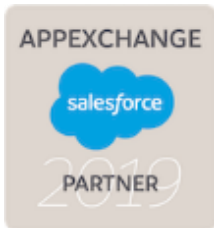


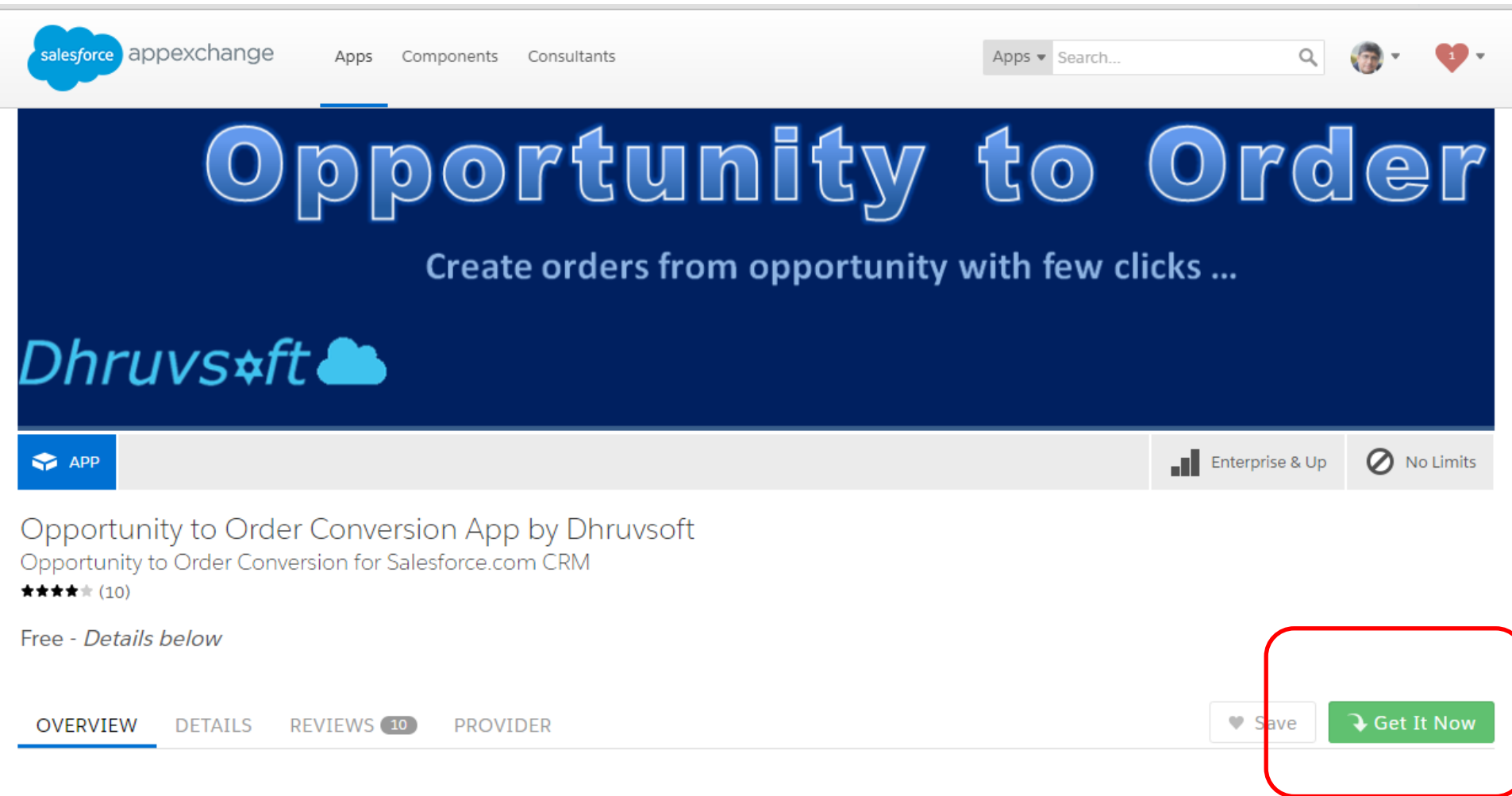
Install Opportunity to Order

By Dhruvsoft

www.dhruvsoft.com



Step 1: Go to AppExchange Listing



The screenshot shows the Salesforce AppExchange interface. At the top, the navigation bar includes the Salesforce logo, the text 'appexchange', and tabs for 'Apps', 'Components', and 'Consultants'. A search bar with a dropdown menu set to 'Apps' and a search icon is on the right. Below the navigation bar is a large blue banner with the text 'Opportunity to Order' in large, outlined letters, followed by 'Create orders from opportunity with few clicks ...' and the 'Dhruvsoft' logo. Below the banner, there is a section with a blue 'APP' button, a bar chart icon labeled 'Enterprise & Up', and a 'No Limits' icon. The main content area displays the app title 'Opportunity to Order Conversion App by Dhruvsoft', a subtitle 'Opportunity to Order Conversion for Salesforce.com CRM', and a rating of '★★★★★ (10)'. Below this, it says 'Free - Details below'. At the bottom, there are tabs for 'OVERVIEW', 'DETAILS', 'REVIEWS (10)', and 'PROVIDER'. On the right side of the bottom section, there are two buttons: 'Save' and 'Get It Now'. The 'Get It Now' button is highlighted with a red rounded rectangle.

salesforce appexchange Apps Components Consultants Apps Search...

Opportunity to Order

Create orders from opportunity with few clicks ...

Dhruvsoft

APP Enterprise & Up No Limits

Opportunity to Order Conversion App by Dhruvsoft
Opportunity to Order Conversion for Salesforce.com CRM
★★★★★ (10)
Free - Details below

OVERVIEW DETAILS REVIEWS (10) PROVIDER Save Get It Now

Install from link by clicking on button Get now

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B5OM8EAN>

Step 2: Select ORG

- Once you select to install from AppExchange you will be asked to give your credentials
- On success you will be redirected to the following package installation page. Follow the instructions as below:

Step 2: Select ORG

How would you like to continue?



Install in production

Includes active, trial or developer orgs



Install in sandbox

Test in a copy of your production org

Choose the org do you want to install.

Step3: Verify Installation

Almost there!



This app does not list support for your edition of Salesforce. You can continue installation, but it may fail later in the process.



Before installing, please review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.

WHAT YOU ARE INSTALLING

PACKAGE

Opportunity to Order Conversion App by Dhruvsoft

VERSION

Opportunity To Order Managed (August032015 / 1.4.0)

SUBSCRIPTION

Free

DURATION

Does Not Expire

NUMBER OF SUBSCRIBERS

Site-wide

WHERE YOU ARE INSTALLING

ORGANIZATION

Lightining

EDITION

Developer

USER NAME

kiran@lightining.com



I have read and agree to the terms and conditions .

[Cancel Install](#) | [Back to previous step](#)

Confirm and Install!

On the next page make 'I have read and agree to the terms and conditions' checkbox to True and Click on 'Confirm and Install!' button

Step 4: Select access

**Install Opportunity to Order Conversion App by Dhruvsoft**
By Dhruvsoft


☐ Install for Admins Only


☒ Install for All Users


☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
Opportunity to Order Conversion App by Dhruvsoft	Dhruvsoft	August032015	1.4

Description

Opportunity to Order Conversion App by Dhruvsoft helps you Convert Opportunity to Order with just few clicks. While converting, you can optionally link Order to a Contract. No more double entry of data – convert an opportunity to an order in few clicks.

Additional Details [View Components](#) [API Access](#)

Select the User access & click on Install

Step 5: Wait



Install Opportunity to Order Conversion App by Dhruvsoft

By Dhruvsoft



Installing and granting access to all Users...

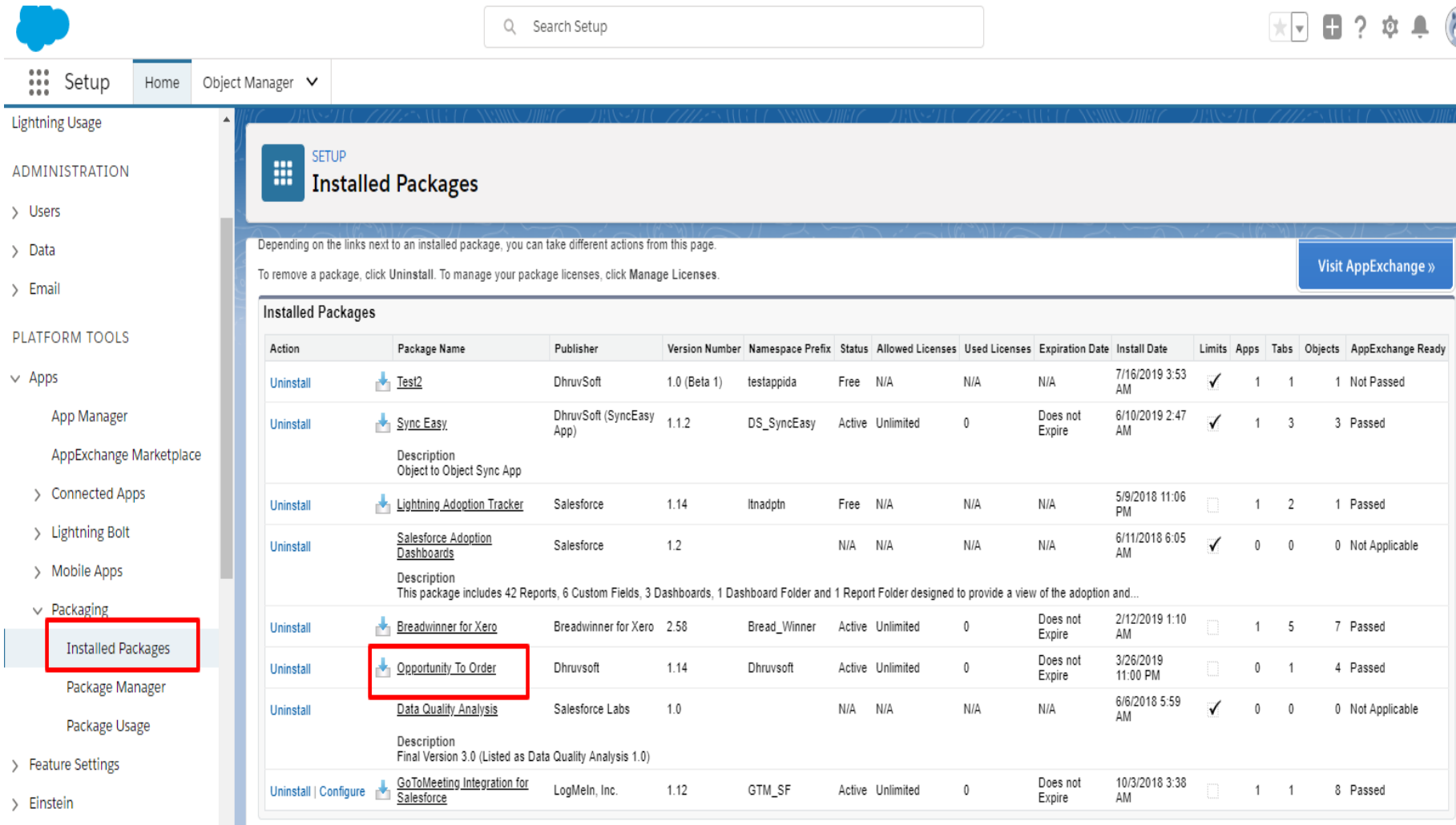
App Name	Publisher	Version Name	Version Number
Opportunity to Order Conversion App by Dhruvsoft	Dhruvsoft	1.7 June 2016	1.6

Description

Opportunity to Order Conversion App by Dhruvsoft helps you Convert Opportunity to Order with just few clicks. While converting, you can optionally link Order to a Contract. No more double entry of data – convert an opportunity to an order in few clicks.

APP ID: 00000000000000000000000000000000

Step 6: Verify in installed Packages



Lightning Usage

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- ▼ Apps
 - App Manager
 - AppExchange Marketplace
 - > Connected Apps
 - > Lightning Bolt
 - > Mobile Apps
- ▼ Packaging
 - Installed Packages**
 - Package Manager
 - Package Usage
- > Feature Settings
- > Einstein

Search Setup

Setup Home Object Manager ▼

SETUP Installed Packages

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

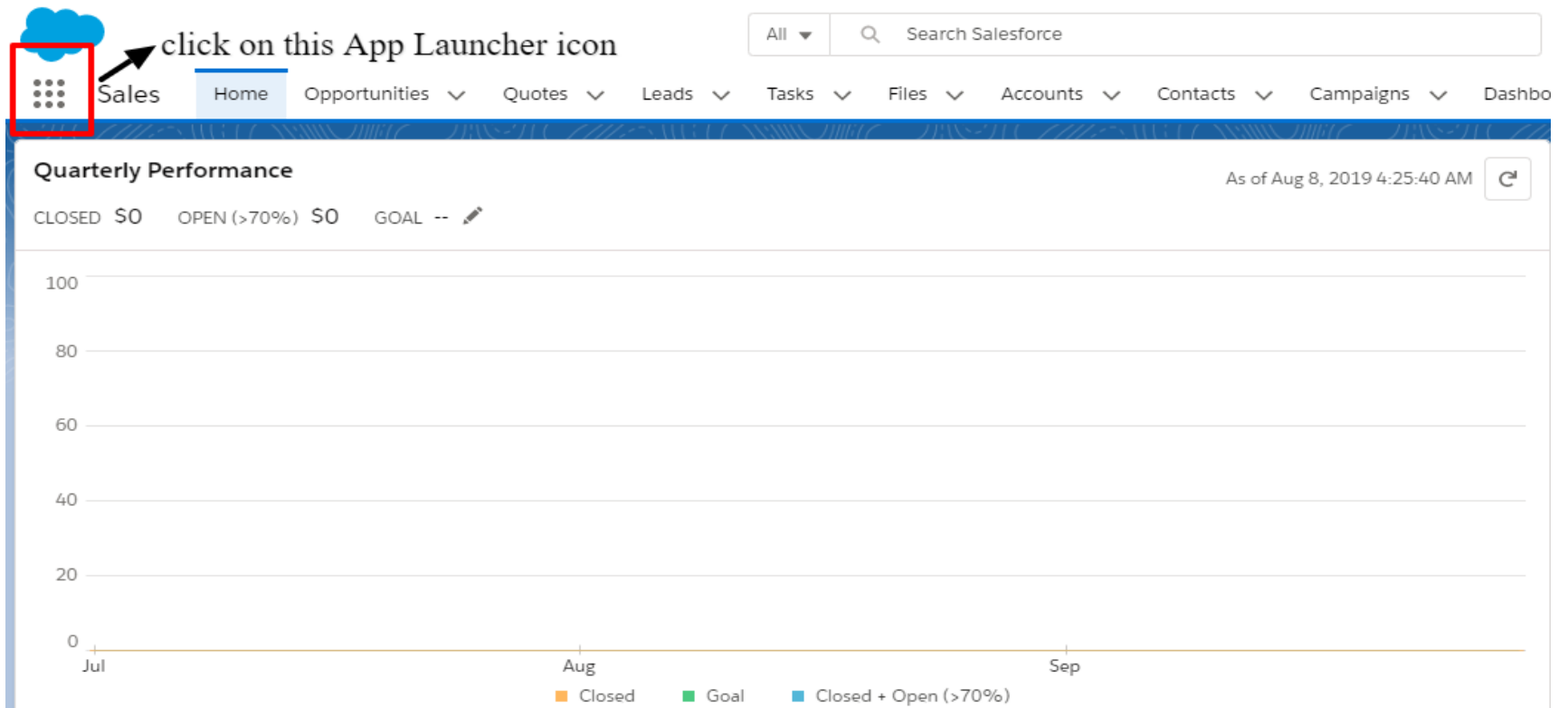
To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

[Visit AppExchange »](#)

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Test2	DhruvSoft	1.0 (Beta 1)	testappida	Free	N/A	N/A	N/A	7/16/2019 3:53 AM	✓	1	1	1	Not Passed
Uninstall	Sync Easy Description Object to Object Sync App	DhruvSoft (SyncEasy App)	1.1.2	DS_SyncEasy	Active	Unlimited	0	Does not Expire	6/10/2019 2:47 AM	✓	1	3	3	Passed
Uninstall	Lightning Adoption Tracker	Salesforce	1.14	ltnadptn	Free	N/A	N/A	N/A	5/9/2018 11:06 PM		1	2	1	Passed
Uninstall	Salesforce Adoption Dashboards Description This package includes 42 Reports, 6 Custom Fields, 3 Dashboards, 1 Dashboard Folder and 1 Report Folder designed to provide a view of the adoption and...	Salesforce	1.2		N/A	N/A	N/A	N/A	6/11/2018 6:05 AM	✓	0	0	0	Not Applicable
Uninstall	Breadwinner for Xero	Breadwinner for Xero	2.58	Bread_Winner	Active	Unlimited	0	Does not Expire	2/12/2019 1:10 AM		1	5	7	Passed
Uninstall	Opportunity To Order	Dhruvsoft	1.14	Dhruvsoft	Active	Unlimited	0	Does not Expire	3/26/2019 11:00 PM		0	1	4	Passed
Uninstall	Data Quality Analysis Description Final Version 3.0 (Listed as Data Quality Analysis 1.0)	Salesforce Labs	1.0		N/A	N/A	N/A	N/A	6/6/2018 5:59 AM	✓	0	0	0	Not Applicable
Uninstall Configure	GoToMeeting Integration for Salesforce	LogMeIn, Inc.	1.12	GTM_SF	Active	Unlimited	0	Does not Expire	10/3/2018 3:38 AM		1	1	8	Passed

Step 7: Go to O2O Settings Tab



Step 7: Go to O2O Settings Tab

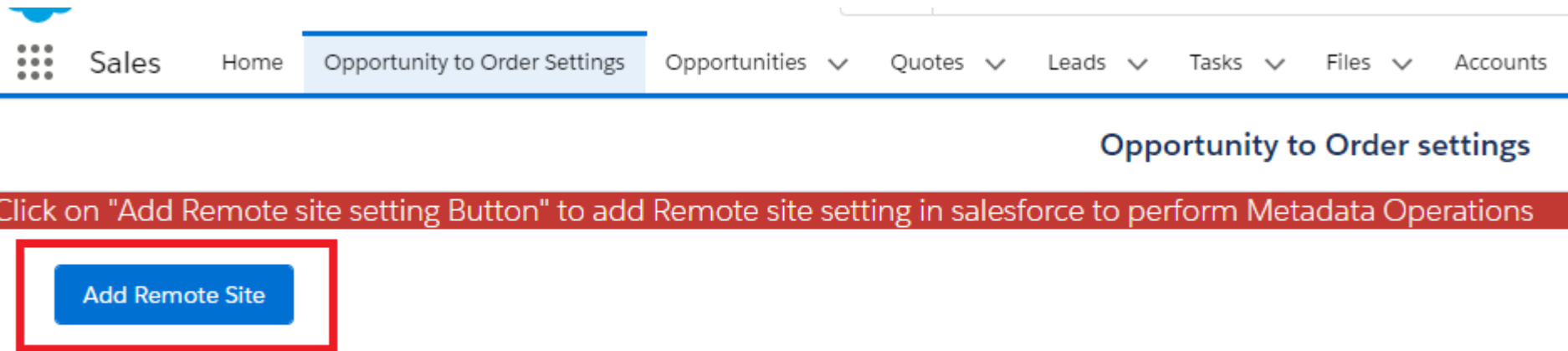
App Launcher

Search apps or items...

[Visit AppExchange](#)

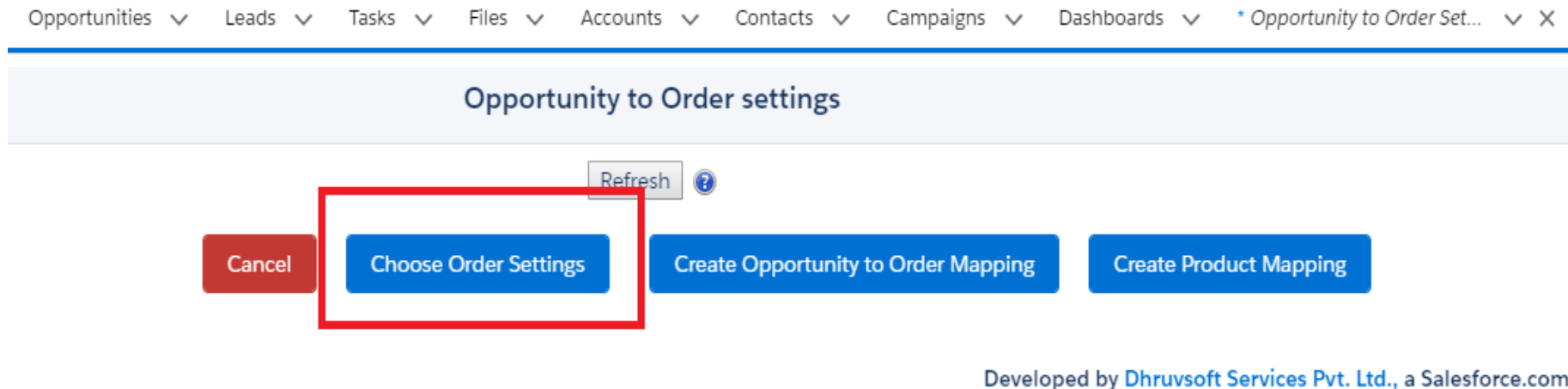
Authorization Form Consent	Authorization Form Data Use	Authorization Form Text	Breadwinner	CMS Workspaces
Calendar	Campaigns	Camping Item	Cases	Channel Program Levels
Channel Programs	Chatter	Consumption Schedules	Contact Point Type Consent	Contacts
Contracts	Dashboards	Data Use Legal Basis	Data Use Purpose	Duplicate Record Sets
Email Templates	Employee Salaries	Energy Audits	Enhanced Letterheads	Files
Forecasts	GoToMeeting	Groups	Home	Invoices
Leads	Lightning Adoption Tracker Setup-Classic	Lightning Bolt Solutions	Lightning Usage	Line Items
List Emails	Macros	Mappings	Opportunities	Opportunity to Order Settings
Orders	Partner Fund Allocations	Partner Fund Claims	Partner Fund Requests	Partner Marketing Budgets
Payments	People	Price Books	Products	Projects
Quick Text	Quotes	Reports	Scorecards	Streaming Channels
Sync Easy	Sync Logs	Tasks	User Provisioning Requests	Xero Contacts
ptos	testObjects			

Step 7: Add remote site



Add remote site for initial setup (Note this step may not be visible if you are using Professional Edition)

Step 7: Set Default Order Status



Click on “Chose Default Order Status” button

Step 7: Set Default Order Status

Order Settings

Choose default Order "Status" of the new Order that will be created when an Opportunity is converted. This status should be of 'Draft' category type. Refer to the status field on Order for identifying the correct value.

Draft converted order status :

Activate order after conversion : ☒

Activated converted order status :

Auto convert to order : ☒

Choose opportunity created date : [8/28/2019 2:05 AM]

Time interval for auto conversion (Minutes) :

Primary opportunity contact mapped to :

Update Order Layout ☐

Select the default Order Status and Click Save Order Status. (Note this will be the status of converted Orders)

Step 7: Map Opportunity to Order Custom Fields

Please refresh page from URL(Address bar),if you have changed any field level properties in Order OR Opportunity object

Unmapped fields

Opportunity		Order	Required	Enforced Picklist	Dependent Picklist	Controlling Field
--none--	----->	Test Checkbox - (Boolean)				
--none--	----->	Test Currency - (Currency)				
--none--	----->	Test Date - (Date)				
--none--	----->	Test DateTime - (Datetime)				
--none--	----->	Test Text - (String)				
--none--	----->	Test Number - (Double)				
--none--	----->	Test Email - (Email)				

Cancel

Back

Save Mapping

Map the custom fields on Opportunity to Order

Step 7: Map Opportunity product to Order product Custom Fields

Please refresh page from URL(Address bar),if you have changed any field level properties in Order OR Opportunity object

Unmapped fields

Opportunity Product Field		Order Product Field	Required	Enforced Picklist	Dependent Picklist	Controlling Field
--none--	----->	Test Text - (String)				
--none--	----->	Test Number - (Double)				
--none--	----->	Test Email - (Email)				
--none--	----->	Test DateTime - (Datetime)				
--none--	----->	Test Date - (Date)				
--none--	----->	Test Currency - (Currency)				
--none--	----->	Test Checkbox - (Boolean)				

Cancel

Back

Save Mapping

Map the custom fields on Opportunity product to Order product

Step 8: Edit Opportunity Layout

SETUP > OBJECT MANAGER
Opportunity

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

- Buttons
- Custom Links
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists

Quick Find

Section Total Amount Invo...

Blank Space

Delivery/Install...

IsConverted

Opportunity Detail

Standard Buttons: Edit Delete Clone Change Owner Change Record Type Sharing Submit for Approval Printable View

Opportunity Information (Header visible on edit only)

Opportunity Owner	Sample Text	Amount	\$123.45
Private	☒	Expected Revenue	\$123.45
Opportunity Name	Sample Text	Close Date	8/28/2019
Account Name	Sample Text	Next Step	Sample Text
IsConverted	☒	Stage	Sample Text
Type	Sample Text	Probability (%)	695%
Lead Source	Sample Text	Primary Campaign Source	Sample Text
Days to Close	375.05		
Discount Percent	69,259%		
Discount Percent Status	Sample Text		
Account Name of the Opportunity	Sample Text		
Approval status	Sample Text		

Add “Is Converted” Field on the Opportunity layout if not already added.

Step 8: Edit Opportunity Layout

The screenshot shows the Salesforce Classic Publisher interface for editing an Opportunity layout. At the top, there is a toolbar with buttons like 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below this is a 'Quick Find' search bar labeled 'Mobile Action Name'. A table of available actions is displayed, with 'Convert To Order' highlighted in the first row. An arrow points from this button to the 'Salesforce Mobile and Lightning Experience Actions' section in the layout editor. This section contains a row of buttons, including 'Convert To Order', which is highlighted with a red box. Other sections visible include 'Opportunity Sample', 'Highlights Panel', 'Quick Actions in the Salesforce Classic Publisher', and 'Opportunity Detail'.

Quick Find: Mobile Action Name	
Change Owner	Convert To Order
Change Record Type	Delete
Clone	Edit
Convert To Order	Email
File	Link
Log a Call	Mobile Smart Actions
New Account	New Case
New Event	New Group
New Opportunity	New Task
Printable View	Question
	Sharing
	Submit for Approval

Opportunity Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Post File New Task Log a Call New Case New Note New Event Link Poll Question Email

Salesforce Mobile and Lightning Experience Actions

Sharing Post File **Convert To Order** New Task Log a Call New Case New Note New Event Link Poll Question Email

Change Record Type Clone Submit for Approval Delete Edit Change Owner

Opportunity Detail

Standard Buttons: Edit Delete Clone Change Owner Change Record Type Sharing Submit for Approval Printable View

Custom Buttons: Convert To Order

Add "Convert to Order" Button if not already added in the Salesforce Mobile and Lightning Experience Actions

Edit Page Layouts

Add following on page layouts

- Opportunity
 - Convert to Order (Button)
 - Is Converted (Field)
 - Order (Related List)
- Order
 - Order Amount (Opportunity) (Field)
 - Convert from Opportunity (Field)

Opportunity to Order in Action

 Opportunity
TestOpp

[+ Follow](#) [Convert To Order](#)

Account Name

[TestAccount](#)

Close Date

8/27/2019

Amount

\$255,000.00

Opportunity Owner

 [venkata suseela anuku](#)

Qualification

Needs Analysis

Value Propositi...

Id. Decision M...

Perception Ana...

Proposal/Price ...

Negotiation/R...

starting

Proposal

Closed

Activity

Details

Chatter

Opportunity Owner

 [venkata suseela anuku](#)

Amount

\$255,000.00

 **Products (3)**

[Installation: Industrial - High](#)

Quantity: 1.00

Sales Price: \$85,000.00

Ready to Convert

The image shows a Salesforce Opportunity record for 'Edge Emergency Generator'. The record is in the 'Closed Won' stage. The left sidebar shows the 'Details' tab with various fields including Opportunity Owner, Amount, Expected Revenue, Close Date, Next Step, Stage, Probability (%), Primary Campaign Source, test email, test percent, test picklist, Opportunity Currency, Main Competitor(s), Delivery/Installation Status, Last Modified By, and Description. The right sidebar shows the 'Products (1)' section with 'GenWatt Diesel 1000kW', 'Notes & Attachments (0)', 'Contact Roles (0)', 'Partners (0)', 'Stage History (3)', 'Orders (0)', and 'Quotes (0)'. The bottom of the page has a blue bar with a 'Capture' button.

Opportunity Details:

- Opportunity Owner: Prudhvi Perumalla
- Private: ☐
- Opportunity Name: Edge Emergency Generator
- Account Name: Edge Communications
- Type: New Customer
- Lead Source: Word of mouth
- IsConverted: ☐
- Renamed field 2:
- testing checkbox: ☒
- test currency: USD 1,244.00
- testing date: 8/28/2019
- test number: 12,345
- test phone: 766666666
- Order Number: 731645
- Current Generator(s): John Deere
- Tracking Number: 830150301420
- Created By: Prudhvi Perumalla, 7/17/2018 3:00 AM
- Description: test2

Amount: USD 100,000.00

Expected Revenue: USD 100,000.00

Close Date: 7/13/2018

Next Step:

Stage: Closed Won

Probability (%): 100%

Primary Campaign Source:

test email: test@gmail.com

test percent:

test picklist: test1

Opportunity Currency: USD - U.S. Dollar

Main Competitor(s): John Deere

Delivery/Installation Status: Completed

Last Modified By: Prudhvi Perumalla, 8/28/2019 8:14 AM

Products (1)

- GenWatt Diesel 1000kW
- Quantity: 1.00
- Sales Price: USD 100,000.00
- Date:

Notes & Attachments (0)

Contact Roles (0)

Partners (0)

Stage History (3)

- Stage: Closed Won
- Amount: USD 100,000.00
- Probability (%): 100%
- Expected Revenue: USD 100,000.00
- Close Date: 7/13/2018
- Last Modified By: Prudhvi Perumalla
- Last Modified: 8/28/2019 8:13 AM

- Stage: Closed Won
- Amount: USD 75,000.00
- Probability (%): 100%
- Expected Revenue: USD 75,000.00
- Close Date: 6/20/2013
- Last Modified By: Prudhvi Perumalla
- Last Modified: 7/17/2018 3:00 AM

- Stage: Closed Won
- Amount: USD 75,000.00
- Probability (%): 100%
- Expected Revenue: USD 75,000.00
- Close Date: 7/13/2018
- Last Modified By: Prudhvi Perumalla
- Last Modified: 7/17/2018 3:00 AM

Orders (0)

Quotes (0)

Convert

Convert Opportunity to Order

Opportunity Name: TestOpp

Account Name: TestAccount

Cancel

Convert

Developed by [Dhruvsoft Services Pvt. Ltd.](#), a Salesforce.com Consulting Partner.

Converted Order

Order
00000114

New ContactNew OpportunityNew Case

✓

Activated

✓ Mark Status as Complete

Related

Details

Order Owner

 [venkata suseela anuku](#)

Order Number

00000114

Account Name

[TestAccount](#)

Order Start Date

8/27/2019

Customer Authorized By

Company Authorized By

Billing Address

Activated By

 [venkata suseela anuku](#)

Contract Number

Order Amount

\$255,000.00

Converted from Opportunity

☒

Order Type

Status

Activated

Shipping Address

Activated Date

8/27/2019 7:19 PM

Activity

New Task

Log a Call

Email

Create a task...

Add

Filters: All time • All activities • All types

Refresh

Expand All

Next Steps

More Steps

No next steps. To get things moving, add a task or set up a meeting.

Past Activities

No past activity. Past meetings and tasks marked as done show up here.

Load More Past Activities

Additional help

www.dhruvsoft.com

contact@dhruvsoft.com

