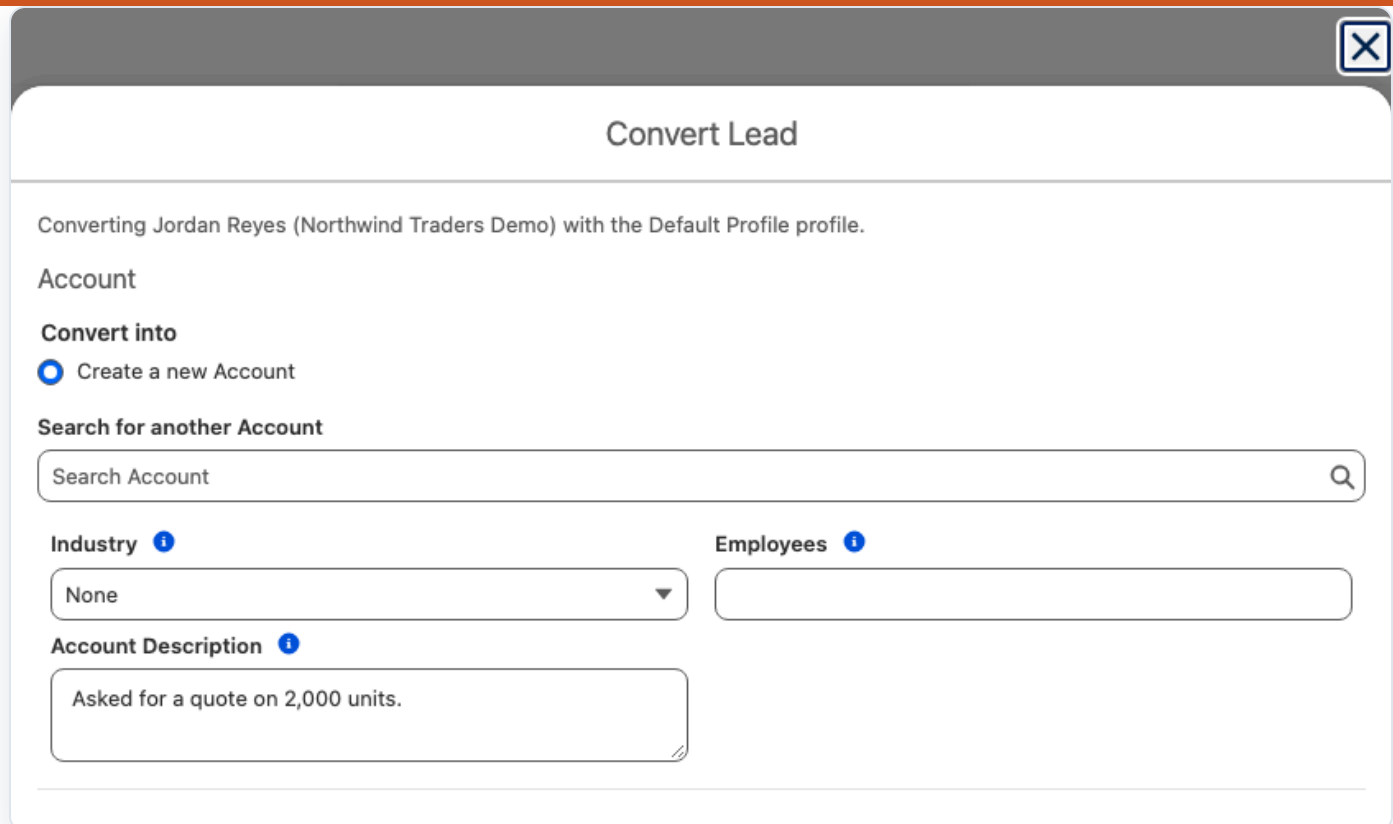


Lead Converter

Replace the standard Convert screen with one you control: dry-run it, convert in bulk, and undo it later.



The screenshot shows the 'Convert Lead' interface in Salesforce Lightning. At the top, it says 'Converting Jordan Reyes (Northwind Traders Demo) with the Default Profile profile.' Below this, there's a section for 'Account' with a 'Convert into' dropdown menu. The 'Create a new Account' option is selected. There's a search bar for 'Search for another Account' with a search icon. Below the search bar, there are fields for 'Industry' (a dropdown menu with 'None' selected) and 'Employees' (a text input field). There's also an 'Account Description' field with a text area containing 'Asked for a quote on 2,000 units.' The interface is clean and modern, with a grey header bar and a white main content area.

200

Leads converted in one bulk run

3

starter profiles: standard, account
and contact only, merge into existing

5

languages: English, German,
Spanish, French (CA), Portuguese
(BR)

Lead Converter lets a **profile** decide which fields a person sees, how Lead values are **copied onto the new Account, Contact and Opportunity**, and what else happens at conversion. Every conversion is **checked first with a dry run** and **recorded**, so it can be **undone**. Convert one Lead, **up to 200 at once**, or from a Flow.

Lead conversion is where data quality is made or lost

The standard Convert screen gives every user the same form, copies fields by fixed mapping rules, creates duplicates when a matching Account already exists, and cannot be reversed. Bad conversions spread through pipeline reports and are painful to repair.

1

See it before it happens

A **dry run** shows what would be created or updated, and nothing is saved until you convert.

2

Different Leads, different rules

Profiles serve Leads by record type and order. Each profile sets the fields shown, the **field maps** and what happens after conversion.

3

Reuse existing records

Suggest existing Accounts and Contacts, match on duplicate rules, and merge into existing accounts, filling only blank fields.

4

Bulk convert

Convert **up to 200 Leads** from the Bulk Convert tab or a Lead list view, with a results screen.

5

Undo a conversion

Every conversion is recorded in **Conversions**. Undo shows what will be deleted before you confirm.

6

Works with Flow

Call the same conversion from a Flow, so automations use the same profile rules.

Without Lead Converter

- One Convert form for every Lead and every team
- Duplicate Accounts created at conversion
- A wrong conversion is hard to reverse
- Field copying by a fixed standard mapping

With Lead Converter

- A profile per kind of Lead, with the fields and maps you choose
- A dry run before any record is created
- Existing Accounts and Contacts suggested and reused
- A history of every conversion, with Undo

WHAT IT DOES

Convert with confidence

A Convert screen you configure

Choose the Account (new or existing), Contact and Opportunity, fill the fields your profile shows, and run a dry run before you convert.

Convert Lead

Create an Opportunity ☒ Active

* Opportunity Name ⓘ

Northwind Traders Demo - New Opportunity

Next Step ⓘ

Description ⓘ

Asked for a quote on 2,000 units.

Options

Converted Status ⓘ

Convert with a dry run.

Profiles

New from Template New Profile

Search

Q Name or description

Name	Lead Record Types	Order	Active	Contents
Default Profile Standard fields for every Lead. Edit it, or copy it, to fit your process.	All Leads	1000	✓	8 fields, 2 maps

The Profiles tab.

Profiles

One row per profile with the Lead record types it serves, its order, status and a summary. Clone, activate or deactivate, or start from a template.

Field maps

Say how Lead values are copied onto the new records: from a field, a fixed value, only when blank, and for any object in the conversion.

Field Maps

Copy a Lead field into a field of the new record. Setup's own field mapping still applies; use these for what it cannot do.

+ Add a Map

Record ⓘ	Field ⓘ	Copy From (Lead Field) ⓘ	When ⓘ
Account	Account Description (Description)	Description (Description)	Only when blank
Opportunity	Description (Description)	Description (Description)	Only when blank

Field maps in a profile.

WHAT IT DOES, CONTINUED

Profiles, history and bulk

Bulk Convert

Choose Leads, check them (nothing is saved), then convert the ones that pass. Each Lead is converted on its own with the profile its record type selects.

Search Leads

Q Demo

Lead Status

All

My Leads Only

Inactive

Lead

Company

Status

Owner

Created

Jordan Reyes

Northwind Traders Demo

Open - Not Contact...

John Lawton

Oct 21, 2026

Priya Nair

Contoso Pharma Demo

Open - Not Contact...

John Lawton

Oct 21, 2026

Lee Prospect1Demo

DM Demo Lead Co 1

Open - Not Contact...

John Lawton

Oct 13, 2026

Lee Prospect1Demo

DM Demo Lead Co 1

Open - Not Contact...

John Lawton

Oct 13, 2026

Lee Prospect2Demo

DM Demo Lead Co 2

Open - Not Contact...

John Lawton

Oct 13, 2026

Lee Prospect2Demo

DM Demo Lead Co 2

Open - Not Contact...

John Lawton

Oct 13, 2026

Lee Prospect3Demo

DM Demo Lead Co 3

Open - Not Contact...

John Lawton

Oct 13, 2026

Lee Prospect3Demo

DM Demo Lead Co 3

Open - Not Contact...

John Lawton

Oct 13, 2026

Ada LovelaceDemo

DM Demo Lead Co X0

Open - Not Contact...

John Lawton

Oct 13, 2026

Grace HopperDemo

DM Demo Lead Co X1

Open - Not Contact...

John Lawton

Oct 13, 2026

Alan TuringDemo

DM Demo Lead Co X2

Open - Not Contact...

John Lawton

Oct 13, 2026

Lee Prospect3Demo

DM Demo Lead Co 3

Open - Not Contact...

John Lawton

Oct 13, 2026

The Bulk Convert tab.

A history of every conversion

See what was converted, by whom, with which profile and what was created, and open the records.

Conversions

Search

Q Demo

Status

All

Source

All

Number

Lead

Company

Profile

Source

Status

Converted...

Converted...

Account

Contact

Opportu...

LC-000016

Sam Okafor

Fabrikam Suppl...

Default Profile

App

Converted

Oct 22, 2026, 1...

John Lawton

Open

Open

Open

The Conversions tab.

Undo This Conversion

Undoing a conversion creates a new Lead from the values saved when Sam Okafor was converted. The Account, Contact and Opportunity the conversion created are deleted unless other records depend on them; those are kept and listed.

Undo This Conversion.

Bulk Convert

Search and select up to 200 Leads, convert them with each Lead's own profile and see the result for every one.

Undo, with a clear warning

Undo explains what will happen first: the Lead is recreated from the values saved at conversion, and the Account, Contact and Opportunity it created are deleted unless other records depend on them.

HOW IT WORKS

Up and running in four steps

1. Switch it on

In Settings, make sure Enable Lead Converter is on.

2. Edit a profile

A Default Profile is installed. Edit it, or start from a template.

3. Add the action

Add **Convert (Lead Converter)** to the Lead page and remove the standard button.

4. Convert

Dry run, convert, then check the Conversions tab.

Who it is for

- **Sales operations and RevOps.** enforce one conversion process across teams and Lead types.
- **SDR and inside sales teams.** convert quickly, singly or in bulk, without creating duplicates.
- **Admins.** change conversion rules with profiles, not code.

Built for trust

- **Native to Salesforce.** Profiles are Custom Metadata in your org.
- **Runs with the person's own access** (optional Elevated Conversion for teams that need it).
- **Every action checks its custom permission:** Convert, Unconvert, Bulk Convert, Manage Profiles, Manage Settings.
- **In-app Administrator and User guides** in five languages.

Everything included

- ✓ Configurable Convert screen
- ✓ Dry run before conversion
- ✓ Profiles by Lead record type and order
- ✓ Field maps onto Account, Contact and Opportunity
- ✓ Starter profiles: Standard, Account and Contact Only, Merge into Existing
- ✓ Existing Account and Contact suggestions

- ✓ Bulk Convert, up to 200 Leads
- ✓ Conversion history with Undo
- ✓ Flow action for automations
- ✓ Optional elevated conversion
- ✓ Admin, User and Read Only permission sets
- ✓ In-app guides in five languages

Take control of lead conversion

Lead Converter is built, tested and documented. Ask for a walk-through with a profile built for your own Lead types.