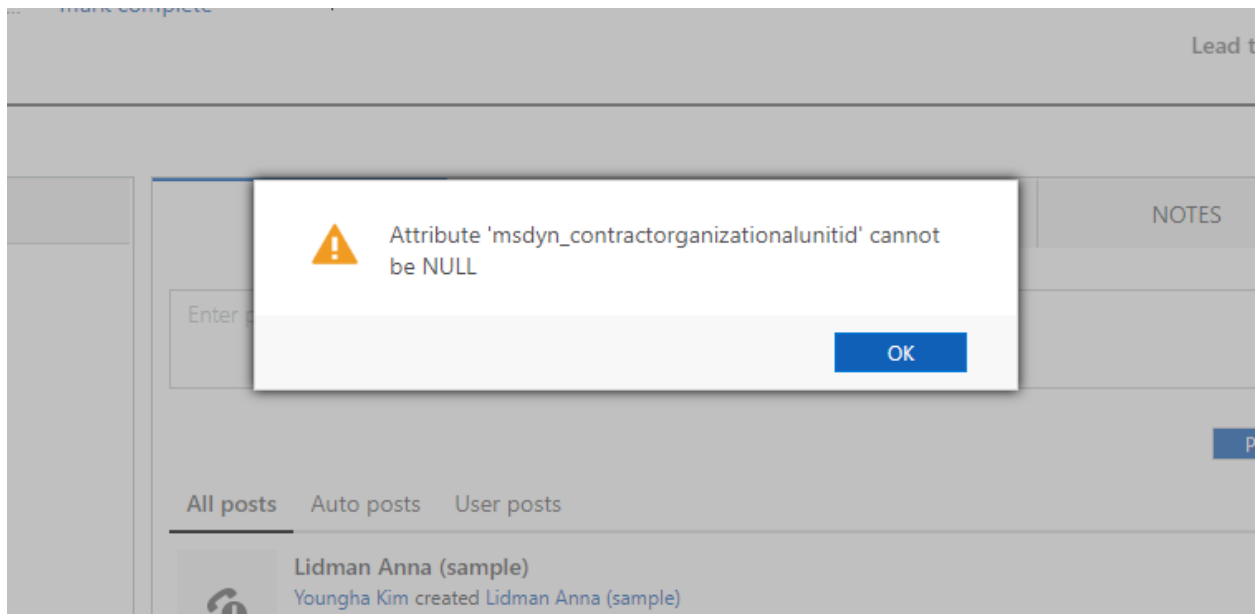


How to Address all Known Issues/Errors When Qualifying a Lead to an Opportunity

If you're on the latest PSA version, 2.4.4.30, you will run into the following error when you Qualify the Lead as Work Based, without Product Price List and a Contracting unit fields filled out.



This is an error regarding the Opportunity: Project Information form restrictions mentioned at the beginning of the blog post. We need to create the missing fields on the Lead and map the correct fields to the Opportunity when User Qualify the Lead.

1. Create two lookup fields
 - a. Lookup field to Price List

File Save and Close Show Dependencies Managed Properties Actions Help

Field Working on solution: PSA Lead to Opportuni

Product Price List of Lead

4 Common Information Business Rules

General

Schema

Display Name * Product Price List Field Requirement * Optional

Name * ebs_productpricelist Searchable Yes

Field Security Enable Disable

⚠ Enabling field security? [What you need to know](#)

Auditing * Enable Disable

⚠ This field will not be audited until you enable auditing on the entity.

Description

Appears in global filter in interactive experience Sortable in interactive experience dashboard

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)

Type

Data Type * Lookup

Target Record Type * Price List

Relationship Name * ebs_pricelevel_lead_ProductPriceList

Edit relationship detail(advanced)

b. Lookup field to Organization Unit

File Save and Close Show Dependencies Managed Properties Actions Help

Field Working on solution: PSA Lead to Opportunity

Contracting Unit of Lead

4 Common Information Business Rules

General

Schema

Display Name * Contracting Unit Field Requirement * Optional

Name * ebs_contractingunit Searchable Yes

Field Security Enable Disable

⚠ Enabling field security? [What you need to know](#)

Auditing * Enable Disable

⚠ This field will not be audited until you enable auditing on the entity.

Description

Appears in global filter in interactive experience Sortable in interactive experience dashboard

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)

Type

Data Type * Lookup

Target Record Type * Organizational Unit

Relationship Name * ebs_msdyn_organizationalunit_lead_ContractingU

Edit relationship detail(advanced)

2. Drag and Drop the fields onto the Lead form

The screenshot shows the PowerApps Form Editor interface. The top ribbon includes tabs for FILE, HOME, and INSERT. The HOME tab is active, showing various toolbars for Save, Edit, Select, Form, and Upgrade. The main workspace displays the form structure for 'Solution: PSA Lead to Opportunity' with the form name 'Lead'. The form is divided into sections: Header, Summary, CONTACT, and SOCIAL PANE. The Summary section contains fields for Type, Contracting Unit, Product Price List, Topic, and Name. The CONTACT section contains fields for Type and Contracting Unit. The SOCIAL PANE section is currently empty.

3. Save and Close the Form editor

4. Navigate to the 1: N Lead to Opportunity Relationship [opportunity_originating_lead]

The screenshot shows the PowerApps Relationships view for the 'Solution PSA Lead to Opportunity'. The left sidebar displays the '1:N Relationships' section. The main area shows a table of relationships with the following columns: Schema Name, Primary Entity, Related Entity, Type of Behavior, Field Name, State, Customizable, and Field Description. The relationship 'opportunity_originating_lead' is highlighted, indicating a 1:N relationship between Lead and Opportunity.

Schema Name	Primary Entity	Related Entity	Type of Behavior	Field Name	State	Customizable	Field Description
opportunity_originating_lead	Lead	Opportunity	Referential	Originating Lead	Managed	True	Choose the lead that the opportunity was create...

5. Click New

The screenshot shows the PowerApps interface for a relationship named 'Lead to Opportunity'. The 'Mappings' tab is selected in the left-hand pane. The main area displays a table with columns for Source Name, Source Display Name, Target Name, and Target Display Name. A 'New' button is highlighted in the top left of the table area.

<input type="checkbox"/>	Source Name ↑	Source Display Name	Target Name	Target Display Name
	budgetamount	Budget Amount	budgetamount	Budget Amount
	budgetstatus	Budget	budgetstatus	Budget
	campaignid	Source Campaign	campaignid	Source Campaign

6. Map the lookup fields to their respective Opportunity lookup fields.
7. Save and Close and publish the solution.
8. Users will have to fill out the new fields before Qualifying the Lead is the projected Opportunity will need to use the Opportunity: Project Information form.