Blink

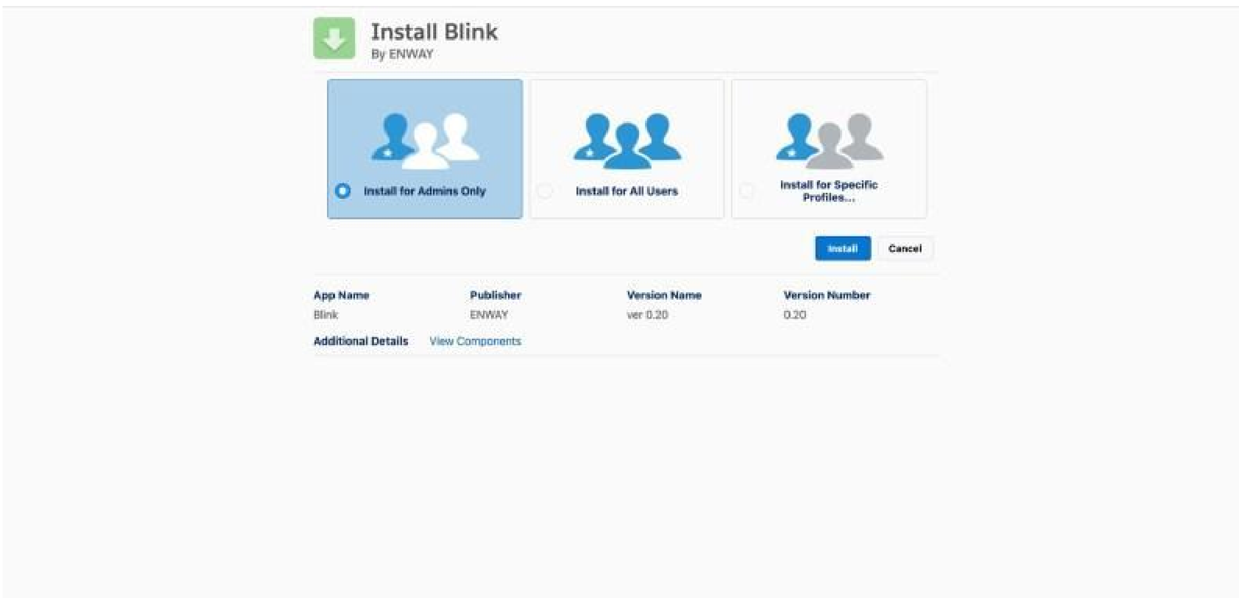
Extend your lead conversion process

Installation

Blink was built to help companies to speed up the sales process. To share lead information with custom objects you can easily add them in the settings. Using a few clicks add fields and record types mapping. Blink supports single and multiple lead conversions. Now you don’t need any additional development.

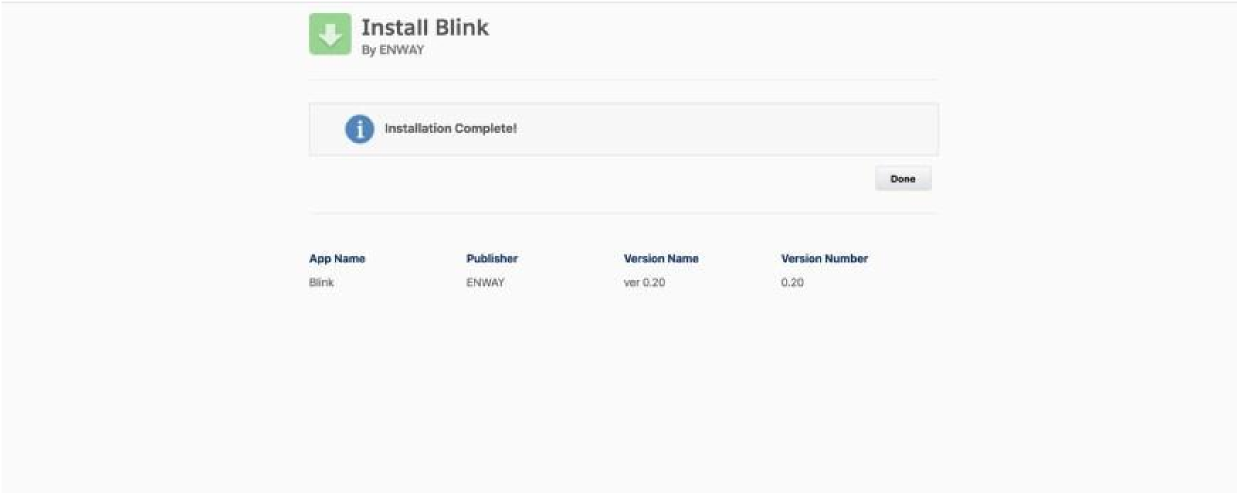
Step 1

Install the package. Depending on your settings select profiles installation options.



Step 2

Wait until the finish step and click “Done”.



Step 3

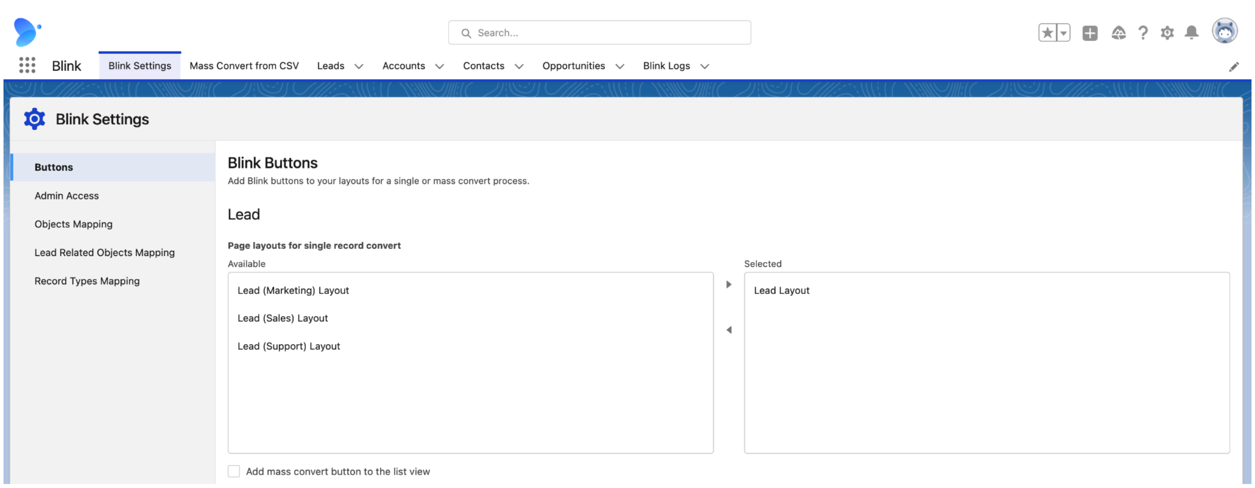
Single lead convert

There are two ways to add buttons to page layouts:

- From the Blink Settings > Buttons
- Add Manually

Blink Settings (Lightning only)

Open the Blink Settings and click Buttons. Use multi-picklist in the Lead section to select a layout for the “Blink Convert” button.

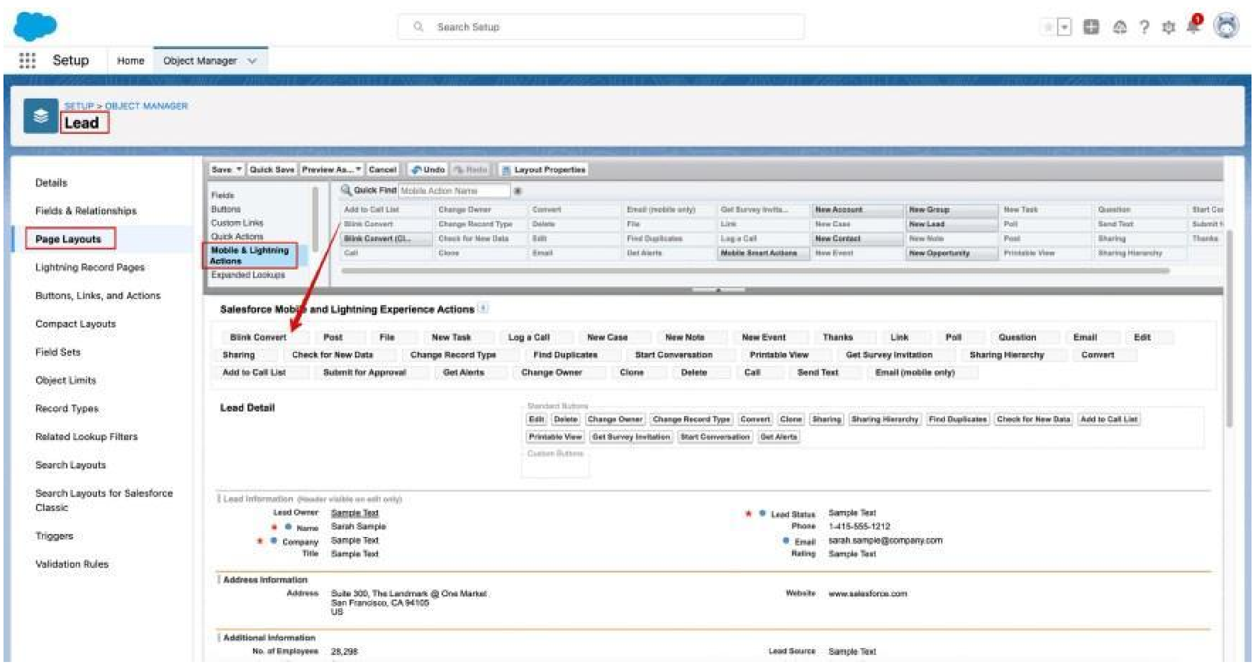


Add Manually

Add single Lead convert buttons on the page layout (Lightning or Classic depends on your user interface).

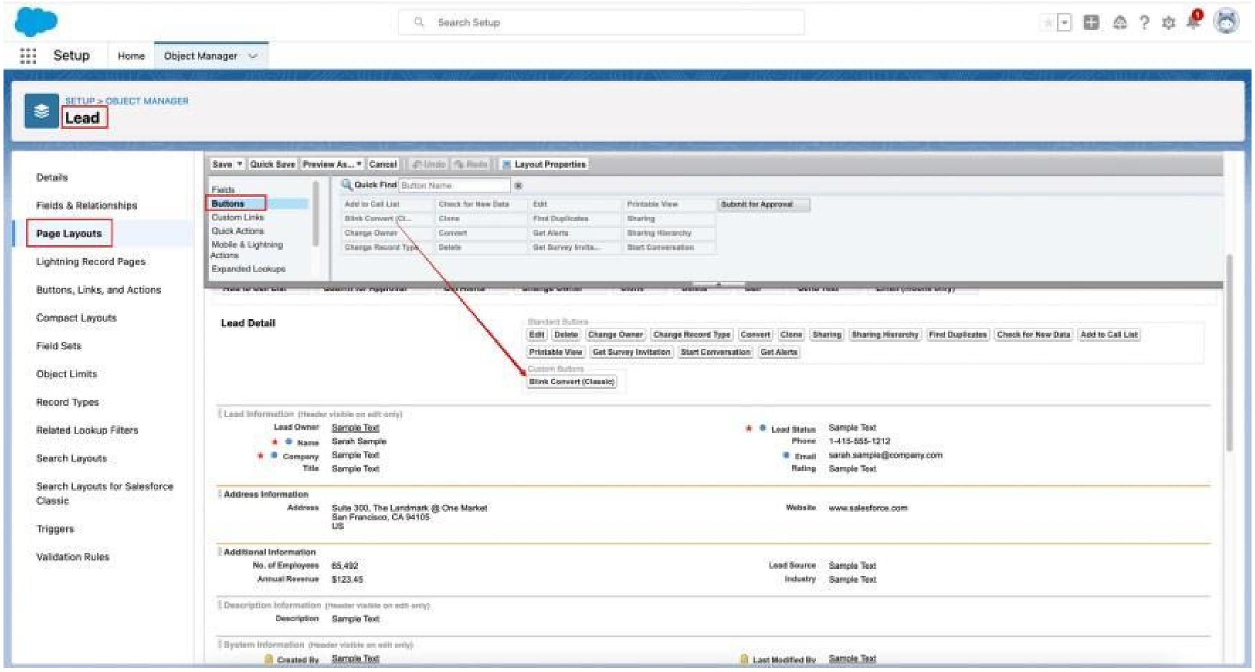
Lightning

1. Go to the Setup > Objects Manager > Lead
2. Click “Page Layouts” in the sidebar
3. Select page layout you want to edit
4. In the settings section go to the “Mobile & Lightning Actions”
5. Drag and drop “Blink Convert” button to the “Salesforce Mobile and Lightning Experience Actions”
6. Click “Save”



Classic

1. Go to the Setup > Objects Manager > Lead
2. Click “Page Layouts” in the sidebar
3. Select page layout you want to edit
4. In the settings section go to the “Buttons”
5. Drag and drop “Blink Convert (Classic)” button to the “Lead detail > Custom Buttons”
6. Click “Save”



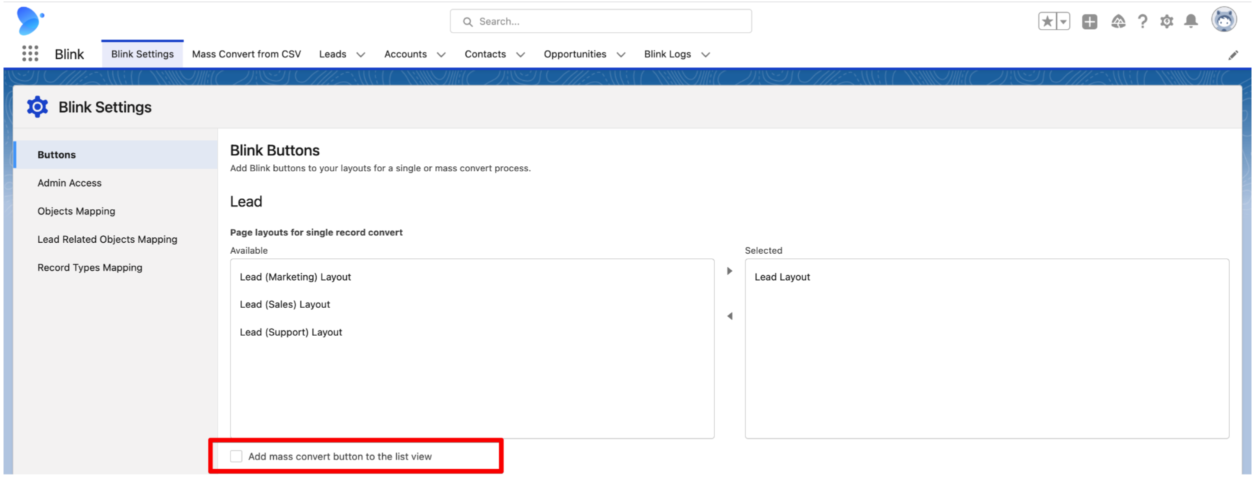
Mass convert

There are two ways to add the button to the list view:

- From the Blink Settings > Buttons
- Add Manually

Blink Settings

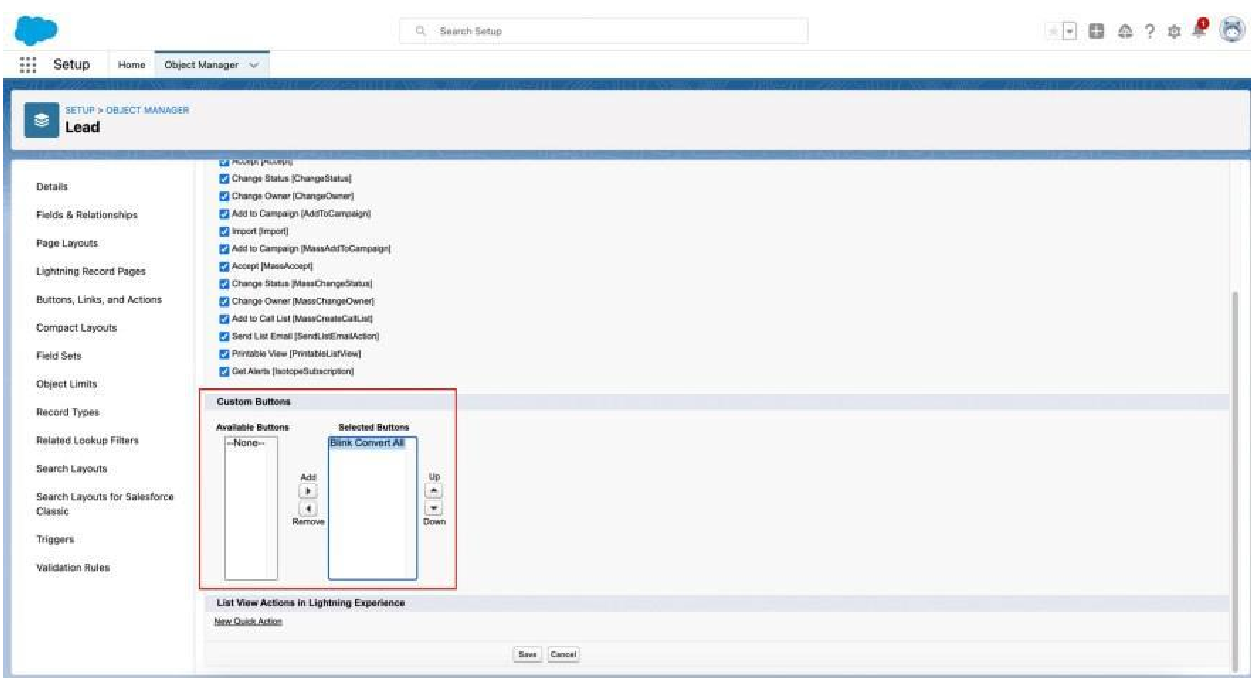
Open the Blink Settings and click Buttons. Use the checkbox “Add mass convert button to the list view” under the multi-picklist in the Lead section.



Add Manually

Add mass Lead convert buttons on the page layout.

1. Go to the Setup > Objects Manager > Lead
2. Click “Search Layouts for Salesforce Classic” in the sidebar
3. Click Edit for the “List View”
4. Select “Blink Convert All” button and move it to the “Selected button”
5. Click “Save”



Step 4

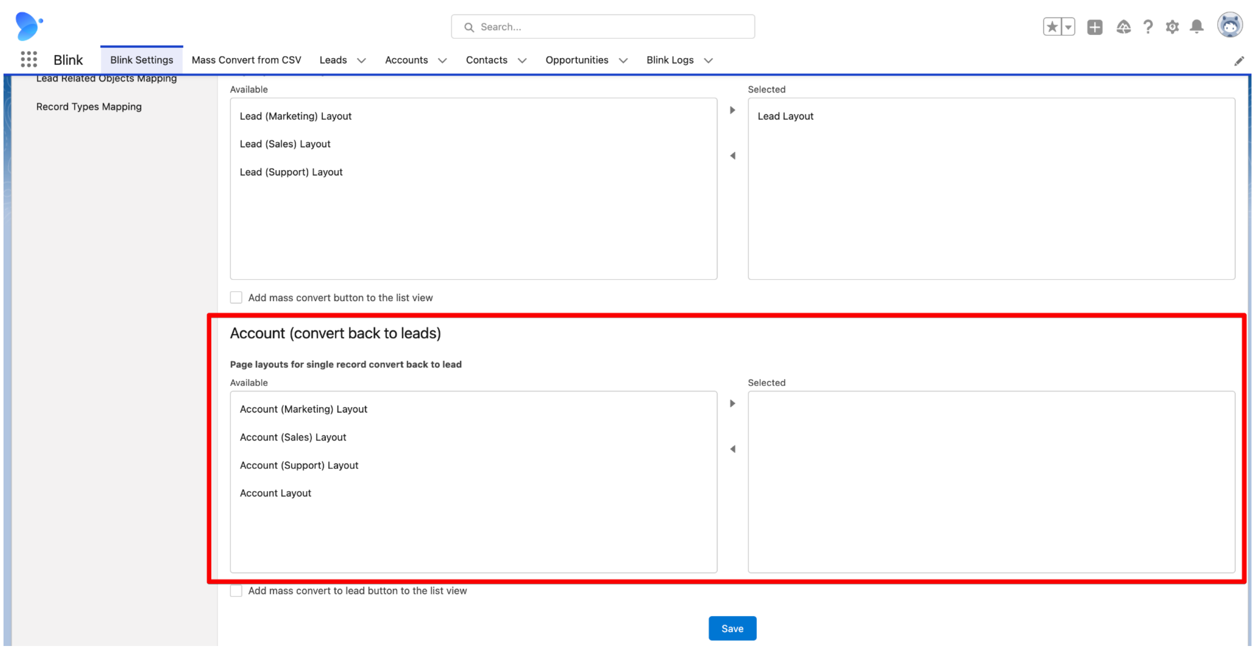
Convert Account Back to Lead

There are two ways to add the button to the list view:

- From the Blink Settings > Buttons
- Add Manually

Blink Settings (Lightning only)

Open the Blink Settings and click Buttons. Use multi-picklist in the Account section to select a layout for the “Blink Convert to Lead” button.



Add Manually

Add “Blink Convert to Lead” button on the page layout (Lightning or Classic depends on your user interface).

Lightning

1. Go to the Setup > Objects Manager > Account
2. Click “Page Layouts” in the sidebar
3. Select page layout you want to edit

4. In the settings section go to the “Mobile & Lightning Actions”
5. Drag and drop “Blink Convert to Lead” button to the “Salesforce Mobile and Lightning Experience Actions”
6. Click “Save”

Classic

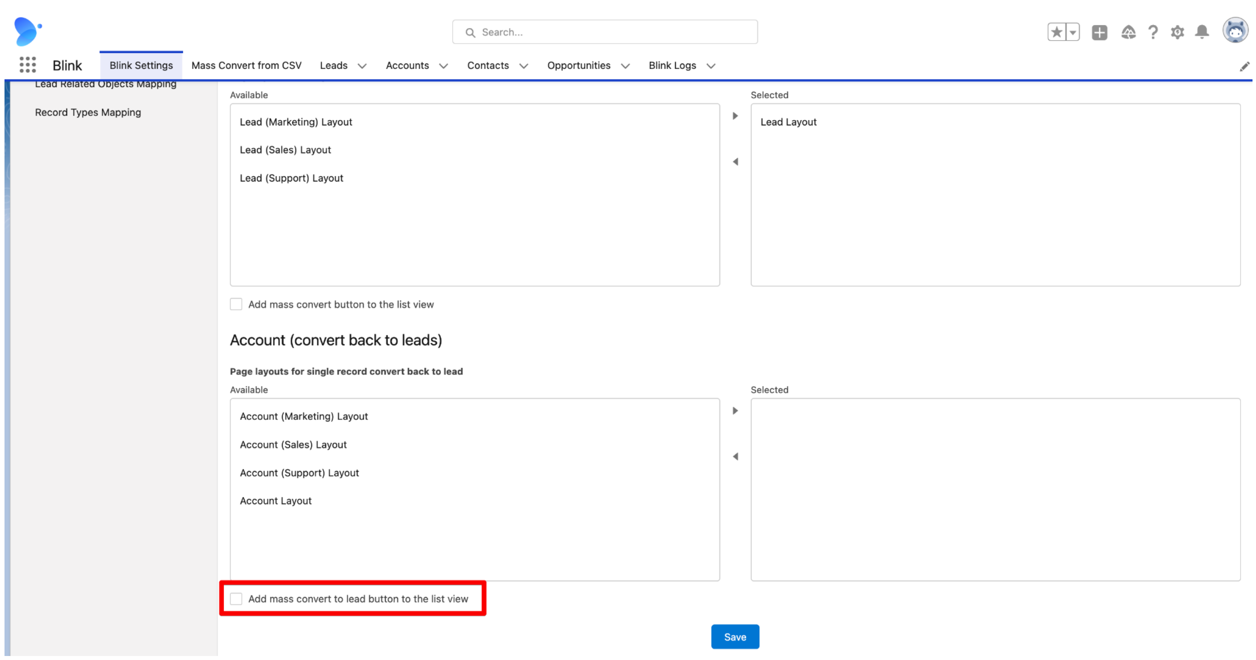
1. Go to the Setup > Objects Manager > Account
2. Click “Page Layouts” in the sidebar
3. Select page layout you want to edit
4. In the settings section go to the “Buttons”
5. Drag and drop “Blink Convert to Lead (Classic)” button to the “Account detail > Custom Buttons”
6. Click “Save”

Mass Convert Lead Back to Account

There are two ways to add buttons to the list view:

- From the Blink Settings > Buttons
- Add Manually

Blink Settings

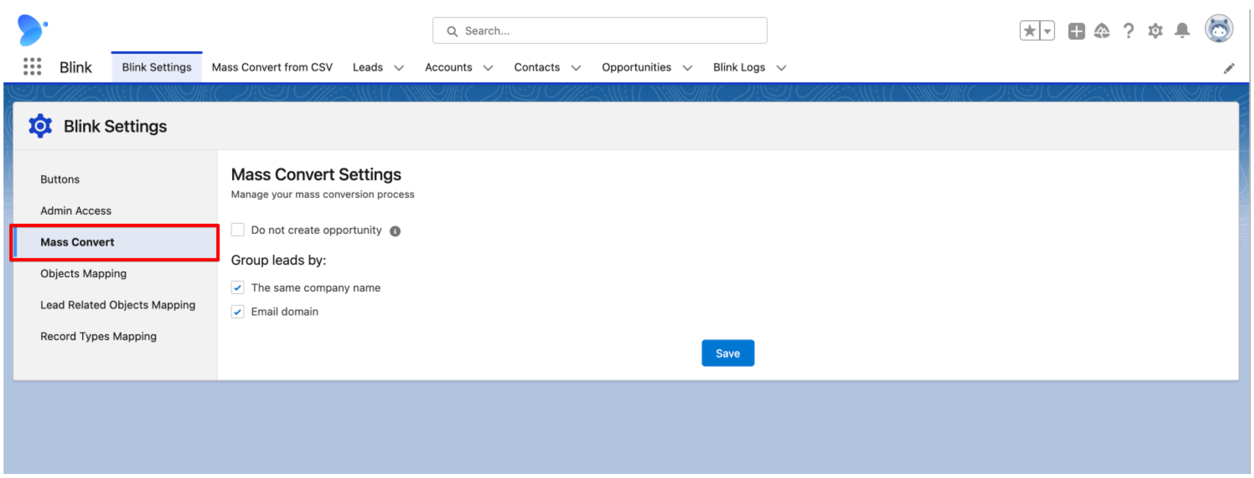


Add Manually

1. Go to the Setup > Objects Manager > Account
1. Click “Search Layouts for Salesforce Classic” in the sidebar
2. Click Edit for the “List View”
3. Select “Blink Convert All” button and move it to the “Selected button”
4. Click “Save”

Mass Convert Settings

In the setting you have the option to set your default choice for creating Opportunity records. Additionally, the upcoming section shows the lead record grouping. This feature can be helpful when uploading leads to Salesforce without company information. Or with the same company name.



Setup Objects Mapping

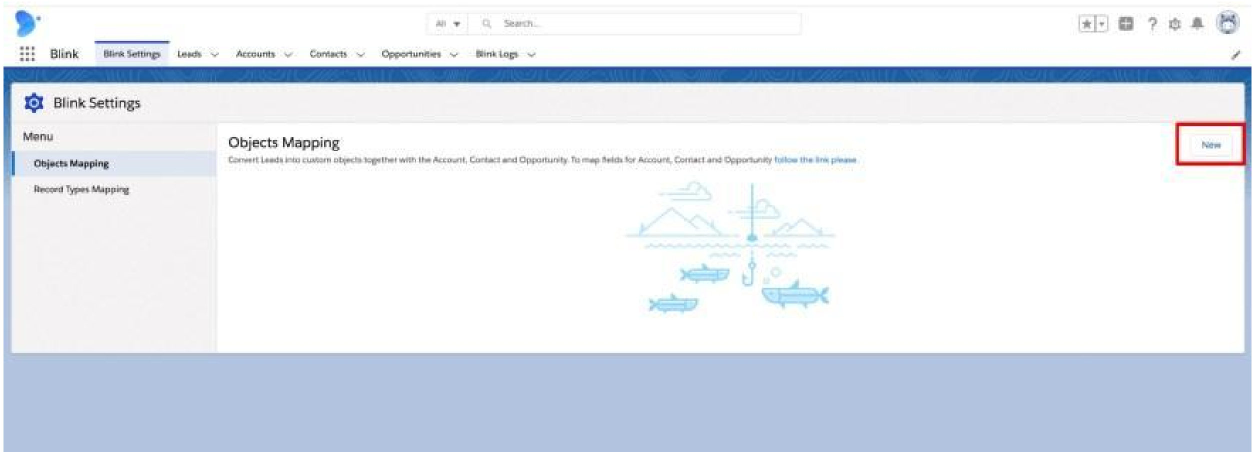
Using Blink settings you can add custom objects to the Lead conversion process. Also, it’s possible to map Lead records types with standard and custom objects.

To open settings go to App launcher > Blink > Blink settings.

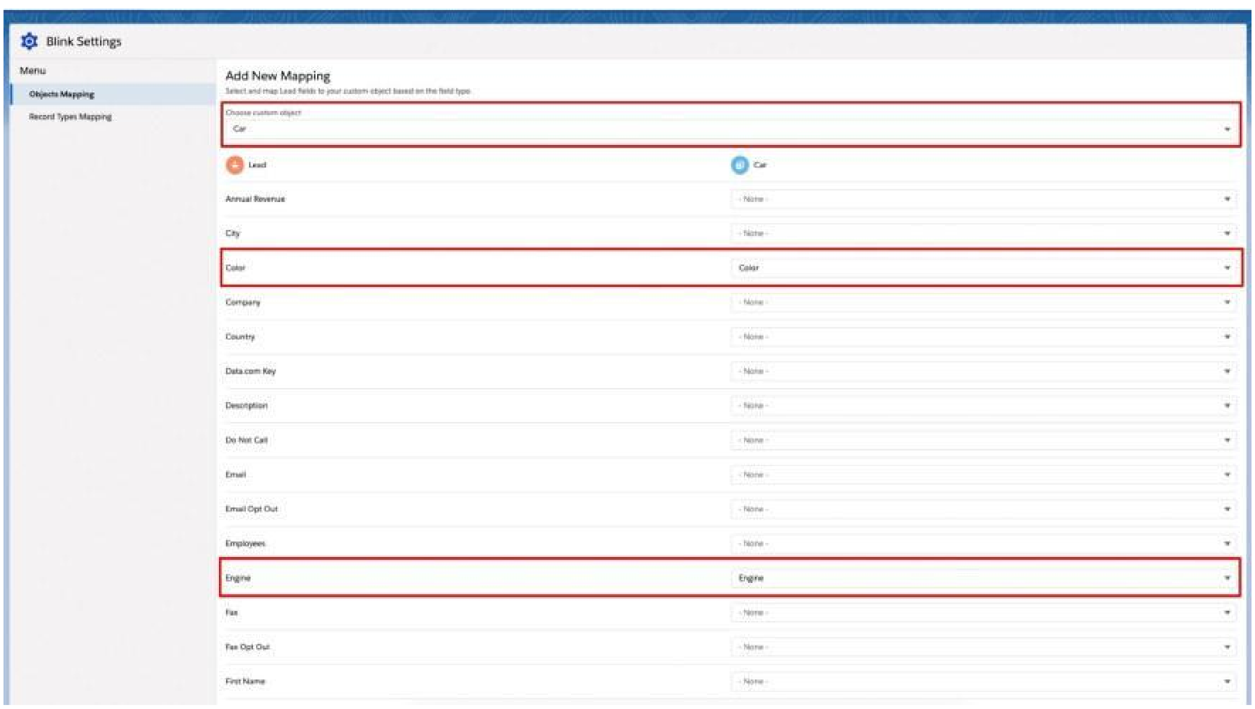
Map Custom Object Fields to Convert with Lead

Using objects mapping setting it’s possible to add custom objects to Account, Contact, Opportunity group in the Lead conversion process.

Go to Object settings > New to add a new custom object.



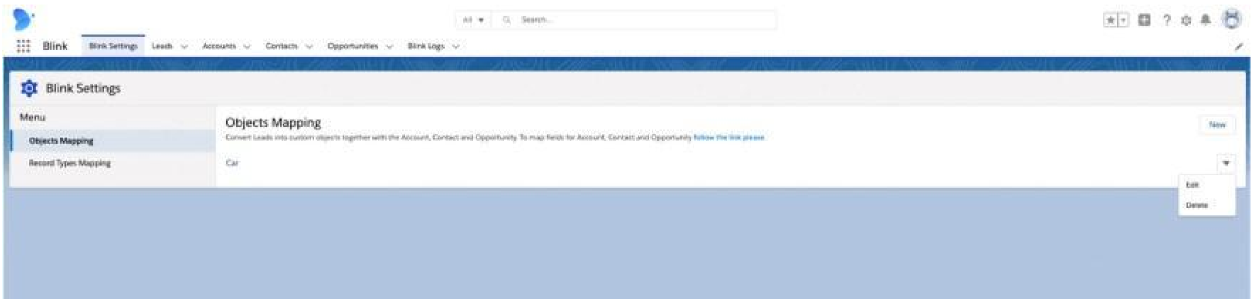
Select a custom object from the drop-down “Choose custom object” menu. Set up fields mapping from the Lead to a custom object.



Click Save to save the mapping.

If the custom object Name field is not mapped, it will be populated as Lead First and Last Name.

To edit or delete mapping use the action drop-down in the lightning table.

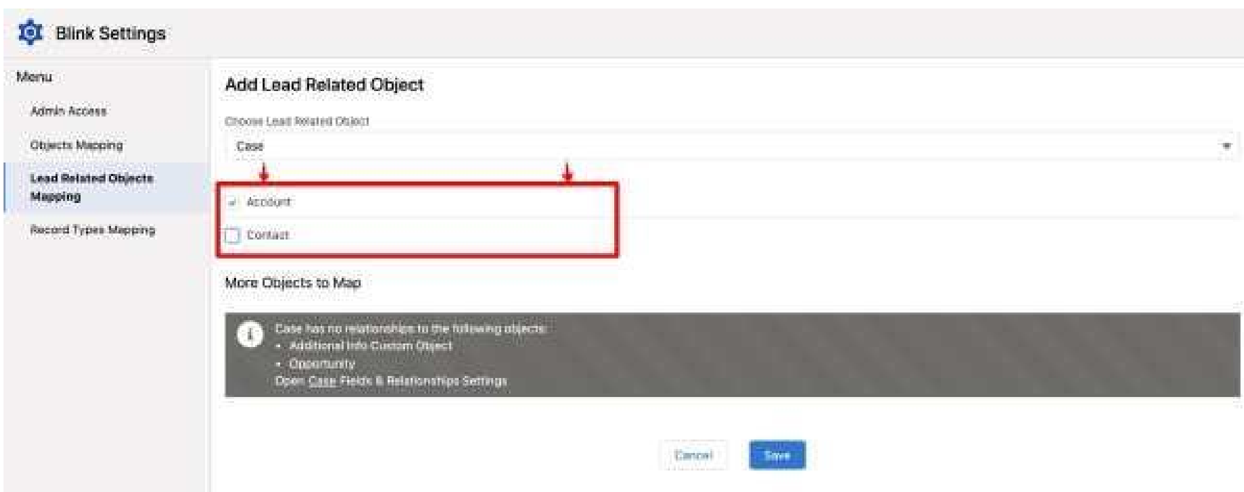


Lead Related Lists Mapping

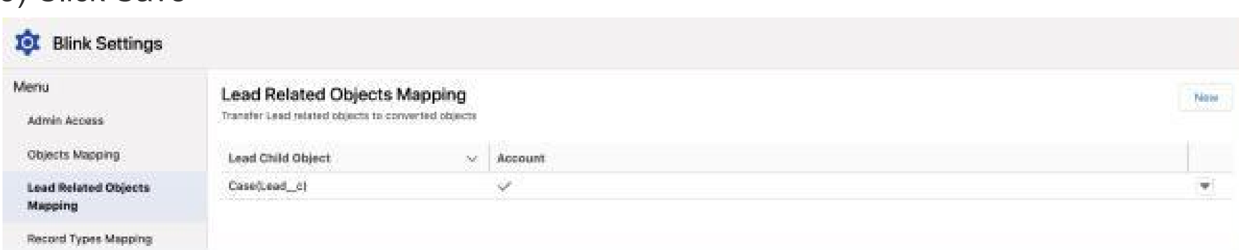
Is it possible to move Lead Related Lists to Account, Contact, Opportunity, Custom Object Related Lists upon conversion? Well, currently Salesforce doesn’t support this feature. Nevertheless, we’ve extended the Blink app with the Lead Related Lists mapping setting.

In order to use this function, please:

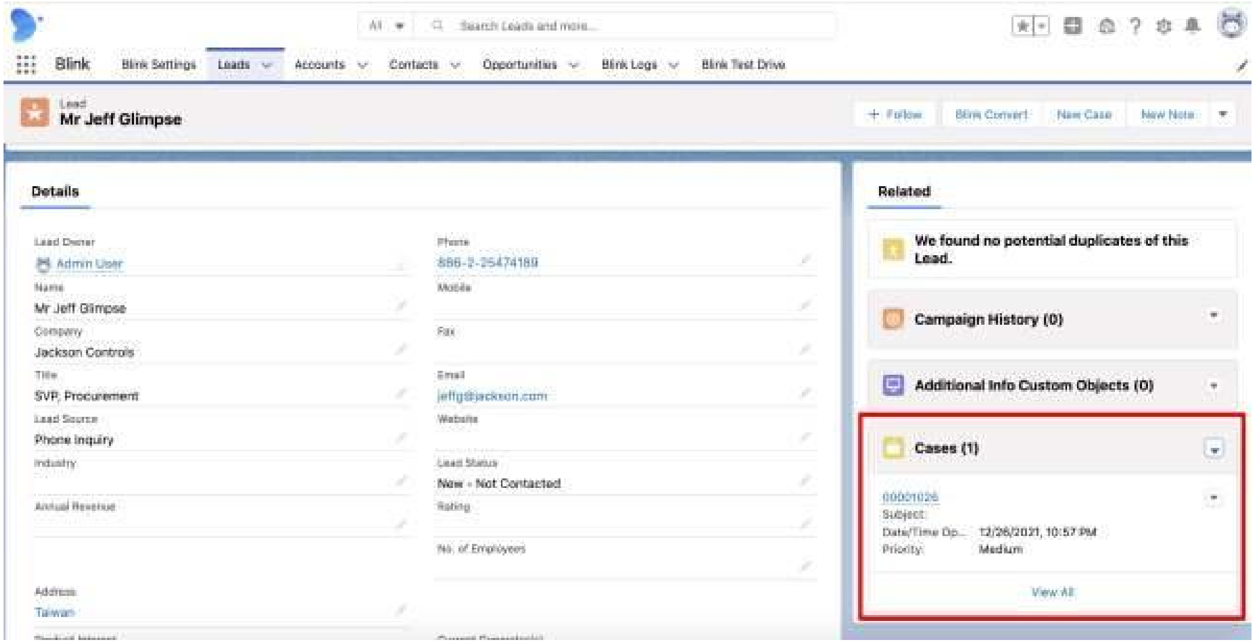
1) Go to App Launcher -> Blink -> Blink Settings -> Lead Related Objects Mapping -> New
2) Pick the option of Lead related objects in the «Choose Lead Related Object»
3) Choose an object to map its records from the Lead to the target object. In the example we take a Case object and associate it with an Account:



4) To check objects relationships, you may see highlighted suggestions in the «More Objects to Map» info section
5) Click Save

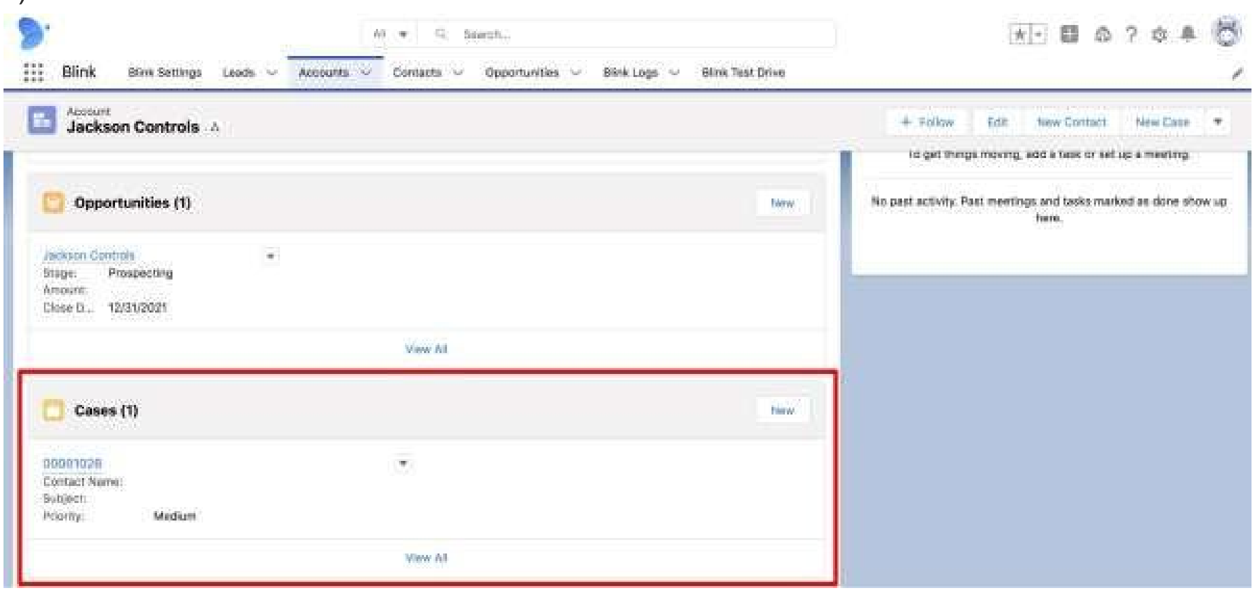


6) Go to the Lead record with the Case related list



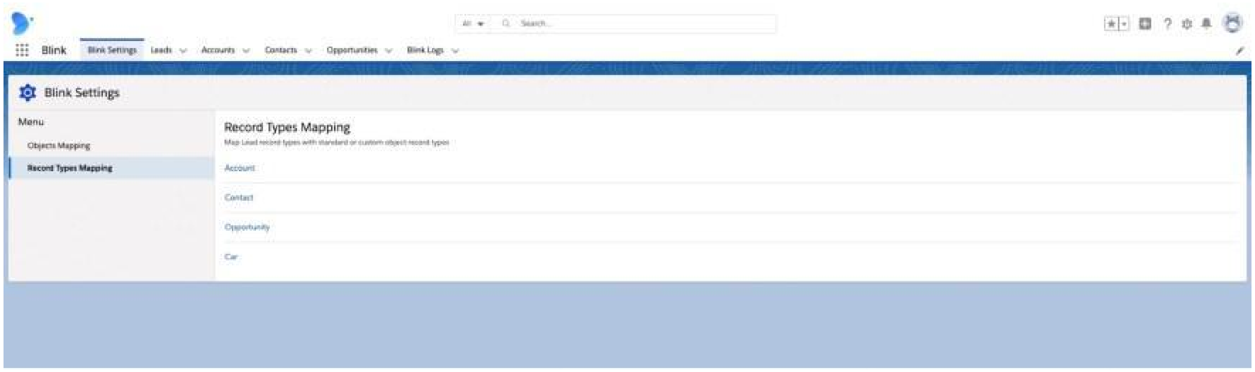
7) Click the «Blink Convert» button

8) Check the Case related list in the new created Account:

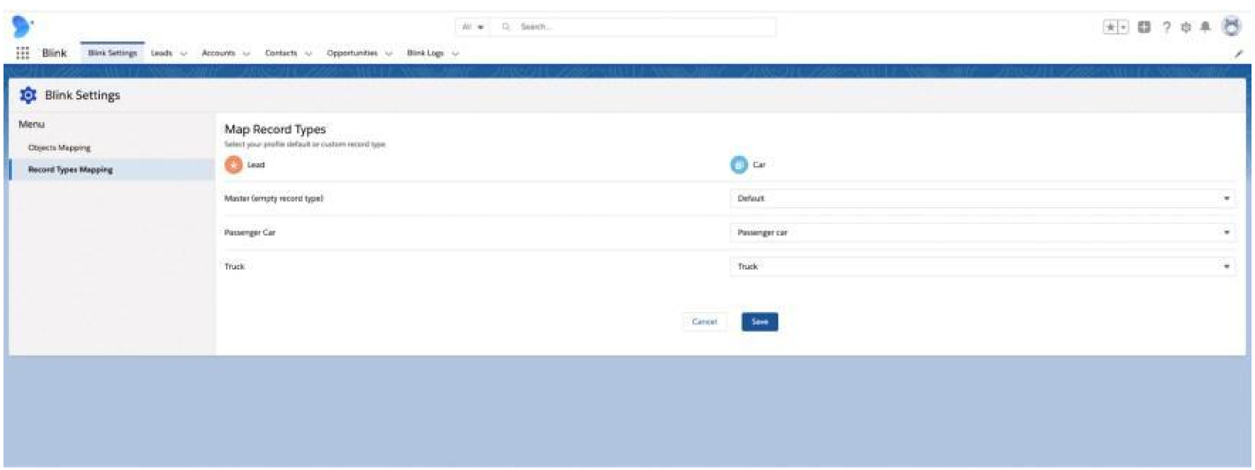


Setup Record Types Mapping

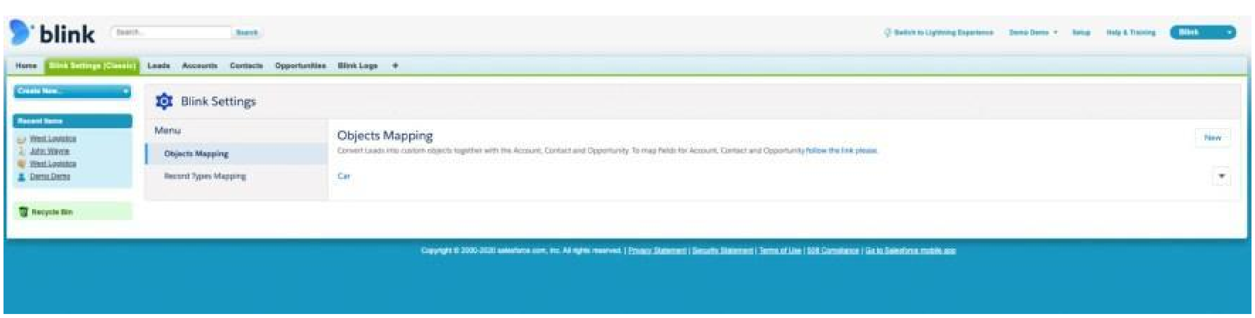
To set a specific record type after the Lead conversion process go to the Blink settings > Record Types Mapping. Then select Account, Contact, Opportunity or custom object from the list.



Map record types from Lead to your target object. Click Save.



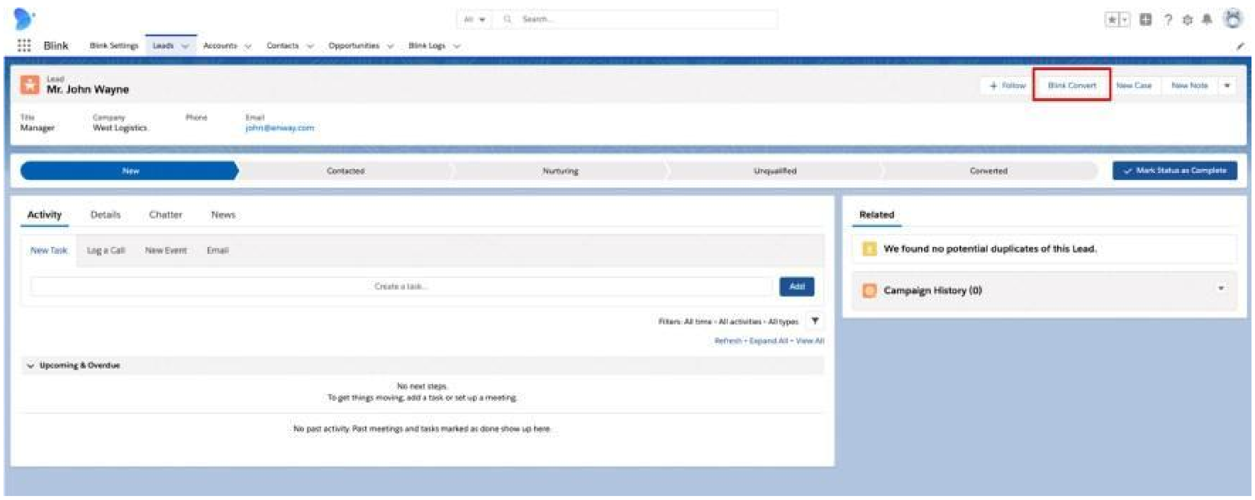
The Classic view has a similar interface



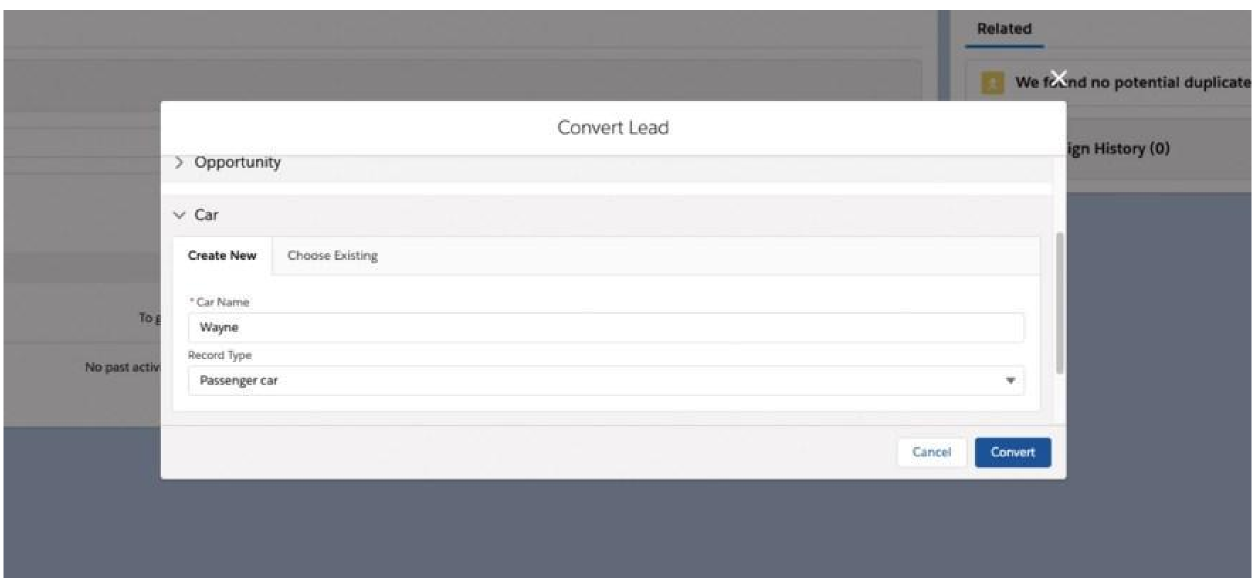
Convert Single Lead Record

Lightning

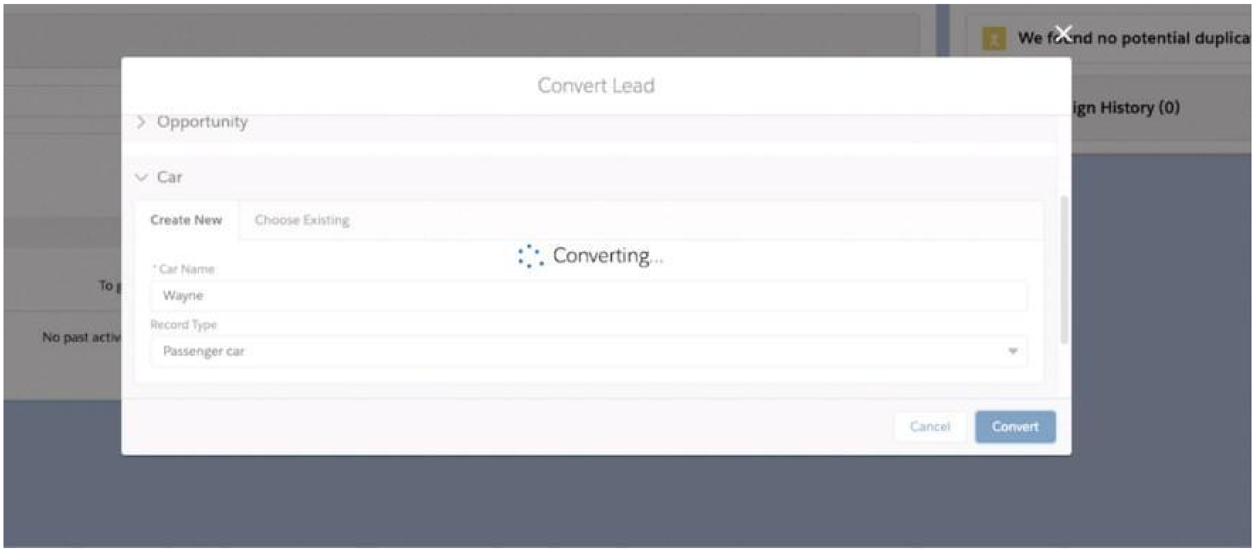
To convert a single lead record click the “Blink Convert” button on the Lead page layout.



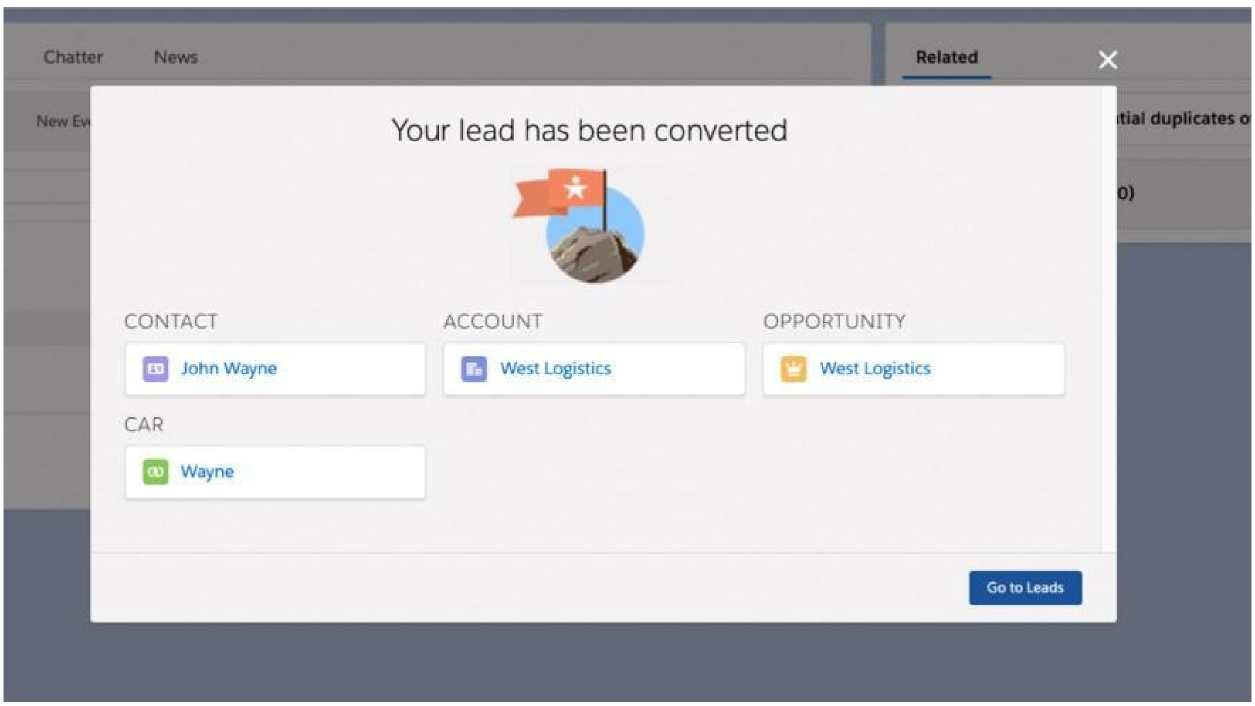
In the modal screen apply changes to the Account, Contact, Opportunity and custom object.



Click the Convert button.

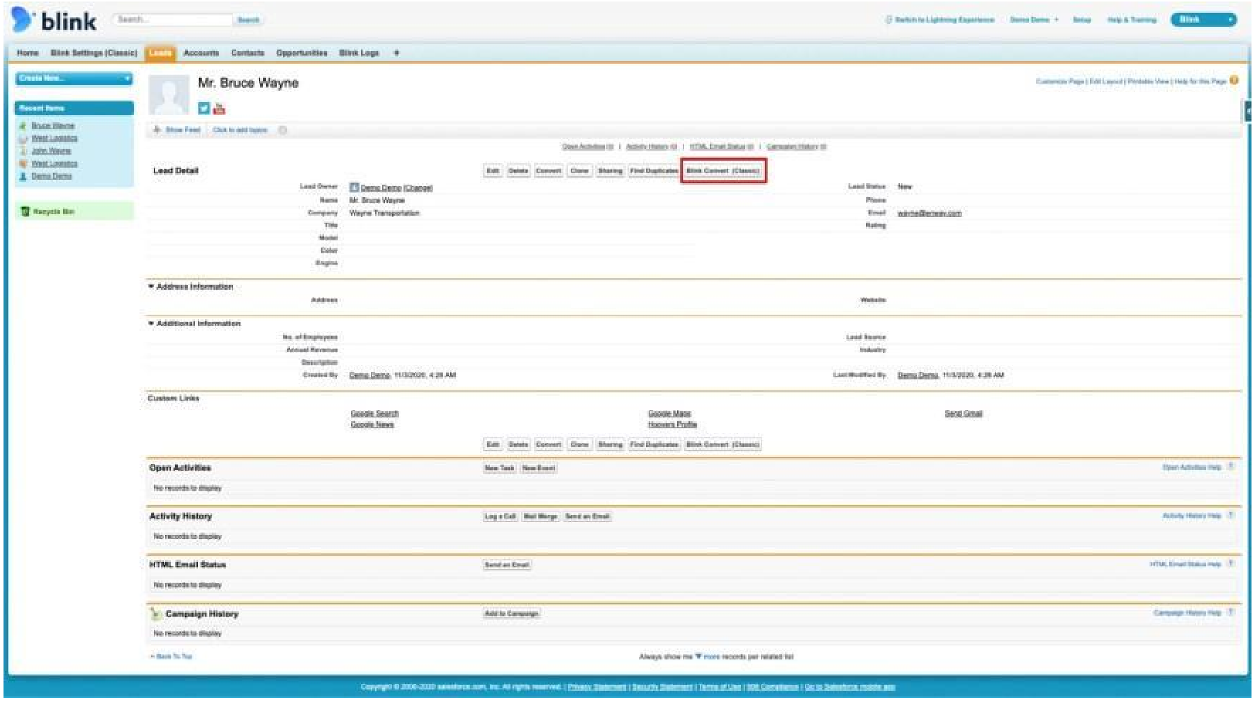


On the final screen select a final record to open.

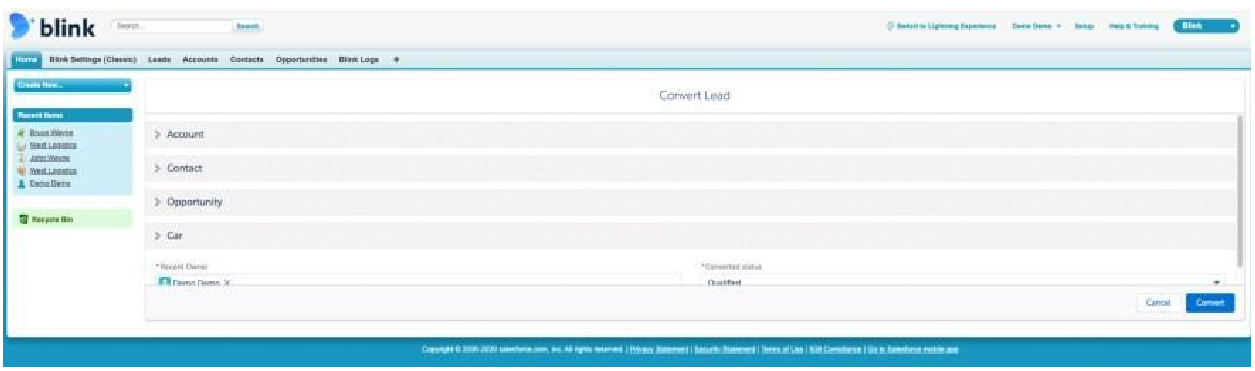


Classic

Open a lead record and click “Blink Convert (Classic)”.

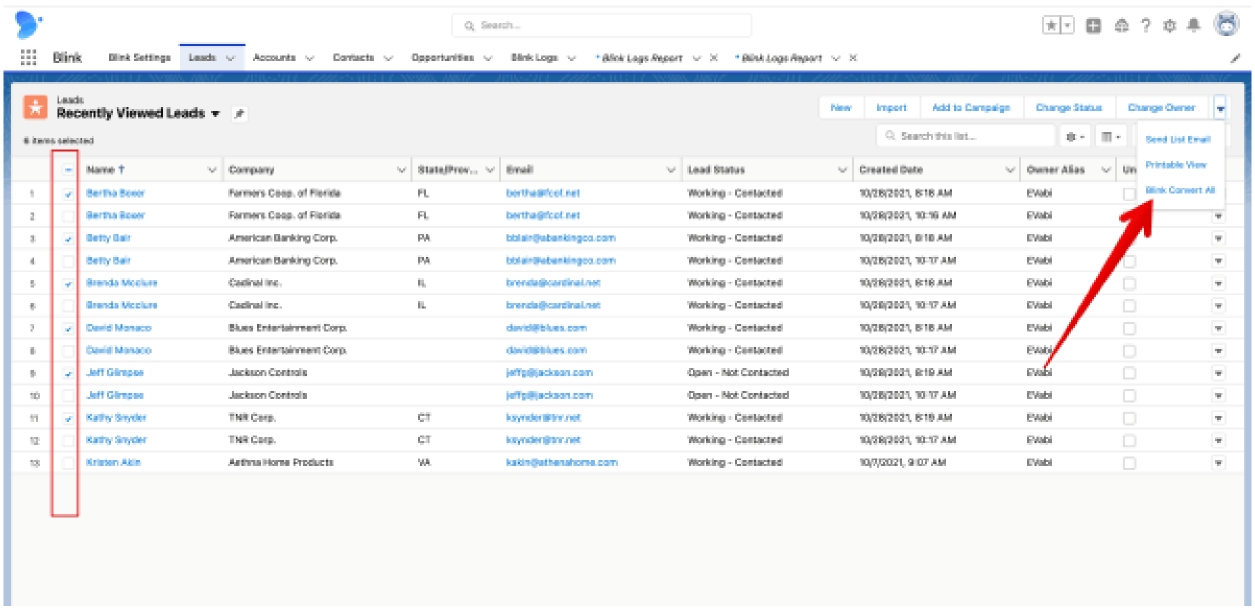


Check your information and click convert.

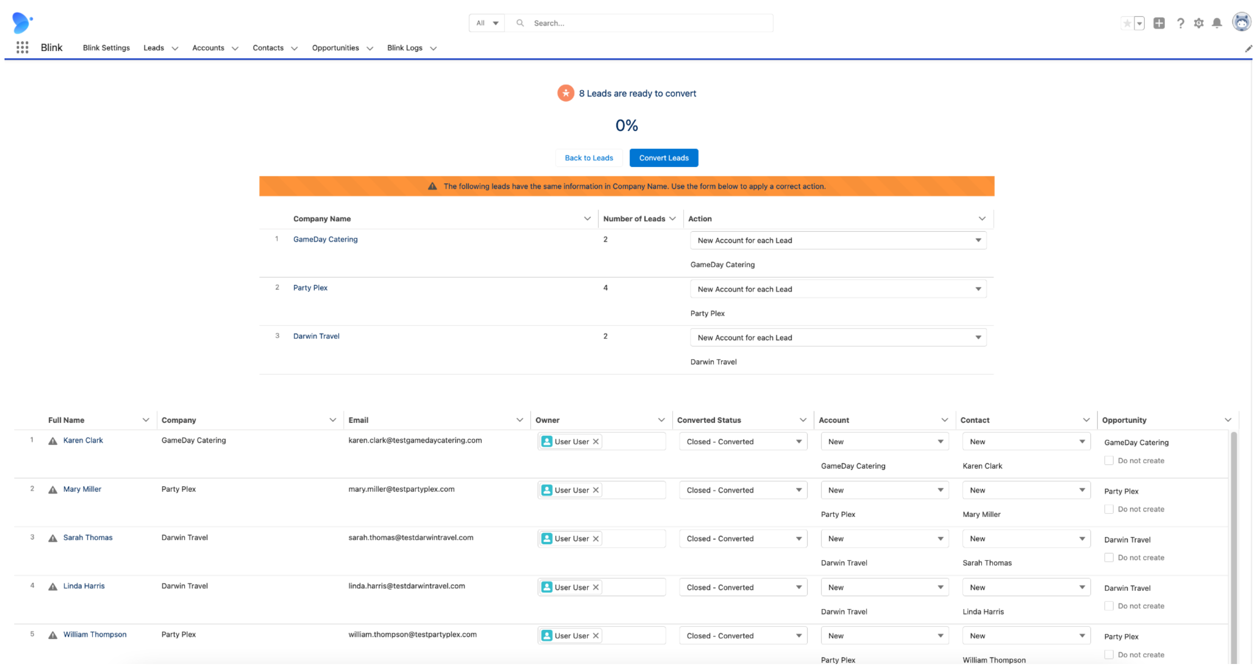


Mass Convert Leads

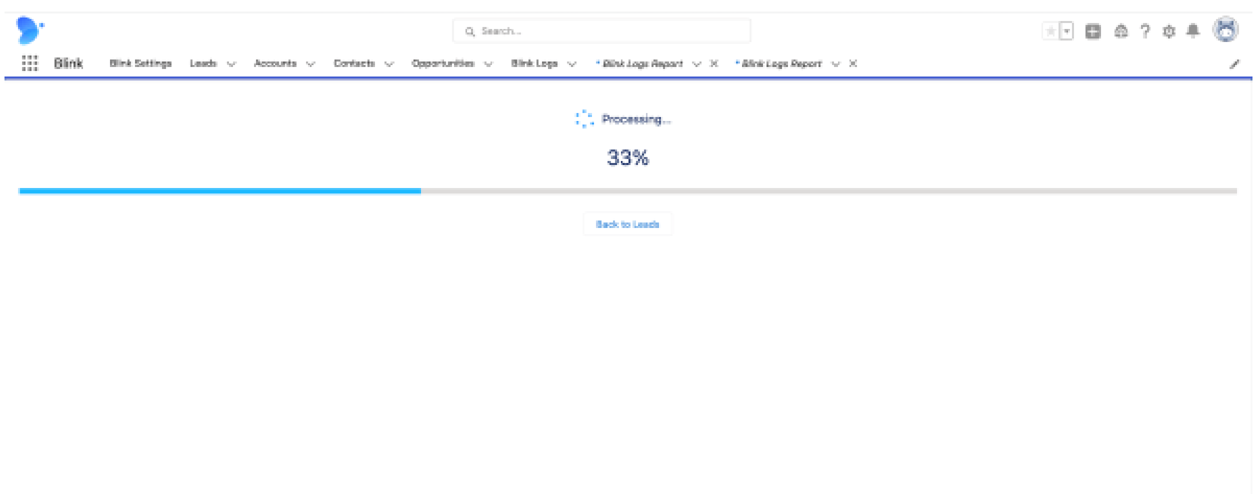
To do mass Lead conversion open the Leads list view. Select several records and click the “Blink Convert All” button.



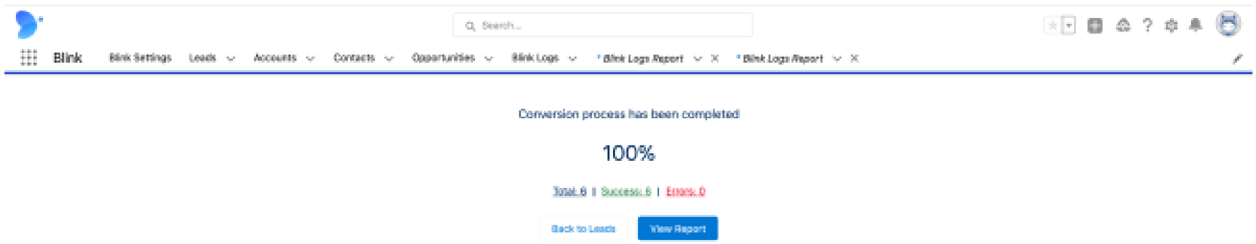
On the new screen review your selection and click “Convert Leads”. It’s also possible to use inline editing for each line. The system highlights lead duplicates by a company name.

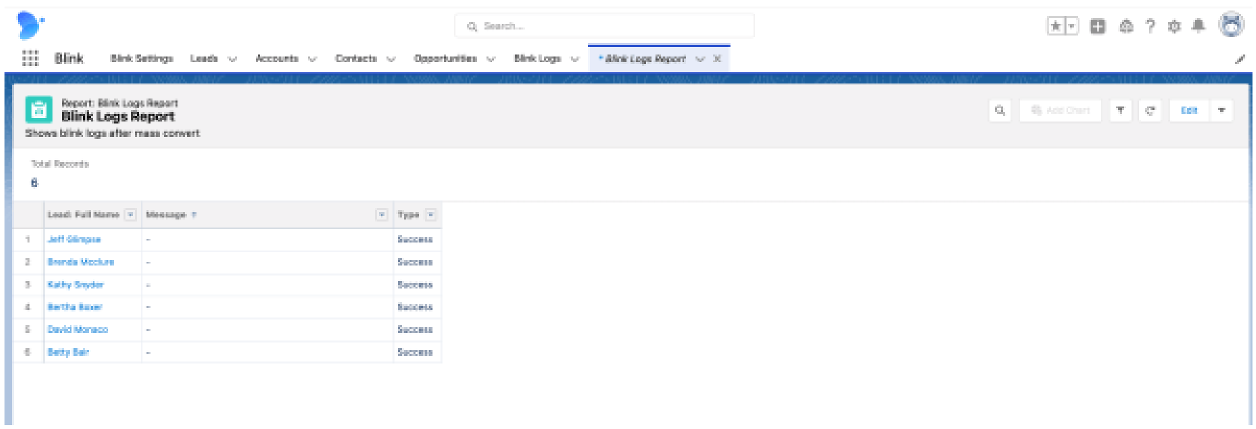


Wait until processing is complete to see results.



On the final screen, you can find bulk convert results. To get details click the “View Report” button. “Success” and “Errors” links are also available to view a report filtered by type.



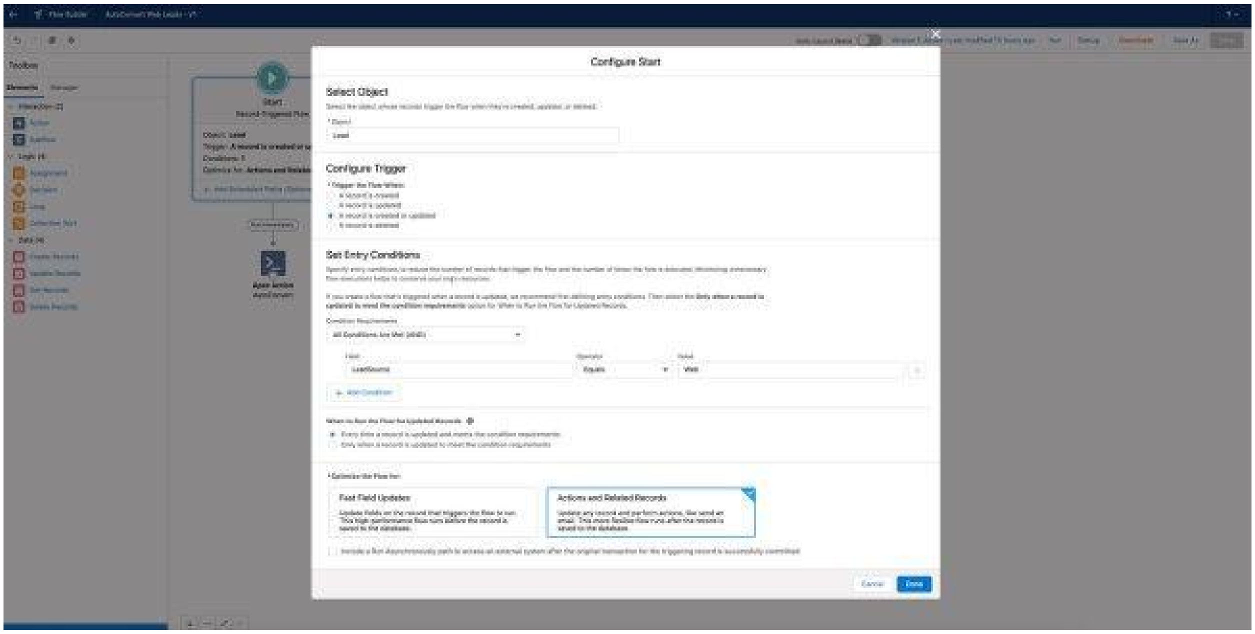


Auto Convert Leads

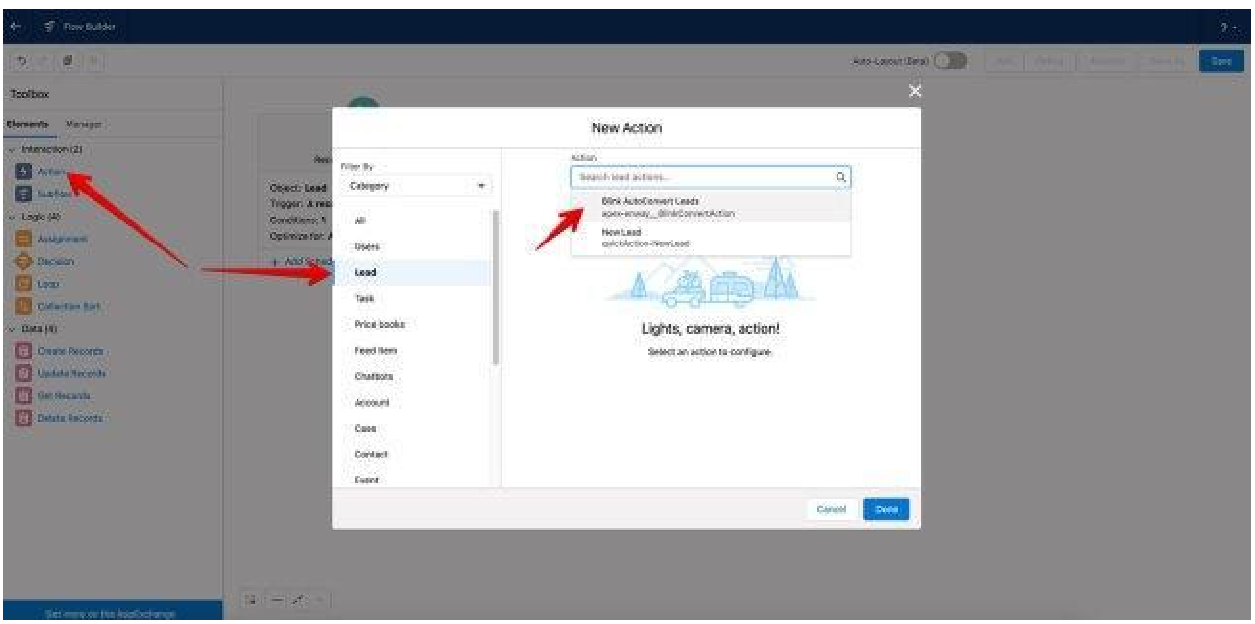
To auto convert lead in Salesforce, we provide a package-based Salesforce Flow Action.

Auto convert Lead Flow Action works with a single and many leads at the same time. On the single conversion, the system fires the logic immediately. If you update many leads with flow entry criteria, they will be converted using the asynchronous job. It will take some time (depending on a number of records) to convert all leads.

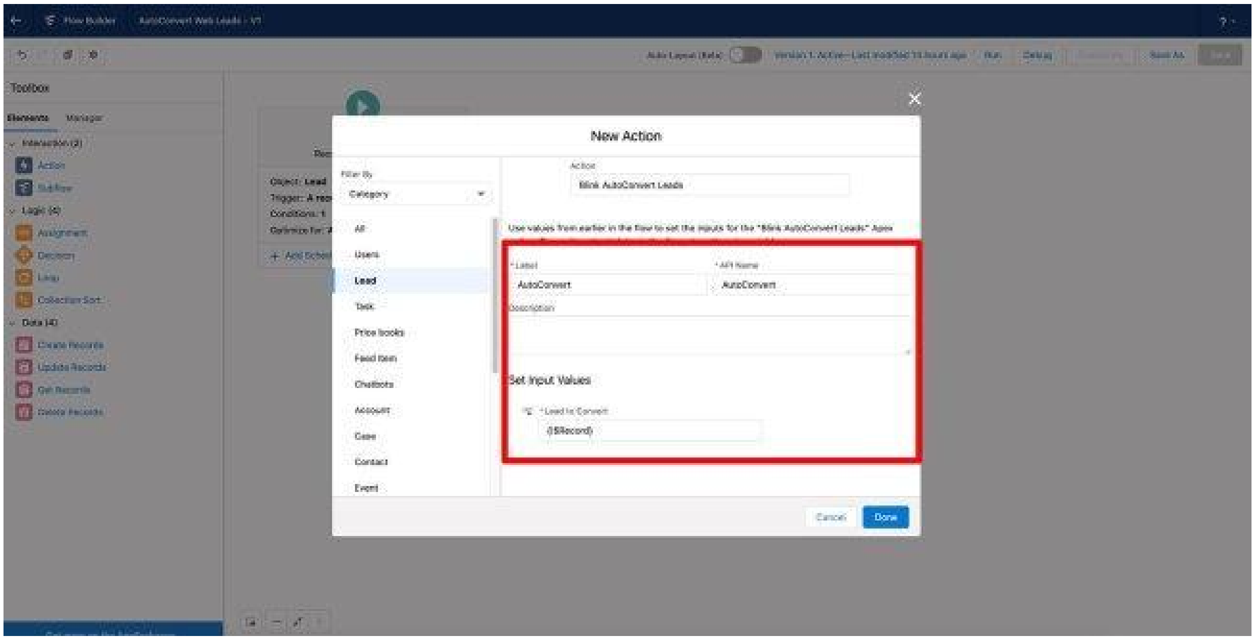
First, think about entry criteria for auto convert lead. In our example, we want to convert leads with a “Web” lead source. Go to the Setup>Flows>New Flow.



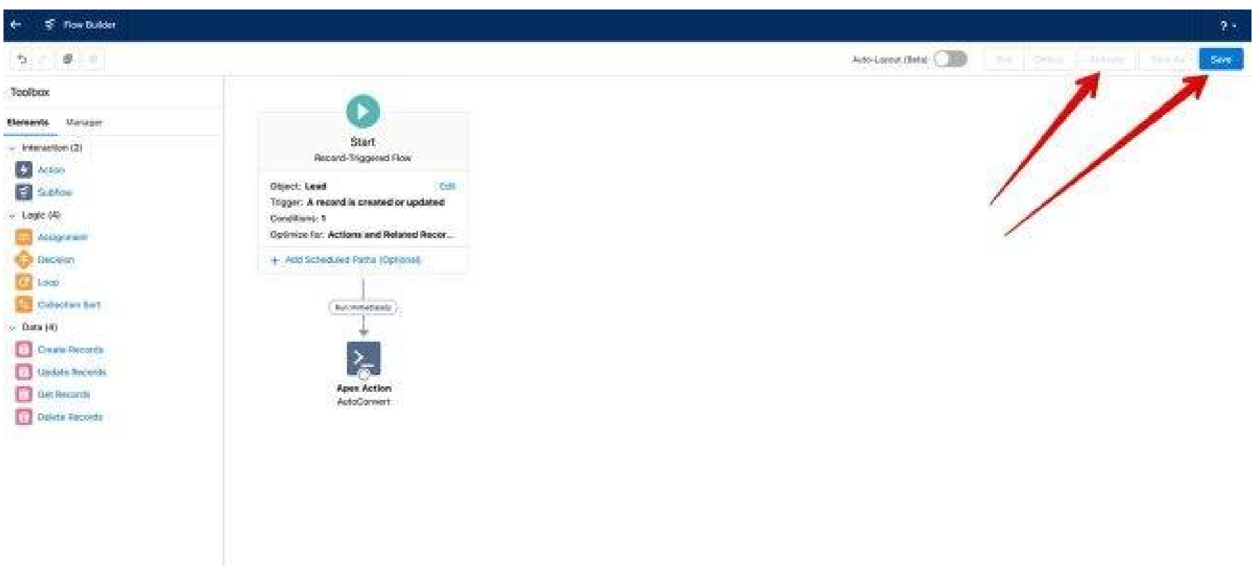
Drag and drop Flow Action to the screen. Select auto convert action from the Blink package for the Lead object.

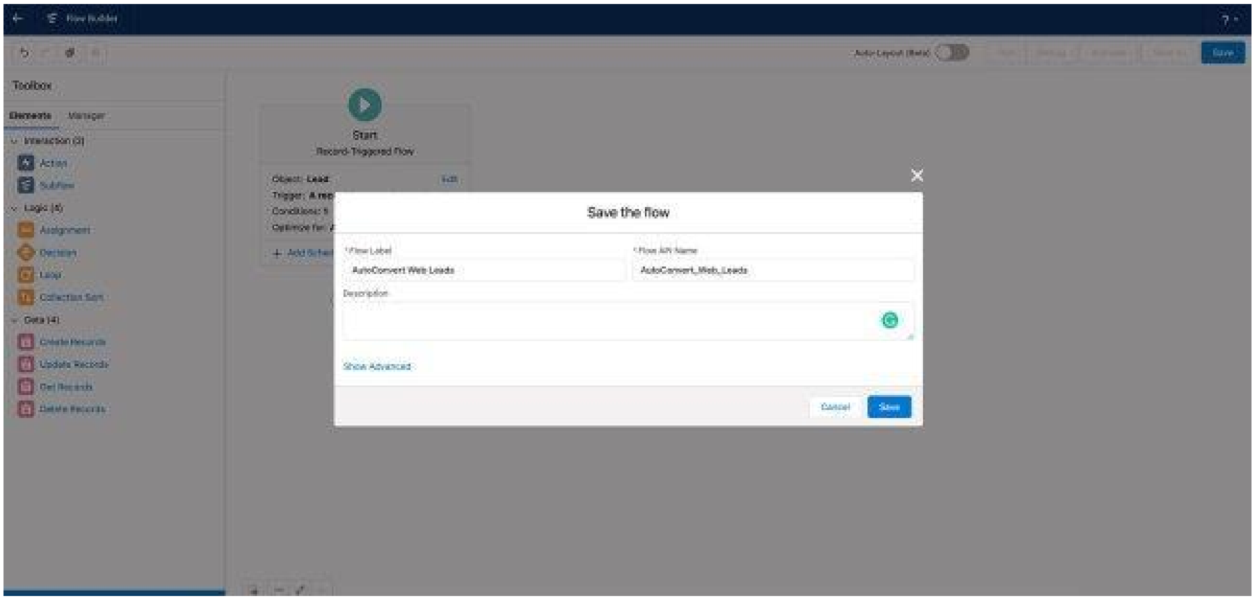


Add name and input values.

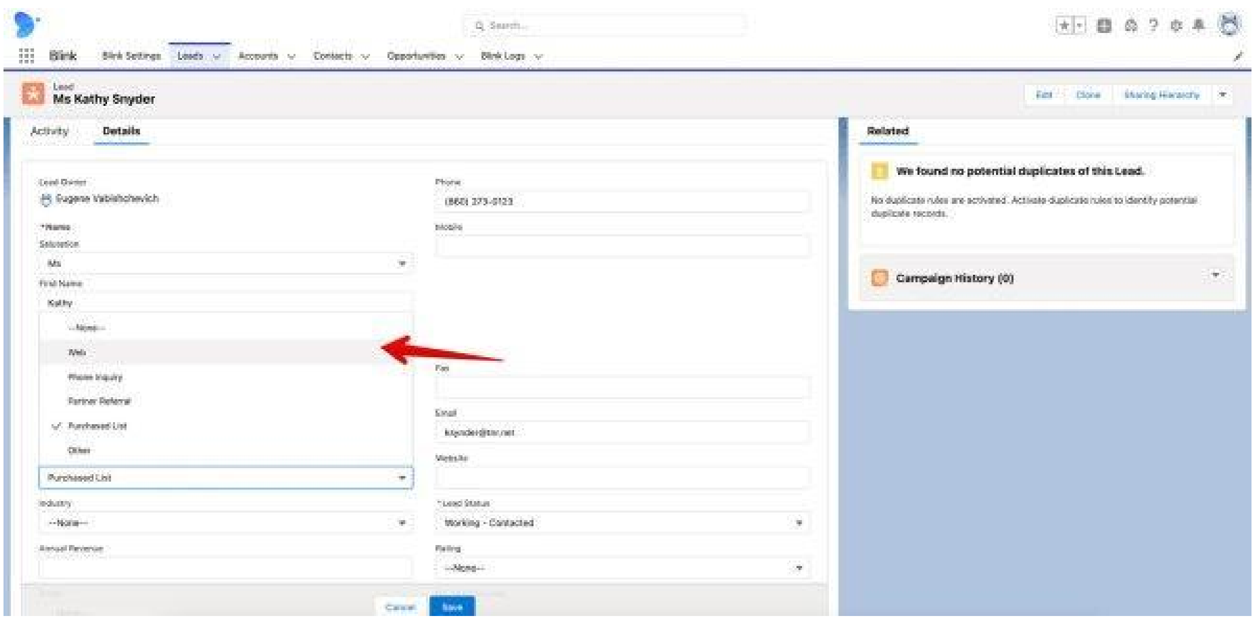


Connect screen items. Save the flow and activate.

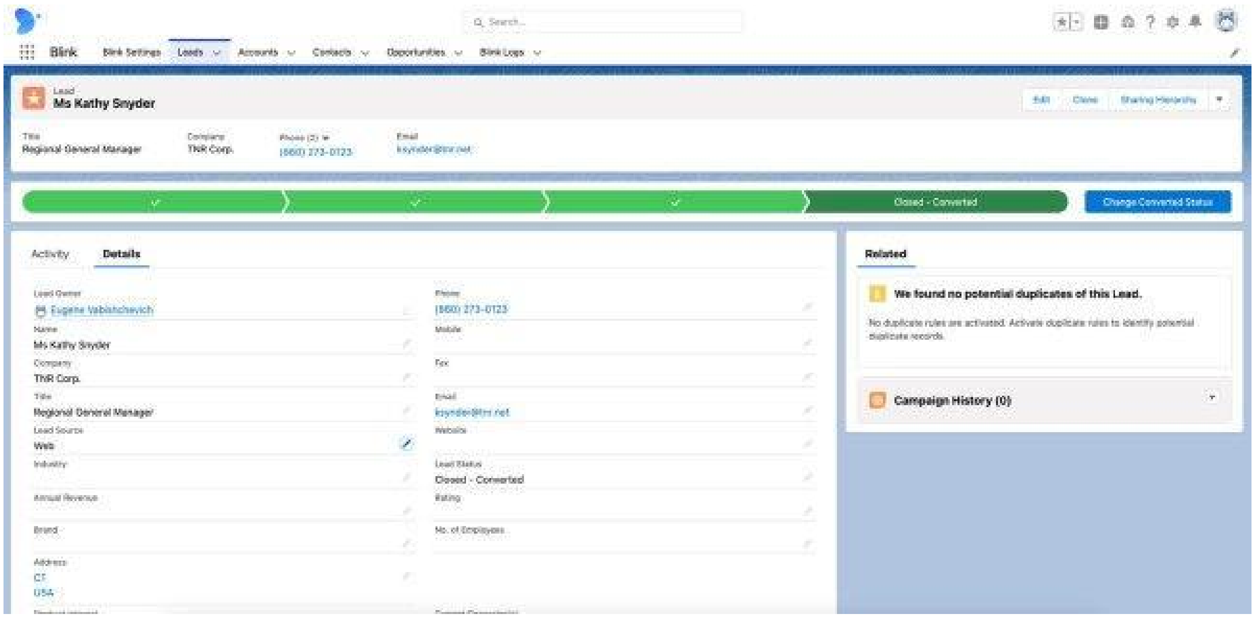




Go to the lead record. Change Lead Source to “Web”. Update the record.



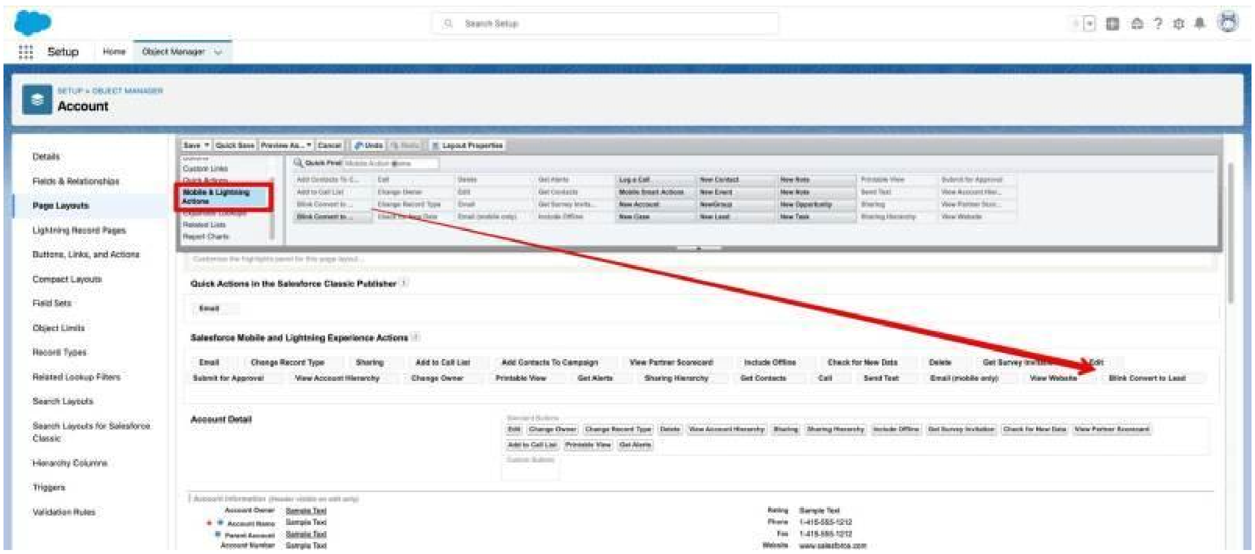
Review converted lead.


Blink
Blink Settings
Leads
Accounts
Contacts
Opportunities
Blink Logs
Lead
Ms Kathy Snyder
Edit
Clone
Sharing Hierarchy
Title
Regional General Manager
Company
TNR Corp.
Email
ksynder@tnr.net
Closed - Converted
Change Converted Status
Activity
Details
Lead Owner
Eugene Vabishchevich
Name
Ms Kathy Snyder
Company
TNR Corp.
Title
Regional General Manager
Lead Source
Web
Industry
Annual Revenue
Brand
Address
CT
USA
Phone
(860) 273-0123
Mobile
Fax
Email
ksynder@tnr.net
Website
Lead Status
Closed - Converted
Rating
No. of Employees
Related
We found no potential duplicates of this Lead.
Campaign History (0)

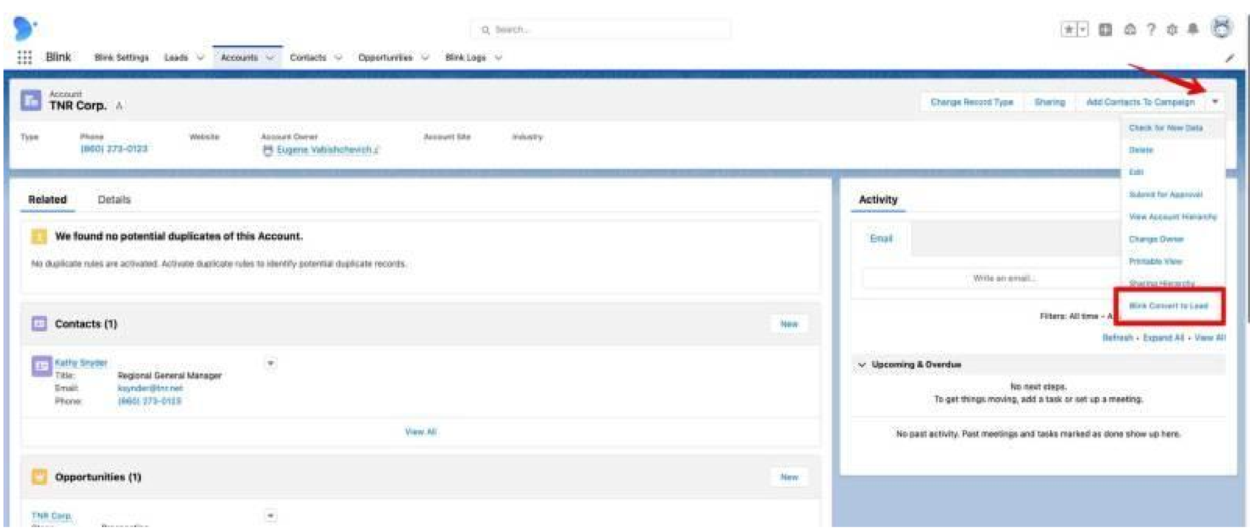
Convert leads back to accounts and contacts

Single Convert Account and Contact to Lead

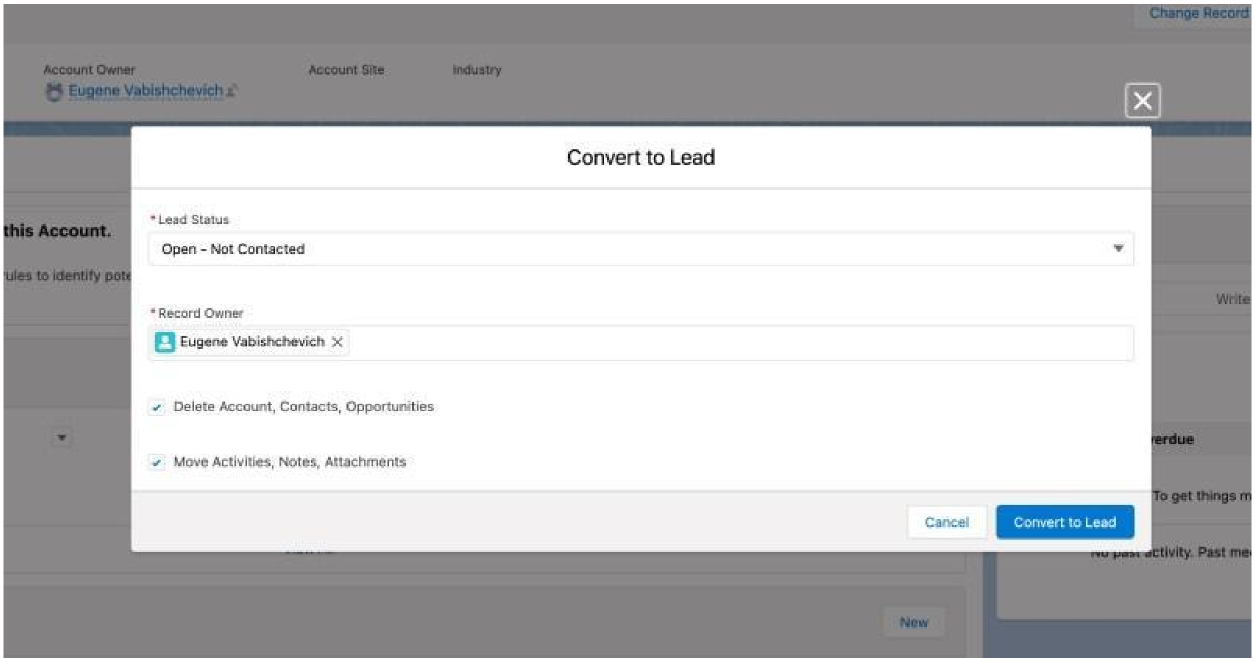
Open **Setup > Object Managed > Account > Page Layouts**. Select your page layout from the list. Drag and drop the button “Blink Convert to Lead” for the Lightning UI or “Blink Convert to Lead (Classic)” if you use the Classic Salesforce interface. Click “Save”.



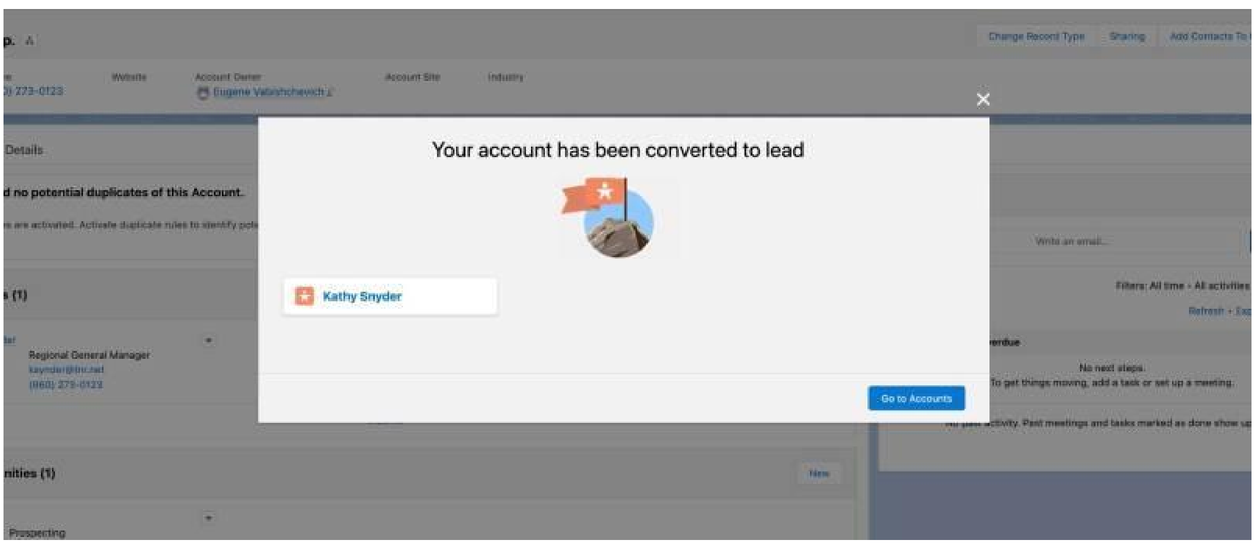
Open an account record and click “Blink Convert to leads”.



Choose lead status, record owner, pick checkboxes if want to delete account, contact and opportunity or move activities. Click “Convert to Lead”.

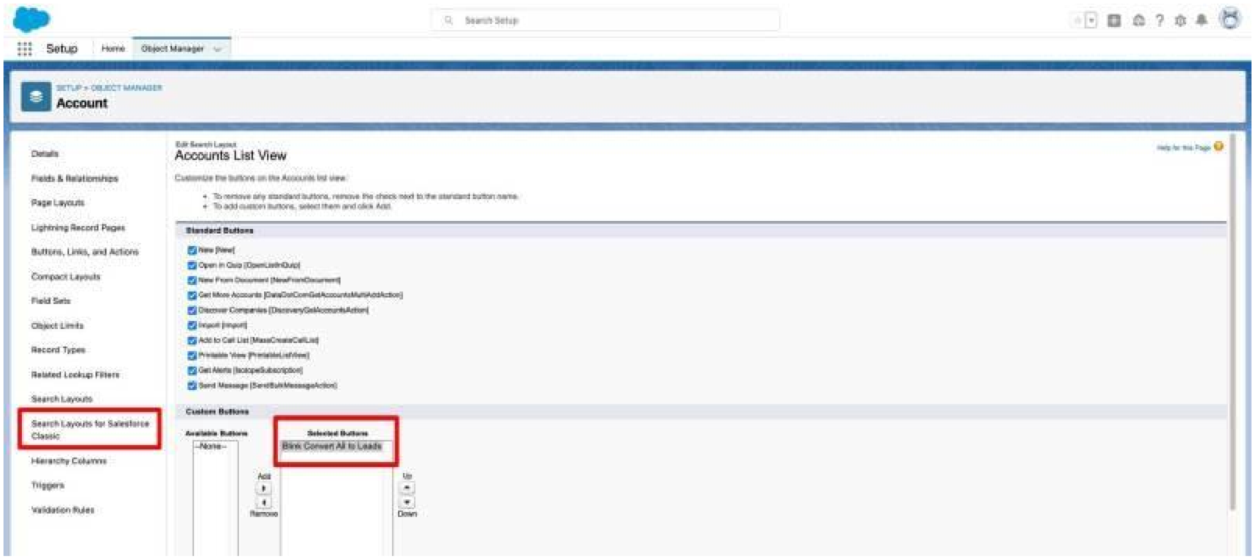


Review your converted lead record by clicking the link on the final screen.

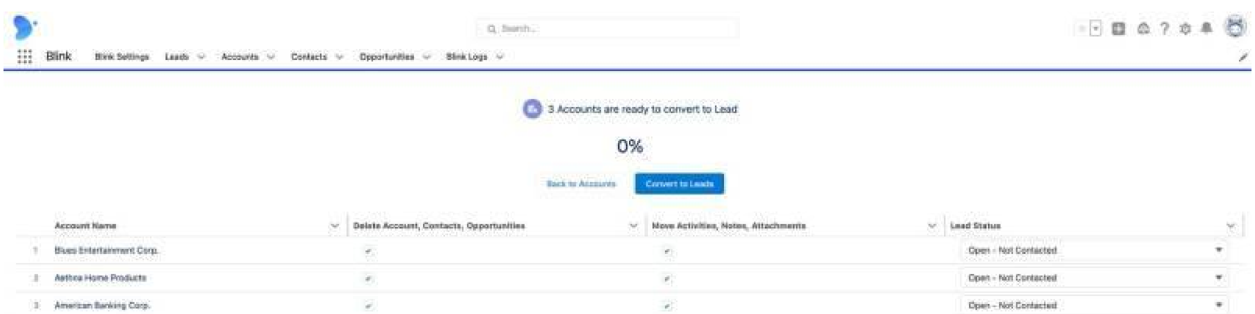


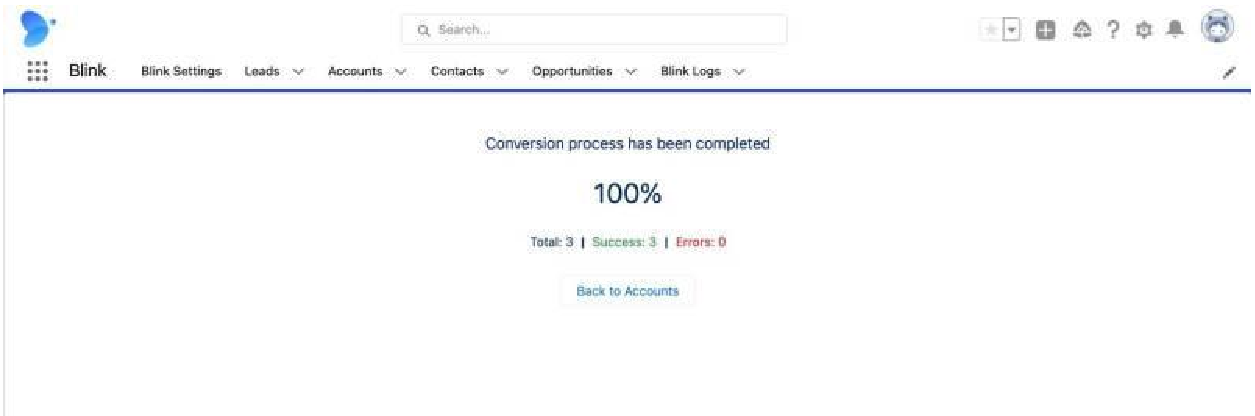
Mass Convert Accounts and Contacts to Leads

Open **Setup > Object Managed > Account > Search Layouts for Salesforce Classic**. Click Edit for the “List View” layout. Move the “Blink Convert All to Leads” button. Click “Save”.



Go to the list view of Account, select records to process and click “Blink Convert All to Leads”. Review selected records and click “Convert to Leads”.

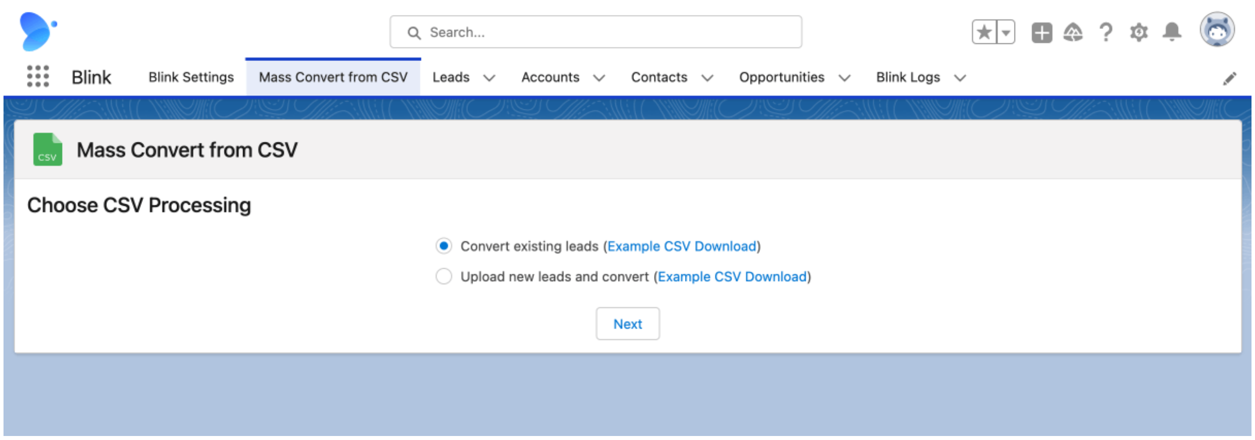



Search...
Blink
Blink Settings
Leads
Accounts
Contacts
Opportunities
Blink Logs
Conversion process has been completed
100%
Total: 3 | Success: 3 | Errors: 0
Back to Accounts

Mass Upload and Convert Leads from the CSV file

The main screen of the Mass Convert from CSV tab contains two options:

- Convert existing leads
- Upload new leads and convert



The option “Convert existing leads” will help you convert up to 1000 leads at one time. Basically, you need to create a CSV file with the list of lead IDs and then upload it to the app. This option extends the number of leads for mass conversion from 200 to 1000 in the basic list view. Let’s see how it works.

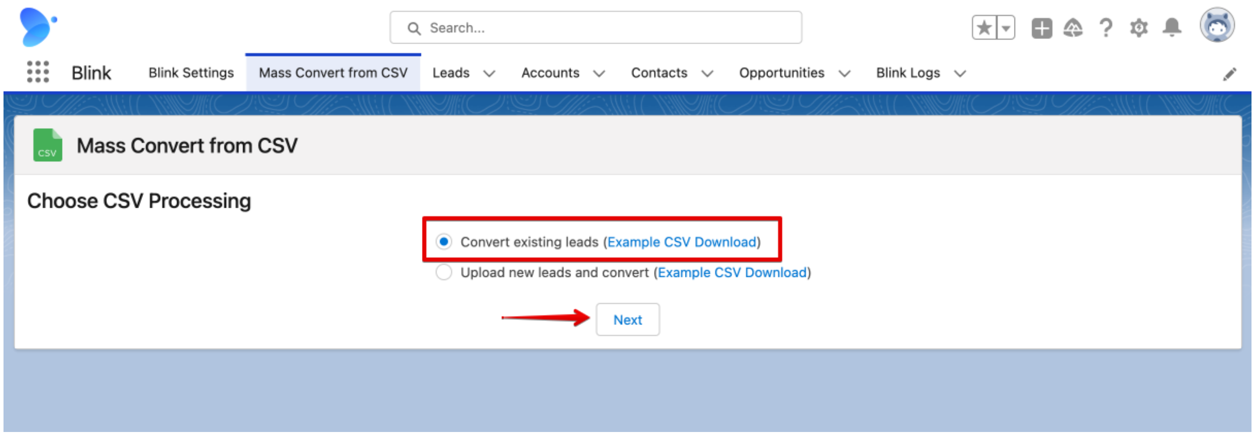
Step 1

Prepare you CSV file. The format is very simple: one column with the lead id and the second is for existing account id:

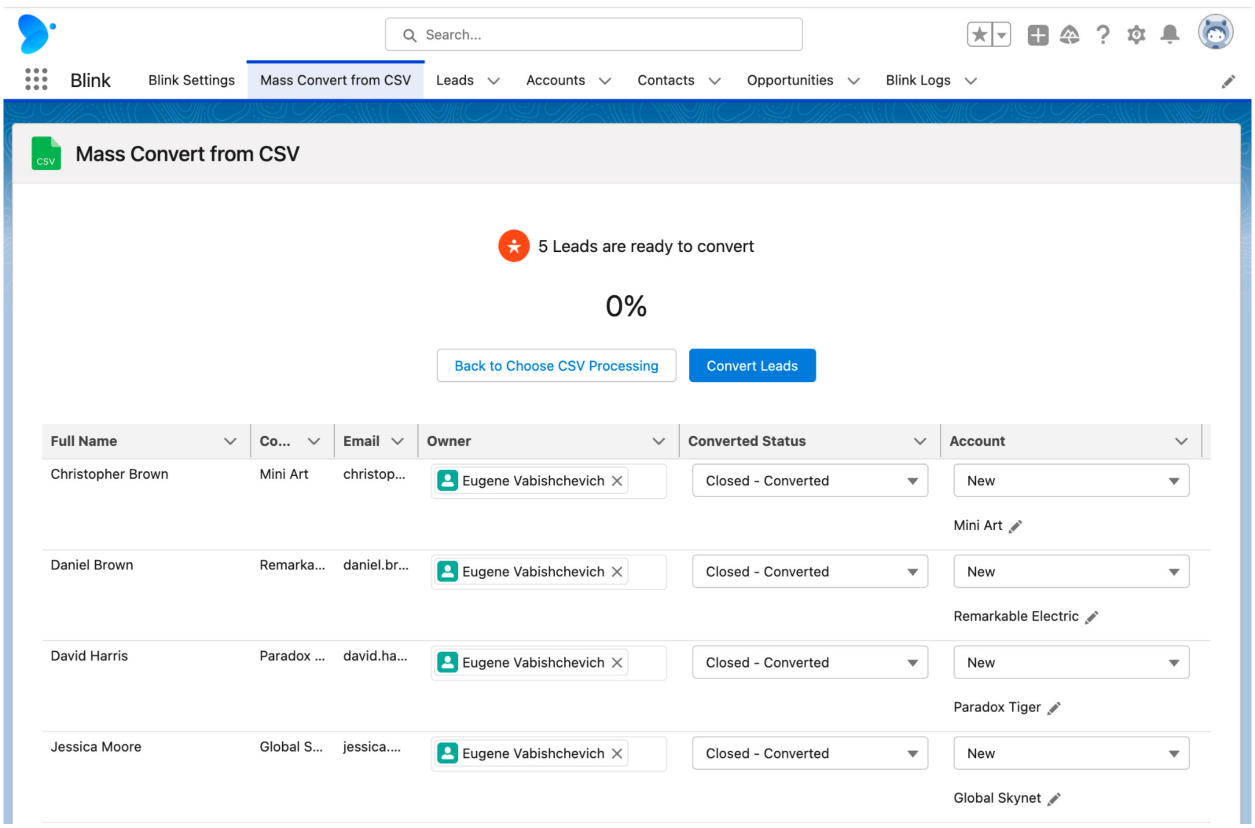
```
"ID","AccountId"
"00QAW000006XJmq2AG","001AU00000Ao18DYAR"
"00QAW000006XJmp2AG","001AU00000Ao18DYAR"
```

Step 2

Open the Blink application and go to “Mass Convert from CSV”. Select the option “Convert existing leads” and click Next.

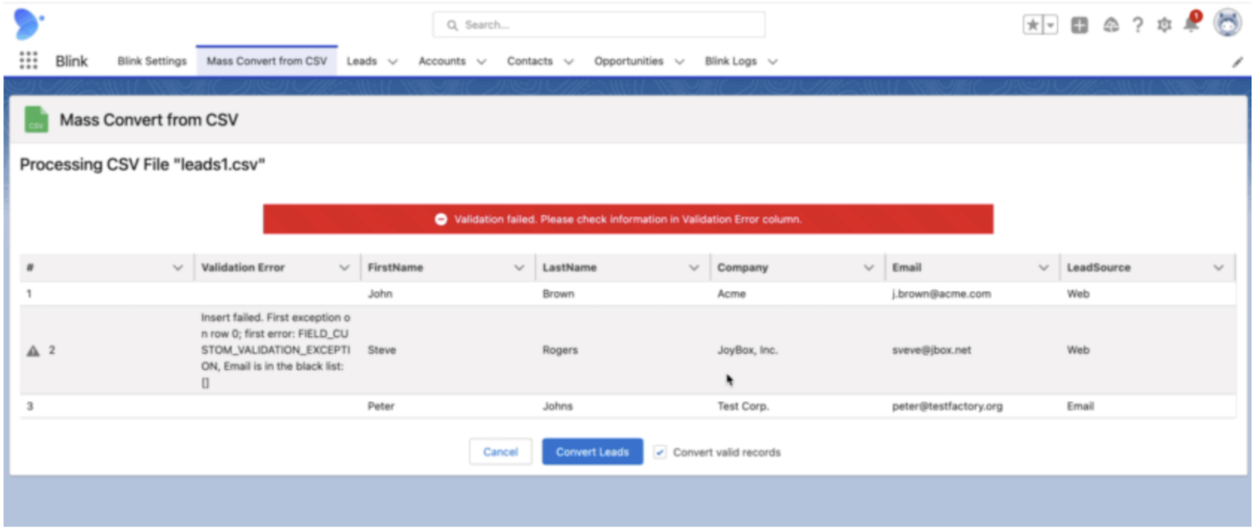


Select and upload your CSV file. After the upload, you will see the mass convert screen.



Upload new leads and convert

Using a new tab “Mass Convert from CSV” you can upload leads to Salesforce and convert them automatically. Before uploading it’s possible to validate all leads before creation. In case of any error, you can see a validation response from the system and then ignore invalid records from the convert process. Quick and easy.



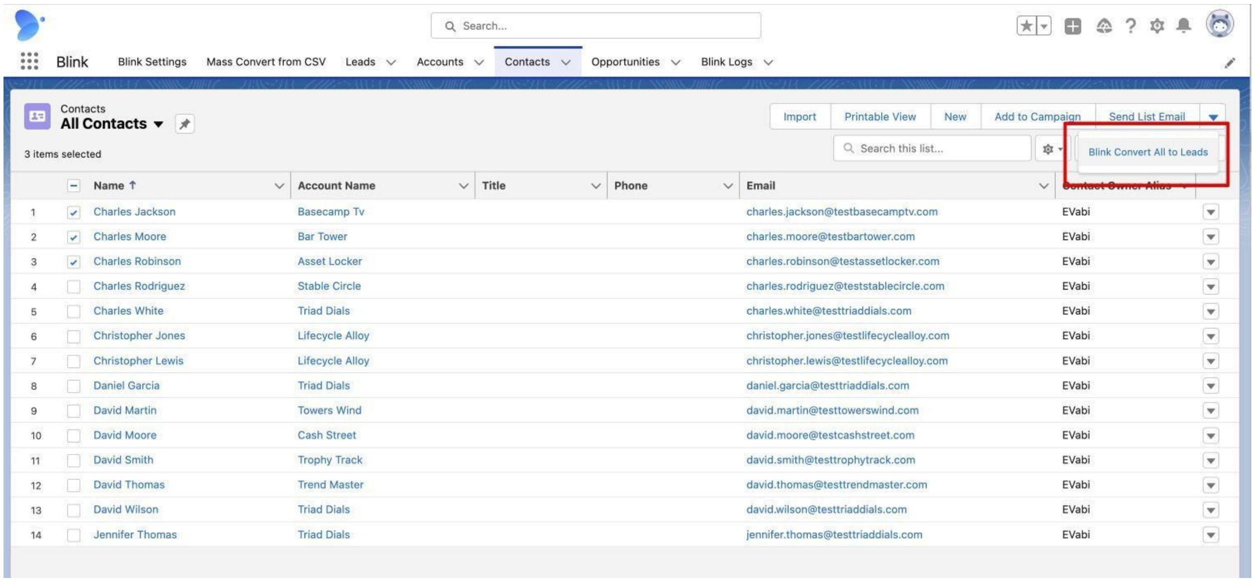
A few considerations:

- Max 1000 records per a file
- Column headers should be valid lead fields API names

Convert Contacts to Leads

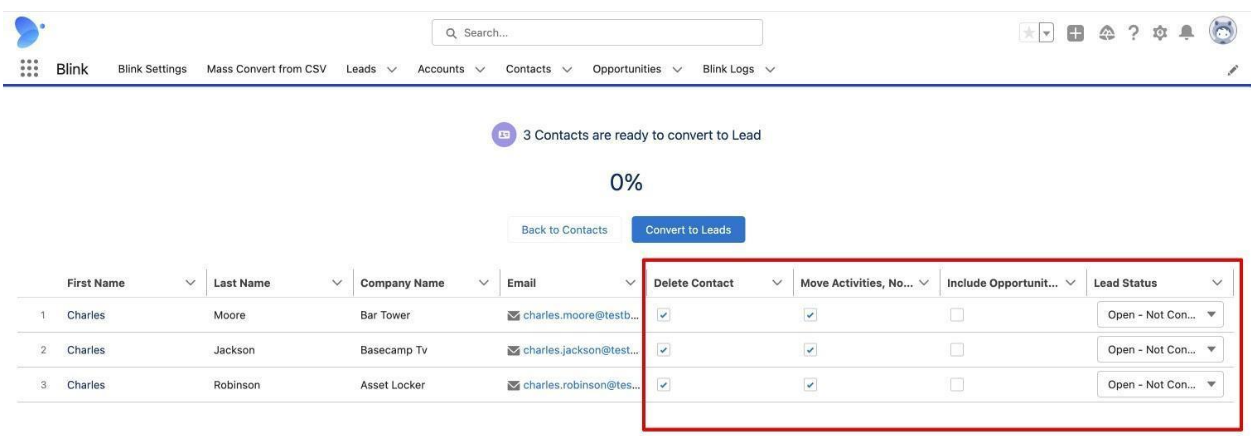
Mass convert Contacts to Leads

To do a mass Contacts conversion open the contacts list view. Select several records and click the “Blink Convert All to Lead” button.

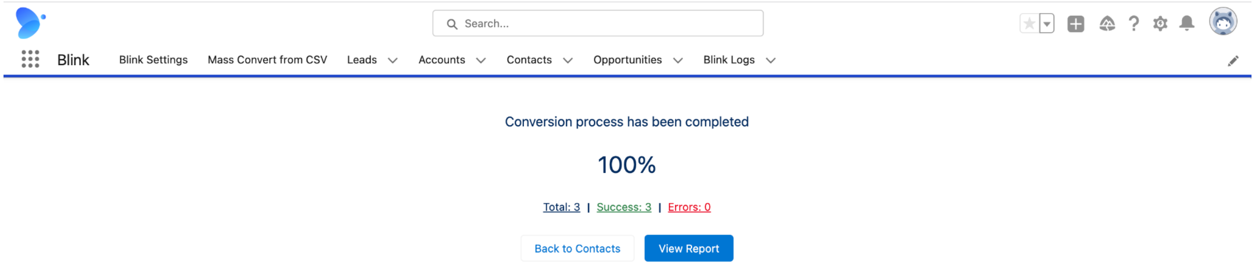


Review your selection on the table view. The following actions are available:

- Delete contact – delete existing contact after conversion
- Move Activities, Notes, Attachments – in case you have activities, note and attachments the system can move them into new lead
- Include Opportunities Data – populate lead information based on the standard Lead-Opportunity mapping from filled-out Opportunities fields sorted by created date (newest first).

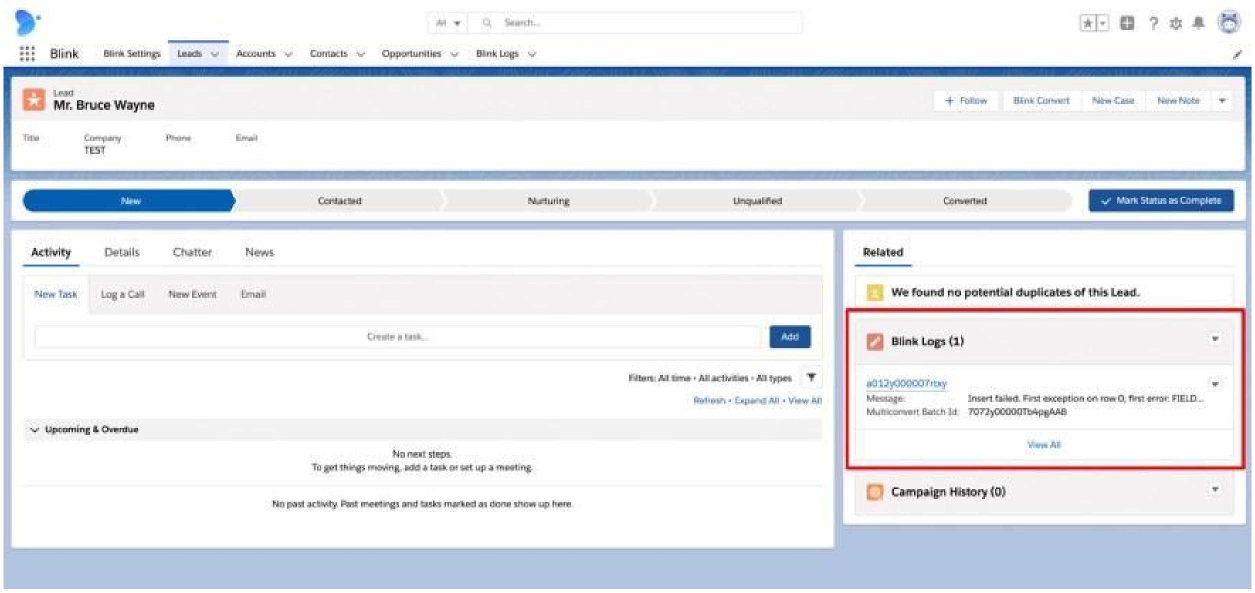


After the conversion process it's possible to see reports.


Search...
Blink
Blink Settings
Mass Convert from CSV
Leads
Accounts
Contacts
Opportunities
Blink Logs
Conversion process has been completed
100%
Total: 3 | Success: 3 | Errors: 0
Back to Contacts
View Report

Errors Handling

To handle conversion errors to use the custom object “Blink Log”. It has a lookup connection to the Lead object. To view Blink Log records add a related list to the page layout.



Open a log to check details.