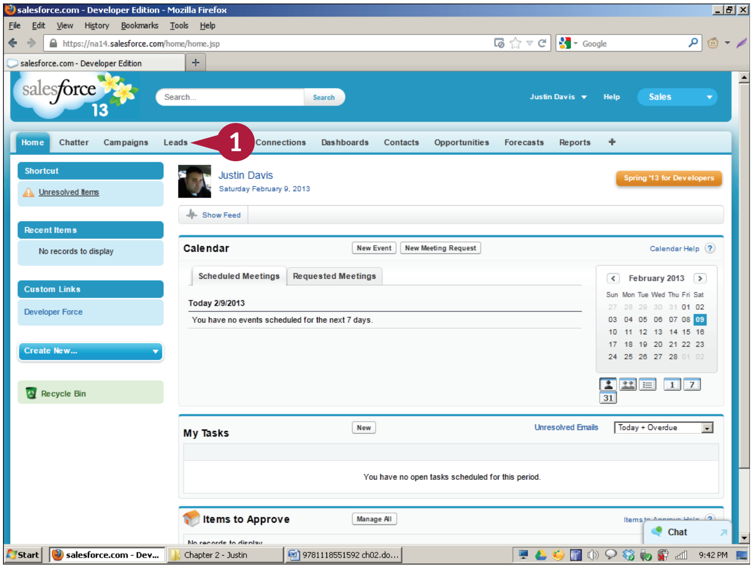
Create a New Lead

Leads are individuals or organizations who may be interested in the products and services you offer. Leads can come from a variety of sources, such as networking events, trade shows, and purchased lead lists.

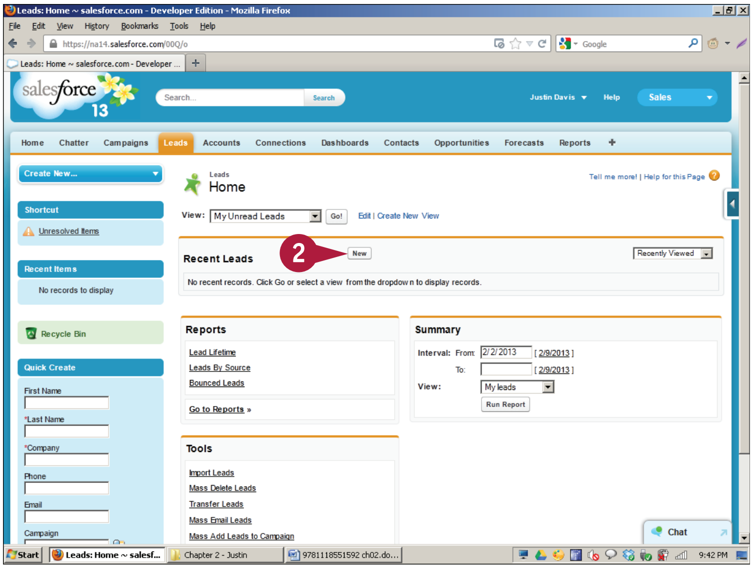
You can use the leads area in Salesforce to manage and qualify leads, check and monitor their status as possible customers, and convert them into prospects.

Create a New Lead

1. Click the **Leads** tab.



2. Click **New**.

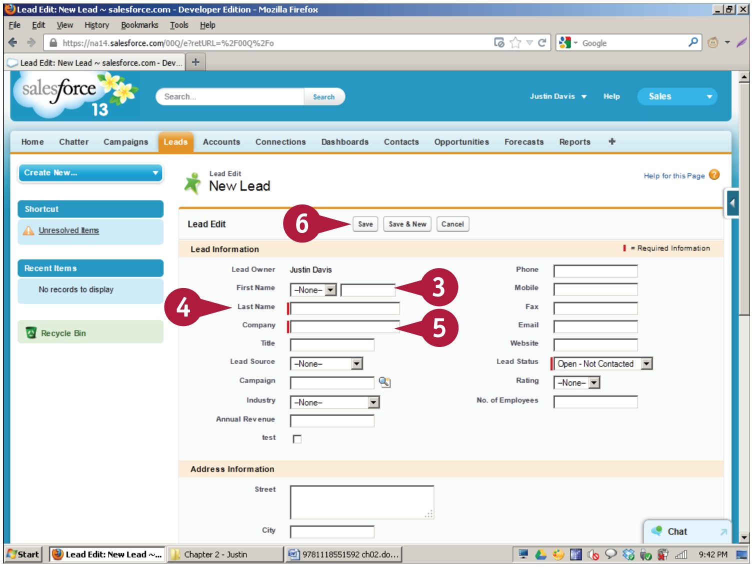


3 Enter the first name of the lead.

4 Enter the last name of the lead.

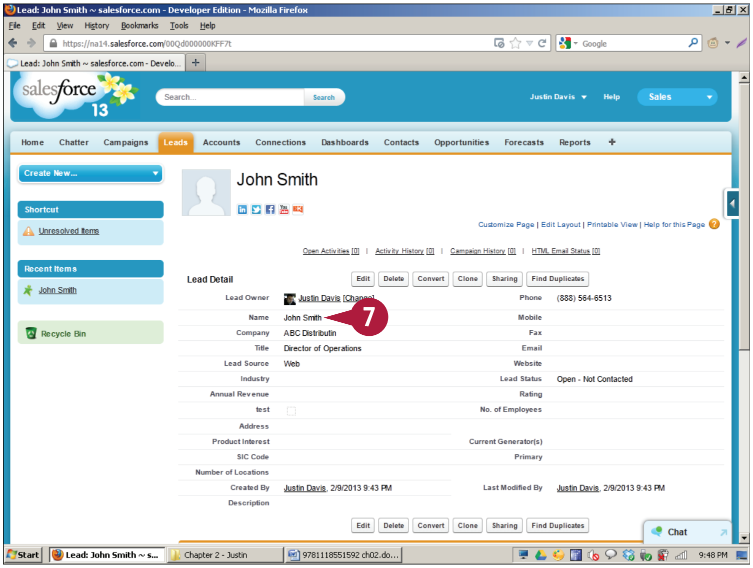
5 Enter the name of a company for the lead, if relevant.

6 Click **Save**.



7 Salesforce saves your lead and displays the details on a new page in the lead list.

Note: To avoid duplicating leads, click **Find Duplicates** before you click **Save**.



TIPS

Who uses leads?

Leads are a key revenue-generating resource for any individual or team working in sales or marketing. Other departments, such as customer support and engineering, can also generate leads, although they often require help and training to collect opportunities and pass them to sales and marketing.

What is lead ownership?

In Salesforce, a lead is owned by one individual or group — usually, but not always, the person or team who first added it. The owner is expected to progress the lead, qualifying it to determine if the lead is a firm sales prospect. Leads can also be moved to a queue until they are qualified. For more on queue creation, see “Create a Lead Queue,” later in this chapter.