

# Convert Lead

1. From **CRM** module, click **Leads**. Leads screen will appear.
2. Open Lead you want to convert into a Prospect.

Lead - Convert\_Lead

New Save Search Delete Undo Convert Additional Close

Entity Lead General Messages Activities Attachments Audit Log Entity Type

Name **Convert\_Lead** Phone 091-235-123 Entity No 1006455

Contact Name Convert\_Lead\_Contact Suffix Email Convert\_Lead@test.com Mobile

Class

Location Name 01 Printed Name Convert\_Lead

Search Address Enter address to search...

Address Makati, PH

City Makati State PH

Zip/Postal 1009 Country Philippines

Time Zone (UTC+08:00) Kuala Lumpur, Singapore

Document Delivery

External ERP ID Origination Date 3/21/2018

Line of Business

Line of Business

Contact Information

Type*	Details*

Internal Notes

? 1.32s | Saved Page 1 of 2 Refresh

3. To convert the lead, click **Convert** button.

!

**iRely i21**

Do you want to convert this Lead to a Prospect?

Yes No

4. Click **Yes** to proceed.
5. Once converted, check the Entity type. It should be Prospect.
6. To check the converted entity, go to Sales Entities screen.