



Smart Converter Manual

User Manual, FAQs & Installation Steps

Amdrodd Technologies

Salesforce Consulting Partner



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REVOLVING AROUND TECHNOLOGIES

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Introduction

Smart Lead Converter is a Salesforce Lightning App that can help users convert Leads to Standard and Custom objects, and also to recordtype of your needs. The user can add custom mappings for standard and custom objects in their org with the help of Smart Lead Converter.

With Smart Lead Converter installed in your org, you can convert standard fields to custom fields, custom fields to standard fields, and custom fields to custom fields. It also allows mapping to specific record types for both standard and custom objects.

A different mapping can be set for every profile. Smart Lead Converter also converts files to the mapped objects. You can activate or deactivate an existing mapping. You also have the option to edit and delete existing mappings.

Smart Lead Converter is a Lightning App and is fully compatible with all lightning features.

What is the Smart Lead Converter (SLC)?

- Smart Lead Converter (SLC) is an Advanced Lead conversion app which can be used to convert Leads to Account, Contacts, Opportunities and other **Standard & Custom Objects.**
- Along with field mappings, SLC helps you migrate associated Files of the leads as well.
- If you work with multiple record types of Leads and other objects, SLC helps you define the destination record type for each converted Lead, irrespective of your default record type.
 - As you might know, Salesforce standard lead conversion converts records only to the default record type of Account, Contact & Opportunity.
- SLC allows you to have different conversion mappings for different Profiles which makes your lead conversions more flexible and meaningful based on the requirements of the Profile. Only one mapping can be assigned to each profile.

1. Do I need the Smart Lead Converter?

You need SLC if you have any one or more of the following requirements for your Salesforce org:

- You want to convert Lead to Custom Objects or Standard Objects and not just Accounts, Contacts and Opportunities.
- You have multiple profiles, and each profile has access to multiple Lead Record Types.
- You want to move Files also to the Converted Records along with Lead Conversion.

Here's an example of how we can define destination record type using Smart Lead Converter.

- Assume that your profile has access to 4 Lead Record Types "Manufacturing", "Utilities", "Real Estate" and "Logistics"
- Also you have access to 4 Account/Contact/Opportunity Record Types, "Manufacturing", "Utilities", "Real Estate" and "Logistics" (Assume the default Record Type is Manufacturing for both Accounts and Contacts.)
- Using SLC can ensure that Lead of Record Type "Logistics" gets converted to Account, Contact and Opportunity of Record Type "Logistics" itself.
- Using Standard Lead conversion, your Lead will get converted to the Record Type "Manufacturing", even if the Lead you converted was of Record Type "Utilities", "Real Estate" OR "Logistics", because your default Record Type is "Manufacturing"
- The above example is applicable to custom objects too, as we can move Leads to custom objects too using SLC.

2. Is my Salesforce Instance compatible with Smart Lead Converter?

Yes, your Salesforce instance is compatible with SLC if:

1. You are in Salesforce Lightning.
2. You are on Professional Edition or Above.

3. Are there any prerequisites for installing the Smart Lead Converter?

- A domain must be registered in the org for Smart Lead Converter to work. This is a requirement for Salesforce Lightning Components and hence to have SLC working on your org, the domain is required.
- At least one Lead record type must be present in the Salesforce org for Smart Lead Converter Installation to be successful.
- Smart Lead Converter will work only for profiles having access to the Standard and Custom Objects.
- Smart Lead Converter will work only for users with access to Profiles.

4. Can all users in my org use Smart Lead Converter?

Yes. SLC is licensed for one Salesforce instance and not for an individual user. So everybody in your organization can use SLC and the admin can assign permissions to allow admin access to specific users.

5. As an admin, will I have full control over the Smart Lead Converter settings?

Yes, you have full control over SLC settings. You can enable/disable SLC for your users. You will also have the ability to edit or make mappings active or inactive based on your requirement.

6. Will Amdrodd help us implement Smart Lead Converter?

The Smart Lead Converter detailed implementation guide is self explanatory. If you need additional help, you can always contact us at support@amdrodd.com

7. Can I restrict the admin access of Smart Lead Converter to some users?

You can install Smart Lead Converter for Admin only and use Smart Lead Converter Permission sets to assign access to individual users.

There are 2 permission sets for SLC:

- Smart Lead Converter Admin Access: If a user is assigned to this permission set, they will have access to all features of the SLC.
- Smart Lead Converter User Access: If a user is assigned to this permission set, they will have access only to the Smart Lead Convert Button in their Lead Layout. They will not have access to add or edit the custom mapping rules.

8. What is the Smart Lead Convert Button?

It is the smarter alternative to the Standard Lead Convert button in Salesforce. The Smart Lead Convert button converts your Leads according to the specific Mapping Rules set for your Profile.

9. Can Smart Lead Converter convert multiple leads at a time?

No, currently mass conversion is not present. You can only convert one lead at a time.

10. Will the custom objects of Smart Lead Converter add to my limits in my org?

Since it is a managed package, it will not count against your org limit.

11. Some of my users are in Classic and some of my users are in Lightning. Can we use Smart Lead Converter?

SLC is purely built on Lightning UI and uses LWC. So ONLY Lightning users can use SLC. Unfortunately classic users cannot use this solution.

12. I need some additional modifications to be done specifically. Will I get support?

If the request is for an upgrade or for additional features, you can contact us. We will work with you to understand the feasibility of those requirements & we can build those specifically for you at an additional cost.

**13. We would like to see some additional features on Smart Lead Converter.
Where can I request them?**

Please contact us at Support@Amdrodd.com so we can understand your requirements and analyse the feasibility of the same.

14. What is the regular maintenance required for Smart Lead Converter?

SLC doesn't require any regular maintenance. Amdrodd might release upgraded versions on a regular basis. We will provide you notifications as and when we have a new release.

15. Will I get notified when there is an upgrade?

We will provide you notifications as and when we have a new release.

16. Can I take a trial of the Smart Lead Converter?

Yes, you can download SLC into your Sandbox and test its features. Our detailed installation and configuration document will help with the initial set up. You can always contact us at support@amdrodd.com for any questions, clarifications or support.

17. What is the cost of Smart Lead Converter?

It is FREE. Currently Smart Lead Converter is a free app.

18. Some of my existing functionalities are getting impacted by this app. Will you help us analyze and resolve?

SLC is a stand alone tool in itself. Chances of impacting other features are very low. But our Services & Consulting arm will be happy to look into the issue and can provide you a detailed analysis.

19. Do you also provide regular Salesforce implementation and Support services, outside of Smart Lead Converter support?

Yes, we do provide implementation and support services outside the Smart Lead converter too. Please send us an email with your requirement to Support@Amdrodd.com.

20. How can we contact you?

You can always contact us at Support@Amdrodd.com for any questions, clarifications or support.

21. Do you have call centre support over the telephone?

Currently we don't have on-call support. Sending an email to Support@Amdrodd.com is the best way to reach us currently. If required, we can join you over a screen share meeting and try to iron out any implementation issues that you might have.

22. What is the future plan for Smart Lead Converter?

Following features are there in Smart Lead Converter Roadmap

- Mass Lead Conversion
- Reporting Features
- Multiple Mapping for a single profile

Technical FAQ's

1. What happens if there is a mismatch in Field types between Lead and Destination objects?

SLC has an inbuilt check to ensure that this kind of mapping doesn't happen.

2. How often can the settings be changed in the Smart Lead Converter?

We can change this as often as required.

3. My Lead conversion is customized using Apex/VF page. Can I still use Smart Lead Converter?

Please contact your Administrator or Developer. You can also contact us at support@amdrodd.com for an analysis.

4. Can I install this in Sandbox, Test it and migrate changes to production?

You can install this sandbox and try it. But settings cannot be migrated to production. You will have to recreate the settings in production, very similar to all other AppExchange solutions.

5. What happens if we click on the Standard Convert Button instead of the Smart Lead Convert button?

Standard Lead Conversion will occur.

6. What happens if a user with a profile that has no custom mapping rules assigned clicks on Smart Lead Convert?

Standard Lead Conversion will occur.

7. Will I be able to revert the conversion process for a profile?

Yes, you can revert the conversion process back to the standard by making the mapping rule for the profile inactive.

8. Is reverse Lead conversion possible with Smart Lead Converter?

No, this feature is currently not available with Smart Lead Converter.

Installation Guide

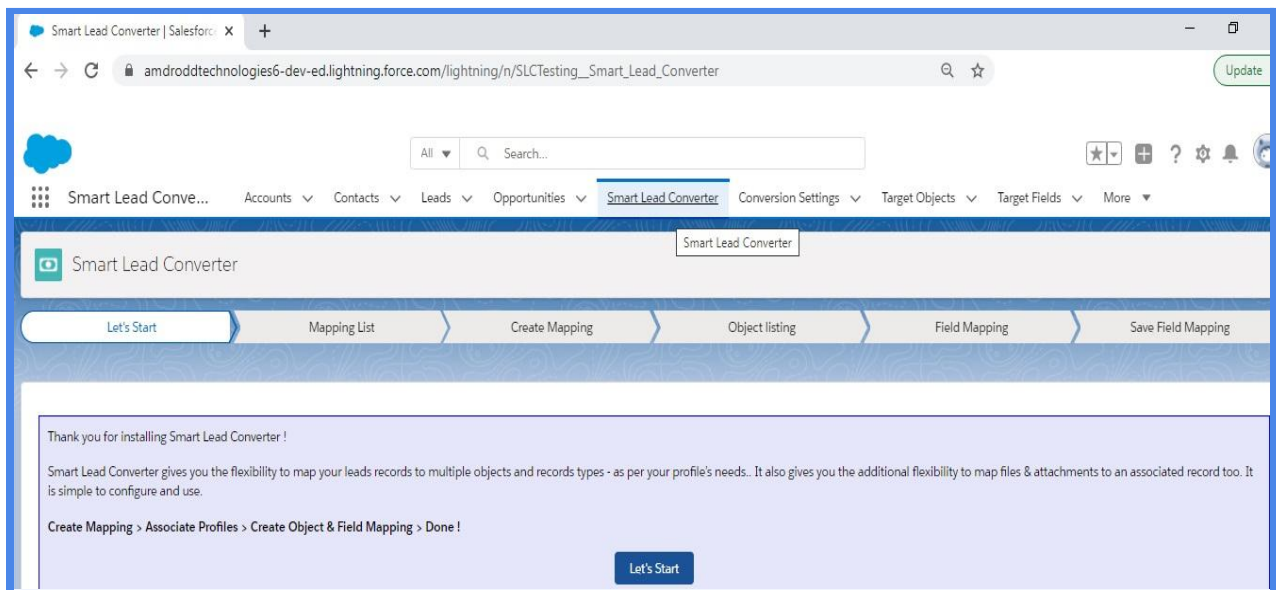
Installation Steps

1. Search for "Smart Lead Converter" in [AppExchange](#).
2. Select "**Smart Lead Converter**" and select the App.
3. The Installation screen will have 3 options:
 - **Install Smart Lead Converter for Admins ONLY**
Choosing this option will give full access to the app only for Admin.
 - **Install Smart Lead Converter for All Users.**
Choosing this option will install the app for all USERS. This will give admin access to all users.
 - **Install Smart Lead Converter for Specific Profiles.**
Choosing this option allows access to specific profiles.

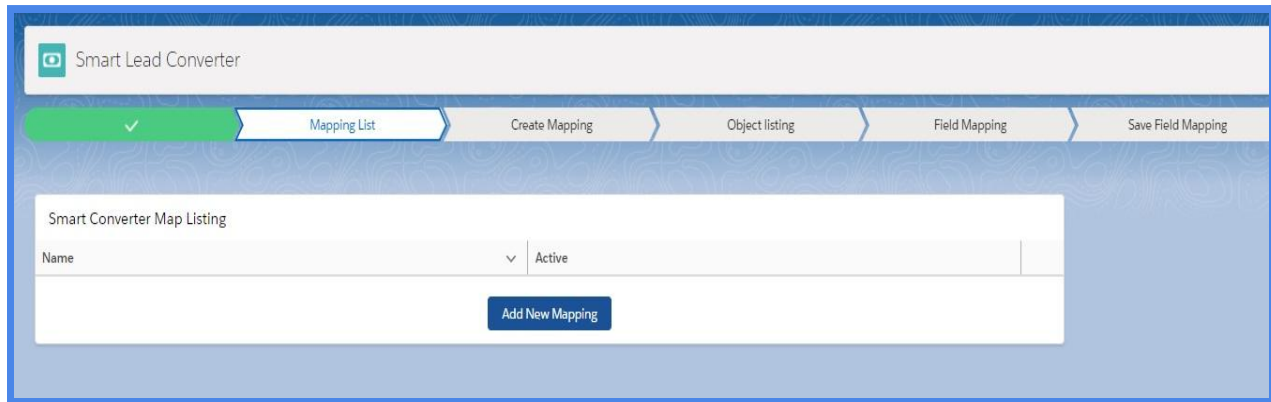
Please NOTE: Standard profiles (including the Read-Only profile) don't receive access to any installed custom objects. Because permissions are not editable for standard profiles, you must clone such profiles to grant access.



4. Navigate to the Smart Lead Converter Tab.



❖ 1st Page: Add New Mapping.



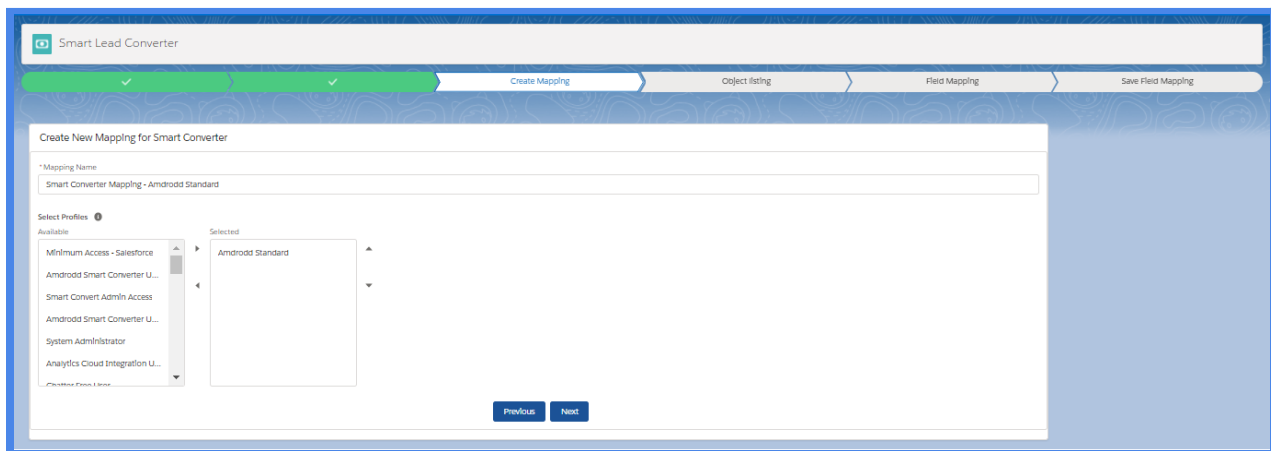
Smart Lead Converter

Mapping List | Create Mapping | Object listing | Field Mapping | Save Field Mapping

Smart Converter Map Listing

Name	Active
Add New Mapping	

❖ 2nd Page: Add Mapping Name and Select Profiles for which you want to set mapping.



Smart Lead Converter

Create Mapping | Object listing | Field Mapping | Save Field Mapping

Create New Mapping for Smart Converter

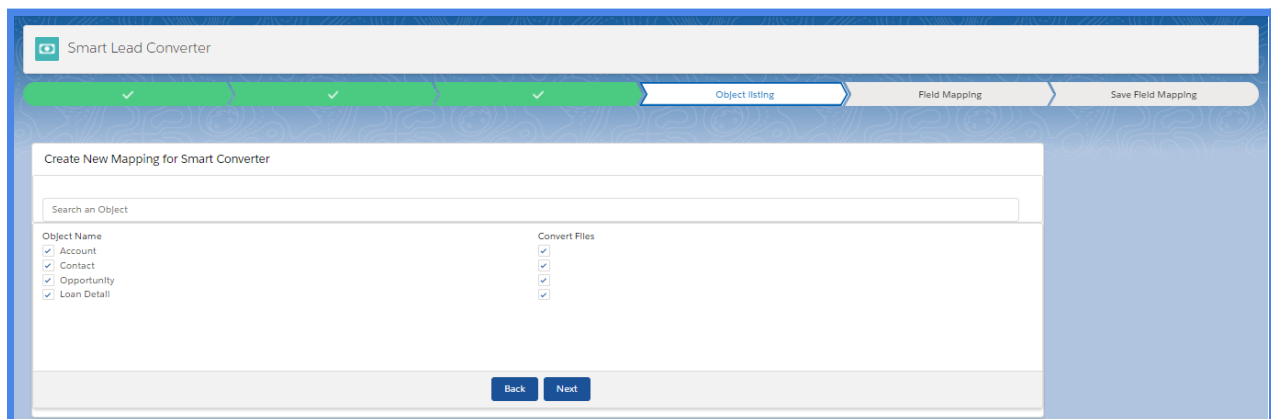
**Mapping Name
Smart Converter Mapping - Amdrodd Standard

Select Profiles

Available	Selected
Minimum Access - Salesforce	Amdrodd Standard
Amdrodd Smart Converter U...	
Smart Converter Admin Access	
Amdrodd Smart Converter U...	
System Administrator	
Analytics Cloud Integration U...	
...	

Previous Next

❖ 3rd Page: Choose Standard and Custom Objects to set Mapping. Select if Files need to be converted for each Object.



Smart Lead Converter

Object listing | Field Mapping | Save Field Mapping

Create New Mapping for Smart Converter

Search an Object

Object Name	Convert Files
☒ Account	☒
☒ Contact	☒
☒ Opportunity	☒
☒ Loan Detail	☒

Back Next

❖ 4th Page: Choose Fields and Records to map for each object and Confirm Mapping. Change between the tabs and choose Mappings for all the required fields and records before your click Confirm Mapping.

Smart Lead Converter

Field Mapping

Save Field Mapping

Account Contact Opportunity Loan Detail

Confirm mapping

ACCOUNT RECORDTYPES	LEAD RECORDTYPES
Manufacturing	Alternate SC
Manufacturing	Manufacturing
Marketing	Marketing
Sales	Sales

ACCOUNT FIELD	LEAD FIELD
* Account Name	First Name
Billing City	Choose Field Name
Billing State/Province	Choose Field Name

Smart Lead Converter

Field Mapping

Save Field Mapping

Account Contact Opportunity Loan Detail

Confirm mapping

CONTACT RECORDTYPES	LEAD RECORDTYPES
Manufacturing	Alternate SC
Manufacturing	Manufacturing
Marketing	Marketing
Sales	Sales

CONTACT FIELD	LEAD FIELD
* Last Name	Last Name
Account ID	Choose Field Name

Smart Lead Converter

Field Mapping

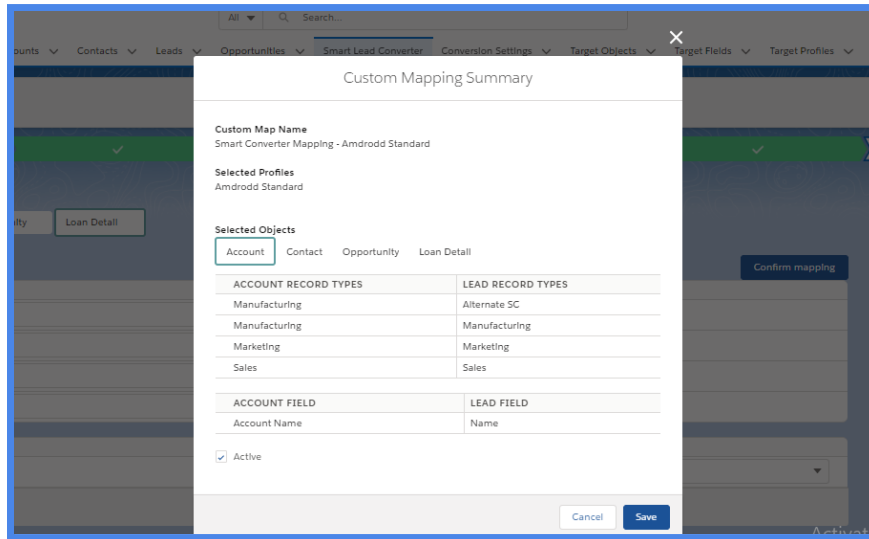
Save Field Mapping

Account Contact Opportunity Loan Detail

Confirm mapping

OPPORTUNITY FIELD	LEAD FIELD
* Close Date	CY Quarter End Date
* Stage	Status
* Name	First Name
* Private	Converted
Account ID	Choose Field Name
Campaign ID	Choose Field Name

❖ 5th Page: Review Custom Mapping Summary and Save.



Custom Mapping Summary

Custom Map Name
Smart Converter Mapping - Amdrodd Standard

Selected Profiles
Amdrodd Standard

Selected Objects
Account Contact Opportunity Loan Detail

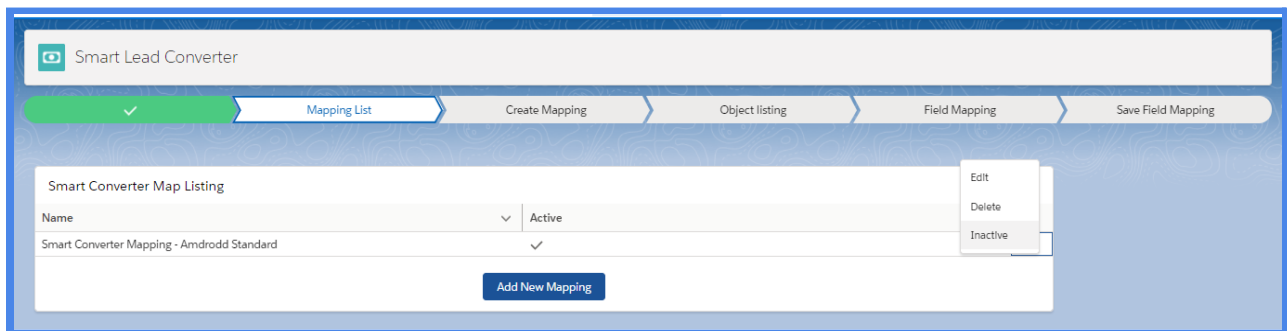
ACCOUNT RECORD TYPES	LEAD RECORD TYPES
Manufacturing	Alternate SC
Manufacturing	Manufacturing
Marketing	Marketing
Sales	Sales

ACCOUNT FIELD	LEAD FIELD
Account Name	Name

☒ Active

Cancel Save

- You can save your mapping as Active or Inactive.
- Your New Mapping will get listed under Smart Lead Converter Map Listing.
- You also have the option to Edit, Delete or Deactivate a Mapping from the Main Page



Smart Lead Converter

Mapping List Create Mapping Object listing Field Mapping Save Field Mapping

Smart Converter Map Listing

Name	Active	
Smart Converter Mapping - Amdrodd Standard	✓	Edit Delete Inactive

Add New Mapping

- All users in the Amdrodd Standard Profile is now all set to Convert Leads using the New Mapping Rules.

Note: One profile can have only one custom mapping. So when a new mapping is created, the profiles that already have a Smart Lead Converter Mapping assigned will not be displayed.

A few more commonly asked questions...

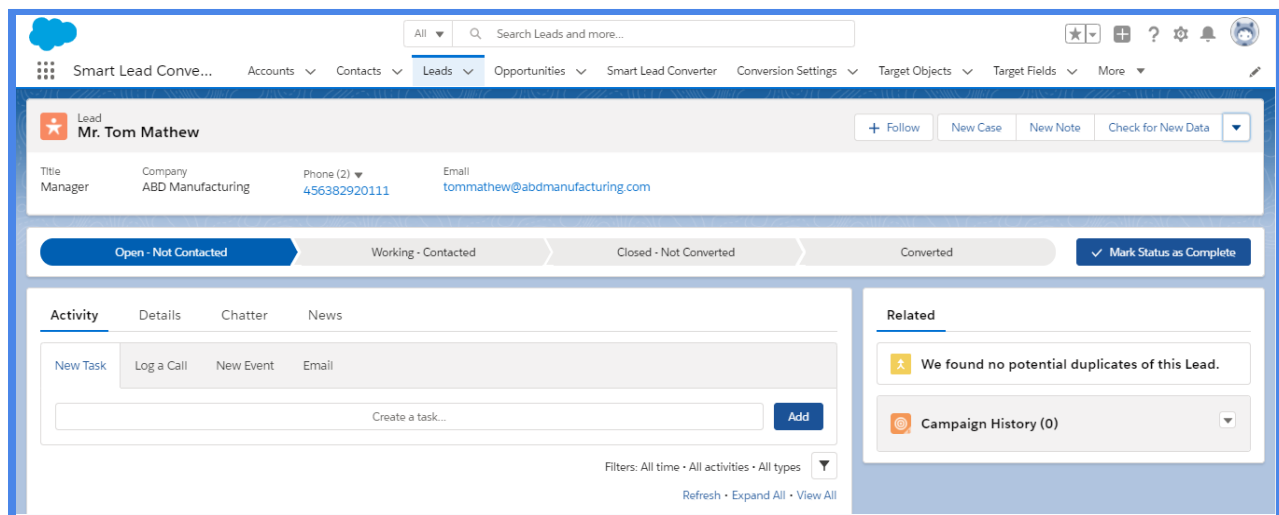
1. How to Add Smart Lead Converter in Lead Layout

- ▶ After installing the app package in your org, go to > Setup
- ▶ In the left side of the page look for: Object Manager
- ▶ Scroll down and select Lead Object.
- ▶ Click Page Layouts.
- ▶ Select the required Layout
- ▶ Click Mobile and Lightning Action
- ▶ Search 'Smart Lead Converter' on the Quick Find section.
- ▶ Drag and drop the button where you want to place it.

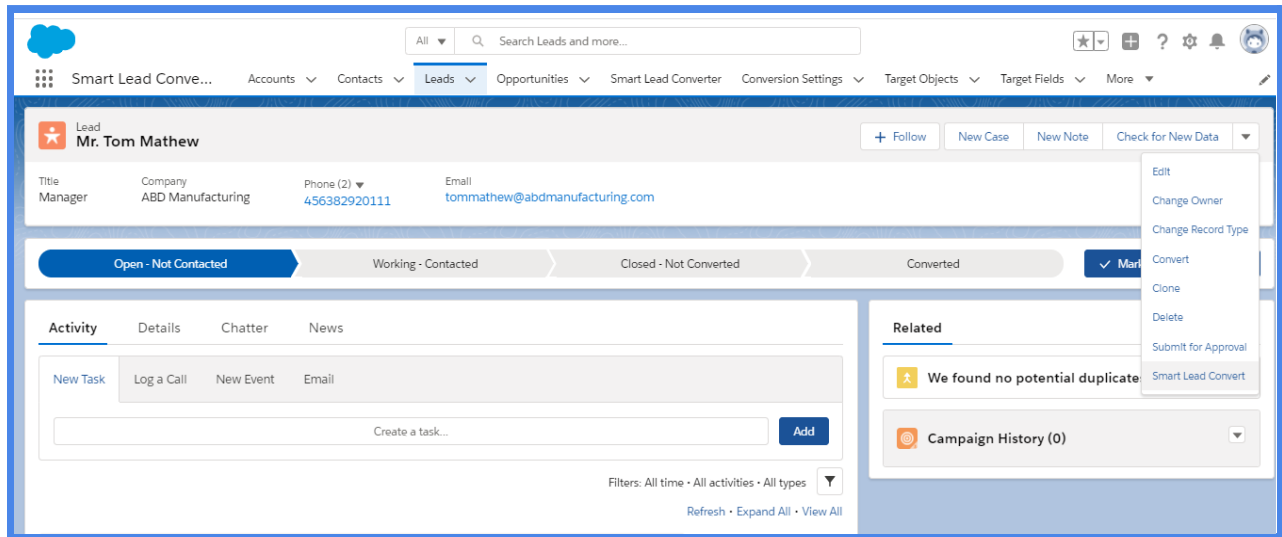
2. How to use the Smart Lead Convert Button for your Leads

Conversion Process

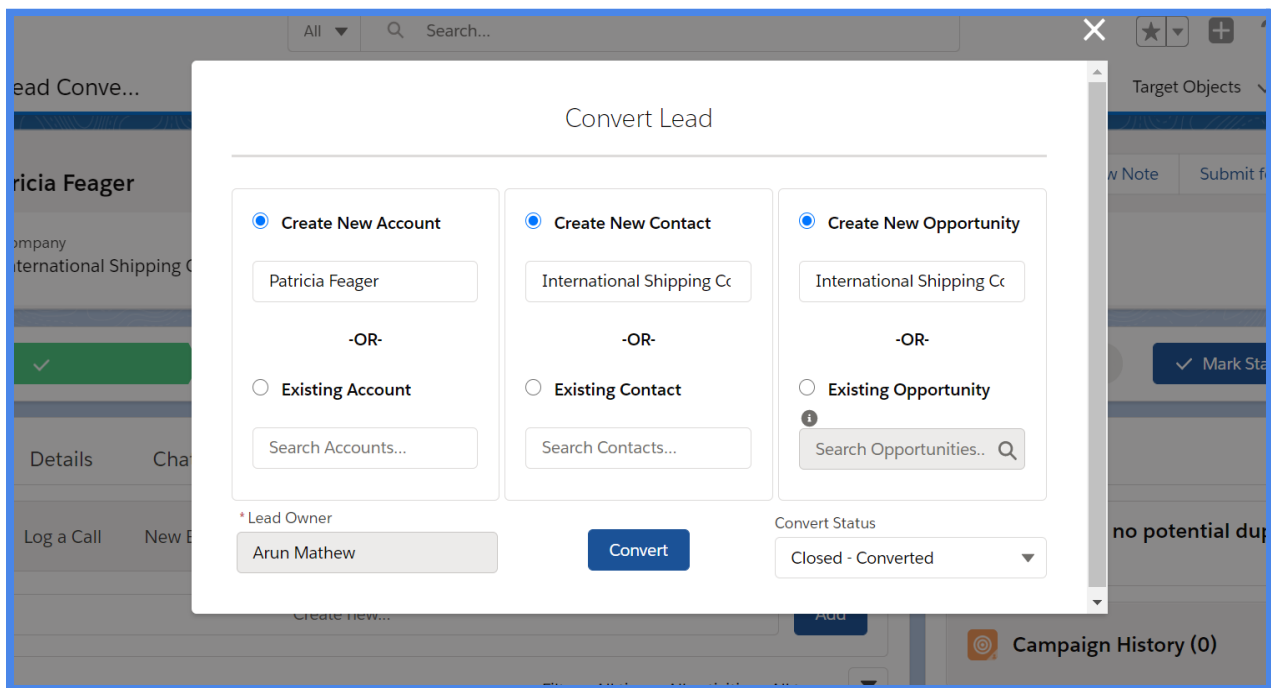
- ▶ Navigate to Leads and open the Lead to be converted.



- ▶ The Smart Lead Convert option is available inside the Lead Records for all Profiles that have Smart Lead Converter Access.



► Navigate to the Smart Lead Convert button and click it. Your lead will convert according to the Smart Lead Converter Mapping Rules set for your Profile.



3. What if I installed Smart Lead Converter for Admin Only, but want to give Smart Lead Converter Admin or User Access to other Profiles?

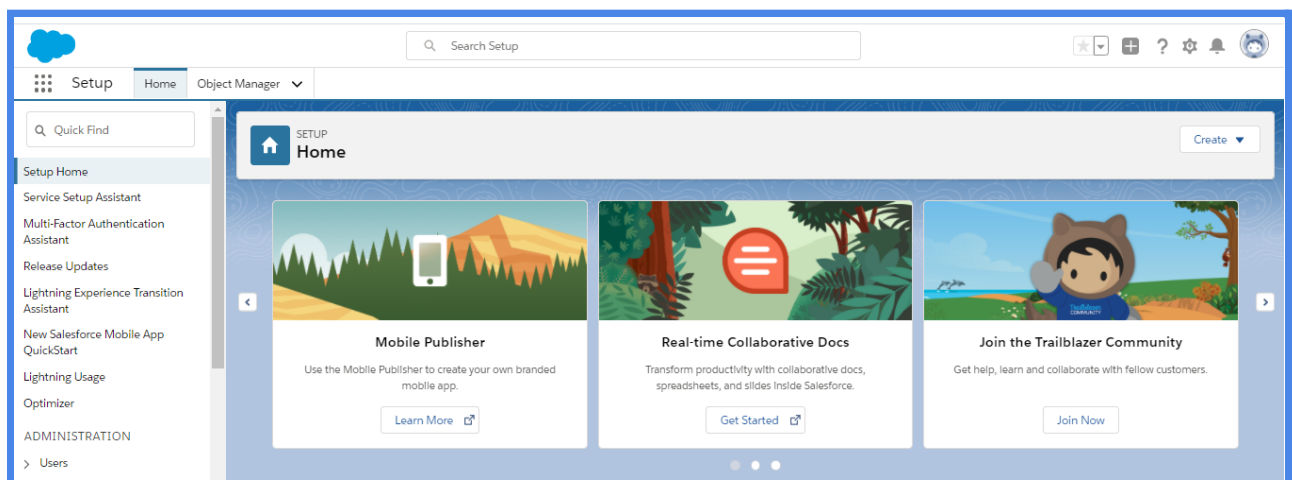
You can use Smart Lead Converter Permission settings to provide access to other profiles.

There are 2 permission sets for SLC:

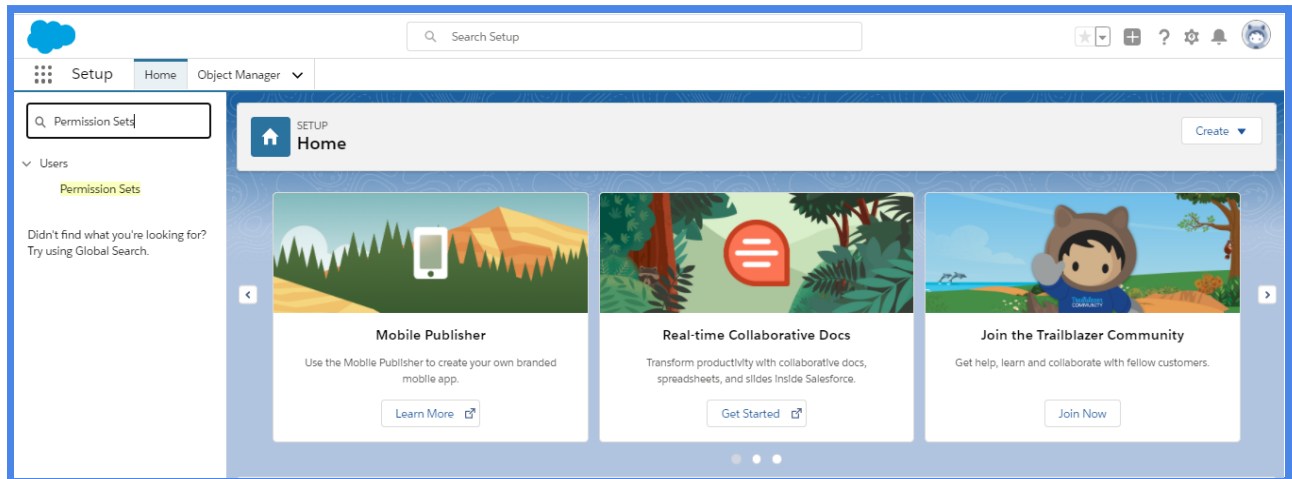
- **Smart Lead Converter Admin Access:** If a user is assigned to this permission set, they will have access to all features of the SLC. They will be able to assign Mapping Rules for Profiles and also have access to the Smart Lead Convert button in the Lead layout.
- **Smart Lead Converter User Access:** If a user is assigned to this permission set, they will have access ONLY to the Smart Lead Convert button in their Lead layout. They will not have access to add or edit the custom mapping rules.

4. How to give Smart Lead Converter Admin access to a Profile?

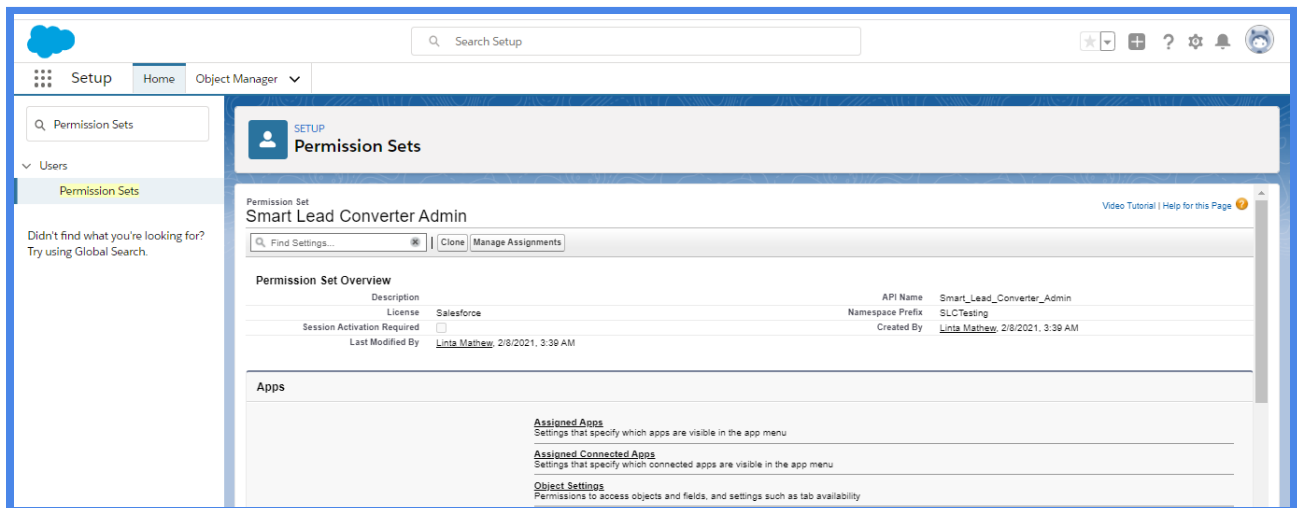
- ❖ Click Setup.



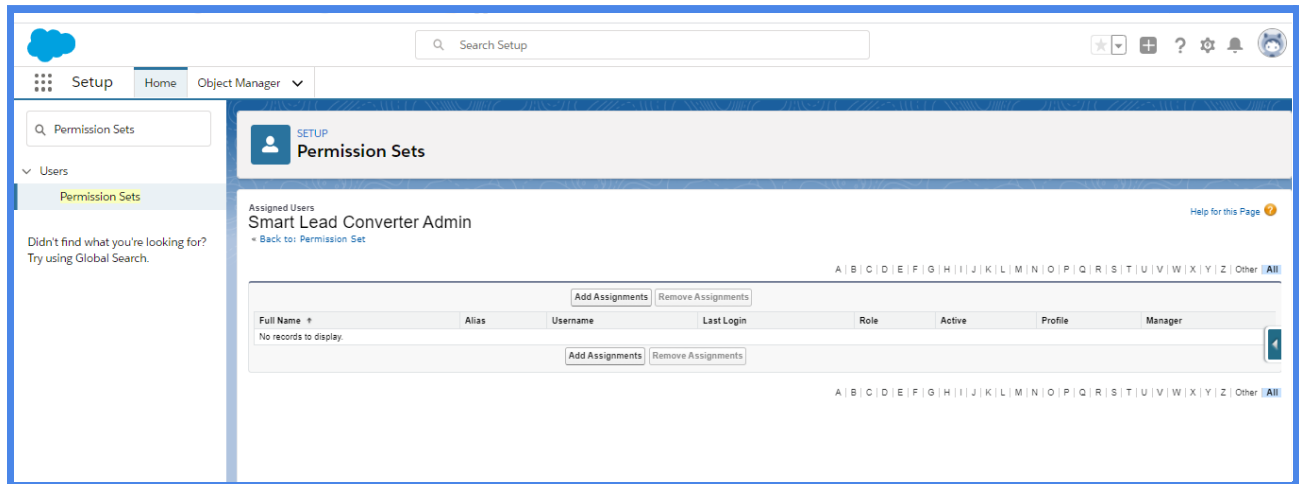
- ❖ In the Quick Find box, search for Permission Sets.



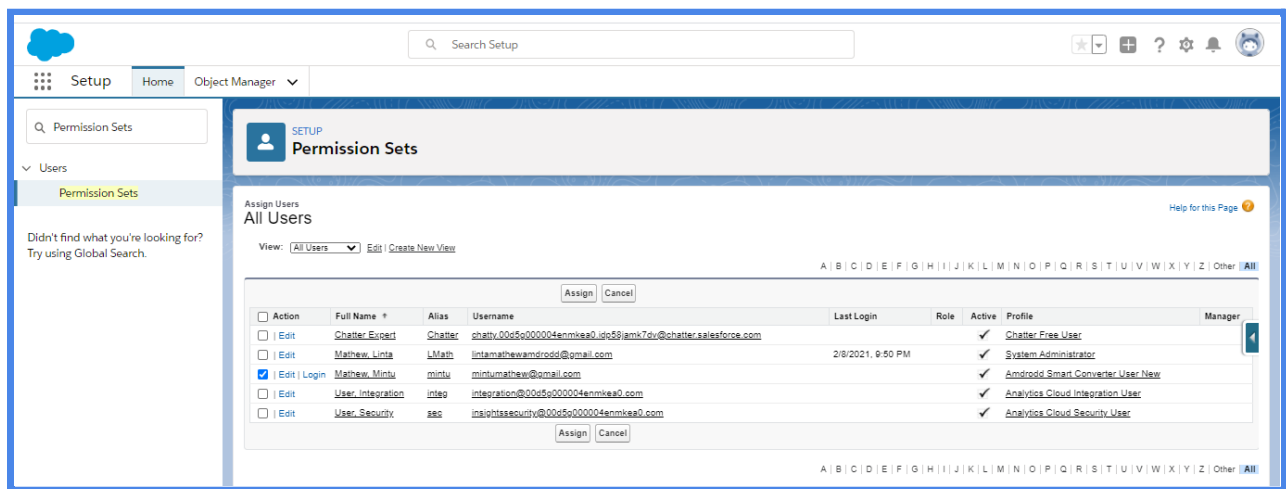
- ❖ From the list of Permission Sets, choose Smart Lead Converter Admin.



- ❖ Click Manage Assignments and the Add Assignments.

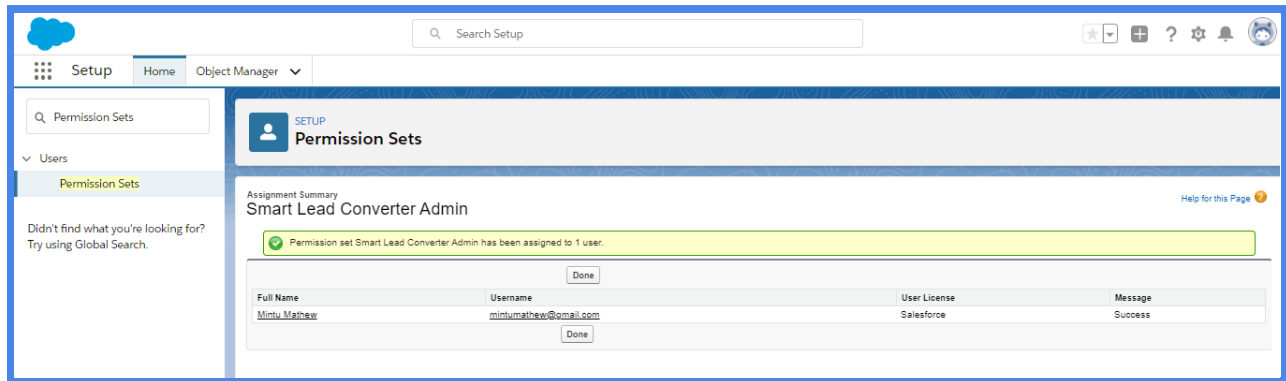


- ❖ Choose the user for which you want to provide the Smart Lead Converter Admin Access and click Assign.



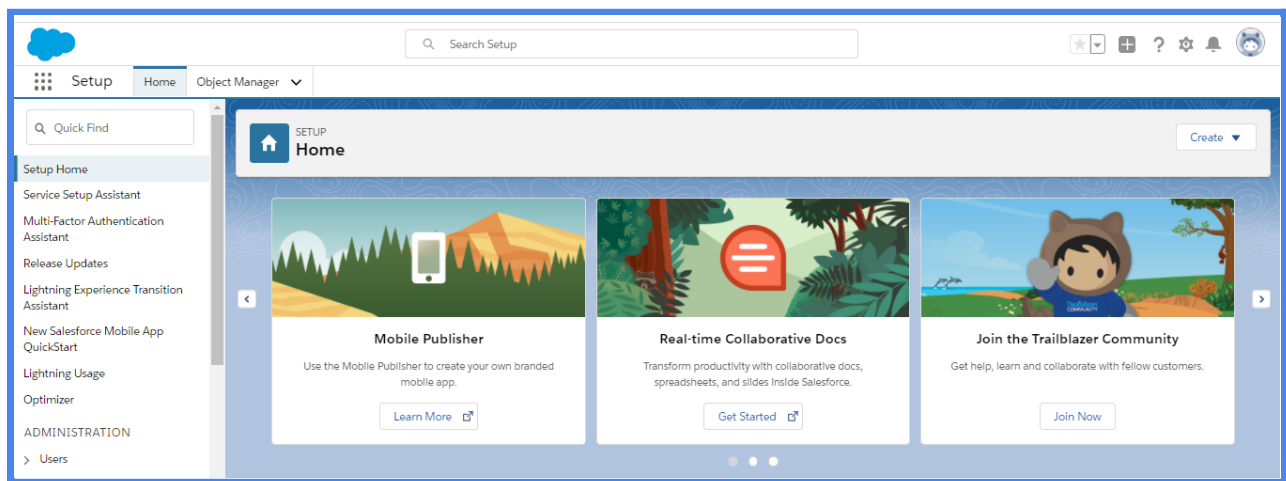
Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
☐ Edit	Chatter Expert	Chatter	chatter_0005v000004enmkea0_00058janx7dv@chatter.salesforce.com			✓	Chatter Free User	
☐ Edit	Mathew Linta	LMath	lmatamathewamdrodd@gmail.com	2/8/2021, 9:50 PM		✓	System Administrator	
☒ Edit Login	Mathew Mintu	mintu	mintumathew@gmail.com			✓	amdrodd Smart Converter User New	
☐ Edit	User Integration	inteq	integration@0005v000004enmkea0.com			✓	Analyticia Cloud Integration User	
☐ Edit	User Security	asec	mscvtisssecurity@0005v000004enmkea0.com			✓	Analyticia Cloud Security User	

- ❖ Now, the User will have full access to Smart Lead Converter App.

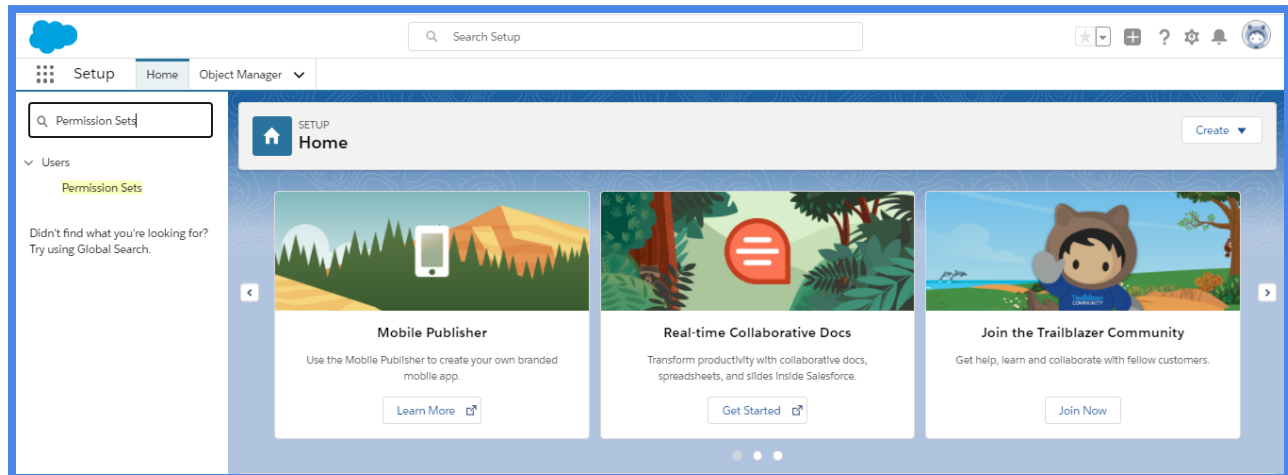


5. How to give Smart Lead Converter User access to a Profile?

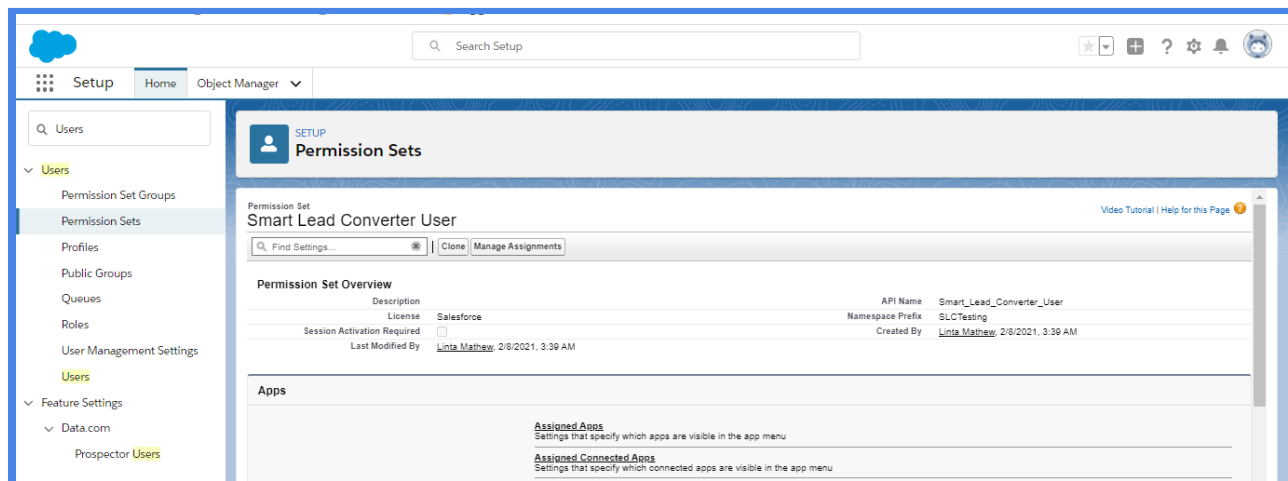
- ❖ Click Setup.



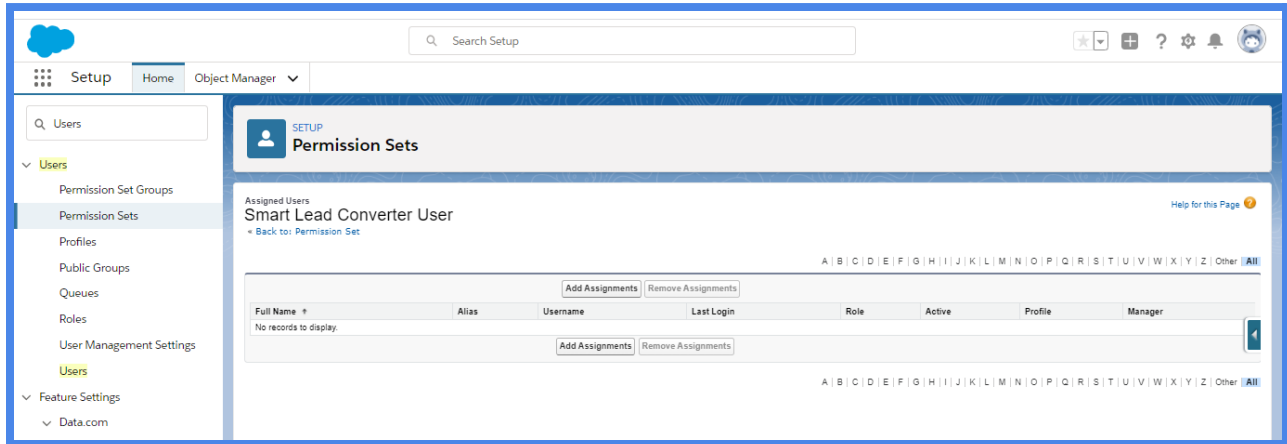
- ❖ In the Quick Find box, search for Permission Sets.



❖ From the list of Permission Sets, choose Smart Lead Converter User.

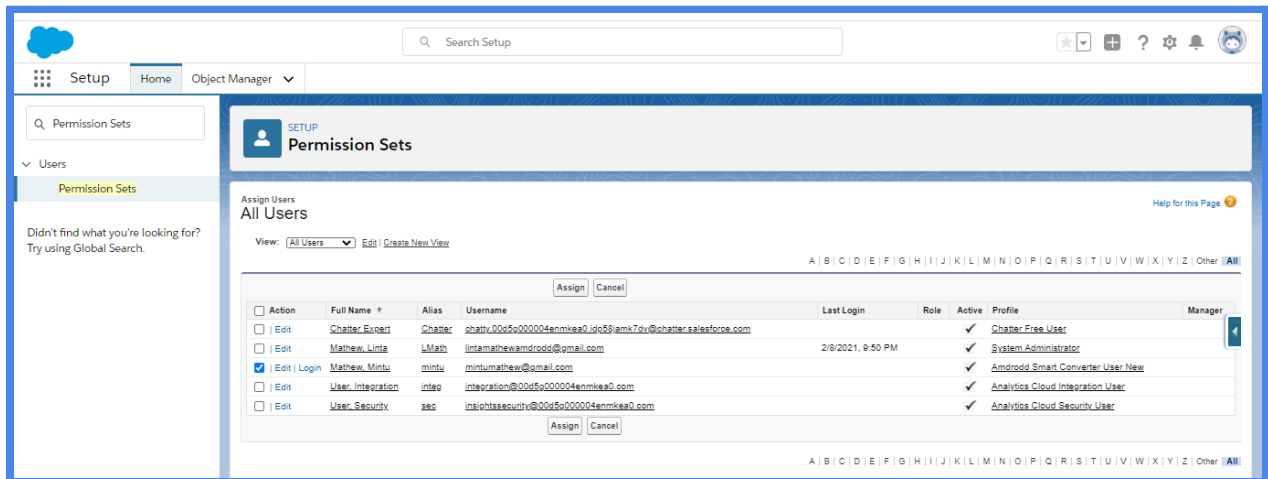


❖ Click Manage Assignments and the Add Assignments.



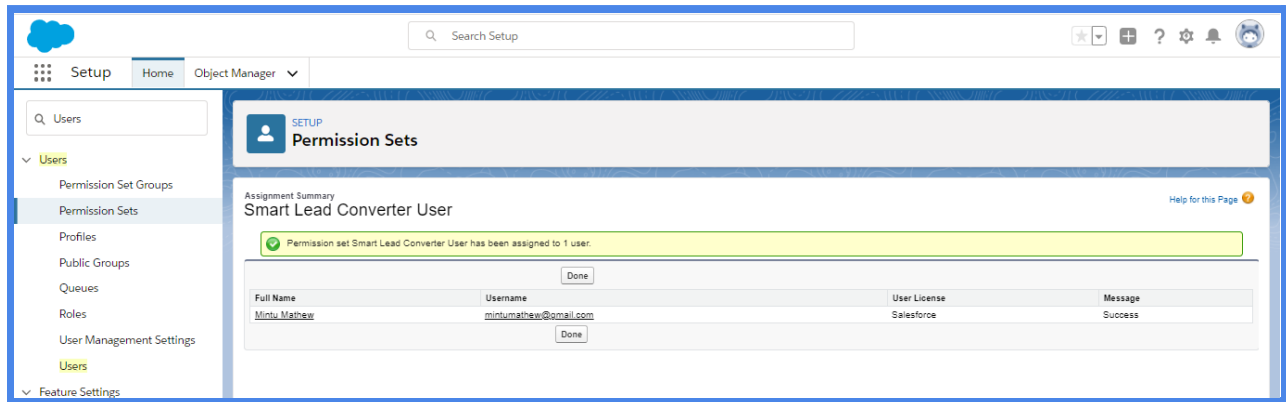
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'Users' entered. The 'Users' section is expanded, showing 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', and 'Data.com'. The main content area is titled 'Permission Sets' and shows 'Assigned Users' for the 'Smart Lead Converter User'. A table lists the assigned users, with columns for Full Name, Alias, Username, Last Login, Role, Active, Profile, and Manager. The table is currently empty, showing 'No records to display'.

- ❖ Choose the user for which you want to provide the Smart Lead Converter User Access and click Assign.



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'Permission Sets' entered. The 'Permission Sets' section is expanded, showing 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Permission Sets' and shows 'Assign Users' for the 'Smart Lead Converter User'. A table lists the assigned users, with columns for Action, Full Name, Alias, Username, Last Login, Role, Active, Profile, and Manager. The table contains several rows of users, including 'Chatter_Eugene', 'Mathew_Linta', 'Mathew_Mintu', 'User_Integration', and 'User_Security'. The 'User_Integration' row is selected, and the 'Assign' button is visible.

- ❖ Now, the User will have Smart Lead Convert button access, but no access to set Smart Lead Converter Mapping rules.



Conclusion

That's all folks!

You are all set to use the Smart Lead Converter now!

Have any questions or suggestions?

Feel free to drop an email to support@amdrodd.com. We are constantly working on bringing new upgrades to the Smart Lead Converter. Your input would mean so much!
