

Once your lead has been qualified as a business prospect, you should convert it into a contact and, if necessary, a company. If this lead/contact has a potential job to fill, you should also create an opportunity. You can create all of these records in one streamlined workflow; information from the lead record is carried over to the converted records. Leads can also become candidates if it turns out they are actively seeking employment.

Marie Gibbons | Owner/Operator | Qualifying < Previous Next >

Convert

Overview Edit Activity Notes (0) LinkedIn

Task Appointment New Lead Qualifying Converted

Assigned To:

Status: Qualifying

Primary Email: mgibbons@pinkmango.com

Phone: 508-422-4411

Address: 6347 Scituate Lane #17

City: Chatham

State: Massachusetts

Zip: 02633

Country: United States

Status: Qualifying

Owner: Sally Training

Assigned To:

Primary Email: mgibbons@pinkmango.com

Address: 6347 Scituate Lane #17

Phone: 508-422-4411

Convert Lead

What would you like to convert the Lead to?

Create new Company
Associate with Existing Company

Create new Contact
Associate with Existing Contact

Create new Opportunity

[Convert to a New Candidate](#) Cancel Next

- If the lead is associated with a company that already has a record in Bullhorn, select the **Associate with Existing Company** radio button and then select the name of the company from the drop-down.
- If the lead already has a contact record in Bullhorn, select the **Associate with Existing Contact** radio button and select the name of the contact from the drop-down (**NOTE:** If you selected an existing company in Step 2, then this drop-down will only show the names of contacts associated with that company).
- If you also want to create an associated opportunity record, select the **Create new Opportunity** check box.
- If the lead is looking for employment, select the **Convert to a New Candidate** link.