



Multiple LeadConverter USER MANUAL



CMMISVC/3SM
Exp. 2020-08-16 / Appraisal #29917



gold
cloud alliance
partner

App Overview

- ▶ Lead conversion is a major process in Salesforce if a not a rather important one.
- ▶ This process is usually done one at a time in conventional method.
- ▶ Multiple Lead Converter is a native, Lightning Experience release management that converts multiple number of Leads at a time providing additional features. Just Select and Convert!
- ▶ **Additional Features:**
 - ❖ Converts multiple Leads at a time
 - ❖ Filters leads to convert by Pagination, records per page and view selected Leads
 - ❖ Handles duplications using 'Find Existing Contact' feature
 - ❖ Move Related List records from Lead to Account/Contact/Opportunity

Pre-Requisites & Procedure

- ▶ Install the app package in your org. Ensure you have My Domain enabled in your org.
If not, please refer this link:
<https://trailhead.salesforce.com/en/projects/slds-lightning-components-workshop/steps/slds-lc-1>
- ▶ From the app picker select the Multiple Lead Converter App
- ▶ Navigate to the Lead Converter Tab
 - ❖ **1st Page** : View , Filter, Select - Leads
 - ❖ **2nd Page** : View Selected Leads; Deselect if you wish to!
 - ❖ **3rd Page** : Lead Conversion Information
 - ❖ **4th Page** : Displays Account that Leads has been attached to.

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


Multiple Lead Conv...

Home
Leads
Lead Converter
Error Message Handler
Lead Employees


Lead Converter

Lead Converter Tab

Display Leads

Selected Leads

Convert Information

Converted

71 Leads • page 1 / 8

Record Per Page > 

10

NUMBER OF SELECTED LEADS: 0


Search By Field

--None--


Search Value

Search...

LEAD NAME	COMPANY	STATE	EMAIL	LEAD SOURCE	PHONE	RATING	STATUS	CREATED DATE	☐
Bruce Watkins	Gusto Distributing	WI	brucewatkins@mailinator.com	Road Shows	631-689-9753		New	Oct 2, 2017	☐
Celina Lincoln	Eternal Word Television Network Inc.	PR	clincolin@example.com	References	(358) 555-5524	Warm	Working	Oct 2, 2017	☐
Charla Lecroy	Winter Sports Inc	TX	clecroy@example.com	References	(955) 555-2405	Hot	Working	Oct 2, 2017	☐

Multiple Lead Conv...

Home

Leads

Lead Converter

Error Message Handler

Lead Employees

Search Salesforce

1.67 % 89.05 KB

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71 Leads • page 1 / 8

Record Per Page >

10

Select the number of records to display in current page

Search By Field

--None--

--None--

Lead Name

Company

Email

Phone

Rating

Status

Created Date

Filter leads based on the set of fields

Search Value

Search...

Search based on the keyword

NUMBER OF SELECTED LEADS: 0

Select leads, All/Individual

	STATE	EMAIL	LEAD SOURCE	PHONE	RATING	STATUS	CREATED DATE	
	WI	brucewatkins@mallinator.com	Road Shows	631-689-9753		New	Oct 2, 2017	☐
	PR	clincoln@example.com	References	(358) 555-5524	Warm	Working	Oct 2, 2017	☐
Charla Lecroy	TX	cleroy@example.com	References	(955) 555-2405	Hot	Working	Oct 2, 2017	☐
Darwin Munk	MA	dmunk@example.com	References	(984) 555-9751	Warm	Working	Oct 2, 2017	☐
Dave Deller	CA	dd@dumny.com.uk	Road Shows	(415) 901-7000		New	Oct 2, 2017	☐
David Homme	OR	davidhomme@mallinator.com	Road Shows	759-255-1555		New	Oct 2, 2017	☐
Debra Boehme	NY	dboehme@example.com	References	(642) 555-3891	Cool	Working	Oct 2, 2017	☐
Demario Quast	TX	dquast@example.com	References	(633) 555-2241	Hot	Contacted	Oct 2, 2017	☐
Derek Rose		drose@ulyssesnet.com	Road Shows	(875) 940-9745		New	Oct 2, 2017	☐
Edith McIntire	NE	emcintire@example.com	References	(860) 555-8814	Warm	Working	Oct 2, 2017	☐

Next Page

Proceed to Next Step 2

- ▶ Second page; You can see your selected leads, deselect if you want!
- ▶ Proceed to Next Step/ Go back to page 1


Lead Converter

✓

Selected Leads

Convert Information

Converted


SELECTED LEADS

NUMBER OF SELECTED LEADS: 5

LEAD NAME	COMPANY	STATE	EMAIL	LEAD SOURCE	PHONE	RATING	STATUS	CREATED DATE	
Bruce Watkins	Gusto Distributing	WI	brucewatkins@mailinator.com	Road Shows	631-689-9753		New	Oct 2, 2017	✓
Celina Lincoln	Eternal Word Television Network Inc.	PR	clincoln@example.com	References	(358) 555-5524	Warm	Working	Oct 2, 2017	✓
Charla Lecroy	Winter Sports Inc	TX	clecroy@example.com	References	(955) 555-2405	Hot	Working	Oct 2, 2017	✓
Darwin Munk	Red Lodge Mountain	MA	dmunk@example.com	References	(984) 555-9751	Warm	Working	Oct 2, 2017	✓
Dave Deller	UB Group	CA	dd@dummy.com.uk	Road Shows	(415) 901-7000		New	Oct 2, 2017	✓

Back to step 1

Proceed to Next Step 3

- ▶ Third Page; You need to give lead conversion Information

✓

✓

Convert Information

Converted

Record Owner

Lead Owner

Lead Status

Closed-Converted

Send Email to owner

☐

 ACCOUNT INFORMATION

Create New Account

☐

Add to Existing Account

☐

Find Existing Contact

☐

 When you want to search for 'Existing Contact' based on some field of Lead then please follow the below steps.

STEPS:

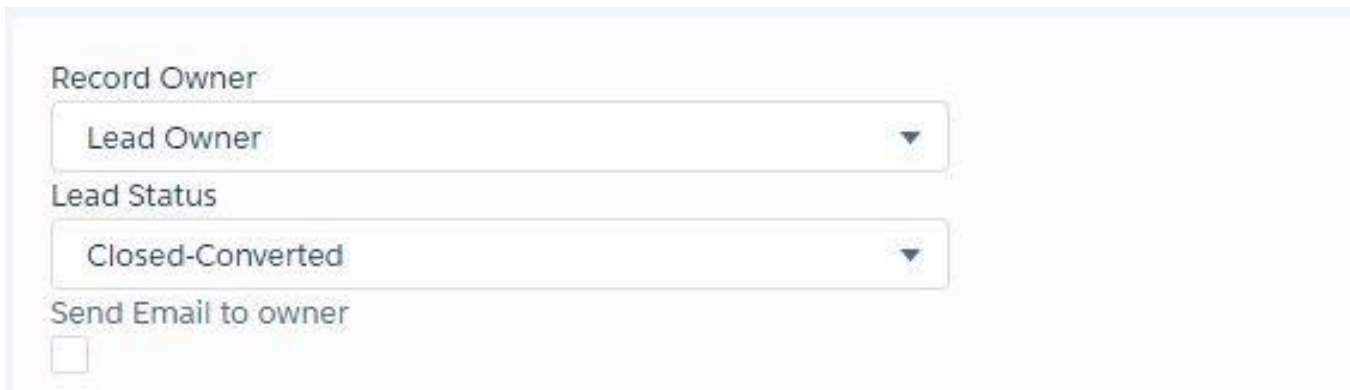
1. Click on Setup

2. Search for Custom Settings and for 'Map to Existing Contact' click on Manage

3. Click on New

Conversion Process

- ▶ For newly created Account/Contact/Opportunity, the record owner will be the lead owner.
- ▶ By default lead status is close-converted (when lead is converted).
- ▶ Select 'Send Email to Owner' when you wish to notify Account Owner that lead has been attached to it and information of Account and Contact.



Record Owner

Lead Owner ▼

Lead Status

Closed-Converted ▼

Send Email to owner

☐

Account Information

- ▶ In Account information, you can either select to 'Create New Account' or 'Add to Existing Account'.

 ACCOUNT INFORMATION

Create New Account

☐

Add to Existing Account

☐

Find Existing Contact

☐

Account Information

- ▶ When you select 'Add to Existing Account', click on search icon to select Account.
- ▶ To select an Account, click on Account Name.

Create New Account
☐

Add to Existing Account
☒



Multiple Lead Conv... Home Leads ▾ Lead Converter Error Message Handler ▾ Lead Employees ▾

Search Account

ACCOUNT NAME	BILLING CITY	BILLING STATE/PROVINCE	BILLING ZIP/POSTAL CODE	PHONE	ACCOUNT OWNER ALIAS
Bear Paw Livestock	Sharpsburg	GA	30277	(313) 555-6815	Effat Aditya
American Silkscreen	Lutz	FL	33558	(827) 555-3384	Effat Aditya
Thompson Power Systems Inc	Crete	NE	68333	(860) 555-8814	Effat Aditya
Ebsco Industries Inc	Halethorpe	MD	21227	(494) 555-7051	Effat Aditya
Email2Lead					Effat Aditya

Account Information Steps

- ▶ When you want to search for 'Existing Contact' based on some field of Lead then please follow the below steps.
- ▶ STEPS:
 - ❖ Click on Setup
 - ❖ Search for Custom Settings and for 'Map to Existing Contact' click on Manage
 - ❖ Click on New
 - ❖ Provide Data as mentioned
 1. Name : Dataset1 (any)
 2. Field on Lead : This should be field API Name which is in Lead
 3. Field on Contact : This should be field API Name which is in Contact

Account Information Example

- ▶ To Make you understand let us give API Names in custom setting mentioned:
'Field on Lead': Phone AND 'Field on Contact': Phone
- ▶ Here if CONTACT PHONE is same as of LEAD PHONE then this Contact will be attached to Account thereby handling duplications.

Opportunity Information

- ▶ If you wish to create an opportunity along with Account and Contact, here you can do it.
- ▶ Do not create an opportunity
- ▶ Create an opportunity for each lead as Account Name + Contact Name
- ▶ Create an opportunity for each lead



OPPORTUNITY INFORMATION

Do not create an opportunity

☐

Create an opportunity for each lead as Account Name + Contact Name

☐

Create an opportunity for each lead

☐

Related List Information



RELATED LIST INFORMATION

Want to move Related List to Account/Contact/Opportunity?

☐

- ▶ For moving 'Related List' from Lead to Account/Contact/Opportunity then please follow the below steps.
- ▶ STEPS:
 - ❖ Click on Setup
 - ❖ Search for Custom settings and for 'Move Related Records' click on Manage
 - ❖ Click on New
 - ❖ Provide Data as mentioned

Related List Information Steps

1. Name Example : Dataset1
2. Lookup to Lead : This should be field API Name which has lookup to Lead
3. Lookup to Account : This should be field API Name which has lookup to Account
4. Lookup to Contact : This should be field API Name which has lookup to Contact
5. Lookup to Opportunity : This should be field API Name which has lookup to Opportunity
6. SObject Name : This should be Object API Name which has lookup to Account/Contact/Opportunity and Lead
7. Move to Account : Whether you want to move Related List to Account
8. Move to Contact : Whether you want to move Related List to Contact
9. Move to Opportunity : Whether you want to move Related List to Opportunity

Related List Information Example

- ▶ To Make you understand lets have a dummy object LEAD EMPLOYEE! We want to move Related List from Lead to Account and Contact.
- ▶ Here an object LEAD EMPLOYEE has a lookup to Lead, Account and Contact, so if you want to transfer Related List from Lead to Account and Contact, go to this objects fields and give their API Names accordingly in custom setting mentioned.
- ▶ For example : 'Lookup to Lead': Lead__c AND 'Lookup to Account': Account__c (relationship name) AND 'Lookup to Contact': Contact__c (relationship name) AND 'SObject Name': Lead_Employee__c AND 'Move to Account' : Checked AND 'Move to Contact' : Checked
- ▶ If there is another object that has a lookup to Lead and Account/Contact/Opportunity and you want to move Related List then make one more record in custom setting in addition to above record.

Converted lead information

- ▶ After clicking on convert button, the app redirects to Account Information page.
- ▶ We can see the details of Account that Lead has been attached to!


Lead Converter


Success!
Converted Successfully.


✓

✓

✓

Converted


ACCOUNT INFORMATION

ACCOUNT NAME	BILLING CITY	TYPE	ACCOUNT PHONE	CREATED DATE
Gusto Distributing	Stevens Point		631-689-9753	
Eternal Word Television Network Inc.	Sabana Seca		(358) 555-5524	
Winter Sports Inc	San Antonio		(955) 555-2405	
UB Group	San Francisco		(415) 901-7000	
Red Lodge Mountain	Sheffield		(984) 555-9751	

Go to Step 1



Thanks!



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