

<MULTIPLE LEAD CONVERTER>

User Manual

Version 1.0

27-Apr-2023

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1. Introduction

Salesforce is a powerful platform that helps organizations streamline their sales, marketing, and customer service processes.

Our new project goal to enhance these capabilities by leveraging the latest features and functionalities of Salesforce. We believe that this project can benefit your organization as well, by providing you with better insights into your customer data, improving your sales pipeline management, and increasing your team's productivity.

1.1 Overview

The development document contains all preparations for each unit or module including the Apex classes, flowcharts and reports and dashboards which are done in the developer edition. The paper is dynamic and is maintained by the system development team and should be constantly updated as the system's development progresses.

The main purpose of this project is to convert multiple leads into Account/Contact/ Opportunity on a single click.

- Lead Conversion in Salesforce is usually done one at a time in conventional method.
- Multiple Lead Converter is a native app that converts multiple number of Leads at a time providing additional features.
- The related objects from Lead Account / Contact/ Opportunity.
- The filters lead to convert by Pagination, records per page and view selected Leads.If user got any duplications of existing lead is there, then user have to convert into existing account/contact/opportunity.

1. Getting Started

- In this User has to have salesforce credentials to login into salesforce.
- After login into salesforce, user has to install the package (multiple led converter app) in App Exchange.

1.1 Attentions & Notices

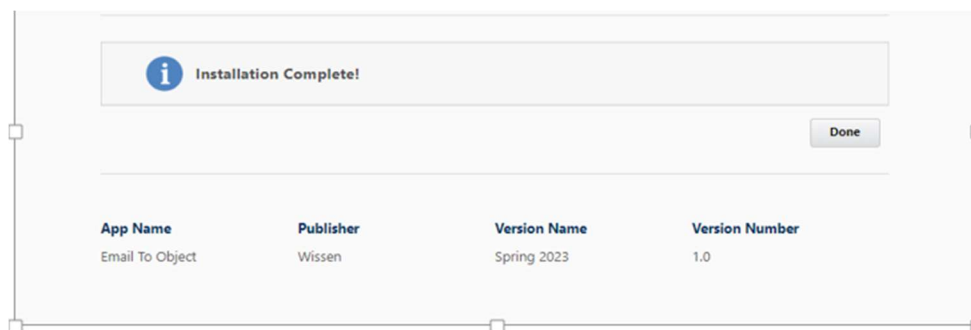
Salesforce User registration or Salesforce User Sign-in credential require installing this package.

1.2 Installation

Click on this link below and install the package.

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t2w000009JoQb>

Select Install for All Users only and click on install.



After installing the package, you can see the package with the name (Lead Converter) in Salesforce org. as shown below:

SETUP
Installed Packages

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click [Manage Licenses](#).

[Visit AppExchange »](#)

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Email To Object	Wissen	1.0		4/13/2023, 12:00 AM	✓	0	0	0	Not Applicable
Uninstall	Lead Converter	Absyz	1.8	Icon	3/21/2023, 1:43 AM		1	3	4	Passed
Description Mass Lead Converter App!										

1.3 User Access Considerations

- User should have to login in Salesforce org.
- Lead has to be created already.

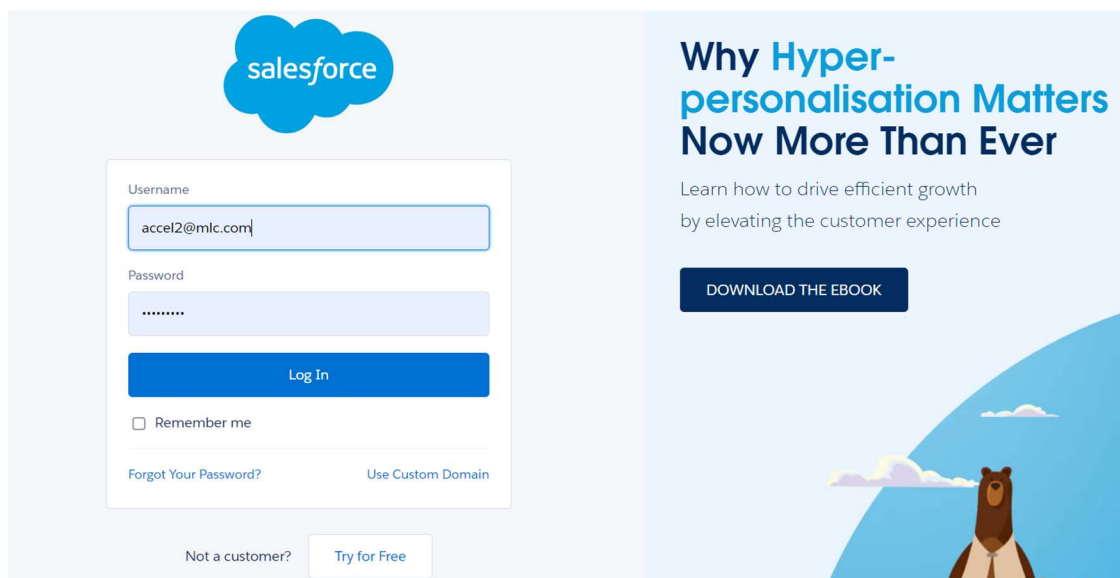
1.4 Accessing the System

Salesforce account is mandatory for all user to see the lead records created in Org

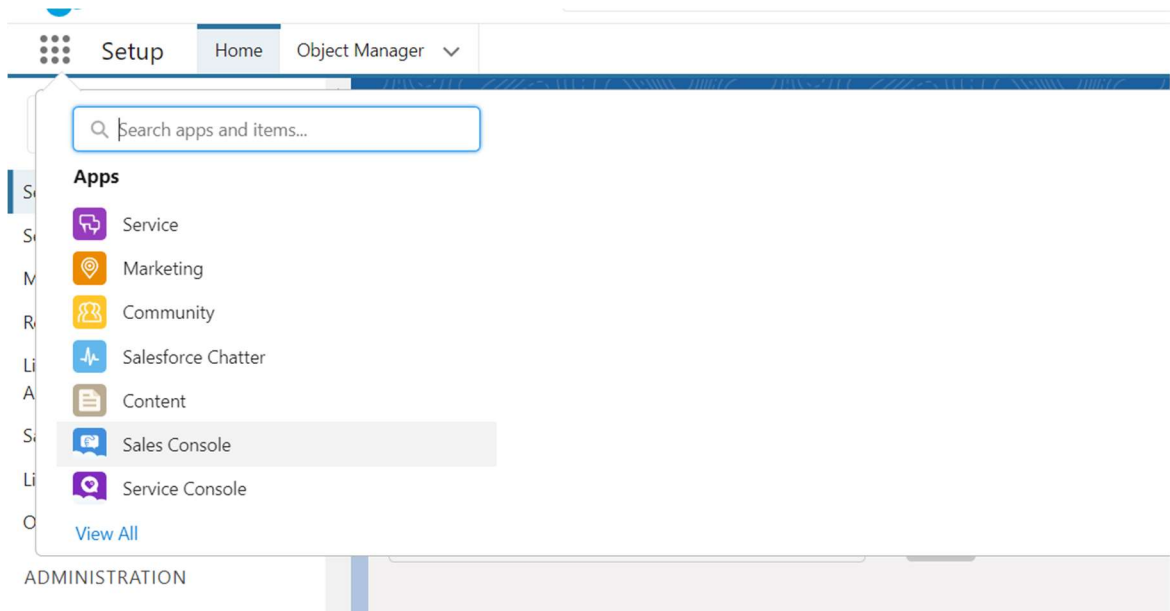
1.5 System Organization & Navigation

Lead Object data table (End User to Salesforce Org):

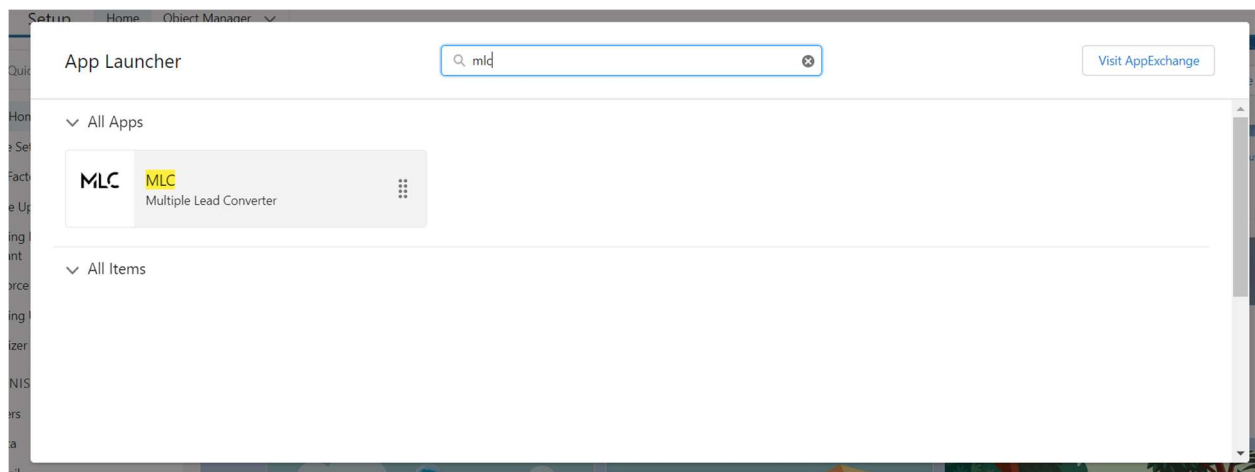
- User has to login in <https://login.salesforce.com> and user has to fill the username and password details to login.



- After the user logged in successfully then user will pop-up this image.



User has to search MLC on search bar and click on that application.



The application will be shown as below.

MLC

Search...

Home Lead Converter Leads Accounts Contacts Opportunities Reports Dashboards

Multiple Lead Converter

Search Lead...

Search by lead status
Working - Contacted

Proceed to Next Step

Name	Company	Lead Status	Email
☐ Jonathan Young	Vorenza	Working - Contacted	elainemitchell.vorenza@gmail.com
☐ Lisa Moore	Evorry	Working - Contacted	jaylalittle.evorry@gmail.com
☐ Peter Howard	Rosatino	Working - Contacted	briaandrews.rosatino@gmail.com
☐ Phillip Mullins	Rakz	Working - Contacted	kaliyahmorse.rakz@gmail.com
☐ John Davis	Treepa	Working - Contacted	katelynweeks.treepa@gmail.com
☐ Sabrina Doyle	Wazzl	Working - Contacted	neveahbarber.wazzl@gmail.com
☐ Nicholas Clayton	Nerve	Working - Contacted	alizabjamin.nerve@gmail.com
☐ Teresa Brown	Evopu	Working - Contacted	kayleyhuber.evopu@gmail.com
☐ Steven Santiago	Nulano	Working - Contacted	charleshernandez.nulano@gmail.com
☐ Karan Young	Fullman	Working - Contacted	markuschoval fullman@gmail.com

Number of Leads
10

Showing 1 of 8 Page(s)

Next

Total Leads
80

Search based on the keyword

First Page; User can see the lead records here, navigate between the record pages, filter, select/deselect, view records per page.

Lead Converter

Search by lead status

All

Filter leads based on Lead Status

Search Lead....

✓ Proceed to Next Step

Name	Company	Lead Status	Email
☐ David Monaco	Blues Entertainment Corp.	Working - Contacted	david@blues.com
☐ Bill Dadio Jr	Zenith Industrial Partners	Closed - Not Converted	bill_dadio@zenith.com
☐ Eugena Luce	Pacific Retail Group	Closed - Not Converted	eluce@pacificretail.com
☐ Sandra Eberhard	Highland Manufacturing Ltd.	Working - Contacted	sandra_e@highland.net
☐ Betty Bair	American Banking Corp.	Working - Contacted	bblair@abankingco.com
☐ Hiten Tejwani	Accenture	Open - Not Contacted	hitentejwani@accenture.com
☐ Ravi Kishan	IBM	Open - Not Contacted	ravikishan@ibm.com
☐ Neha Dhupia	Persistent	Open - Not Contacted	nehadhupia@persistent.com
☐ Pankaj Kapoor	Apisero	Open - Not Contacted	pankajpankaj@apisero.com
☐ Bharat Jadhav	tcs	Open - Not Contacted	bharatjadhav@tcs.com

Number of Leads: 10

< Prev Showing 1 of 2 Page(s) Next >

Total Leads: 18

Select the number of records to display in current

Pagination

From this image, user can select the leads from three different ways.

Lead Converter

Back

If user click back button then it will go main page

Convert

✓ Convert

Name	Company	Lead Status	Email
Sandra Eberhard	Highland Manufacturing Ltd.	Working - Contacted	sandra_e@highland.net
Betty Bair	American Banking Corp.	Working - Contacted	bblair@abankingco.com
Hiten Tejwani	Accenture	Open - Not Contacted	hitentejwani@accenture.com
Ravi Kishan	IBM	Open - Not Contacted	ravikishan@ibm.com
Neha Dhupia	Persistent	Open - Not Contacted	nehadhupia@persistent.com
Pankaj Kapoor	Apisero	Open - Not Contacted	pankajpankaj@apisero.com

It shows the selected Leads.

When user click convert button then the Account & contact will be created at back-end automatically and opportunity is optional if it is needed then user can checkbox the opportunity then opportunity will be created.

If user click checkbox then Opportunity will be created

The screenshot shows the 'Lead Converter' interface. A modal overlay is displayed with a checkbox labeled 'Create an Opportunity' which is checked. A green arrow points from the text box on the left to this checkbox. The background table lists leads with columns: Name, Company, Lead Status, and Email.

Name	Company	Lead Status	Email
ZoeD			
Manu			
Greg			
Naom			
Emilia			
ManuelClayton	Neenox	Working - Contacted	manuelclayton.neenox@gmail.com
LeeHammond	Mortagee	Working - Contacted	leehammond.mortagee@gmail.com
CaelJacobs	Jeezl	Working - Contacted	caeljacobs.jeezl@gmail.com
LeeFlowers	Wedowa	Working - Contacted	leeflowers.wedowa@gmail.com
FinneganCarr	Qotty	Working - Contacted	finnegancarr.qotty@gmail.com

The screenshot shows the 'Lead Converter' interface with a success message: 'Your leads has been converted'. A red banner indicates '2 Duplicate Lead Found'. A 'Go to Leads' button is present. Below the message is a table with columns: Account, Contact, and Opportunity.

Account	Contact	Opportunity
Ozeet	KaydenKrause	KaydenKrauseopp26/03/2023
Dexilo	MarcusHorne	MarcusHorneopp26/03/2023
Adcrab	JennaLowery	JennaLoweryopp26/03/2023
Sioria	MarioJacobson	MarioJacobsonopp26/03/2023
Anario	BradleyRuiz	BradleyRuizopp26/03/2023
Dromoto	DaleRyan	DaleRyanopp26/03/2023
Tornaddo	DariusRosario	DariusRosarioopp26/03/2023
Apprena	KonnorYang	KonnorYangopp26/03/2023

Once the Account, Contact and Opportunity is created and if user found any duplicate leads then it will show on right top the duplicate found.

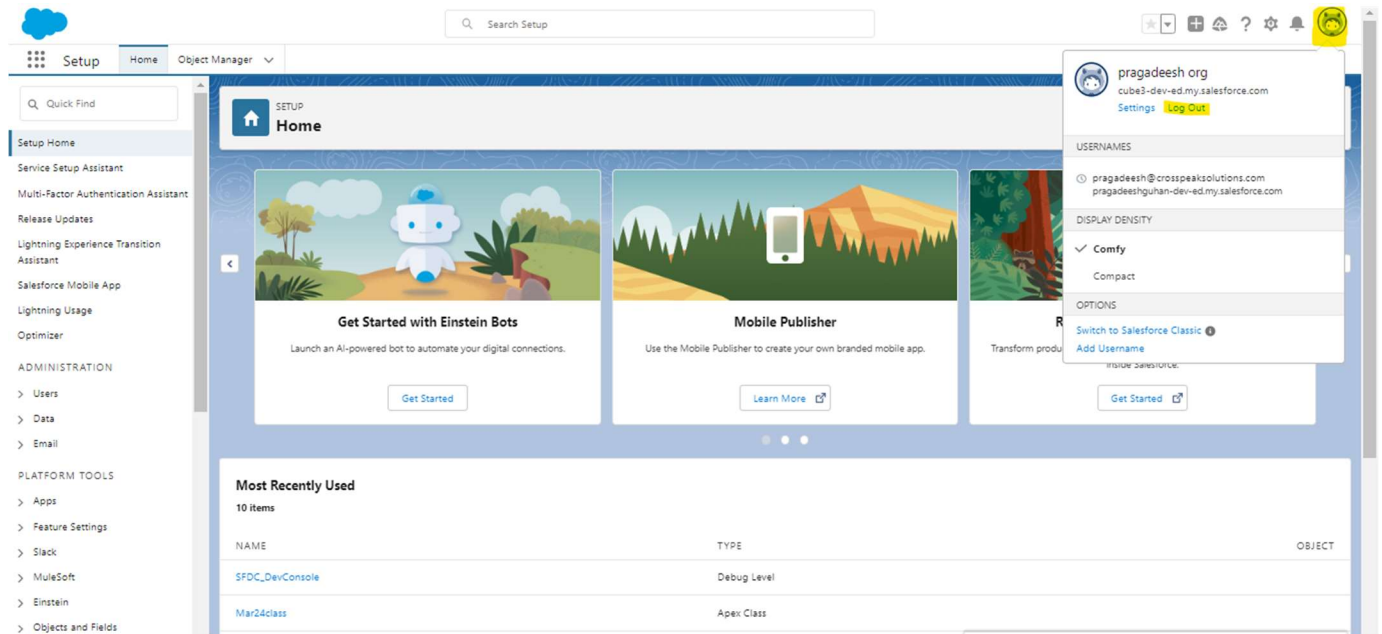
The screenshot shows the 'Lead Converter' interface with a success message: 'Your leads has been converted'. A red banner indicates '2 Duplicate Lead Found'. A modal overlay titled 'Similar Records Exist' is displayed, showing a table with columns: Name, Company, Lead Status, and Email. The modal has 'Skip' and 'Merge' buttons.

Name	Company	Lead Status	Email
MoniqueGlover	Drizzlr	Working - Contacted	moniqueglover.drizzlr@gmail.com
JordonButler	Simiyo	Working - Contacted	jordonbutler.simiyo@gmail.com

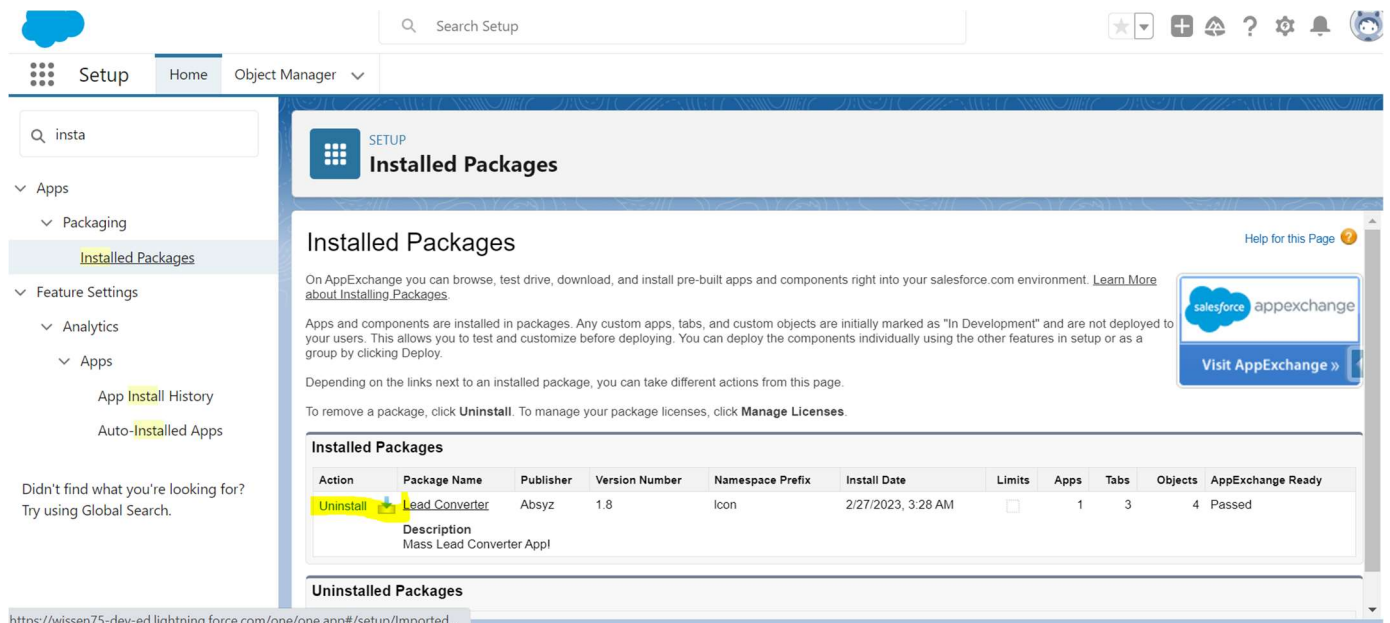
While converting leads into Account, Contact and opportunity then if user got any duplicates then it will show in above.

1.6 Exiting the System

- If User wants to log out from Salesforce, click on the bear icon, which highlighted in the image below and click on log out.

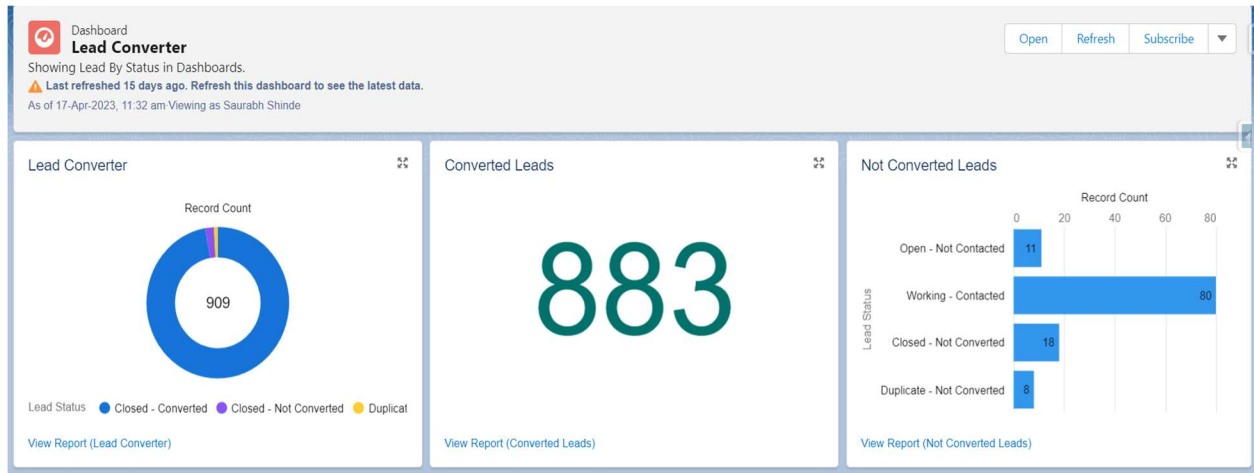


- Click the highlighted part to uninstall the package.



2. Post Installation, Troubleshooting & Support

- After installation of package user should customize the reports and dashboards on home page.
- Lead Converter, Converted Leads and Not Converted Leads reports has to be created.



2.1 Error Messages

- In MLC if user didn't checkbox the leads then an error message will pop-up.

Multiple Lead Converter

Select Leads
Select at least one Lead for going forward

Search Lead....

Search by lead status
Working - Contacted

☐	Name	Company	Lead Status	Email
☐	Jonathan Young	Vorenza	Working - Contacted	elainemitchell.vorenza@vorenza.com
☐	Lisa Moore	Evorry	Working - Contacted	jaylalittle.evorry@gmail.com
☐	Peter Howard	Rosatino	Working - Contacted	briaandrews.rosatino@rosatino.com
☐	Phillip Mullins	Rakkz	Working - Contacted	kaliyahmorse.rakkz@rakkz.com
☐	John Davis	Treepa	Working - Contacted	katelynweeks.treepa@treepa.com
☐	Sabrina Doyle	Wazzl	Working - Contacted	neveahbarber.wazzl@wazzl.com
☐	Nicholas Clayton	Nerve	Working - Contacted	alizabenjamin.nerve@nerve.com
☐	Teresa Brown	Evopu	Working - Contacted	kayleyhuber.evopu@evopu.com
☐	Steven Santiago	Nulano	Working - Contacted	charleshernandez.nulano@nulano.com
☐	Karen Young	Fullman	Working - Contacted	madisonhowell.fullman@fullman.com

Number of Leads: 10

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2.2 Special Considerations

- Deactivate the standard Contact Duplicate Rule in duplication rules.

2.3 Support

The user can get emergency assistance and system support

Table 1 - Support Points of Contact

Contact	Organization	Phone	Email	Role
Srihari R	Wissen Infotech	8867796840	srihari.ravindranath@wisseninfotech.com	PM
Shalini M	Wissen Infotech	8897272195	shalini.muthyam@wisseninfotech.com	PM
Vanithadevi K S	Wissen Infotech	6374103872	vanithadevi.subramanian@wisseninfotech.com	PM

Appendix A: Approvals

The undersigned acknowledge that they have reviewed the User Manual and agree with the information presented within this document. Changes to this User Manual will be coordinated with, and approved by, the undersigned, or their designated representatives.

Table 1 - Approvals

Document Approved By	Date Approved
Obula Reddy Yerasi, Associate Vice President, Wissen Infotech	03-May-2023
Srihari R, Project Manager, Wissen Infotech	28-Apr-2023
Vanithadevi S, Program Manager, Wissen Infotech	27-Apr-2023