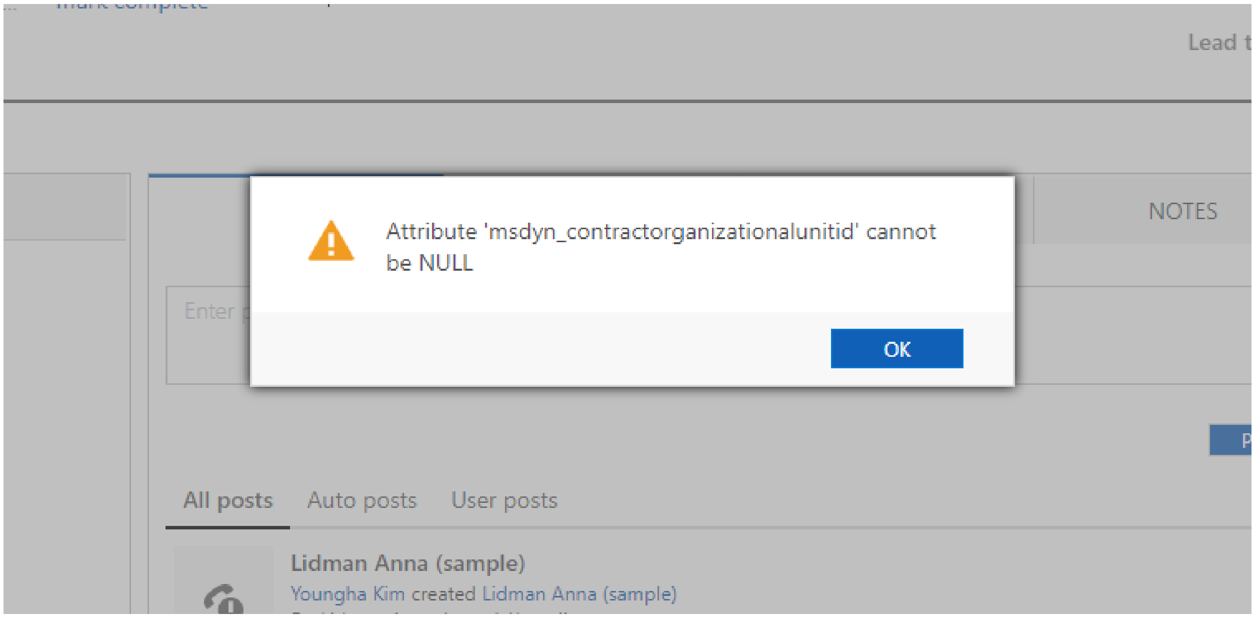
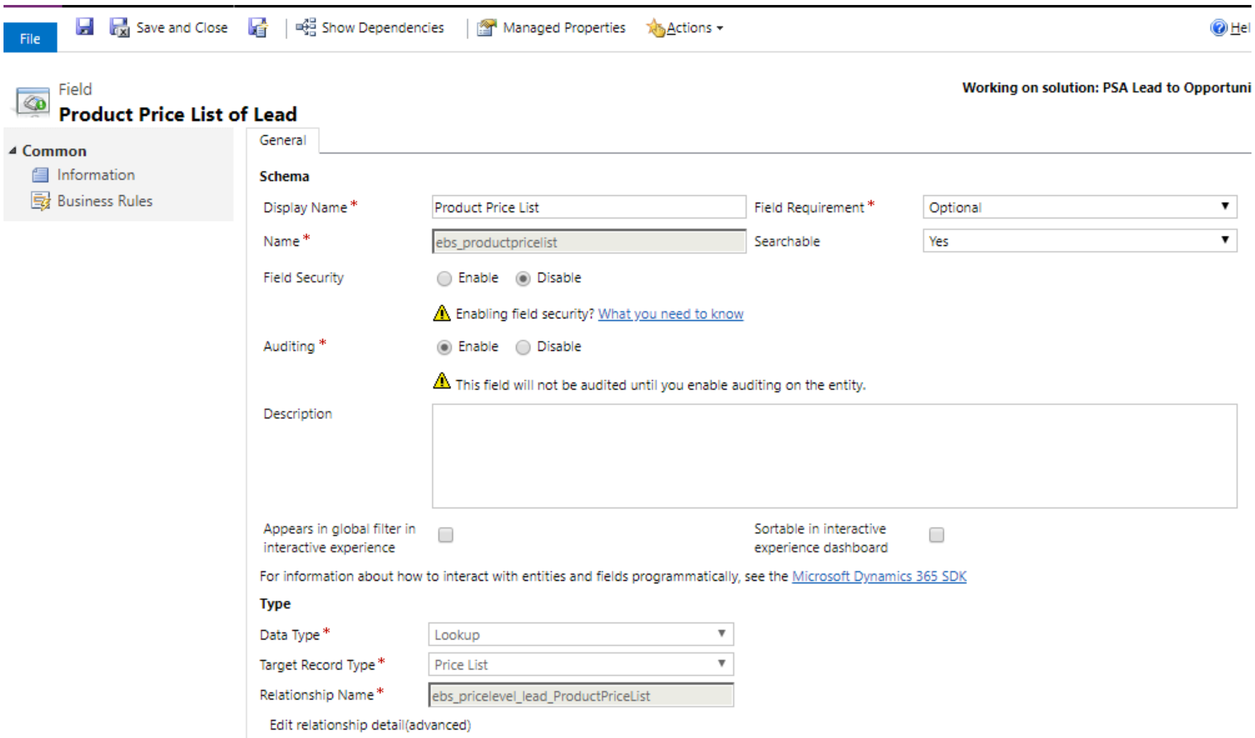
How to Address all Known Issues/Errors When Qualifying a Lead to an Opportunity

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.

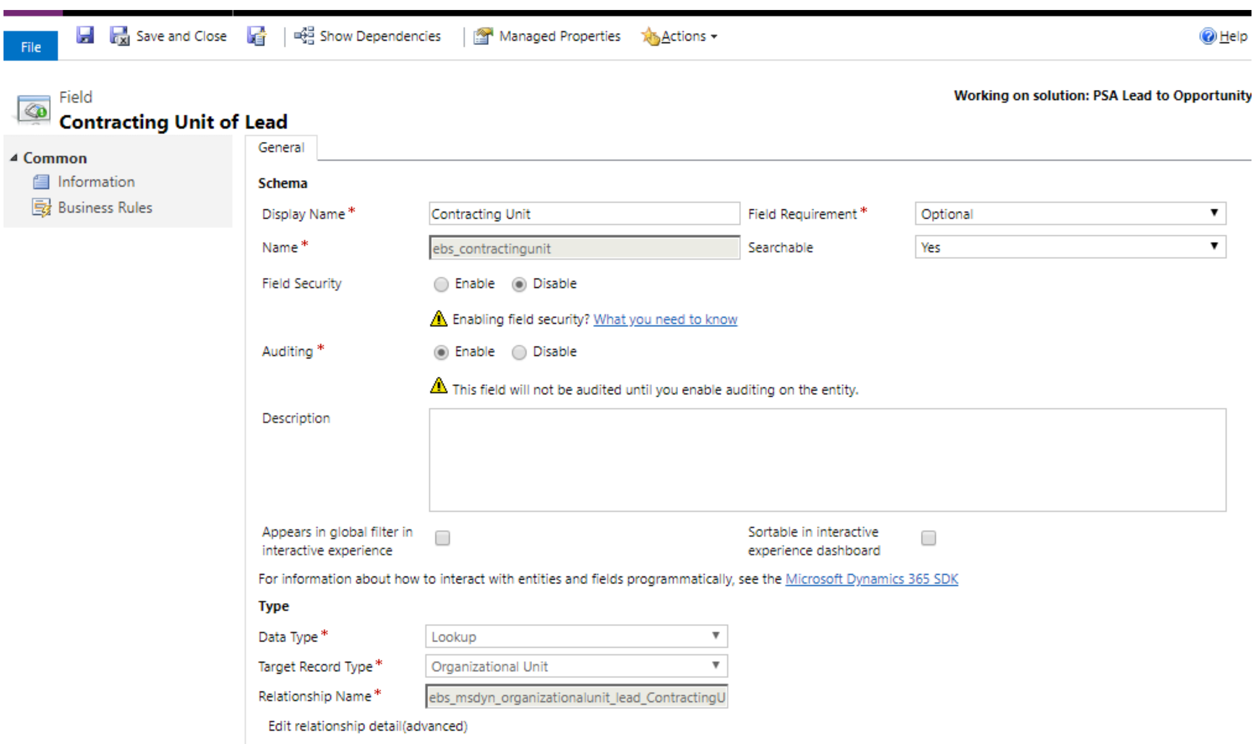


This is an error regarding the Opportunity: Project Information form restrictions mentioned at the beginning of the blog post. We need to create the missing fields on the Lead and map the correct fields to the Opportunity when User Qualify the Lead.

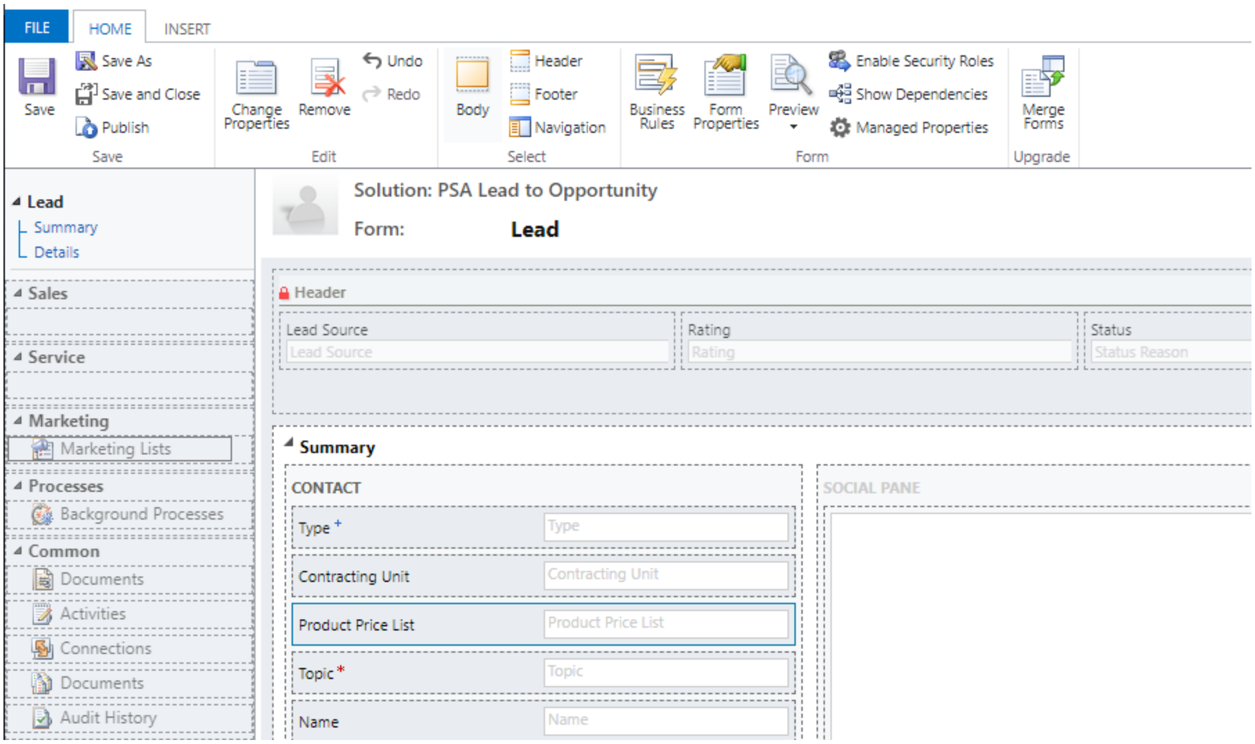
1. Create two lookup fields
    a. Lookup field to Price List



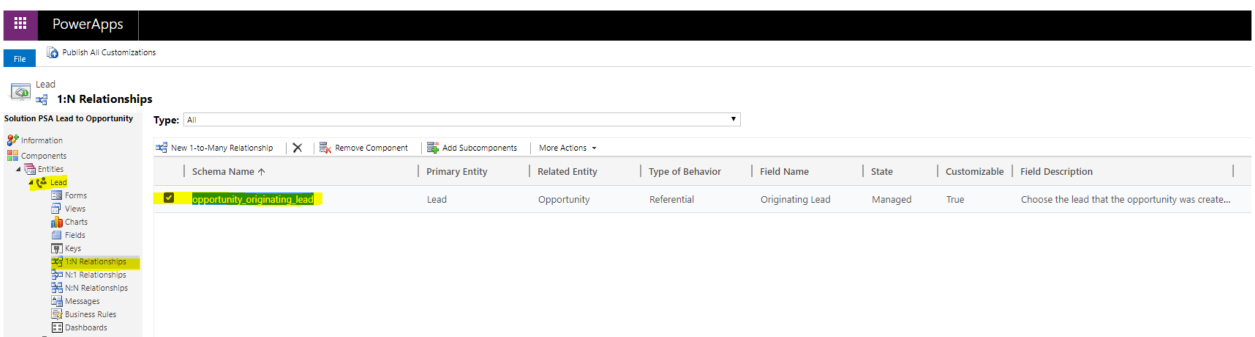
b. Lookup field to Organization Unit



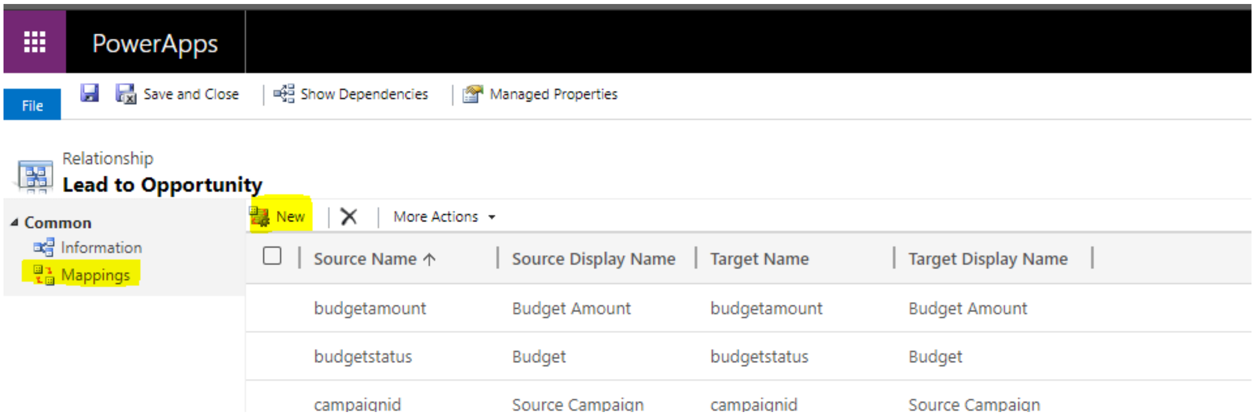
2. Drag and Drop the fields onto the Lead form



3. Save and Close the Form editor
4. Navigate to the 1: N Lead to Opportunity Relationship [opportunity_originating_lead]



5. Click New



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.