Lead to Deal Conversion

Using Mria CRM · https://mriacrm.com/docs/lead-to-deal-conversion/

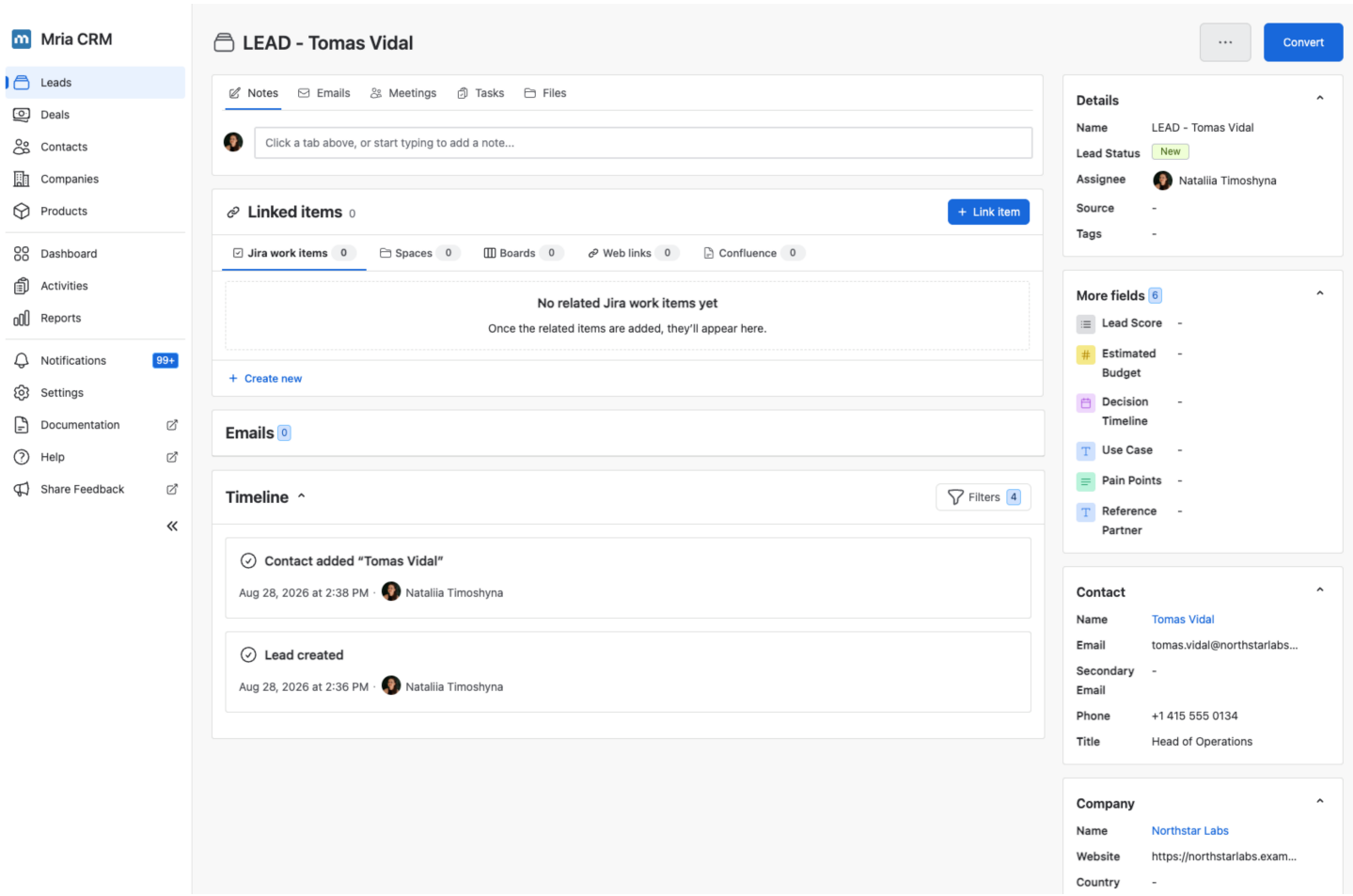
When a Lead is qualified, it can be converted into a **Deal**. Conversion allows you to track opportunities in your sales pipeline while keeping associated Contacts, Companies, and Activities connected.

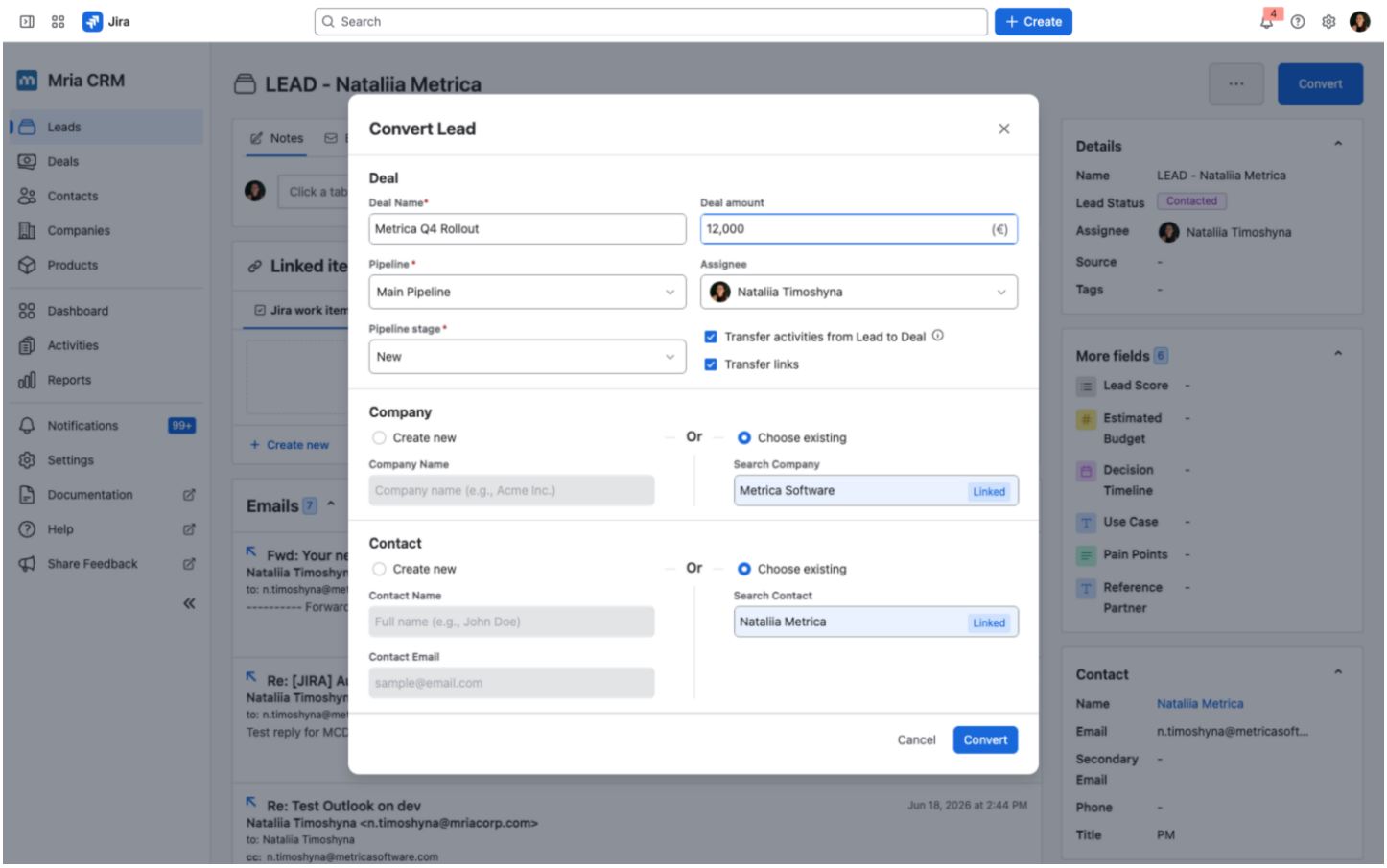
Case 1: Lead with Linked Contact and Company

If the Lead already has a **Contact** and **Company** linked, they are automatically used in the conversion process.

Steps to Convert a Lead:

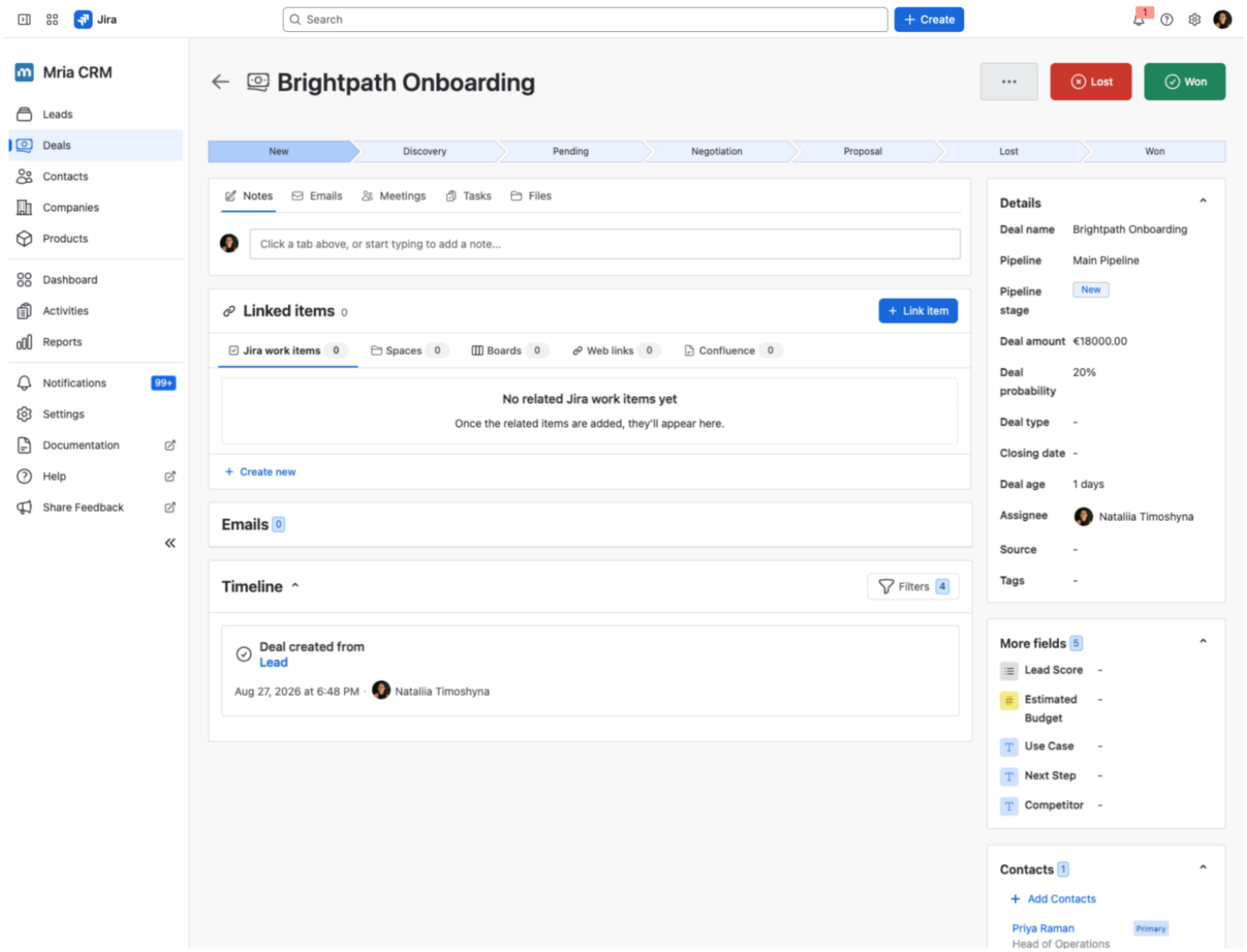
1. Open the Lead you want to convert and click **Convert**.
2. In the **Convert Lead** window, fill in the Deal details:
   - **Deal Name** — required.
   - **Deal amount** — optional, shown in the workspace currency.
   - **Pipeline** — required; which pipeline the Deal belongs to.
   - **Pipeline stage** — required; the starting stage, for example New or Discovery.
   - **Assignee** — who becomes responsible for the Deal.
3. Under **Company** and **Contact**, the linked records are already chosen — *Choose existing* is pre-selected and each shows a Linked badge.
4. **Transfer activities from Lead to Deal** and **Transfer links** are selected by default. Leave them on to carry the Lead's history into the Deal, or clear either box to convert without it.
5. **Transfer activities** moves Notes, Meetings and Tasks across. **Transfer links** moves Web, Jira and Confluence links. Files stay on the Lead record either way.
6. Click **Convert**.


Mria CRM
Leads
Deals
Contacts
Companies
Products
Dashboard
Activities
Reports
Notifications
99+
Settings
Documentation
Help
Share Feedback
LEAD - Tomas Vidal
Convert
Notes
Emails
Meetings
Tasks
Files
Click a tab above, or start typing to add a note...
Linked items 0
+ Link item
Jira work items 0
Spaces 0
Boards 0
Web links 0
Confluence 0
No related Jira work items yet
Once the related items are added, they'll appear here.
+ Create new
Emails 0
Timeline
Filters 4
Contact added "Tomas Vidal"
Aug 28, 2026 at 2:38 PM · Nataliia Timoshyna
Lead created
Aug 28, 2026 at 2:36 PM · Nataliia Timoshyna
Details
Name LEAD - Tomas Vidal
Lead Status New
Assignee Nataliia Timoshyna
Source -
Tags -
More fields 6
Lead Score -
Estimated Budget -
Decision Timeline -
Use Case -
Pain Points -
Reference Partner -
Contact
Name Tomas Vidal
Email tomas.vidal@northstarlabs...
Secondary Email -
Phone +1 415 555 0134
Title Head of Operations
Company
Name Northstar Labs
Website https://northstarlabs.exam...
Country -



➡ Result:

- The Lead's status changes to **Converted**.
- A new Deal is created in the **Deals module**, with the selected details.
- If activities were transferred, they will appear in the Deal's **Planned** section (for open Meetings and Tasks) and **Timeline** (for completed or past activities).
- The Deal inherits linked Contact and Company from the Lead.



Case 2: Lead without Linked Contact or Company

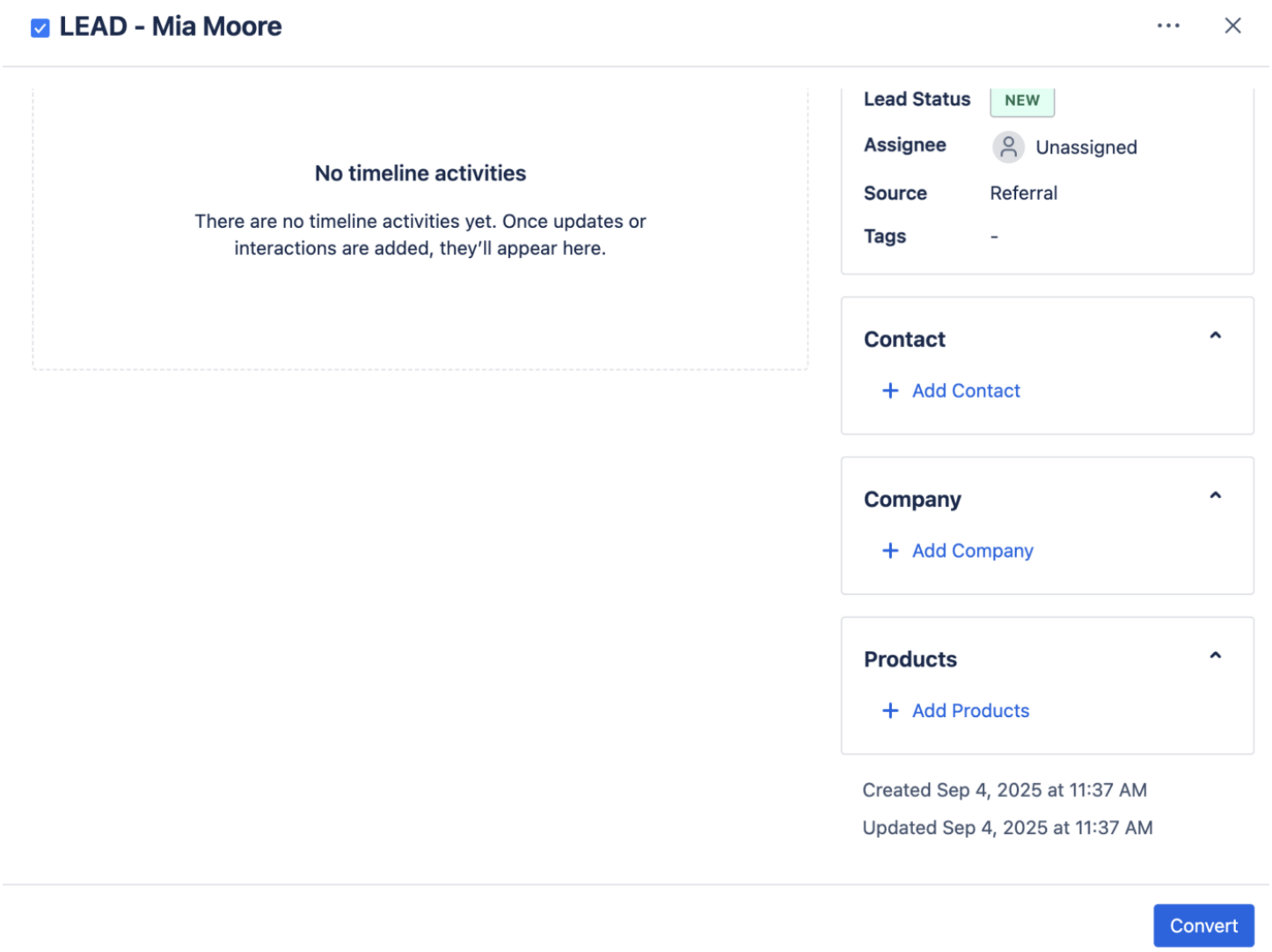
If a Lead does not yet have a **Contact** or **Company**, you can create or choose them during conversion.

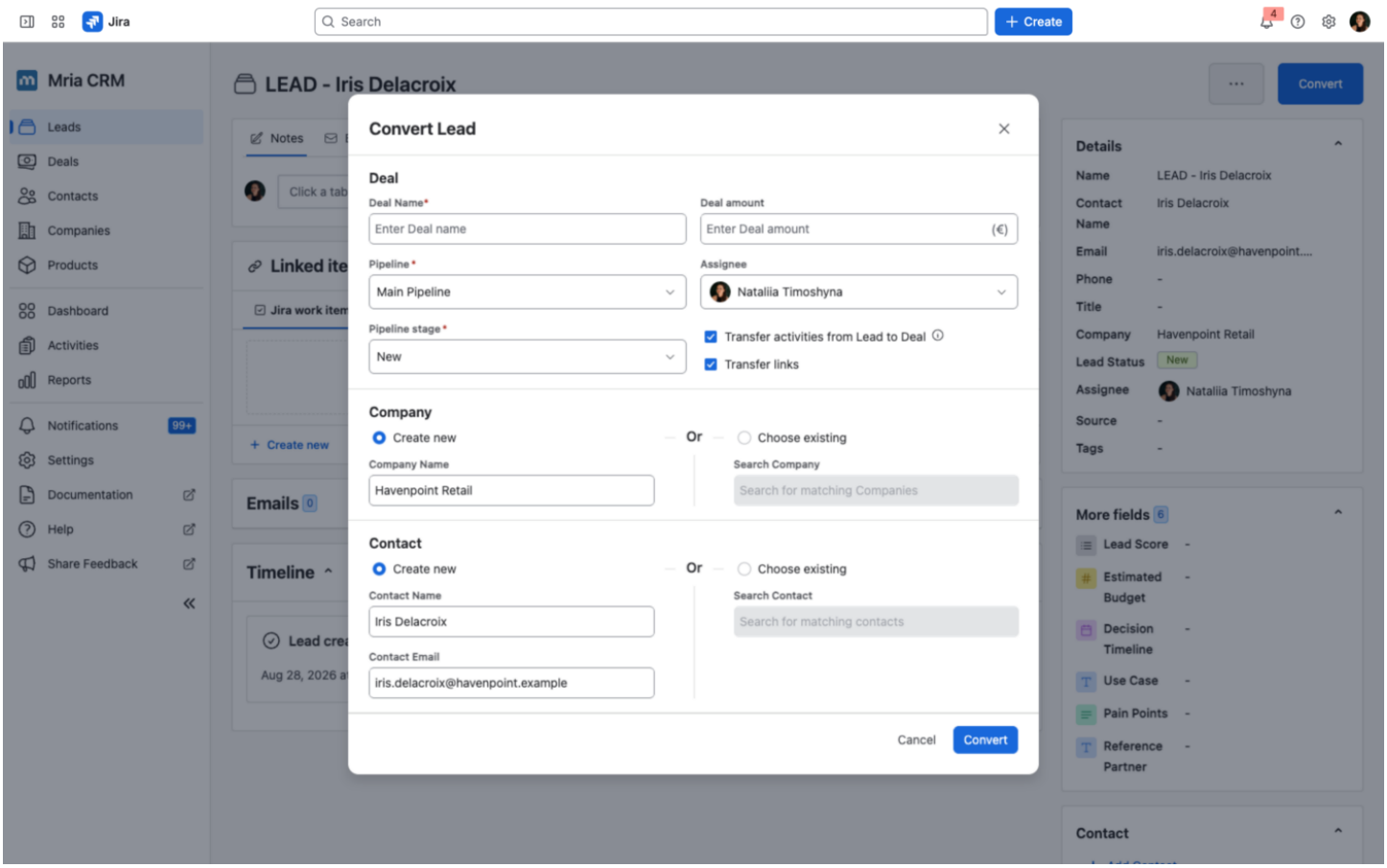
1. Open the Lead and click **Convert**.
2. Fill in the Deal details — **Deal Name**, **Pipeline** and **Pipeline stage** are required; **Deal amount** and **Assignee** are optional.
3. In the **Company** section, either pick **Create new** and enter a name — it is pre-filled from the Lead — or pick **Choose existing** and search for one.
4. In the **Contact** section, either pick **Create new** and enter a name and email, or **Choose existing** and search.

5. **Transfer activities from Lead to Deal** and **Transfer links** are selected by default. Clear either box if you do not want that data carried over.
6. Click **Convert**.

➡ Result:

- The Lead is marked as **Converted** and linked to whichever Company and Contact you supplied on the form.
- The Deal is created and linked to the same entities.
- Additional Contact and Company details (such as Phone, Title, Website, Industry, Country) can be added later in their full views.





Mixed Cases

Any combination of Case 1 and Case 2 is supported. For example:

- A Lead may already have a Contact linked, but not a Company → you can create or choose a Company during conversion.
- A Lead may already have a Company linked, but not a Contact → you can create or choose a Contact during conversion.

Company and Contact are optional. On the Convert Lead form only **Deal Name**, **Pipeline** and **Pipeline stage** are marked required. If you leave the Company section and the Contact section empty, the Lead still converts and the Deal is created with neither attached — you can link them from the Deal later.

Where the Lead already had a Contact or a Company linked, that record is carried over, so in practice most conversions do end up with both.

Custom Field Carryover on Conversion

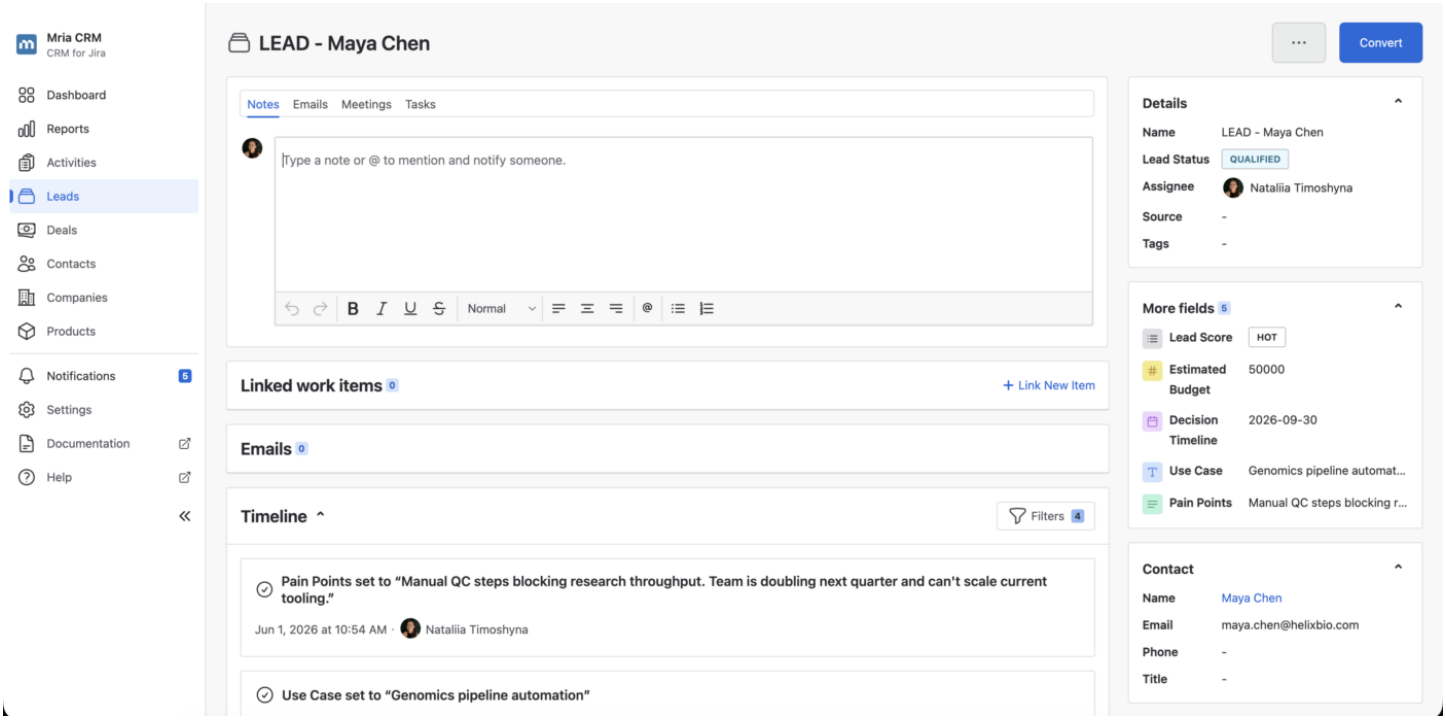
If your team uses Custom Fields, values can copy from the Lead to the new Deal automatically during conversion — no need to retype them.

The rule: a custom field's value copies over only when both of these match between the Lead and the Deal entity:

- The field **names** are identical.
- The field **types** are the same (for example, a Dropdown on the Lead won't copy into a Short text on the Deal, even if the names match).

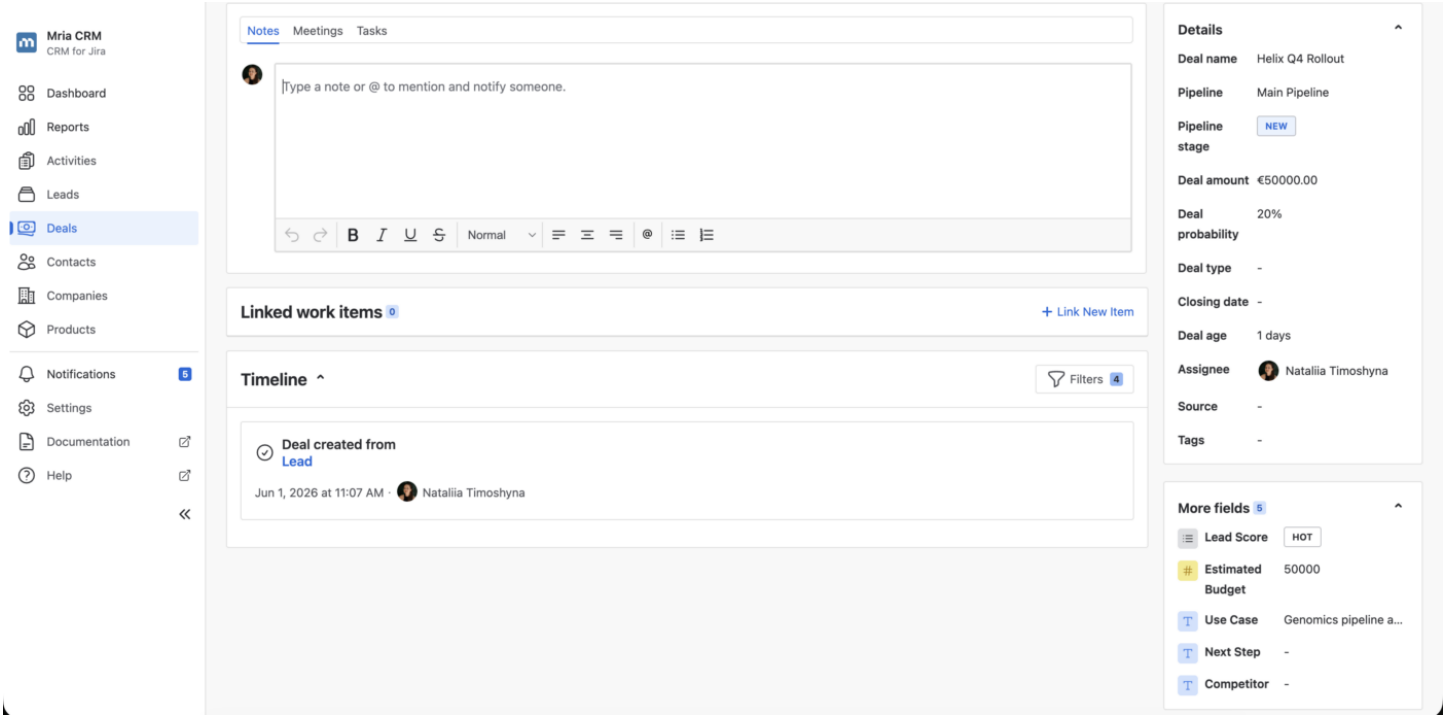
Custom fields that exist only on the Lead stay on the Lead record after conversion — they have nowhere to go on the Deal. Custom fields that exist only on the Deal remain empty after conversion, ready for the sales rep to fill in.

Example. A qualified Lead has five custom fields populated — Lead Score, Estimated Budget, Decision Timeline, Use Case, and Pain Points. On the Deal entity, three of those names also exist (Lead Score, Estimated Budget, Use Case), plus two Deal-specific fields (Next Step, Competitor).



When the Lead is converted into a Deal, **Lead Score**, **Estimated Budget**, and **Use Case** carry their values straight over because the names and types match on both entities. **Decision Timeline** and **Pain Points** are not copied — the Deal entity doesn't have those fields, so the values stay on the

original Lead record. **Next Step** and **Competitor** remain empty on the new Deal for the sales rep to fill in as the Deal progresses.



Tip: If you want a Lead field to carry into the Deal, create a matching custom field on the Deal entity with the same name and the same type. See Custom Fields for setup instructions.

After conversion, you can manage the Deal in the **Deals module**, move it across pipeline stages, and mark it as **Won** or **Lost**.