

Rapid Lead Converter and Online Payment Importer



Abstract

Sick of converting leads the old fashioned way? The AJAX interface of this lead conversion utility will make lead conversion fun again. Plus, create Opportunities for leads that have Opportunity data associated with them--i.e. importing online donations.

Description

This Component relies on an S-Control and a Custom Tab.

The AJAX S-Control allows you to:

- Significantly cut Lead processing time
- Use Leads for importing online payments
- Wonder how you lasted so long doing Lead conversion the old way

Features & Benefits

- **Greatly simplify the Lead conversion process**
- **Minimize duplicates when brining in Leads**
- **Create Opportunities from data on the Lead record**

Installation Steps

Step	Description
Get it	Download and install the application from the AppExchange
Make the Lead Converter tab visible	Show the tab to your users.
You are installed!	You can immediately start doing rapid Lead conversion
Set up Opportunity Creation	Create the fields "Opportunity Amount" and "Opportunity Close Date" on your Lead object.
Import Leads with Opportunity information attached, or not!	When you import Leads, make sure to include Amount and Close Date information if you have it. Doing so will allow you to create Opportunities on Lead conversion.

Use

Step	Description
Import Leads with Opportunity information attached, or not!	When you create Leads (through the Import Wizard, via web-to-lead, or the web interface) include Opportunity information if you have it. All your unconverted leads will show up for conversion.

Status of the Application

I developed this application for a specific need, and have attempted to generalize it. It is not a polished implementation at this point, but does work. There is much room for improvement, especially around the AJAX S-Controls, which are by no means optimized. I am sharing this freely, with all custom code licensed by the GPL 2.0. If you make any changes or improvements, I'd love to see them!

Specifications

Publisher	ONE/Northwest
Type	Native
Salesforce.com Certification	None
Pricing	\$0

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Screenshot

gokubi.com

Home Contacts Accounts Households Relationships Opportunities Leads **Lead Conversion** Campaigns Reports

Leads to be Converted

Name	Contact	Account	Convert	Email
Pat Stumuller	Create new: Pat Stumuller	Create new: Pyramid Construction Inc.	<input type="button" value="Convert"/>	pat@
Carolyn Crenshaw	Merge with: Carolyn Crenshaw	Merge with: Ace Iron and Steel Inc.	<input type="button" value="Convert"/>	uheat
Claude Thomson	Find Matches	Individual		imeca
E Thomson	Find Matches	Individual		jane-t
Jan SABINE	Find Matches	Individual		jb Boul
Janet Pinsonneault	Find Matches	Individual		custo
Jan Penney	Find Matches	Individual		steeth
Jean Pauline	Find Matches	Individual		kewig
Jim PACEY	Find Matches	Individual		kate-s
Johannes Nylund	Find Matches	Individual		mybo
Joy Nash	Find Matches	Individual		m coll
Judith Nash	Find Matches	Individual		malco
June H. Miller	Find Matches	Individual		gprode
Karen Mijinke	Find Matches	Individual		shanr
Kate Meyer	Find Matches	Individual		hullog
Kathleen McPhail	Find Matches	Individual		worldt
Lloyd Lofdal	Find Matches	Individual		jmeye
Malcolm Levy	Find Matches	Individual		wayne
mark Lauritsen	Find Matches	Individual		gsnas
Michelle Kuster	Find Matches	Individual		koster