

Form and Process

- Convert Lead

Convert Lead

Home (58) Summary Convert Lead x ⌵ 📄

Convert Lead to BP and Opportunity
Convert Lead into a Business Partner and (optional) Sales Opportunity

User/Contact

▼

☒ Create Opportunity

Expected Close Date

📅

Description

Sales Stage

▼

Opportunity Amount

💰

Currency

▼

Sales Representative

▼

Business Partner Group

▼

Business Partner Type

▼

☐ Customer

☐ Run as Job

Saved Parameters ▼

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🗑️

✓ OK

✗ Cancel

Parameters :

1. User/contact : Used to select the Default document create user name.
2. Expected Close Date : Here we can give the expected lead close date
3. Description : Used to give description details.
4. Sales Stage : Used to select the sales stage for the lead.
5. Opportunity Amount : For mention the Opportunity amount
6. Currency : Used to mention the currency type for that conversion
7. Sales Representative : Used to mention the sales rep name

8. Business Partner Group : the group name is used for select the BP group for newly generated documents.
9. Business partner Type : Types also we can select while run the process
10. Create Opportunity : If we want to generate the opportunity for the lead the we need to select.
11. Customer : If this lead is from existing customer means we can select this.

Process use :

By Using this process we can convert the lead from lead to customer , and also we can create the Sales Opportunity too.