

Installation and Setup

1. Where you can find it

First access the AppExchange using the link below:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000G6foxUAB>

Then click on the green button Get It Now

The screenshot displays the Salesforce AppExchange listing for the 'Leads2.me' app. At the top, the 'appexchange' logo is visible next to a search bar. Navigation links include Home, Recommended for You, Solutions by Type, Product Collections, Industry Collections, Consultants, Learn, Latest Collections, and COVID-19. The app listing itself is titled 'Leads2.me for Salesforce' and is attributed to 'By Soubox.com'. A large preview image shows the app's interface with the text 'EASIER TO SET UP'. To the right of the preview, a green 'Get It Now' button is prominently displayed with a red arrow pointing to it. Below the preview, the app is listed as 'FREE' with a rating of 0/5 and a latest release date of 7/16/2021. The description states: 'Make your Sales team happy enabling multiples contact to the lead records. We build an assistant to help you to set up the field mapping between Lead Contact and Contact records in just a few clicks.' The 'Highlights' section lists three key features: 'EASIER TO SETUP', '100% CUSTOMIZABLE', and 'FREE FOREVER'. The 'Description' section provides more details about the app's functionality and requirements. At the bottom, the 'Also Compatible With' section lists 'Salesforce Shield', and the 'Requirements' section specifies 'Salesforce Edition: Professional, Enterprise, Unlimited, Force.com, Developer, Performance'. The 'Support' section indicates that support is not provided.

appexchange

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ALL APPS

Leads2.me for Salesforce

By Soubox.com

EASIER TO SET UP

LEADS2.ME

100% FREE, AND FULLY CUSTOMIZABLE

1 of 1 Give the ability to have multiples contact to your leads

Get It Now

Free

RATING
★★★★★ (0)

LATEST RELEASE
7/16/2021

Make your Sales team happy enabling multiples contact to the lead records
We build an assistant to help you to set up the field mapping between Lead Contact and Contact records in just a few clicks

Overview Reviews

Highlights

- EASIER TO SETUP**
With the Lead Contact Mapping tab, you can set up the mapping fields easier as you set up the lead mapping fields and put this solution to work in just a few minutes
- 100% CUSTOMIZABLE**
Inside Salesforce you have the power to create custom fields for any object, and we want you to have this ability and allow you to customize the field maps from our object to standard contact inside the Salesforce
- FREE FOREVER**
You read it right, it's free, we need this feature and a few customers asked us for something so we decide to build it and share it with the world

Description

Leads2.me is a complete solution to bring to your team the ability to add multiples contact to the same lead and when the lead is converted in an Account it will automatically create all related Contact to the same account you converted.

In just a few minutes you can make your sales team happy with this feature, easier to set up, and completely customizable, turn on and off the field mapped in a few clicks.

And the better part is, it's completely free and is available to you NOW, just hit the [Get It Now] button on the top and try it today.

It requires at least Professional Edition.

Also Compatible With

Salesforce Shield

Requirements

Salesforce Edition: Professional, Enterprise, Unlimited, Force.com, Developer, Performance.

Support

Support not provided
Terms and Conditions

2. Steps to install it

To install we suggest you choose to Install for All Users and then click on the Install button.



Install Leads2.me for Salesforce

By Soublox

☐ Install for Admins Only

☒ Install for All Users

☐ Install for Specific Profiles...

[Install](#) [Cancel](#)

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

Wait until the installation is finished, it may take a few minutes, if it takes so long, you will receive an email when the installation is complete.



Install Leads2.me for Salesforce

By Soublox

 **Installing and granting access to all Users...**

App Name	Publisher	Version Name	Version Number
Leads2.me for Salesforce	Soublox	Leads2.me for Salesforce	1.2

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

In case the installation was fast, you will see this screen, just hit Done and you will be moved back to the Setup.



Install Leads2.me for Salesforce

By Soublox



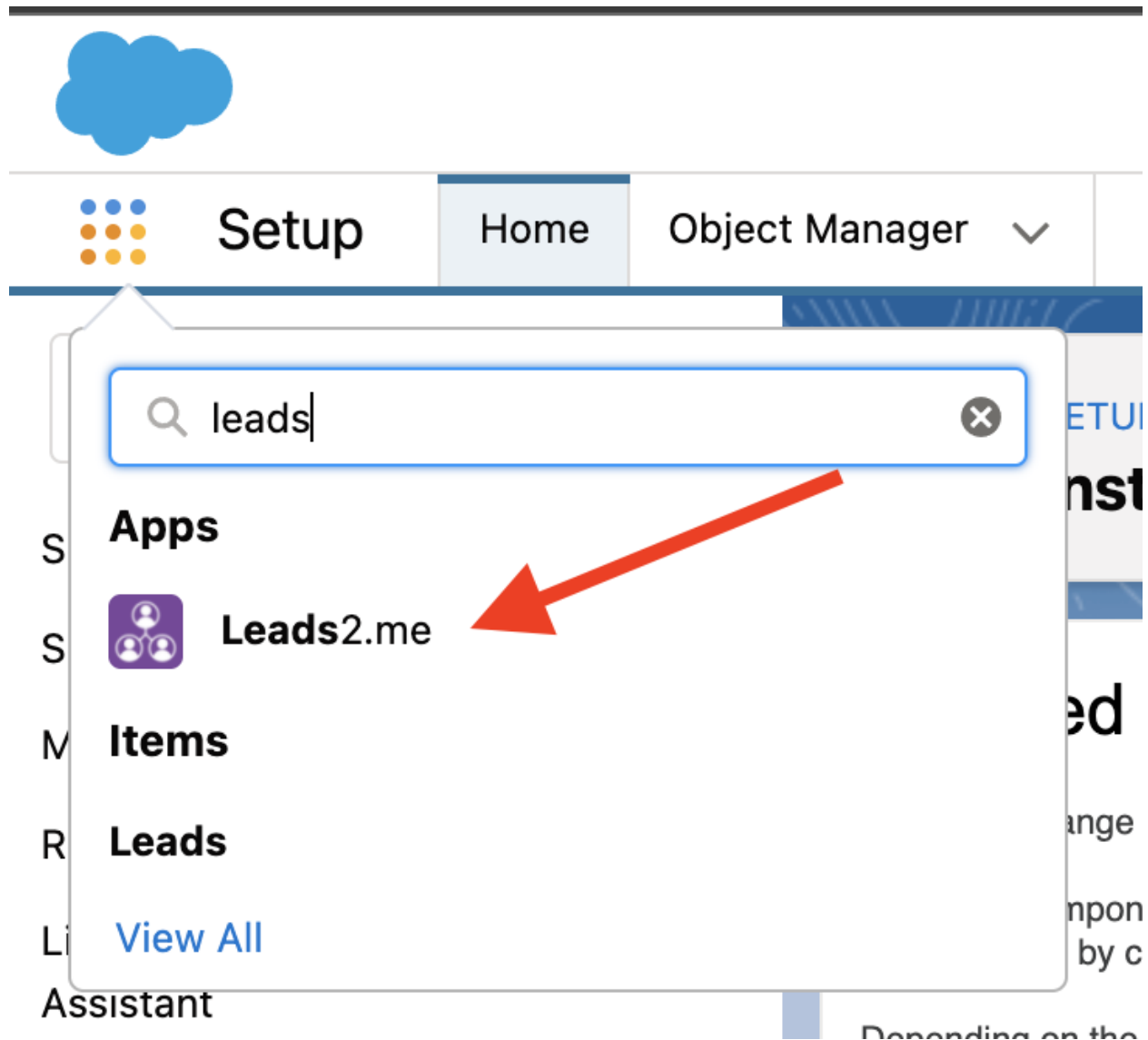
Installation Complete!

Done

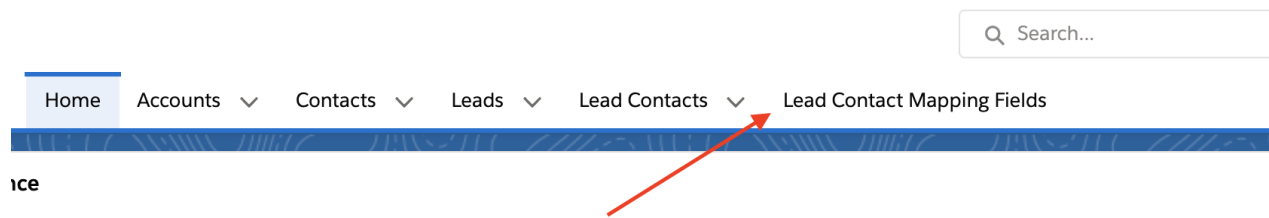
App Name	Publisher	Version Name	Version Number
Leads2.me for Salesforce	Soublox	Leads2.me for Salesforce	1.2

3. How to set up it

You can see the Lead2me app on App Launcher.



After opening the app, go to Lead Contact Mapping Fields to start the settings



To map the object Contact fields as you want, you can also create custom fields on the Lead and Lead Contact object and map these fields here, before or after the first time.

Pointed in the image below you can see the fields of the Lead Contact object in the left column, on the middle column you see the Contact fields. On the right column, you can set Active or Inactive your mapped fields. Once it is disabled, it will not be considered in the conversion process, to disable this feature temporarily, just disable all fields and Save.

Custom Fields

Use the fields to mapping fields you want to convert from lead contacts to contacts.

Lead Contact Fields	Contact Fields	Is Active
Birthdate	Birthdate	Active
Department	None	Active
Description	None	Active
Email	Assistant's Name	Active
First Name	Data.com Key	Active
Last Name	Department	Active
Lead	Email Bounced Reason	Active
Mailing City	First Name	Active
Mailing Country	Full Name	Active
Mailing State/Province	Informal Name	Active
Mailing Street	Jigsaw Contact ID	Active
Mailing Zip/Postal Code	Last Name	Active
Mobile	Mailing City	Active
Owner ID	Mailing Country	Active
Phone	None	Active
Record ID	None	Active
Title	None	Active

Save

Hit save and there we go.

Search...

Lead Contact Mapping Fields

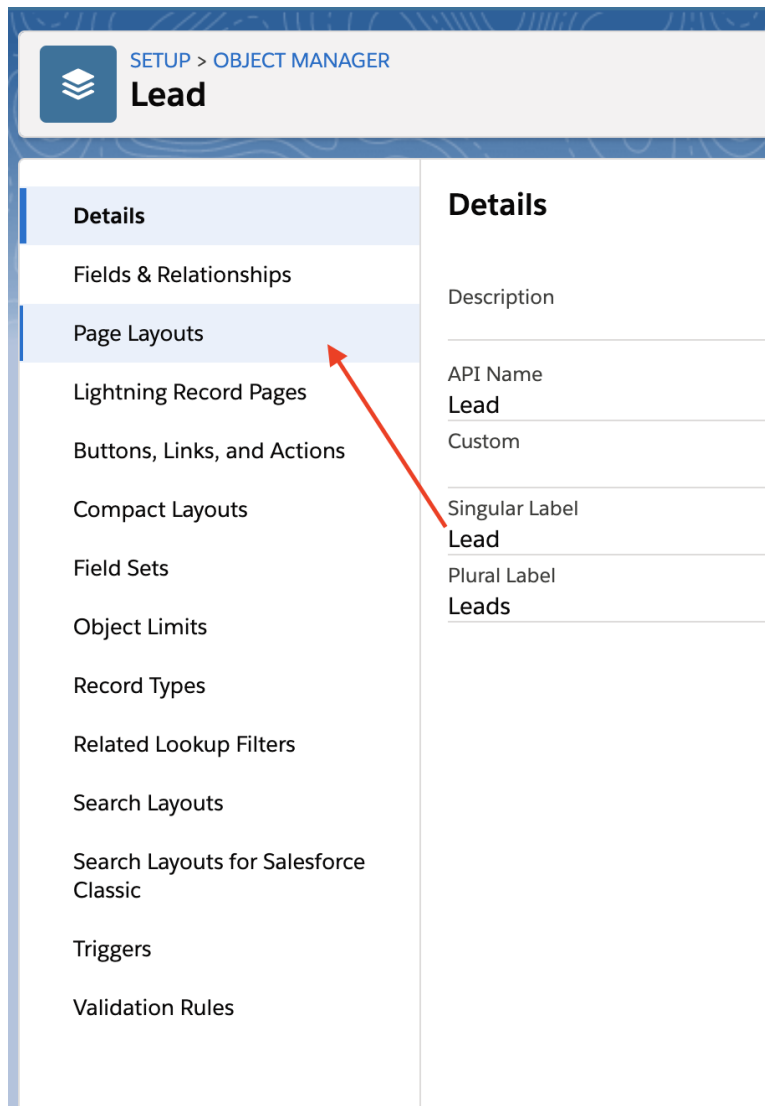
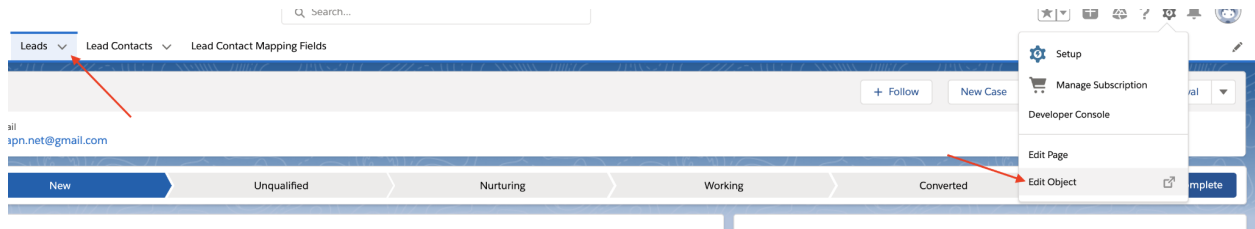
Success!

Lead Contact Fields was saved with success!

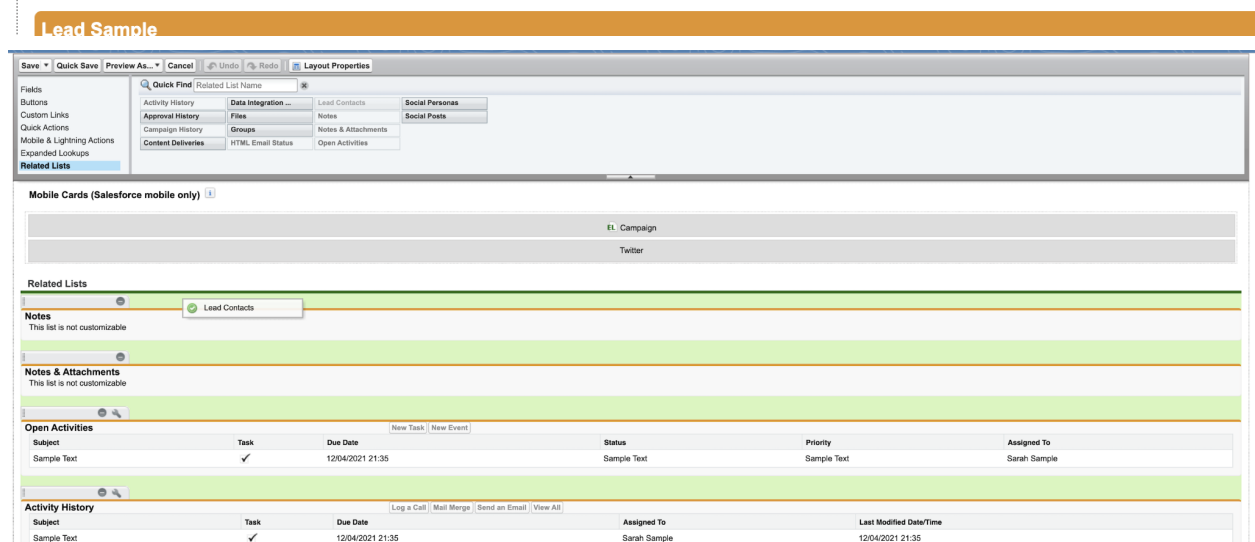
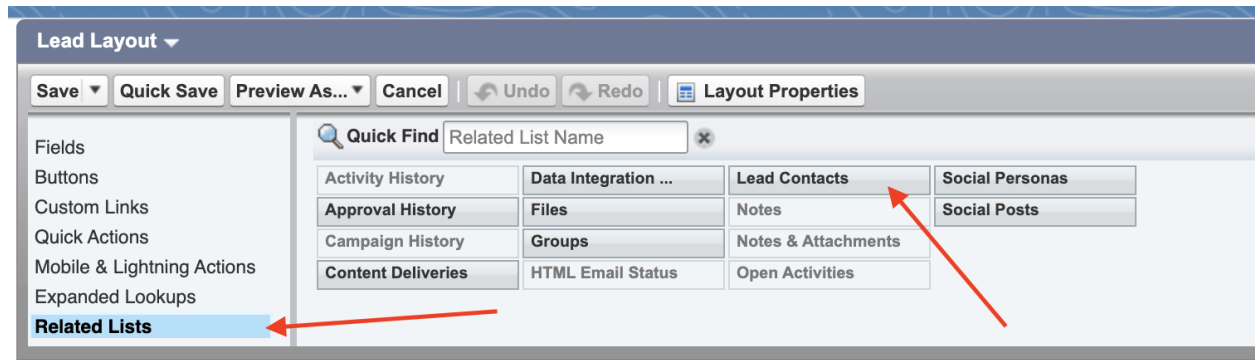
Contact Fields
Birthdate

4. Showing on Lead record Page

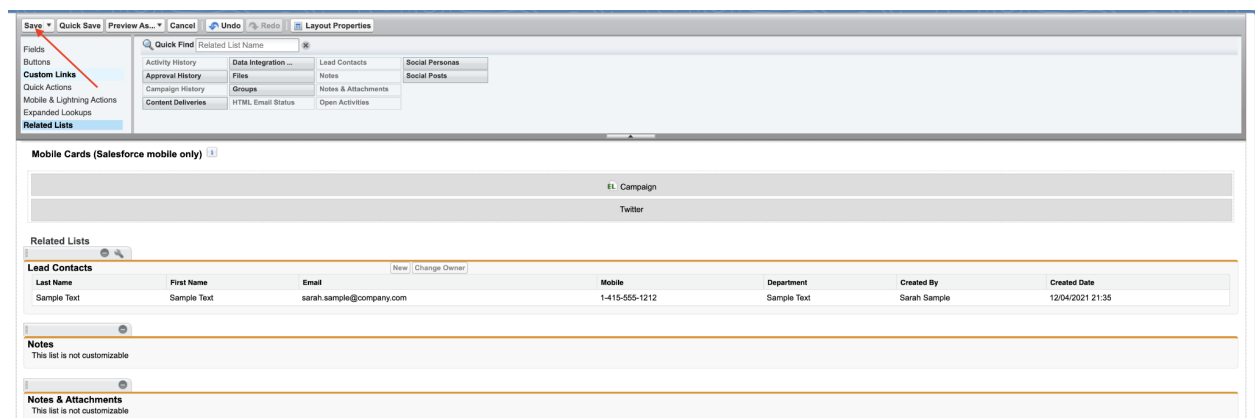
To show the **Lead Contact** object on the record page you need to go to Lead Object Setting and click on Page Layouts.



Find the layout you want to edit, and then go to **Related Lists** and then drag the **Lead Contacts** card to the **Related List** section.



Customize the columns you want to show and then hit Save.



Now go to the Lead, create a new Lead Contact, and when you convert your lead we will create these extra contacts automatically for you :)