

Best Practices to Optimize the User Experience

Consider the steps below if you'd like to reduce human error when you're qualifying a Lead to an Opportunity: Project Information record.

If you'd followed the setup steps in the previous links, you'll notice the Contracting Unit and Product Price List field may not apply for all Leads if you're an organization that uses both out of the box (OOB) Lead to Opportunity Sales process and the PSA Lead to Opportunity sales process.

I would recommend setting up some additional business rules to systematically reduce human error and enhancing a specific user experience.

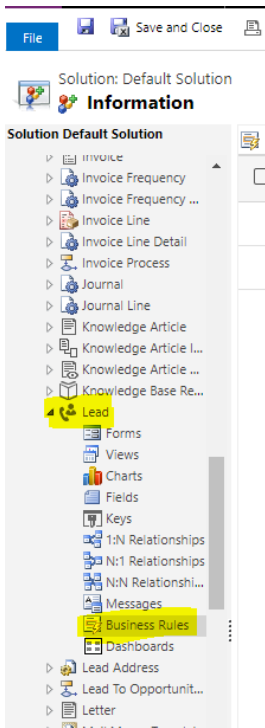
Your organization may want to ONLY use the PSA Lead to Opportunity Sales process and we'll review how to set that up as well.

Using OOB Lead to Opportunity and PSA Lead to Opportunity Processes:

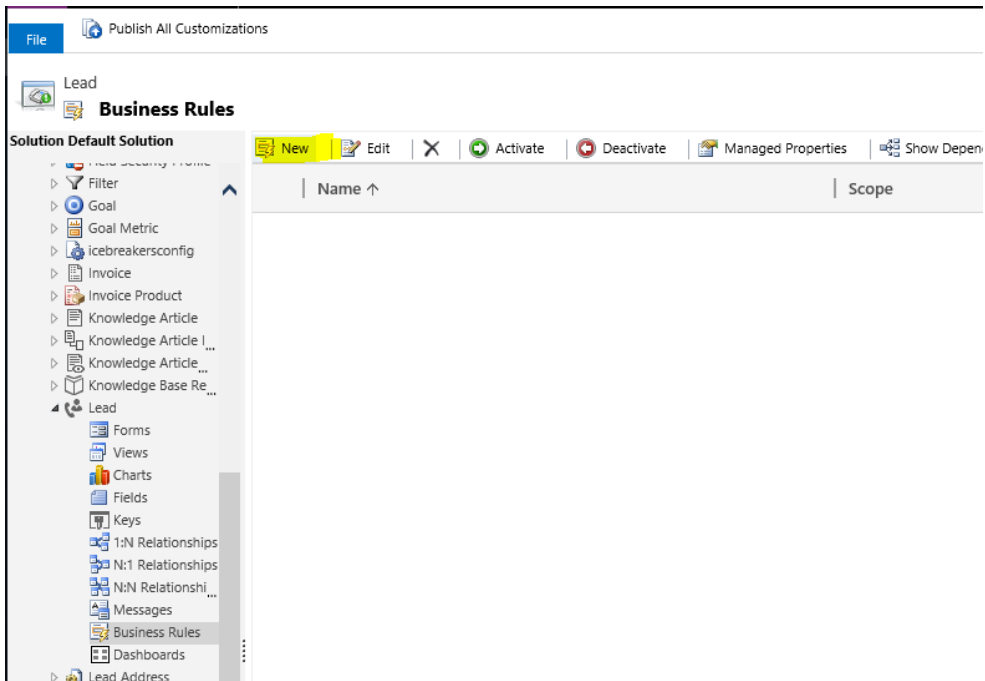
1. Regular Lead to Opportunity Sales Process: Lead equals item based
 - a. IF [Lead: Type] equals Item Based
 - b. Hide, Clear Contracting Unit field and set to "Not Required"
 - c. Hide, Clear Product Price List field and set to "Not Required"
2. PSA Lead to Opportunity Sales Process: Lead equals Work based
 - a. IF [Lead: Type] equals Work Based
 - b. Show and Set Contracting Unit field required
 - c. Show and Product Price List field required

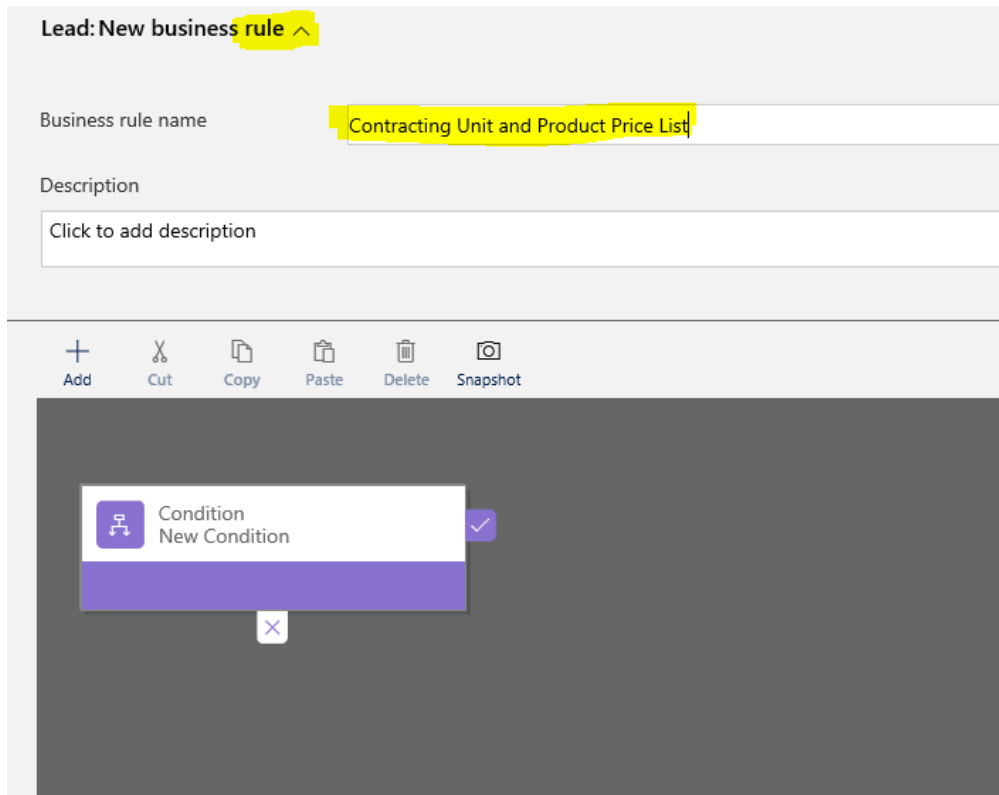
Business Rules Steps:

1. Navigate to the Lead entity business rules customizations
 - a. Settings Module → Customizations → Customize the System → Lead entity → Business Rules



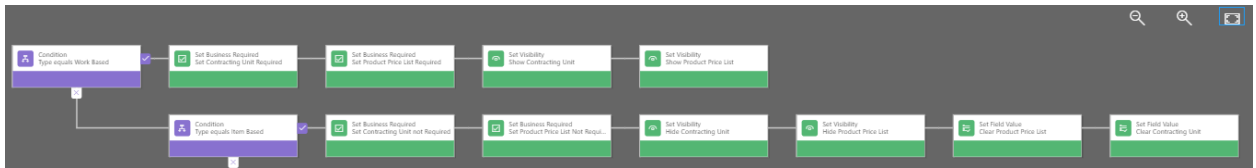
2. Create new Business Rule and name it: Contracting Unit and Product Price List





3. Drag and Drop from the Components area to match the following:
 - a. Condition
 - i. Type field equals Work Based
 - b. Actions
 - i. Set Business Required: Contracting Unit → Business Required
 - ii. Set Business Required: Product Price List → Business Required
 - iii. Set Visibility: Show field Contracting Unit
 - iv. Set Visibility: Show field Product Price List
 - c. Condition
 - i. Type field equals Item Based
 - d. Actions
 - i. Set Business Required: Contracting Unit → Not Business Required
 - ii. Set Business Required: Product Price List → Not Business Required
 - iii. Set Visibility: Hide field Contracting Unit
 - iv. Set Visibility: Hide field Product Price List
 - v. Set Field Value: Clear Contracting Unit
 - vi. Set Field Value: Clear Product Price List
 - e. Condition
 - i. Type field does not contain data
 - f. Actions
 - i. Set Business Required: Contracting Unit → Not Business Required
 - ii. Set Business Required: Product Price List → Not Business Required
 - iii. Set Visibility: Hide field Contracting Unit
 - iv. Set Visibility: Hide field Product Price List

- v. Set Field Value: Clear Contracting Unit
 - vi. Set Field Value: Clear Product Price List
4. Your business rule should look like this, with the following text box



IF

Type contains data AND Type equals "Work based"

THEN

Set **Contracting Unit** as **Business Required**
 Set **Product Price List** as **Business Required**
 Show field **Contracting Unit**
 Show field **Product Price List**

ELSE IF

Type contains data AND Type equals "Item based"

THEN

Set **Contracting Unit** as **Not Business Required**
 Set **Product Price List** as **Not Business Required**
 Hide field **Contracting Unit**
 Hide field **Product Price List**
 Clear **Product Price List**
 Clear **Contracting Unit**

5. Save and Activate the Business Rule
6. Exit the window, save and publish your solution.
7. Once published confirm the proper behavior on the Lead form
8. Lead: Type equals Work based

LEAD ▾
Robin Counts (sample) ☰

Qualify (Active for 8 days, 6 hours) ▶ Develop

Existing Contact?	click to enter	Estimated Budget	click to enter
Existing Account?	click to enter	✓ Purchase Process	Committee
Purchase Timeframe	click to enter	Identify Decision Ma...	mark complete

Summary

CONTACT

Type*	Work based
*Contracting Unit
*Product Price List

9. Lead: Type equals Item Based

LEAD ▾
Robin Counts (sample) ☰

Qualify (Active for 8 days, 6 hours) ▶ Develop

Existing Contact?	click to enter	Estimated Budget	click to enter
Existing Account?	click to enter	✓ Purchase Process	Committee
Purchase Timeframe	click to enter	Identify Decision Ma...	mark complete

Summary

CONTACT

Type*	Item based
Topic*	Likes our products (sample)
Name*	Robin Counts (sample)

Using only PSA Lead to Opportunity Sales Process:

1. Navigate to the Lead entity business rules customizations
 - a. Settings Module → Customizations → Customize the System → Lead entity → Fields

File Publish All Customizations

Lead **Fields**

Solution Default Solution

- Invoice
- Invoice Frequency
- Invoice Frequency ...
- Invoice Line
- Invoice Line Detail
- Invoice Process
- Journal
- Journal Line
- Knowledge Article
- Knowledge Article I...
- Knowledge Article ...
- Knowledge Base Re...
- Lead**
 - Forms
 - Views
 - Charts
 - Fields**
 - Keys
 - 1:N Relationships
 - N:1 Relationships
 - N:N Relationshi...
 - Messages
 - Business Rules
 - Dashboards
 - Lead Address
 - Lead To Opportunit...
 - Letter
 - Mail Merge Template

View: All

New X Edit More Actions

Name	Schema Name	Display Name	Type	Field Type	State
address1_addressid	Address1_AddressId	Address 1: ID	Primary Key	Simple	Managed
address1_adresstype...	Address1_AddressTyp...	Address 1: Ad...	Option Set	Simple	Managed
address1_city	Address1_City	City	Single Line of...	Simple	Managed
address1_composite	Address1_Composite	Address 1	Multiple Line...	Simple	Managed
address1_country	Address1_Country	Country/Regi...	Single Line of...	Simple	Managed
address1_county	Address1_County	Address 1: Co...	Single Line of...	Simple	Managed
address1_fax	Address1_Fax	Address 1: Fax	Single Line of...	Simple	Managed
address1_latitude	Address1_Latitude	Address 1: La...	Floating Point...	Simple	Managed
address1_line1	Address1_Line1	Street 1	Single Line of...	Simple	Managed
address1_line2	Address1_Line2	Street 2	Single Line of...	Simple	Managed
address1_line3	Address1_Line3	Street 3	Single Line of...	Simple	Managed

2. Open the Type [msdyn_ordertype] field

Lead **Fields**

Solution Default Solution

- Invoice
- Invoice Frequency
- Invoice Frequency ...
- Invoice Line
- Invoice Line Detail
- Invoice Process
- Journal
- Journal Line
- Knowledge Article
- Knowledge Article I...
- Knowledge Article ...
- Knowledge Base Re...
- Lead**
 - Forms
 - Views
 - Charts
 - Fields**
 - Keys
 - 1:N Relationships
 - N:1 Relationships
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 - Mail Merge Template

View: All

New X Edit More Actions

Name	Schema Name	Display Name	Type	Field Type	St
statuscode	StatusCode	Status Reason	Status Reason	Simple	M
address1_line1	Address1_Line1	Street 1	Single Line of...	Simple	M
address1_line2	Address1_Line2	Street 2	Single Line of...	Simple	M
address1_line3	Address1_Line3	Street 3	Single Line of...	Simple	M
timespentbymeonema...	TimeSpentByMeOnEm...	Time Spent b...	Single Line of...	Simple	M
timezoneruleversionn...	TimeZoneRuleVersion...	Time Zone Ru...	Whole Number	Simple	M
subject	Subject	Topic	Single Line of...	Simple	M
traversedpath	TraversedPath	Traversed Path	Single Line of...	Simple	M
<input checked="" type="checkbox"/> msdyn_ordertype	msdyn_ordertype	Type	Option Set	Simple	M
utconversiontimezon...	UTCConversionTimeZ...	UTC Conversi...	Whole Number	Simple	M
versionnumber	VersionNumber	Version Num...	Time Stamp	Simple	M

3. Change the Default Value to Work Based

The screenshot shows the 'Field Properties' dialog for a field named 'Type of Lead'. The 'General' tab is active, displaying the following configuration:

- Description:** Whether the Opportunity created when qualifying this Lead is for an Item-based or a Work-based sale.
- Appears in global filter in interactive experience:**
- Sortable in interactive experience dashboard:**
- Type:**
 - Data Type:** Option Set
 - Field Type:** Simple
 - Use Existing Option Set:** Yes No
 - Default Value:** Item based
- Options:** A list of options is shown, with 'Work based' selected. The options are: Item based, Work based.
- Label:** [Empty text box]
- Value:** [Empty text box]
- Description:** [Empty text box]
- Color:** [Color selection box]

4. Save and Close the field
5. Publish All Customizations of the Solution
6. Your Users will never use the OOB Lead to Opportunity Sales Process for any Lead records created after this point.
7. If you'd followed the business rule steps – you may opt out to even place this field on the form since Users should not change this field value.