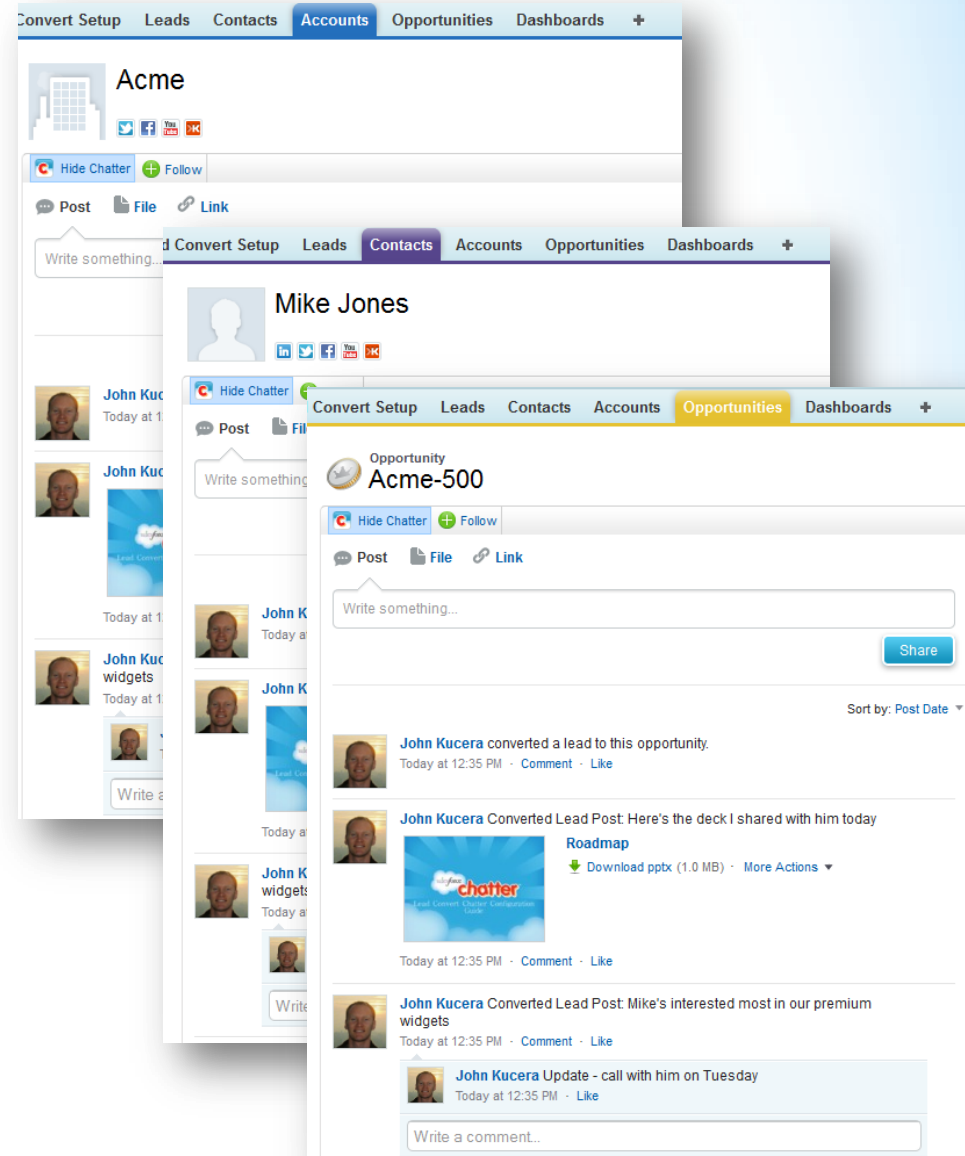
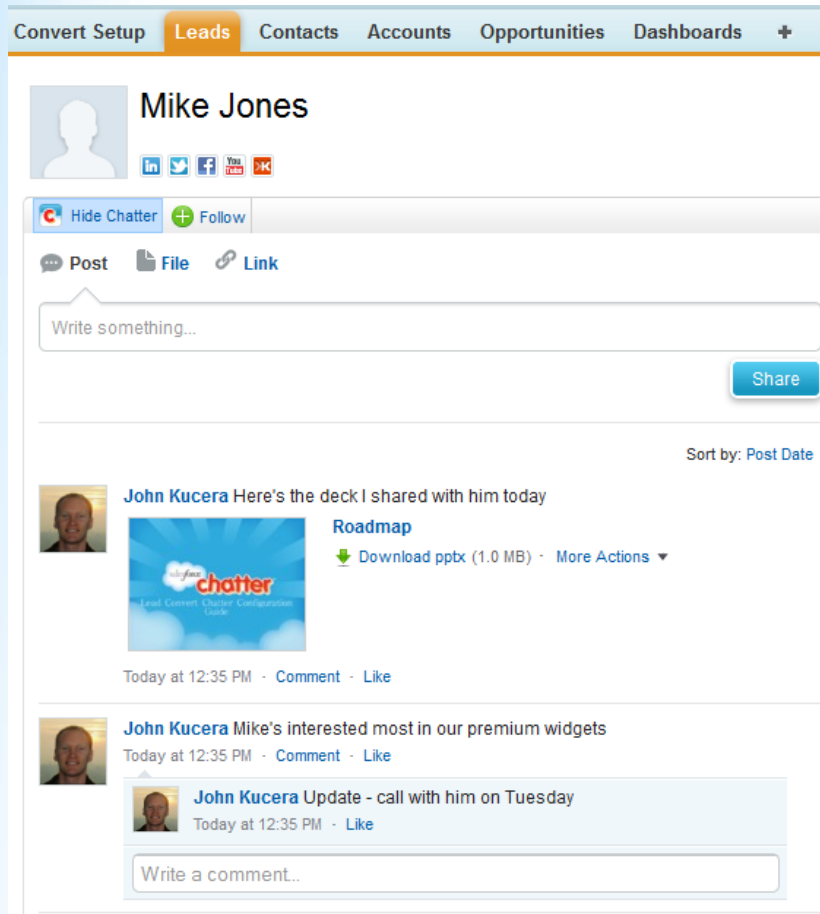




Lead Convert Chatter Configuration Guide

Lead Convert Chatter moves lead Chatter to contact, account, and/or opportunity



Upon install, the default settings are to move posts only to Contact

The screenshot displays the 'Lead Convert Chatter Setup' page in Salesforce. The navigation bar at the top includes 'Home', 'Chatter', 'Lead Convert Chatter Setup' (highlighted), 'Leads', 'Contacts', and 'Accounts'. The main heading is 'Lead Convert Chatter Settings' with a wrench icon, followed by 'Edit Settings'. Below this is a section titled 'Edit Settings' with an 'Edit' button. The first section, 'Where should Chatter people posts on the Lead move upon Lead Convert?', has three options: 'Contact' (checked with a red box around it), 'Account', and 'Opportunity'. The second section, 'Should Chatter posts be moved on Lead or Contact merge?', has one option: 'Move Posts on Merge' (checked). An 'Edit' button is at the bottom.

Home Chatter **Lead Convert Chatter Setup** Leads Contacts Accounts

Lead Convert Chatter Settings
Edit Settings

Edit Settings Edit

▼ Where should Chatter people posts on the Lead move upon Lead Convert?

Contact ☒

Account ☐

Opportunity ☐

▼ Should Chatter posts be moved on Lead or Contact merge?

Move Posts on Merge ☒

Edit

You can change this orgwide setting on the Lead Convert Chatter Setup tab

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Search Leads, Accounts, O... Search

John Kucera Help

Lead Convert Chatter

Home Chatter **Lead Convert Chatter Setup** Leads Contacts Accounts Opportunities Dashboards +

Lead Convert Chatter Settings
Edit Settings

Edit Settings Save

▼ Where should Chatter people posts on the Lead move upon Lead Convert?

Contact	☒
Account	☒
Opportunity	☐

▼ Should Chatter posts be moved on Lead or Contact merge?

Move Posts on Merge ☒

Save

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Limitations

- Lead merge & contact merge not yet supported
- Posts at the 1,000 character limit may see up to 20 characters truncated
- Contact likes & files are not yet supported
- Chatter must be enabled on all of the objects you want to move the posts to



Questions? Email me:
jkucera@salesforce.com