

Convertabl App - How-To Guide

About

This guide is designed to support the user navigating through the Convertabl application, showcasing how the user can create records.

NB: This guide is tailored towards Salesforce Lightning Experience.

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Support

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

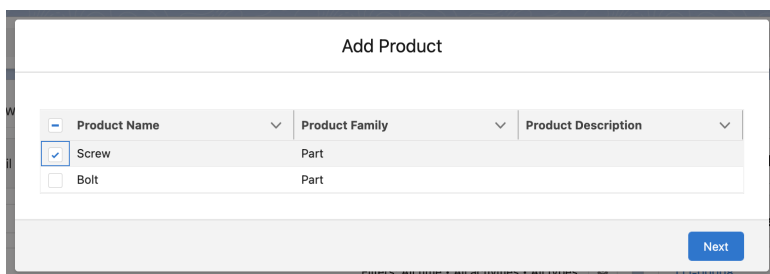
Lead Line Item

What is a Lead Line Item?

How do I create a Lead Line Item?

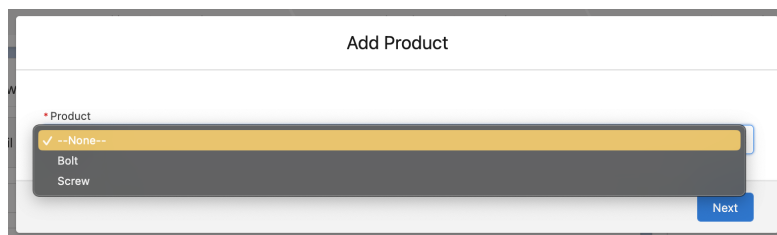
Lead line item records are created using the “Add Product” custom action. Depending on whether you are on the desktop or mobile application the input screens will look different but perform the same output.

Desktop



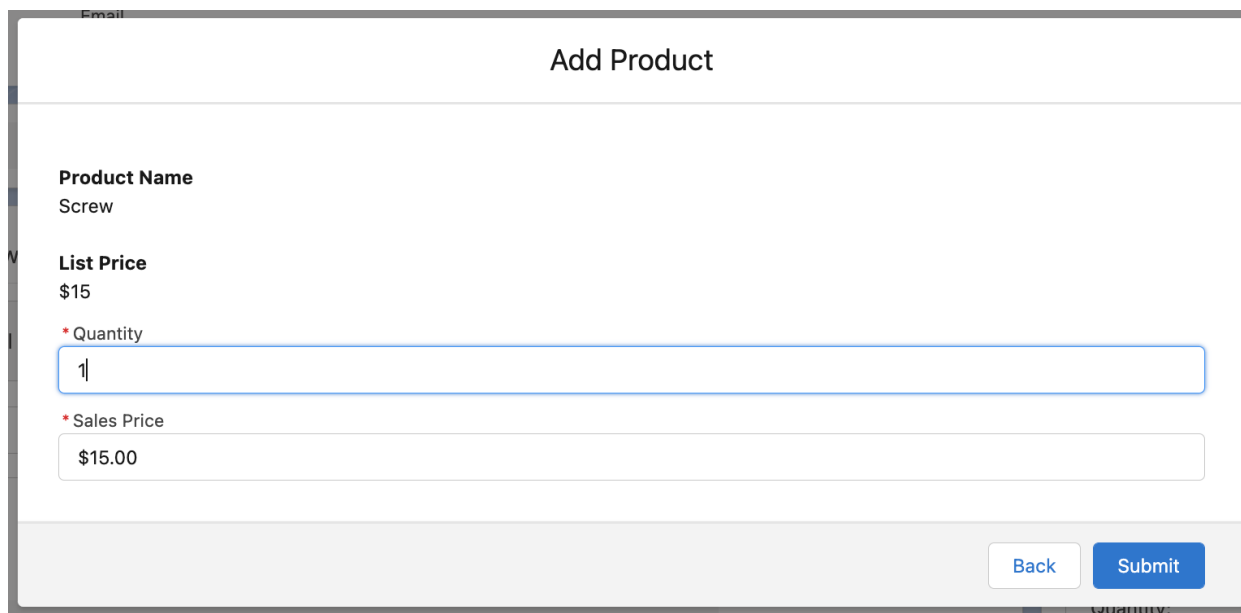
The desktop 'Add Product' form features three dropdown menus: 'Product Name', 'Product Family', and 'Product Description'. Below these, there are two rows of checkboxes. The first row has a checked checkbox for 'Screw' and an unchecked checkbox for 'Bolt'. The second row has a checked checkbox for 'Part' and an unchecked checkbox for 'Part'. A 'Next' button is located at the bottom right of the form.

Mobile



The mobile 'Add Product' form displays a dropdown menu for 'Product' with a yellow highlight on the 'None' option. Below the dropdown, there are two rows of checkboxes. The first row has a checked checkbox for 'None' and an unchecked checkbox for 'Bolt'. The second row has a checked checkbox for 'Screw' and an unchecked checkbox for 'Screw'. A 'Next' button is located at the bottom right of the form.

Upon selection, you will be asked to enter a quantity and sales price. The sales price is defaulted to match the list price but can be overridden. The list price comes from the pricebook associated with the lead.



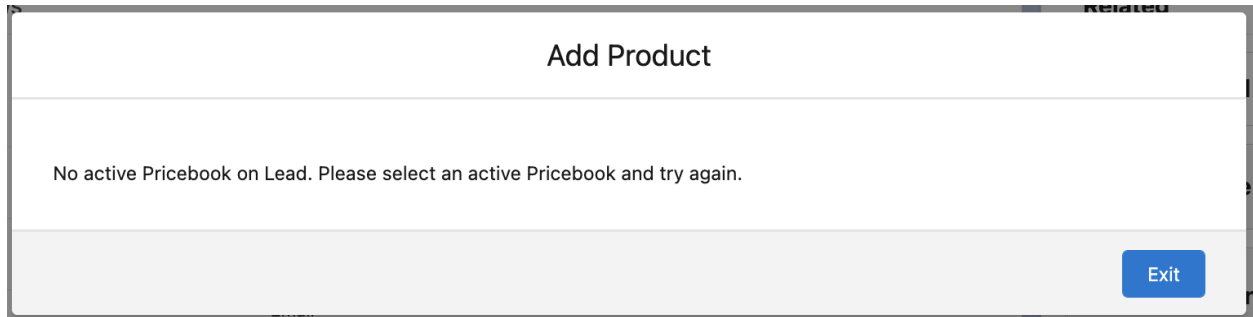
The desktop 'Add Product' form after selection displays the following fields: 'Product Name' (Screw), 'List Price' (\$15), '* Quantity' (1), and '* Sales Price' (\$15.00). The 'Quantity' and 'Sales Price' fields are highlighted with a blue border. At the bottom right, there are 'Back' and 'Submit' buttons.

Once confirmed, Lead Line Item record(s) will be created against the Lead.

Add Product Error Messages:

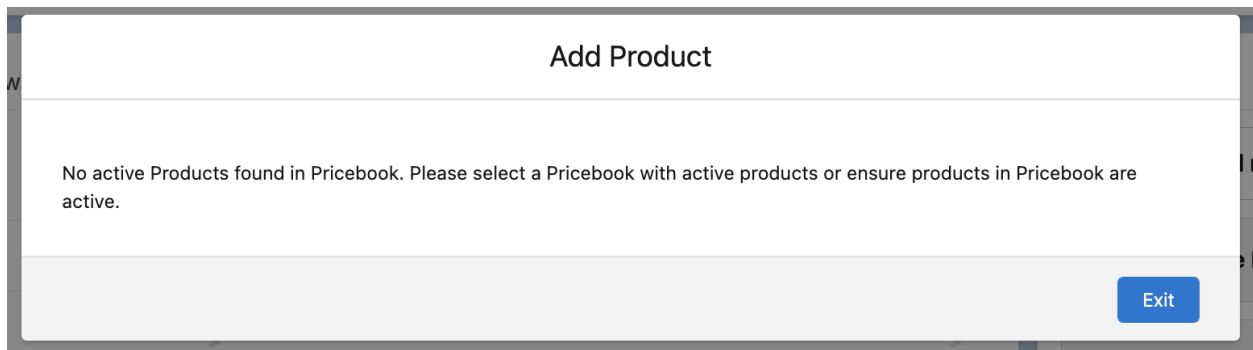
An error message may occur when adding a product to the lead. Possible errors that could occur are:

1. No pricebook on the lead



The screenshot shows a modal dialog titled "Add Product". The main content area displays the error message: "No active Pricebook on Lead. Please select an active Pricebook and try again." At the bottom right of the dialog, there is a blue button labeled "Exit".

2. No active products in the pricebook for selection



The screenshot shows a modal dialog titled "Add Product". The main content area displays the error message: "No active Products found in Pricebook. Please select a Pricebook with active products or ensure products in Pricebook are active." At the bottom right of the dialog, there is a blue button labeled "Exit".

Lead Line Item Page


Lead Line Item
Widget

[Edit](#)
[Clone](#)
[Delete](#)

Quantity
4

Sales Price
\$25.00

Total Price
\$100.00

Lead
[Test Lead 2](#)

Details

Product
[Widget](#)

List Price
\$25.00

Quantity
4

Sales Price
\$25.00

Total Price
\$100.00

System Information

Created By
 User User, 5/12/2022, 2:34 pm

Lead
[Test Lead 2](#)

Last Modified By
 User User, 9/12/2022, 11:14 am

Lead Line Item Number
LLI-00008

Related


Lead Line Item History (3)

3 items • Sorted by Date • Updated a few seconds ago

	Date	Field	User	Original V...	New Value
1	9/12/2022, 11:14 am	Quantity	User User	1	4
2	9/12/2022, 11:14 am	Sales Price	User User	\$5.00	\$25.00
3	5/12/2022, 2:34 pm	Created.	User User		

[View All](#)

- The Lead Line Item page will provide details on the select product, pricing and quantity
- The Lead Line Item History tracks changes to the Product, Quantity and Sales Price
- Total Price is automatically calculated upon edit of the quantity or sales price

Other Important Points

- Products available for selection are based on the lead's pricebook
- Pricebook entries must be active in the pricebook to be available for selection
- If the lead has lead line items and the pricebook is changed, the lead line items are removed
- When a lead is converted with lead line items, a standard quote and quote line items are created based on the products added to a lead
 - The pricebook selected on the Lead and pricing on the lead line items will default through to the opportunity, quote and quote line items respectively
 - The new quote's expiration date will be default to the current date plus 30 days
 - The new quote will also be synced with the opportunity