

Opportunity to Order Conversion App – User Documentation

8/29/2019

Version 3.0

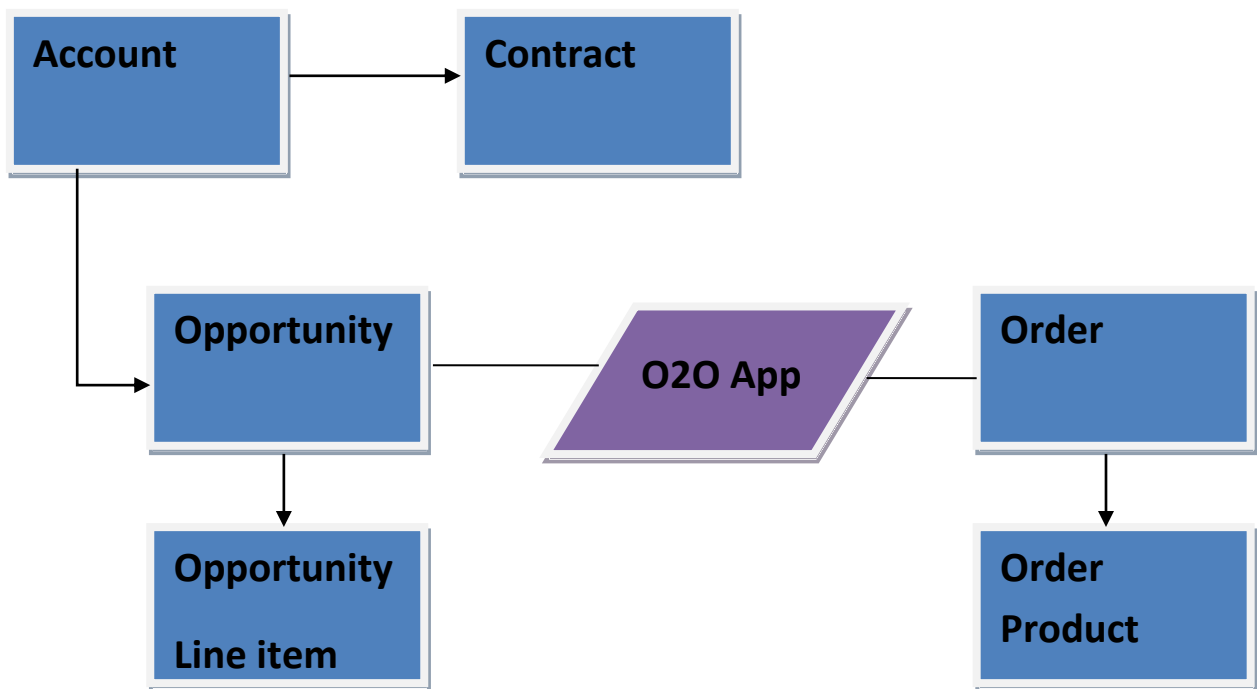
Dhruvsoft Services Private Limited (www.dhruvsoft.com)



Opportunity to Order Conversion App – User Documentation

Overview of Application:

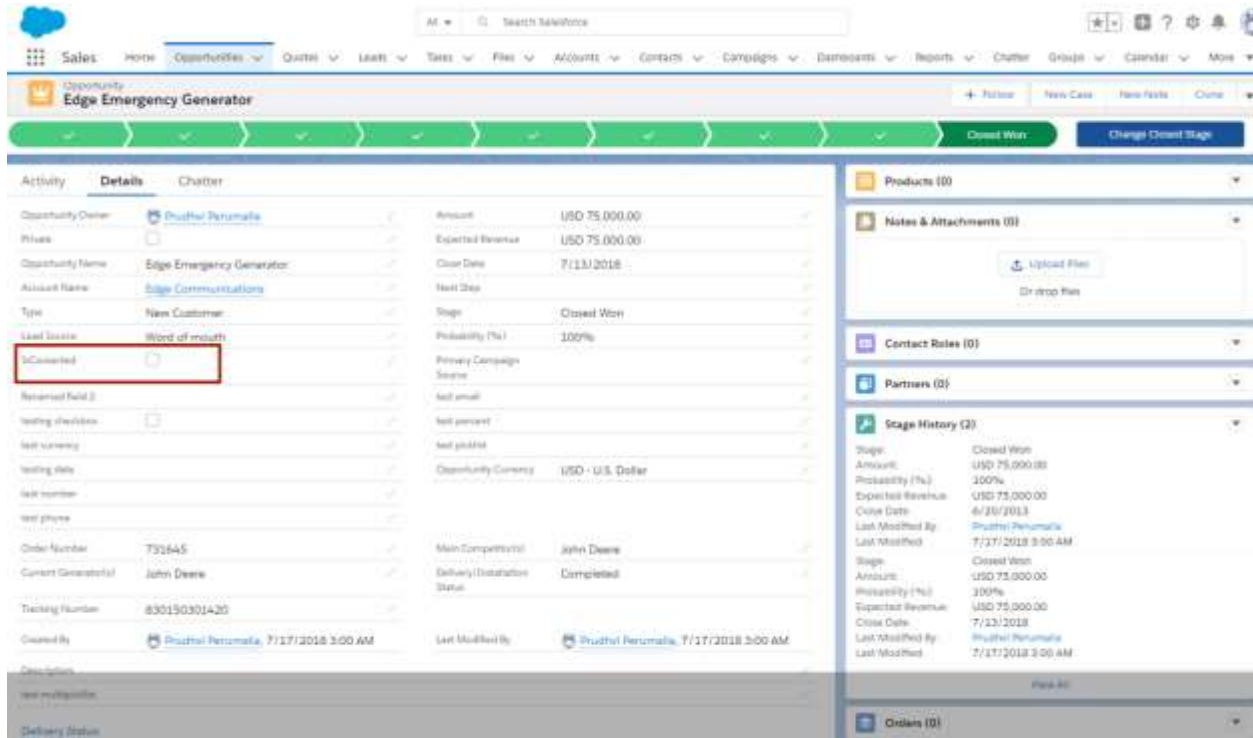
You can use "Opportunity to Order Conversion Application" to convert an opportunity record with opportunity line items into order and its items from the opportunity level and users can add related contracts information into orders based on related account which is selected from opportunity record



Opportunity to Order Conversion App – User Documentation

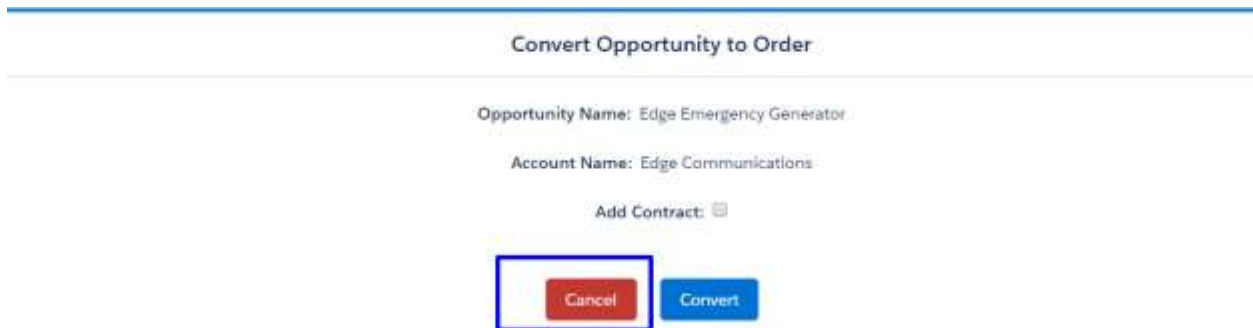
Opportunity to Order Conversion:

Go to opportunity record and click on the “Convert to Order”. Note the “IsConverted” field on Opportunity is unchecked



Cancel Conversion

Click on Cancel button to go back to opportunity record without converting



This will take you back to the Opportunity record without converting to order

Opportunity to Order Conversion App – User Documentation

Conversion without relating to a Contract:

On clicking Convert button you will be redirected to page where you can see the name of opportunity and account. If you want to convert without contract do not select “Add Contract” and click convert.

Convert Opportunity to Order

Opportunity Name: Edge Emergency Generator

Account Name: Edge Communications

Add Contract: ☐

Cancel

Convert

Opportunity to Order Conversion App – User Documentation

A new order will be created. Please click on the order link to navigate to the order created.

Order is Created. Please Check the below link.

[Order Link](#)

Related	Details
Order Owner	Prudhvi Perumalla
Order Number	00000151
Account Name	Edge Communications
Order Start Date	8/28/2019
Customer Authorized By	
Company Authorized By	
Billing Address	312 Constitution Place Austin, TX 78767 USA Austin, TX
Activated By	
testing field	830150301420
test checkbox	☒
test currency	
test date	8/28/2019
test email	test@gmail.com
test number	
test percent	
test phone	
test picklist	test1
Order Currency	USD - U.S. Dollar
Created By	Prudhvi Perumalla, 8/28/2019 8:20 AM
Description	test multipicklist test2
Contract Number	
Opportunity	Edge Emergency Generator
Order Amount	USD 100,000.00
Order Type	
Status	Draft
Shipping Address	312 Constitution Place Austin, TX 78767 USA
Activated Date	
Converted from Opportunity	☒

Conversion with Contract:

Opportunity to Order Conversion App – User Documentation

When converting select “Add Contracts” to select one of the related contracts of that account:

Convert Opportunity to Order

Opportunity Name: Edge Emergency Generator

Account Name: Edge Communications

Add Contract: ☒

Select contract

--None--
--None--
00000103
Convert

Cancel

Click on convert button to create order record with order items

Convert Opportunity to Order

Opportunity Name: Edge Emergency Generator

Account Name: Edge Communications

Add Contract: ☒

Select contract 00000103 ▼

Cancel

Convert

Please click the link to navigate to order created.

Opportunity to Order Conversion App – User Documentation

Order is Created. Please Check the below link.

[Order Link](#)

On creation of order record you can see all the fields being populated from Opportunity and/or Contract. Account name and Opportunity name will come from the Opportunity record, Billing Address and Shipping Address will come from Account record and Customer Authorized By and Company Authorized By will come from Contract object which is selected. Order Products will come from Opportunity Line Items.

Order 00000153

Draft

Activated

Related Details

Order Owner	Prudhvi Perumalla	Contract Number	00000103
Order Number	00000153	Opportunity	Edge Emergency Generator
Account Name	Edge Communications	Order Amount	USD 150,000.00
Order Start Date	8/28/2019	Order Type	
Customer Authorized By		Status	Draft
Company Authorized By		Shipping Address	
Billing Address	312 Constitution Place Austin, TX 78767 USA Austin, TX	Activated Date	
Activated By		Converted from Opportunity	☒
testing field	830150301420		
test checkbox	☒		
test currency			
test date	8/28/2019		
test email	test@gmail.com		
test number			
test percent			
test phone			
test picklist	test1		
Order Currency	USD - U.S. Dollar		
Created By	Prudhvi Perumalla, 8/28/2019 8:28 AM	Last Modified By	Prudhvi Perumalla, 8/28/2019 8:28 AM
Description			
test multipicklist	test2		

X Cancel ✓ Capture

Opportunity to Order Conversion App – User Documentation

There is a custom field Opportunity on the Order page. You can click on opportunity field to navigate to opportunity record.

The screenshot shows the Salesforce interface for an Order record. The top navigation bar includes the Salesforce logo, a search bar, and tabs for Sales, Home, Opportunities, Quotes, Leads, Tasks, Files, Accounts, Contacts, Campaigns, and Dashboards. The main header displays the Order ID '00000153' and its status 'Draft'. Below this, the 'Details' tab is active, showing a list of fields. The 'Opportunity' field, which contains the text 'Edge Emergency Generator', is highlighted with a red rectangular box. Other fields include Contract Number (00000103), Order Amount (USD 150,000.00), Order Type, Status (Draft), Shipping Address, Activated Date, and a 'Converted from Opportunity' checkbox. The bottom of the form includes a 'Description' section with a 'test multipicklist' field and two buttons: 'Cancel' and 'Capture'.

Related	Details
Order Owner	Prudhvi Perumalla
Order Number	00000153
Account Name	Edge Communications
Order Start Date	8/28/2019
Customer Authorized By	
Company Authorized By	
Billing Address	312 Constitution Place Austin, TX 78767 USA Austin, TX
Activated By	
testing field	830150301420
test checkbox	☒
test currency	
test date	8/28/2019
test email	test@gmail.com
test number	
test percent	
test phone	
test picklist	test1
Order Currency	USD - U.S. Dollar
Created By	Prudhvi Perumalla, 8/28/2019 8:28 AM
Last Modified By	Prudhvi Perumalla, 8/28/2019 8:28 AM
Description	
test multipicklist	test2

Once opportunity is converted to order you cannot convert the same record. If IsConverted field is not checked then this Opportunity record is not converted once you convert this record the checkbox will be

Opportunity to Order Conversion App – User Documentation

automatically checked, and we can see the related order records in related list and error will be displayed while converting

The screenshot shows the Salesforce interface for an Opportunity record titled "Edge Emergency Generator". The record is in the "Closed Won" stage. Key details include:

- Opportunity Owner: Pruthi Perumalla
- Amount: USD 150,000.00
- Expected Revenue: USD 150,000.00
- Close Date: 7/13/2018
- Next Step: Closed Won
- Probability (%): 100%
- Primary Campaign Source: test@gmail.com
- Test email: test@gmail.com
- Test phone: test
- Opportunity Currency: USD - U.S. Dollar
- Win Competitor: John Deere
- Delivery/Installation Status: Completed
- Created By: Pruthi Perumalla, 8/28/2019 8:24 AM
- Last Modified By: Pruthi Perumalla, 8/28/2019 8:24 AM
- Description: test2

The "Related Lists" section on the right shows:

- Products (3): GenWatt Generator 2000wV, Quantity: 100, Sales Price: USD 150,000.00
- Notes & Attachments (0)
- Contact Roles (0)
- Partners (0)
- Stage History (2): Shows two stages, both "Closed Won", with details on Amount, Probability, Expected Revenue, Close Date, and Last Modified By.
- Orders (1): 00000103, Status: Draft, Order Start Date: 8/28/2019, Contract Number: 00000103
- Quotes (0)

You will get a message that this opportunity is already converted

The screenshot shows the "Convert Opportunity to Order" dialog box. A red box highlights the error message: "This opportunity is already converted". Below the message, the following information is displayed:

- Opportunity Name: Edge Emergency Generator
- Account Name: Edge Communications
- Add Contract: ☐

At the bottom, there are "Cancel" and "Convert" buttons.