Creating a Lead from a Contact

In Total Expert, a *contact* represents a general summary of an individual, including any available personal information; communication activity recorded in TE; existing applicable products; and relevant leads, tasks, and notes. Several actions are possible on a contact record, including creating a new lead from its stored information.

A *lead* is a focused look into a specific type of product that a contact is likely to be interested in, such as a mortgage or credit card account. There may be several leads associated with a single contact record, each of which can be assigned separately to ensure that the best person can work with the individual to satisfy their need.

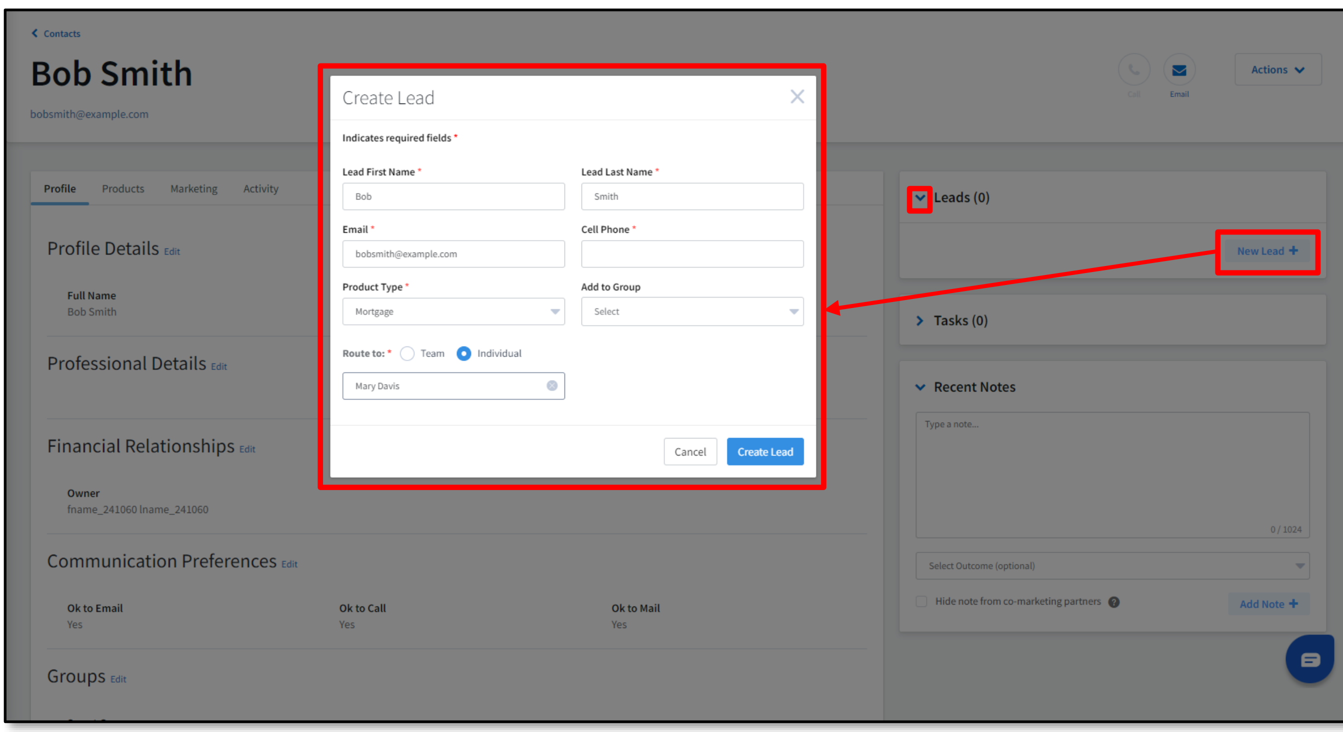
Creating a Lead

You can use the information in an existing contact record to create a new lead quickly.

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the name of the contact you want to use to create a lead.
3. In the Leads section at the top of the right column of data, click the **New Lead+** button.

Tip
You may need to expand the section by clicking the arrow to the left of the section header.

4. In the Create Lead box:
   a. The **Lead First Name**, **Lead Last Name**, and **Email** fields are populated from the corresponding information in the contact record. Make any adjustments as necessary and fill in any empty fields.



b. Enter a current cell phone number for the lead in the **Cell Phone** field. This number may differ from the number(s) associated with the contact record.
c. In the **Product Type** drop-down list, select an available type of product that the lead may be interested in.
d. (optional) In the **Add to Group** field, select 1 or more contact groups that the lead should be added to. These can be used to filter the lead list.
e. For the **Route to** option select either:
    i. **Team** – Select the lead source that should determine how the lead is assigned. The options shown in the drop-down list correspond to the Product Type you selected above.
    ii. **Individual** – Select the specific user to whom the lead should be assigned. The options shown in the drop-down list are the users currently active in your organization. The lead is assigned directly to that user.
f. Click the **Create Lead** button.

The new lead is added to the Leads section in the contact record. A brief summary is shown here, including the current status of the lead and a link to the full lead details page. Click **View** to go to that page.

The user who is assigned the lead also sees the lead in their lead list at **Leads & Contacts → Lead Management → Leads**.