

Convertabl App - Installation Guide

About

This guide is designed to support the installation of the Convertabl application on the Salesforce platform. The following steps are critical to the successful installation of the application and the relevant steps to configure its functionality.

NB: All setup sets are in Lightning Experience.

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Support

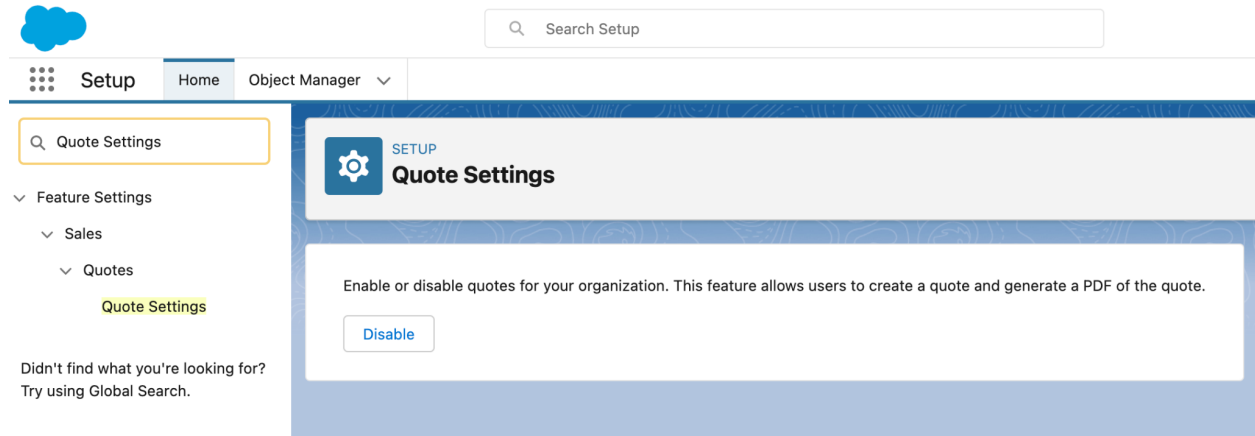
Please contact us at hello@insightablapps.com for any support questions or issues.

Prerequisite Steps

The following steps are required to be completed before installation into the target Salesforce org as there are components within the application which are reliant on these Salesforce features. Without enabling these features, the application will not install.

Enable Quotes

Standard Salesforce quotes are required to be activated as the application creates standard quote and quote line item records upon lead conversion. To activate standard quotes go to Setup > Quotes > Quote Settings and Enable

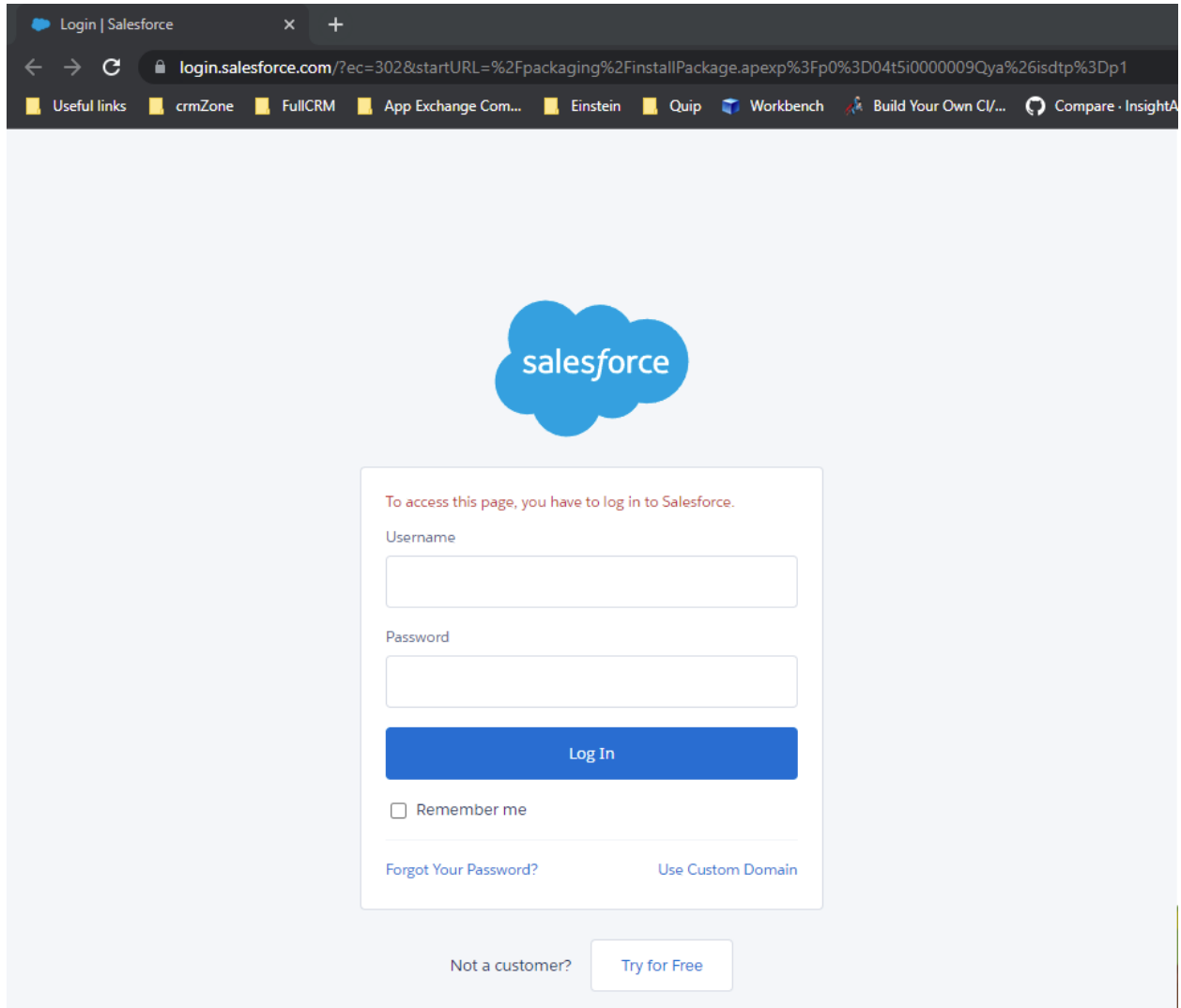


NB: The process that creates quote and quote line items on lead conversion is marked as a template meaning that you can create your own copy of the flow to utilize other quote or quote line item objects.

Installation Steps

On installation it will ask you to log into Salesforce with your Salesforce credentials.

NB: If you are installing into a sandbox, replace the “login” part of the URL with “test” and then login with your sandbox credentials.



The screenshot shows a web browser window with the URL `login.salesforce.com/?ec=302&startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04t5i0000009Qya%26isdtp%3Dp1`. The browser's address bar and tabs are visible. The main content area displays the Salesforce logo (a blue cloud with the word 'salesforce' inside) and a login form. The form includes a message: "To access this page, you have to log in to Salesforce." Below this are fields for "Username" and "Password", a blue "Log In" button, a checkbox for "Remember me", and links for "Forgot Your Password?" and "Use Custom Domain". At the bottom, there is a link "Not a customer?" and a button "Try for Free".

Once logged in you will be presented with the following screen. Ensure:

1. Install for Admins Only (you will be applying permission sets in the next steps to provide access to other non-admins)

Finally, press the Install button. If there are any errors on installation please get in contact and provide any error information.

Post Installation Steps

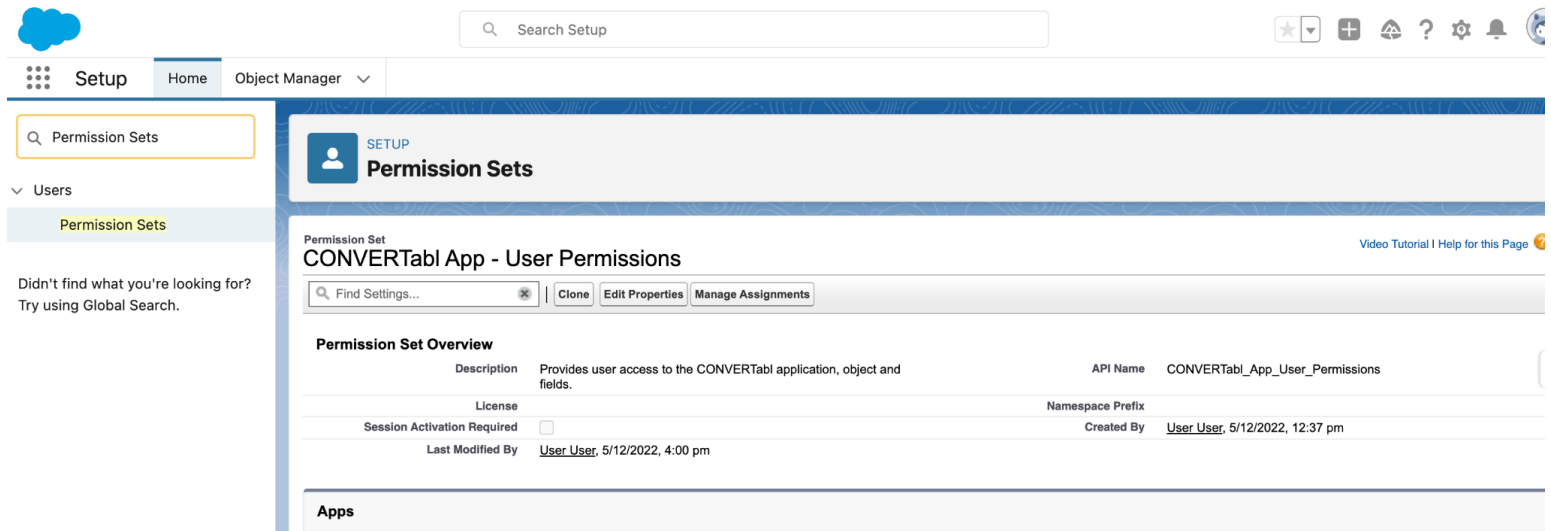
Assign Permission Sets

Permission sets have been created to license a Salesforce user with the Convertabl application providing access to the objects, fields and automation. There are two permission sets:

1. CONVERTabl App - User Permission
 - This permission is to be assigned to any user who requires object and field level access to the Convertabl data model and will be utilizing its features

To assign a permission set:

1. Setup > Permission Sets
2. Select the Permission Set and press "Manage Assignments"



The screenshot shows the Salesforce Setup interface. The left sidebar contains the 'Setup' menu with 'Permission Sets' selected. The main content area displays the 'Permission Set Overview' for 'CONVERTabl App - User Permissions'. The overview includes a search bar, buttons for 'Clone', 'Edit Properties', and 'Manage Assignments', and a table with the following details:

Permission Set Overview	
Description	Provides user access to the CONVERTabl application, object and fields.
API Name	CONVERTabl_App_User_Permissions
License	
Namespace Prefix	
Session Activation Required	☐
Created By	User User, 5/12/2022, 12:37 pm
Last Modified By	User User, 5/12/2022, 4:00 pm

Below the overview is a section titled 'Apps'.

3. Select the users who will be provided access to the application and assign

Assign Users

All Users

View: All Users Edit Create New View

Assign

Cancel

☐ Action	Full Name ↑	Alias	Role
☐ Edit	Chatter Expert	Chatter	
☐ Edit	Dempster, Michael	MDemp	CEO
☒ Edit	Rogers, comm	jroge	
☒ Edit	Rogers, Jack	jroge	Burlington Textiles Corp of America Partner Us
☐ Edit	SVP	sale	SVP, Sales & Marketing
☐ Edit	User, Integration	integ	
☐ Edit	User, Security	sec	

Assign

Cancel

Assign “Run Flows” System Permission

There are a number of Salesforce flows used in Convertabl that require the running user to have the system permission “Run Flows”. This can be set on a user level or at a profile / permission set level. Please see the following article for more details and setup guide:

https://help.salesforce.com/s/articleView?id=sf.wcc_setup_add_run_flows_perms.htm&r=htps%3A%2F%2Fwww.google.com%2F&type=5

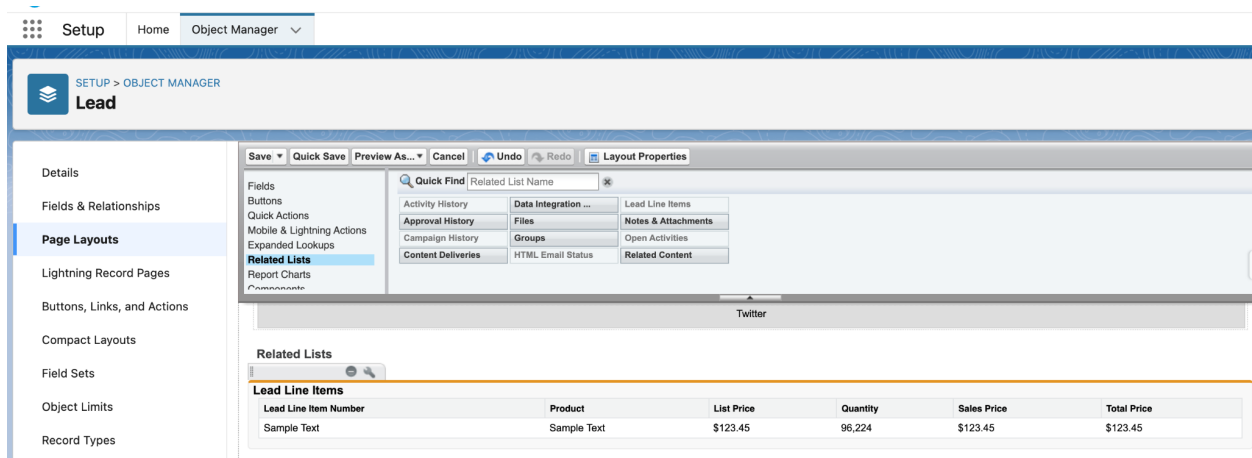
Page Layout Adjustments

Lead

The lead line item related list and Add Product button(s) need to be added to your Lead layout. This will provide the ability to add products to a Lead and view those products in the lead line item related list.

Navigate to your org's Lead page layout and include the following related list:

- Lead Line Items



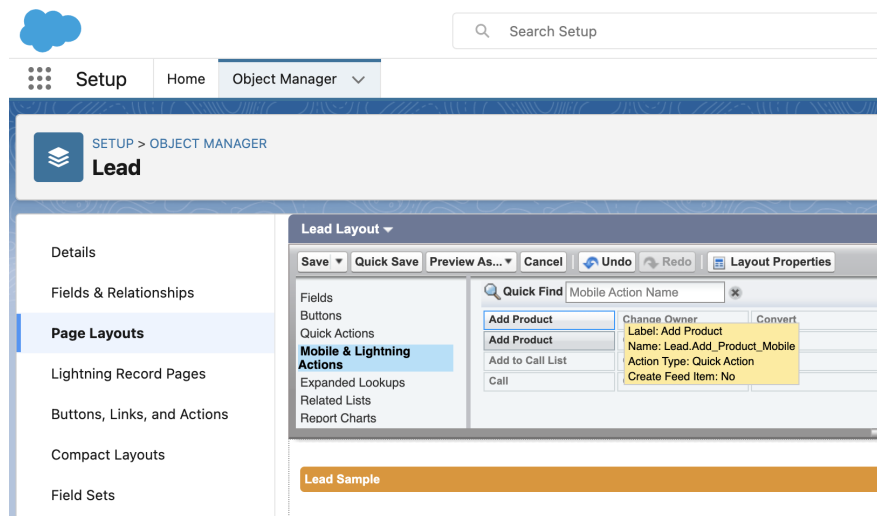
Related Lists

Lead Line Item Number	Product	List Price	Quantity	Sales Price	Total Price
Sample Text	Sample Text	\$123.45	96,224	\$123.45	\$123.45

Ensure the following:

1. New and Change Owner buttons are removed from the related list using the “spanner” icon
2. The correct fields are displaying as per your requirements

While on the same page layout, add the “Add Product” mobile & lightning action to your layout. If you plan to use the application on the desktop and mobile applications, there are separate “Add Product” buttons available.



Ensure the correct button is displayed based on where it is used. This can be handled through a number of solutions including:

- Separate lightning pages for the lead object activated based on form factor
- Lightning page dynamic actions filtered by form factor