

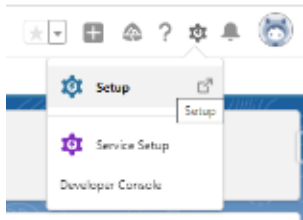
Auto Convert Lead by Trigg Digital: Configuration Guide

When you install the Package from the AppExchange all of the features and functionality will be enabled for you.

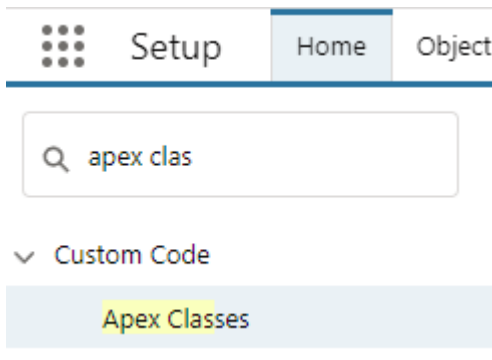
To enable this solution for your users you will need to complete the following;

Grant Access to Apex Class

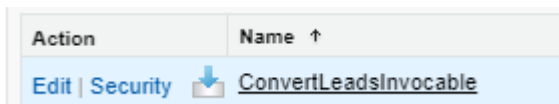
(1) Navigate to Salesforce Setup



(2) Within the Quick Find search for “Apex Classes” and press on the result



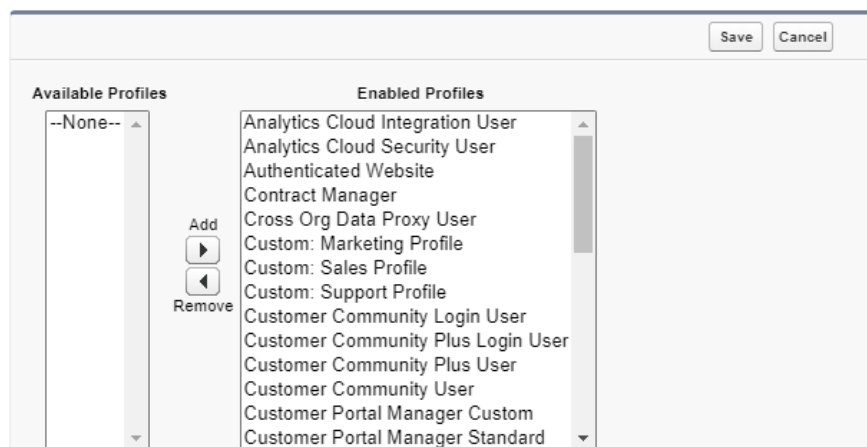
(3) Locate ConvertLeadsInvocable and press on Security



(4) Make this Enabled for the necessary profiles and then press Save

Enable Profile Access for Apex Class

ConvertLeadsInvocable



How to use within Process Builder

Use the functionality of the Process Builder when a record meets a certain criteria you can automatically convert it into an Account, Contact or Opportunity.

For example let's take a look at how to convert a Lead that has reached the "Closed - Converted" Stage.

- (1) On the start criteria set the object to "Lead" and Start the Process "When a record is created or edited".

Choose Object and Specify When to Start the Process

Object * ? i

Lead

Start the process *

☐ only when a record is created

☒ when a record is created or edited

- (2) On the Action Group set the Criteria Name to "Has Been Qualified?", the Executing Actions to "Conditions are met" and the conditions as Lead Status = Closed Converted

Define Criteria for this Action Group ? i

Criteria Name * ? i

Has Been Qualified?

Criteria for Executing Actions *

☒ Conditions are met

☐ Formula evaluates to true

☐ No criteria—just execute the actions!

Set Conditions

	Field *	Operator *	Type *	Value *
1	[Lead].Status	Equals	Picklist	Closed - Converted

Conditions *

☒ All of the conditions are met (AND)

☐ Any of the conditions are met (OR)

☐ Customize the logic

> Advanced

- (3) Within the actions call a Apex Class called Convert Lead, set the Action name and as a minimum set the Lead ID and Converted Status values.

Call Apex

Action Name*

Convert Lead

Apex Class*

Convert Leads

Set Apex Variables

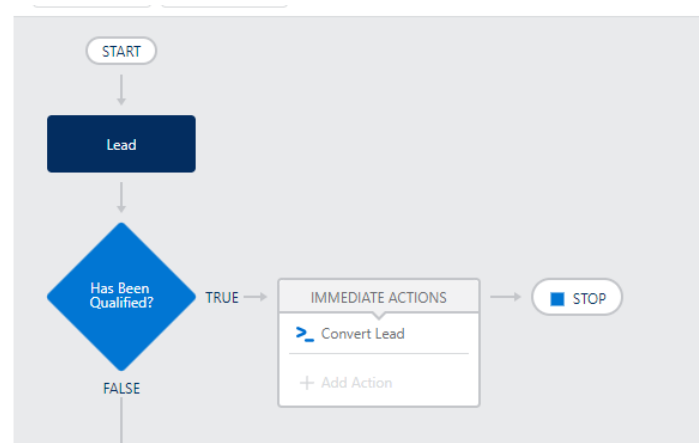
Field*	Type*	Value*
Lead ID	Field Reference	[Lead].Id
Converted Status	Field Reference	[Lead].Status

A full breakdown of the other variables for this code can be found below;

Converted Status*	This is a required variable and represents the status for which you want to convert the Lead under <i>eg. Closed - Converted</i>
Lead ID*	This required variable represents the ID of the Lead to be converted <i>eg. 00Q8d000002beIZEAY</i>
Account ID	If you wish to convert the Lead to a existing Account then optionally set the Account ID to match to <i>eg. 0018d000005t1zSAAQ</i>
Contact ID	If you wish to match to a Contact that already exists then input the Contact ID here <i>eg. 0038d000004cbE8AAI</i>
Create Opportunity	This defaults to TRUE if you do not wish to create a Opportunity on conversion set to FALSE
Opportunity Name	This defaults to Company Name. If you want to override this then pass a text value into this variable.
Overwrite Lead Source	If you want to override the Lead Source on the Contact you need to set this to TRUE, default is FALSE. You also need to specify the Contact ID in that variable too.
Owner ID	If you want the Owner of the converted Record to be different to the Lead Owner

	specify it here eg. 0058d000001Wg8bAAC
Send Email to Owner?	If you want to send a email to the Owner specified in the Owner ID set this to TRUE, default is FALSE

The example Process should look like this



How to use within Flow

Within a Flow add a Apex Action for “Convert Lead” and set the variables as below;

Converted Status*	This is a required variable and represents the status for which you want to convert the Lead under eg. <i>Closed - Converted</i>
Lead ID*	This required variable represents the ID of the Lead to be converted eg. 00Q8d000002be1ZEAY
Account ID	If you wish to convert the Lead to a existing Account then optionally set the Account ID to match to eg. 0018d000005t1zSAAQ
Contact ID	If you wish to match to a Contact that already exists then input the Contact ID here eg. 0038d000004cbE8AAI
Create Opportunity	This defaults to TRUE if you do not wish to create a Opportunity on conversion set to FALSE
Opportunity Name	This defaults to Company Name. If you

	want to override this then pass a text value into this variable.
Overwrite Lead Source	If you want to override the Lead Source on the Contact you need to set this to TRUE, default is FALSE. You also need to specify the Contact ID in that variable too.
Owner ID	If you want the Owner of the converted Record to be different to the Lead Owner specify it here <i>eg. 0058d000001Wg8bAAC</i>
Send Email to Owner?	If you want to send a email to the Owner specified in the Owner ID set this to TRUE, default is FALSE

Other Points to Note

- In order to use the solution you need to have access to the Apex Class.
- To successfully convert a Lead you need the necessary Object Level Access to Account, Contact and Opportunity as well as the Permission to convert a Lead.
- Previous versions of this package included variables to set the Account, Contact and Opportunity Record Type. This functionality has been removed from later versions of the solution due to technical limitations with this, these variables are marked as Deprecated.
- You could build your own logic within a Flow to update the Record Type ID on the outputs from the Apex Action, once the lead has been converted.