurations only. For example, the `Master-Detail Relationship` option is available for custom objects only when the custom object doesn't already have a master-detail relationship.
 - Custom settings allow only a subset of the available data types.
 - Relationship fields count towards custom field limits.
 - Additional field types may appear if an AppExchange package using those field types is installed.
 - The `Roll-Up Summary` option is available on certain objects only.
 - Field types correspond to API data types. See “API Data Types and API Field Types” in the *SOAP API Developer's Guide*.
4. For relationship fields, associate an object with the field and click **Next**.
5. Enter a field label.

Salesforce populates `Field Name` using the field label. This name can contain only underscores and alphanumeric characters, and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. Use the field name for merge fields in custom links, custom s-controls, and when referencing the field from the API. See Merge Fields Overview.



Tip:

Ensure that the custom field name and label are unique for that object.

- If a standard and custom field have identical names or labels, the merge field displays the custom field value.

- If two custom fields have identical names or labels, the merge field may display an unexpected value.

If you create a field label called `Email` and a standard field labeled `Email` already exists, the merge field may be unable to distinguish between the fields. Adding a character to the custom field name makes it unique. For example, `Email2`.

6. Enter field attributes and select the appropriate checkboxes to specify whether the field must be populated and what happens if the record is deleted.
7. In Enterprise, Unlimited, and Developer Editions, specify the field's access settings for each profile, and click **Next**.

Access Level	Enabled Settings
Users can read and edit the field.	Visible
Users can read but not edit the field.	Visible and Read-Only
Users can't read or edit the field.	None



Note:

- When you create a custom field, by default the field isn't visible or editable for portal profiles, unless the field is universally required.
- Profiles with “View Encrypted Data” permission are indicated with an asterisk.

8. Choose the page layouts that will display the editable field and click **Next**.

Field	Location on Page Layout
Normal	Last field in the first two-column section.
Long text area	End of the first one-column section.
User	Bottom of the user detail page.
Universally required	Can't remove it from page layouts or make read only.

9. For relationship fields, optionally create an associated records related list and add it to page layouts for that object.
 - To edit the related list name on page layouts, click **Related List Label** and enter the new name.
 - To add the related list to customized page layouts, select `Append related list to users' existing personal customizations`.
10. Click **Save** to finish or **Save & New** to create more custom fields.

Enterprise, Unlimited, and Developer Edition users can further define field-level security to restrict user access to fields. Consult the Salesforce online help for more information about using field-level security.

Mapping Custom Fields

To specify the mapping for custom lead fields:

1. Select **your Name > Setup > Customize > Leads > Fields > Map Lead Fields**.
2. For each custom lead field, choose a custom account, contact, or opportunity field into which you want the information inserted when you convert a lead.

3. Click **Save**.

- Remember to map custom lead fields to other custom fields of the same data type, that is, map numeric lead fields to other numeric fields or long text area fields to other long text area fields.

Some exceptions are:

- ◇ You can map between text and picklist fields. However, your data may become truncated if the mapped text field is not large enough to hold the entire lead picklist value.
 - ◇ You can map fields of type Text or Text Area to long text area fields
 - ◇ You can map auto-number fields to fields of type Text, Text Area, or Picklist.
 - ◇ Do not map custom formula fields to other formula fields or any other type of field.
 - ◇ Roll-up summary fields are not available for mapping lead fields of converted leads.
- Remember to map custom lead fields of type number, currency, or percent to other number, currency, or percent fields of exactly the same length and decimal places. For example, if your lead currency field has a length of 3 and 2 decimal places, map it to another custom currency field with a length of 3 and 2 decimal places.
 - Any standard lead picklist fields that are blank are mapped to the default picklist values for the account, contact, and opportunity.



Note: If you change the data type of any custom field used for lead conversion, that lead field mapping will be deleted.

Customizing Lead Page Layout

If you want to make some fields read only or required and hide other fields completely, customize your lead page layout.

To edit the page layout:

1. Click *Your Name* > **Setup** > **Customize** > **Leads** > **Page Layout**.
2. Click **Edit** next to the page layout name.
3. Make any desired changes.
4. Click **Save**.

When working with enhanced page layout editor:

- To add a user interface element to the page layout, select the category to which the element belongs on the left column of the palette, and drag the element from the palette to the page layout.
- To remove a user interface element from the page layout, drag the element from the page layout to the right side of the palette, or click the  icon next to the element.
- Use the undo and redo buttons to step backwards and forwards, respectively.
- Use the following keyboard shortcuts.
 - ◇ Undo = CTRL+Z
 - ◇ Redo = CTRL+Y
 - ◇ Quick Save = CTRL+S
- To select multiple elements individually, use CTRL+click. To select multiple elements as a group, use SHIFT+click.
- To change the properties of any element on the page layout, double-click the element or click the wrench icon () next to it. You cannot change the properties of elements in the palette.
- To make a field read-only or required, double-click the field in the page layout and select the Read-Only or Required checkboxes.
- To gain vertical space when working on moving items around within the page layout, click the arrow beneath the palette to collapse it.
- To access the other layouts for an object when viewing or customizing an object with multiple page layouts, click the page layout name at the top of the page and select another layout to view.
- To change the name of the page layout, add personal and public tags if available, and display standard object checkboxes on the page layout, click **Layout Properties**.



Note: You can't rename a page layout if you're using Salesforce.com Professional Edition.

- To review the page layout, click **Preview As**. From the preview in Enterprise, Unlimited, and Developer Editions, select a profile to see how the pages will look for users with different profiles. Note that most related lists' columns preview without data.
- To quickly locate any item in the palette, use the Quick Find box. The Quick Find box is especially useful for page layouts that have large numbers of items available in the palette.
- To choose which related records display in the console's mini view, click **Mini Console View**. (Available in Professional, Enterprise, Unlimited, and Developer Edition organizations only.)



Note: You cannot choose **Mini Console View** for the Close Case layout or the Log a Case page and View Cases page layouts on the Self-Service Portal. You cannot choose **Mini Console View** for opportunity team page layouts.

- To define the mini page layouts of the records that appear in the mini view of the console, click **Mini Page Layout**. The mini page layout also defines the layout of the hover details and event overlays. (Available in Professional, Enterprise, Unlimited, and Developer Edition organizations only.)



Note: You cannot define mini page layouts for the Close Case layout or the Log a Case page and View Cases page layouts on the Self-Service Portal. You cannot define mini page layouts for opportunity team page layouts.

- To choose which fields will be displayed on the record detail page and the order in which they will appear, click **Edit Multi-Line Layout**.
- To save your changes and continue editing the page layout, click **Quick Save**.
- To save your changes when you are done customizing the page layout, click **Save**. If you navigate away from your page layout before clicking **Save**, your changes will be lost.
- To create a copy of your page layout, click **Save** and select **Save As**.

For more detailed information about editing page layouts, see [Customizing Page Layouts with the Enhanced Page Layout Editor](#) in the online help.

Creating Email Templates

Create email templates to use in lead assignment rules, auto-response rules, or to send to prospects who are interested in your company. Use Salesforce to make these email templates match your company messaging.

Design simple email templates to get your users started using consistent messaging. Later, you can build HTML email templates based on a letterhead so that you can keep your company branding consistent. Consult the Salesforce online help for instructions on creating an HTML email template or custom HTML email template.

1. Click **Your Name** > **Setup** > **Email** > **My Templates**. If you have permission to edit public templates, click **Your Name** > **Setup** > **Communication Templates** > **Email Templates**.
2. Click **New Template**.
3. Choose the **Text** template type, and click **Next**.
4. Choose a folder in which to store the template.
5. Select the **Available For Use** checkbox if you would like this template offered to users when sending an email.
6. Enter an **Email Template Name**.
7. If necessary, change the **Template Unique Name**. This is a unique name used to refer to the component when using the Force.com API. In managed packages, this unique name prevents naming conflicts on package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With the **Template Unique Name** field, a developer can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.
8. Select an **Encoding** setting to determine the character set for the template.
9. Enter a **Description** for the template. Both template name and description are for internal use only.
10. Enter the **Subject** for the message.
11. Enter the text to appear in the message.
12. Optionally, enter merge fields in the template subject and text body. These fields will be replaced with information from your records when you send an email. For details about using merge fields, see “Merge Fields Overview” in the online help.
13. Click **Save**.



Note: Click **View Sample Template** to follow a model of an email template.

Consult the Salesforce online help for more information on creating an HTML email template or custom HTML email template.

Defining Assignment Rules

When incoming leads are imported or generated through your website, Salesforce automatically assigns them to users or queues.

Creating Lead Queues

A lead queue is a place to store unassigned leads. Leads can be manually assigned to queues or automatically assigned using assignment rules. Lead queues can have any number of members and members of the queue can take ownership of leads in that queue. If you want users to choose leads from a common place, set up lead queues and give membership to the appropriate users.

Lead queues are an efficient way of sharing leads if you are working in a private sharing model. For example, if you have several reps that cover the same territory, you may want to create lead queues for each territory. Then, make each rep a member of the lead queue for his or her territory so only the reps that cover a territory can pull leads from that territory.

To create a lead queue:

1. Click **Your Name** > **Setup** > **Manage Users** > **Queues**.
2. Click **New**.
3. Enter the Label and Queue Name. The Label is the queue label as it appears on the user interface. The Queue Name is a unique name used by the API and managed packages, and can only contain alphanumeric characters and underscores.
4. Choose email notification settings for the queue:

To Notify	You Must
One email address when new records are placed in the queue	Add an email address to Queue Email. You can add an email address for an individual user or an email distribution list.
All queue members individually when new records are placed in the queue	Leave Queue Email blank.
All queue members and the Queue Email individually when new records are placed in the queue	Add an email address to Queue Email and check Send Email to Members.

5. If your organization uses divisions, select the default division for the queue.

This determines the division for a record when it's assigned to the queue via assignment rules or a manual change of ownership. Note that cases inherit the division of the contact they're related to, or they're assigned to the default global division if no contact is specified.

6. Choose the objects available to the queue.
7. Choose queue members.

You can select individual users, roles, public groups, territories, connections, or partner users. Only queue members and users above them in the role hierarchy can take ownership of records in the queue, depending on your organization's sharing settings.

8. Click **Save**.

Selecting a Default Lead Owner

The default lead owner becomes the owner of a lead when no assignment rules apply. The default lead owner can be a user or a queue. Select a default lead owner so that no lead can fall through the cracks.

To select a default lead owner:

1. Click **Your Name** > **Setup** > **Customize** > **Leads** > **Settings**.
2. Click **Edit** to customize the following defaults:

Field	Description
Default Lead Owner	The user or queue to which leads will be assigned if the active assignment rule fails to locate an owner. This applies to leads captured online and leads that a user manually creates or edits with the auto-assign checkbox enabled.
Notify Default Lead Owner	Checkbox to indicate whether Salesforce sends a notification to the default lead owner when assigning a lead to him or her. Default Lead Owner selected must be a user.
Record Type Setting	If a user creating a new lead applies assignment rules, this setting indicates which record type to assign to the new record. If you want new leads to keep the creator's record type, check Keep the existing record type . If you want to overwrite the creator's record type when applying assignment rules, check Override the existing record type with the assignee's default record type .
Enable Validation and Triggers from Lead Convert	<p>When selected, enables the following operations when you convert leads:</p> <ul style="list-style-type: none"> • Enforcement of universally required custom fields. • Enforcement of validation rules. Note that if validation rules exist for activities and you create an activity during lead conversion, the lead converts but a task is not created. • Workflow actions on leads such as field updates, automatic task assignments, and transfers. Note that existing time-based workflow actions on leads do not get triggered as part of lead conversion. • Execution of Apex before triggers that fire before the insertion of accounts, contacts, or opportunities. In addition, execution of Apex before triggers that fire before the update of accounts or contacts. • Cross-object field updates on accounts and opportunities created from the lead conversion. <p> Note: When Enable Validation and Triggers from Lead Convert is selected, if the lead conversion creates an opportunity and the opportunity has Apex before triggers associated with it, the triggers run immediately after the opportunity is created, before the opportunity contact role is created.</p>

Field	Description
Do Not Change Lead Status Values to New Owner's Record Type on Lead Conversion	If your organization uses record types, you can create a lead process that allows you to provide different Lead Status values for different record types. If Do Not Change Lead Status Values to New Owner's Record Type on Lead Conversion is selected, the Lead Status does not change to the new owner's default value during lead conversion. If this setting is not selected, the Lead Status may change during lead conversion if the new owner's record type has a different default value for Lead Status.

Creating Lead Assignment Rule

An assignment rule can consist of up to 3,000 rule entries, including 300 formula rule entries, which designate a lead assignee based on any lead criteria. For example, a rule entry can assign leads from people in western states to your West Coast sales rep. Another rule entry can assign all leads interested in a particular product to a queue of reps that know that product. Most companies only need one assignment rule, but during a holiday shutdown period or offsite meeting, you may want to temporarily switch to a different assignment rule. You can create several assignment rules, but only one can be active at a time.

To create a lead assignment rule:

1. Click **Your Name** > **Setup** > **Customize** > **Leads** > **Assignment Rules**.
2. Click **New**.
3. Enter the name of the rule.
4. Select **Set this as the active lead assignment rule** to activate the rule immediately.
5. Click **Save**.
6. Click the name of the rule you just created.
7. Click **New** in the Rule Entries section.
8. Enter an order number that tells Salesforce when to fire the rule entry in relation to other rule entries.
9. Select the criteria that determines what attributes the lead must have before Salesforce applies the rule entry.
10. Choose the user or queue to be the assignee if the criteria is met.
11. Choose a notification template to be used when sending an email to the new lead owner.
12. Click **Save**.

Leads are processed through the rule entries in order until a match is found amongst the lead and the rule entry criteria. When Salesforce finds a match, it assigns the lead.

Examples of lead assignment rules:

Sort Order	Criteria	Assign to	Email?
1	[Promotion Code equals "Ad_Feb2003"]	Marketing	Yes
2	[Lead Type starts with "Partner App"]	Partner Queue	Yes
3	[State equals "CA, California"]	Susie Delaney	Yes
4	[Country equals "Italy, IT"]	Italian Queue	Yes

Capturing Leads from Your Website

You may already have a product inquiry page on your website where potential customers can enter contact information. By customizing the HTML on your product inquiry page, you can redirect the information into Salesforce to automatically generate a lead. This process of capturing leads from your website is called Web-to-Lead.

Setting up Web-to-Lead

1. Click **Your Name** > **Setup** > **Customize** > **Leads** > **Web-to-Lead**.
2. Click **Edit** to enable or modify the following Web-to-Lead settings:

Web-to-Lead Setting	Description
Web-to-Lead Enabled	Enables Web-to-Lead.
Default Lead Creator	The user who will be listed as the creator of online leads and who will appear as the sender of email responses. This user must have the System Administrator profile or the “Modify All Data” and “Send Email” permissions.
Default Response Template	<p>The default response template to use for the email response that is automatically sent to prospects when they submit an online lead.</p> <p>If you set up response rules to use different email templates based on the information submitted, the default response template is used when no auto-response rules apply. Leave this option blank if you do not wish to send emails when no response rules apply. This template must be marked as “Available for Use.”</p> <p> Note: Auto-response rules are not available in Group Edition.</p>

3. Click **Save**.
4. To create a Web-to-Lead form, click **Create Web-to-Lead Form** on the Web-to-Lead Setup page.
5. Select fields to include on your Web-to-Lead form. Use the Add and Remove arrows to move fields between the Available Fields list and the Selected Fields list, and use the Up and Down arrows to change the order of the fields on your form.
 - Select the **Campaign** field (and optionally, the **Campaign Member Status** field) if you are using Web-to-Lead as part of a campaign.
 - For organizations using multiple currencies, add the **Lead Currency** field if you add currency amount fields, otherwise all amounts will be captured in your corporate currency.
 - Use a custom multi-select picklist to allow potential customers to express interest in several products.
 - For organizations using lead record types, select the **Lead Record Type** field if you want users to select a record type for Web-generated leads.
6. If your organization uses the Translation Workbench or has renamed tabs, select the language for the form labels displayed on your Web-to-Lead form. The source of your Web-to-Lead form is always in your personal language.

7. Specify the complete URL to which users should be directed after they submit their information—for example, your company's home page for a thank you page—and click **Generate**.
8. Copy the generated HTML code and provide it to your company's webmaster to incorporate into your website.
9. Click **Finished**.

Setting up Web-to-Lead Auto-Response Rules

You may want to send incoming leads different email responses depending on their attributes. For example, leads who expressed interest in a particular product should receive an email template with information about that product. Set up Web-to-Lead auto-response rules that contain the attributes a lead must have to receive an email template. Auto-response rules can have multiple rule entries but only one Web-to-Lead auto-response rule can be active at a time.



Note: Auto-response rules are not available in Group Edition.

To set up Web-to-Lead auto-response rules:

1. Click *Your Name* > **Setup** > **Customize** > **Leads** > **Auto-Response Rules**.
2. Click **New**.
3. Enter a name for the rule.
4. Select the `Set this as the active Web-to-Lead Auto-Response rule` box to make the rule the active auto-response rule. You can only have one active auto-response rule, but the rule can contain many rule entries.
5. Click **Save**.
6. Click the name of the rule that you just created.
7. Click **New** in the Rule Entries section.
8. Enter a number to indicate the order the rule entry should be processed in relation to other rule entries.
9. Select the attributes a lead must meet to receive this template.
10. Enter the email name and address of the sender.
11. Choose an email template to use when the selected attributes apply.
12. Click **Save**.

Customizing the Lead Sharing Model

The sharing model for leads determines the access your users have to lead records.

Choosing a Lead Sharing Model

After determining the level of visibility your users should have, change your sharing model settings for leads.

To choose a lead sharing model:

1. Click **Your Name** > **Setup** > **Security Controls** > **Sharing Settings**.
2. Click **Edit** next to Organization Wide Defaults.
3. Choose a default access level for the lead object.
4. Click **Save**.



Note: Be aware of how your sharing model affects your lead queues. For example, in a Private sharing model, only queue members and their direct reports can view or take ownership of leads owned by a queue. In a Public Read/Write or Public Read Only sharing model, all users can view records owned by a queue but only queue members can take ownership of them. For more information about sharing models, see “Managing the Sharing Settings” in the Salesforce online help.

Importing Leads

Importing your lead data to Salesforce is simple, regardless of what application you use. If you use an application that allows you to export data into a comma separated values format (CSV), you can import that data into Salesforce.

Exporting your Data

Use your current third-party application to create an export file of your data; exporting your data takes place outside of Salesforce. The steps to export your data differ depending on the application you use. Consult the help for your application for specific instructions. For most applications, you can click **File** > **Export** to get started.

Preparing your Import File

When you have a CSV file, you can open it in an application like Excel to verify that the data is correct. You may need to create custom fields for any extra columns. You may also need to change the column headers so that your data easily maps to Salesforce fields.

Examples of field mappings:

Salesforce Field	Import File Label
First Name & Last Name	Full Name of First Name & Last Name
Lead Source	Lead Source
Mobile	Mobile Phone

For more information on preparing your import file and mapping fields, see the Salesforce online help.

Importing a File into Salesforce

After you have prepared your import file, you can import your data using the Lead Import Wizard.

To import your file using the lead import wizard:

1. Start the wizard.

Click *Your Name* > **Setup** > **Data Management** > **Import Leads**, and click **Start the Import Wizard**.

2. Upload the file.

- a. Select **Browse** to load your import file.
- b. If desired, select a value to import into the `Lead Source` field of all imported leads. Alternatively, you can assign the lead source via a `Lead Source` field in your import file. You must specify a `Lead Source` value that is not marked as “Converted”; leads with a “Converted” status will not be imported.
- c. Next, choose a lead assignment rule to determine the owners of imported leads (see “Managing Assignment Rules” in the online help). If you have a `Record Owner` field in your import file, do not select an assignment rule. Without an assignment rule or a `Record Owner` field in your import file, all leads are assigned to the administrator doing the import. When importing records by Salesforce record ID, the `Record Owner` field in your import file is ignored. All records retain their existing owners; record owners cannot be updated using the import wizard.
- d. If you have chosen an assignment rule, select the `Use assignment rule settings to send notification emails to record owners` checkbox to send notification emails to owners of newly created leads. If you do not select the checkbox, no email notifications are sent, regardless of your assignment rule settings.
- e. Then select the character encoding of your file. Most users do not need to change the default setting.

- f. Choose whether to match your organization's leads by Salesforce ID, name, or email. This field sets the criteria for avoiding duplicates. For example, if you are matching by email and a record in your source file has the same email as a record in Salesforce, then that record will be updated in Salesforce. If you are not matching by email and there is a record in Salesforce with the same email, then a new record will be created. Select a matching type of "None" if you do not want to de-duplicate leads; a new record will be created for every lead in your import file.

When importing new leads for a campaign, the `Matching Type` option is not available; the wizard does not merge duplicate leads.

- g. Organizations that use the Translation Workbench can specify the language of the import data.
- h. If you use divisions, select a division to assign to all imported records. Alternatively, select "None" to use the record owner's default division on each record, or specify the division in your import file.
- i. Select the checkbox to trigger workflow rules for new and updated records that match workflow rule criteria.
- j. If your organization has multiple record types on leads, choose the active record type that will be applied to all leads in your import file. However, if you are logged in as a user who has a default lead record type selected at **Your Name > Setup > My Personal Information > Record Type Selection > Lead**, then this drop-down list does not display and your default lead record type is automatically applied to the imported records.
- k. Click **Next** to continue.

3. Map the fields.

- a. The wizard associates the Salesforce lead field names with the field names in your import file. You must verify the default mappings and alter any incorrect mappings. For more information about the default mappings, see "Field Mapping for Importing Leads" in the online help. Any unmapped fields are not imported.
- b. If you chose to avoid duplicate leads (that is, the selected `Matching Type` is not "None"), check the `Overwrite existing lead values` box if you want to overwrite existing lead fields with your import data. Note that you cannot use this checkbox to update existing field data with blank values.
- c. Click **Next** to continue.

4. Review and confirm.

Choose **Import Now!** to send your import request. Your leads are imported within the next 24 hours, and we notify you via email when the import is complete. Once the system begins processing, you cannot cancel the import. See "Undoing an Import" in the online help.

5. Check the Import Queue.

You can use the **Import Queue** link to check the progress of your import. Click **Your Name > Setup > Monitoring > Imports**. Alternatively, click the **Import Queue** link on the Import Wizard for My Organization's Leads page. For imports that have not begun processing, you can click **Del** to cancel the import.

Tips for Training Users

Lead List Views

Show users how to see their open leads using the lead list views on the Leads tab. For example, they can use the My Unread Leads list view to see a list of new leads; leads are considered “unread” until the lead owner views or edits them.

Creating Leads

Show users how to create leads by clicking **New** on the Leads tab. If you have not disabled the Quick Create option in the sidebar, show users how to create leads in this manner.

Merging Duplicate Leads

Inform users that they can merge two or three duplicate leads into one record by clicking **Find Duplicates** on a lead detail page. Clicking **Merge Leads** allows them to select the values to include in the merged record.

Lead Status

After you have customized your lead status values, educate your users on what each status means. Outline a business process for your users so they know when to use each lead status during the lifecycle of a lead.

Accepting Ownership of Leads from Lead Queues

When you create a lead queue, Salesforce automatically generates a list view on the Leads tab using the name of the queue. To view the leads in a queue, members can select the list view for the queue. The lead queue serves as the owner of the lead until a member of the queue manually takes ownership of the lead.

To help your users successfully use lead queues, explain how to view leads in a queue, how list views work, and teach users how to take ownership of leads in a queue.

To accept a lead from a queue:

1. Select the queue list view from the Leads tab. The queue list view displays all of the leads in that queue.
2. Select the leads to accept. Accepting a lead will make you the owner of the lead.
3. Click **Accept**.

To change the ownership of a lead you own or have read/write sharing access to, click the **Change** link next to the `Lead Owner` field, and then specify the name of a user or queue. The **Change** link only displays on the lead detail page, not the edit page. Select the `Send Notification Email` box to send an automated email to the new lead owner. If the new owner is a queue, Salesforce sends the email to all of the queue members.

If a lead has real sales potential within a reasonable period of time, convert the lead. Each time you convert a lead, schedule a follow-up task for the sales rep to contact the new account. Be sure the appropriate rep is the lead owner before converting it because you cannot change information on converted leads. The person converting the lead may get credit for the lead conversion if your organization rewards reps for converting leads.

If a lead has the same first name, last name, and account name as an existing contact, Salesforce prompts you to merge data with existing records or create new records. Select a matching account and click **View** to see account information for the matching records.

Lead Conversion

Based on your internal business process, train your users when to convert leads:

- Explain your lead conversion field mappings
- Inform users that information on converted leads is not available from the Leads tab
- Train users when and how to convert leads

If the `Enforce Validation and Triggers from Lead Convert` checkbox is selected in **Your Name > Setup > Customize > Leads > Settings**, the following operations occur when a lead is converted:

- Enforcement of universally required fields
- Enforcement of validation rules
- Workflow actions on leads such as field updates, automatic task assignments, and transfers
- Execution of Apex before triggers that fire before the insertion of accounts, contacts, or opportunities. In addition, execution of Apex before triggers that fire before the update of accounts or contacts. For more details, see “Managing Apex Triggers” in the Salesforce online help.

For more details about mapping lead fields, see [Mapping Custom Fields](#) on page 7. Custom lead fields that are not mapped to custom account, contact, or opportunity fields are not converted.

To convert a lead:

1. From the lead detail page, click **Convert**.
2. Optionally, change the owner of the new records. This reassigns all notes, attachments, and open activities to the new owner but does not change closed activities. Select the `Send Email to the Owner` checkbox to send an automated email to the new owner.



Note: If you have a trigger set to fire when new records are created, the trigger temporarily assigns a system user as the owner of the created records. After the trigger finishes, the owner is set to the lead owner.

3. In the `Account Name` field, select a new account or search for an existing account. Click **View** to open a printable view of the existing account. Information from the lead is inserted only into blank fields; it will not overwrite existing account data.
4. If you update an existing person account, select the checkbox to overwrite the `Lead Source` field in the person account with the value from the lead.
5. In the `Opportunity Name` field, enter a name for the new opportunity, or select the `Do not create a new opportunity upon conversion` checkbox if you don’t want to create an opportunity.
6. In the `Converted Status` picklist, select a status for the converted lead. Choices include statuses marked as “converted” by your administrator.
7. Optionally, fill in the following fields to schedule a follow-up task that is automatically assigned to the record owner:
 - `Subject`—Subject or short description of the task, for example, “Email quote to customer.” You can enter a subject, or select from a picklist of previously defined subjects.
 - `Due Date (optional)`—Date when the task should be completed. You can enter a date, or choose a date from the calendar that displays when you put your cursor in the field.
 - `Activity Currency`—You’ll see this field if your organization uses multiple currencies. Select a currency to associate with this task.
 - `Comments (optional)`—Text note describing the task. This field can hold up to 32KB of data.
 - `Status`—Current status of task, for example, Not Started or Completed. (Picklist selections can be customized by your administrator.)
 - `Priority`—Urgency of the task, for example, Low, Medium, or High. (Picklist selections can be customized by your administrator.)
 - `Send Notification Email (optional)`—Select this checkbox to send a notification about this task to the assignee.
 - `Reminder (optional)`—Select this checkbox to schedule a reminder for this task.

8. Click **Convert**.

9. If a duplicate contact exists, choose whether to create a new contact or update the existing contact. Information from the lead is inserted only into blank fields; it will not overwrite existing contact data.
10. When updating an existing contact, check the box if you want to overwrite the `Lead Source` field in the contact with the value from the lead.
11. Click **Convert** to finish.

Key Reports

Generate standard and customized reports to get up-to-the-minute statistics on lead generation and qualification. Your lead reports can help you analyze your most productive lead sources, reasons for won and lost leads, or the lifetime value of each lead.

The following lead reports are available by clicking the Reports tab and scrolling down to the Lead Reports folder:

- Lead Lifetime: The life of a lead from creation to closure
- Neglected Leads: Leads that need attention
- Lead Status: The status of leads
- Leads by Source: The sources of leads
- Lead History Report: The data history of lead fields
- Leads By Source: The effectiveness of lead sources
- Bounced Leads: Leads with bounced email addresses

FAQ

How do I assign leads to users and prevent other users from seeing them?

If you use a private sharing model, only the owners of a lead record can view or edit the lead record. For more information on changing your sharing model, see [Customizing the Lead Sharing Model](#) on page 17.

How do I mass transfer leads?

Administrators can mass reassign leads using the Mass Transfer tool by clicking *Your Name* > Setup > Data Management > Mass Transfer Records.

Why can't I import leads?

You may not have the "Import Leads" permission. Users with the Administrator or Marketing User profiles have this permission.

How do I report on converted and unconverted leads?

To run a report that displays information on all converted and unconverted leads, create a custom lead lifetime report that includes `Converted equals True, False`. The Converted field is "False" for unconverted leads and "True" for converted leads. Make sure you have the comma between True and False to include lead records that are converted or unconverted.

Can I convert contacts back to leads?

No, but you can export contact information and then import it as lead records.

What happens to lead data when I convert it?

When you convert a lead, Salesforce creates a new account, contact, and, optionally, an opportunity using the information from the lead. Any campaign members are moved to the new contact and the lead becomes read only. If an existing account and contact have the same names as those specified on the lead, you can choose to update the existing account and contact. Information from the lead is inserted only into blank fields; Salesforce does not overwrite existing account and contact data.

All open and closed activities from the lead are attached to the account, contact, and opportunity. You can assign the owner of the records, and schedule a follow-up task. When you assign a new owner, only the open activities are assigned to the new owner. If you have custom lead fields, that information can be inserted into custom account, contact, or opportunity fields. Converted leads can't be viewed, although they appear in lead reports. Salesforce updates the `Last Modified Date` and `Last Modified By` system fields on converted leads when picklist values included on converted leads are changed.

If I want to delete a value in the Lead Source field, what will happen to records with that value?

If you remove a picklist value, existing leads with that value are not affected. They continue to display the deleted value until you manually change it or mass replace the value. However, new leads cannot contain the deleted value because it will not be available in the Lead Source picklist field.

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