

EMPAUA



Leadly

EMPAUA'S #1 APP

Leadly User Guide

Why Leadly?



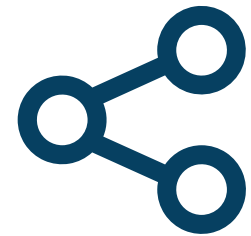
Improve your lead generation processes.



Created and specially designed to accelerate your conversions.

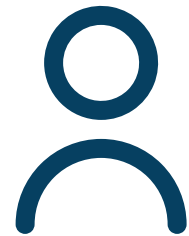


Enhance your customers' experience.



Easy configuration

Leadly requires no technical knowledge or coding background. Anybody can use it, and you can simply set up your mapping with a click of the mouse.



User Friendly

The app is straightforward to use, and it's easy to revise and edit your configuration (fields).



All in one place

Use this app to manage your lead automations in one place, save time and make the lives of your sales team easier.



Boost Team's Productivity

Empower your team to easily define non-standard lead field mappings, create and monitor auto-conversion rules, all without the need for technical expertise.



Getting Started

Salesforce Editions:

Before we start, please bear in mind that Leadly works on the following Salesforce editions:

- Professional
- Enterprise
- Unlimited
- Force.com
- Developer
- Performance



Getting Started

User Permission needed:

- Access to Leads, Accounts, Contacts, Opportunities
- Access to Leadly
- We recommend you to install the App for all users and assign the permission set "Leadly Objects and Fields" to grant access to Sales Users.



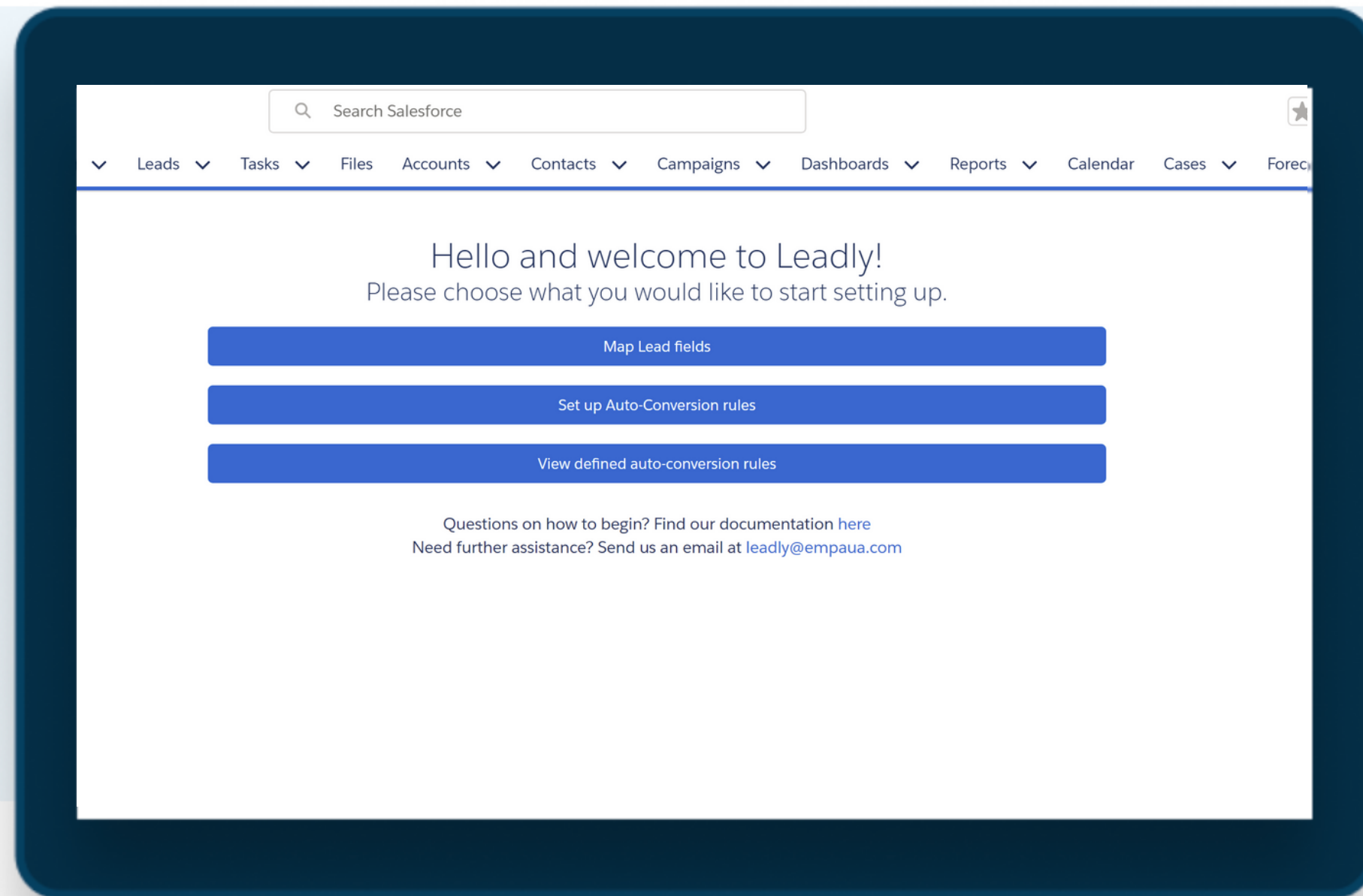
Getting Started

Main Features

- There are two main features that Leadly can help you with:
- Map Lead fields
- Set up Auto-Conversion Rules (with Merge Feature)



Welcome to Leadly!

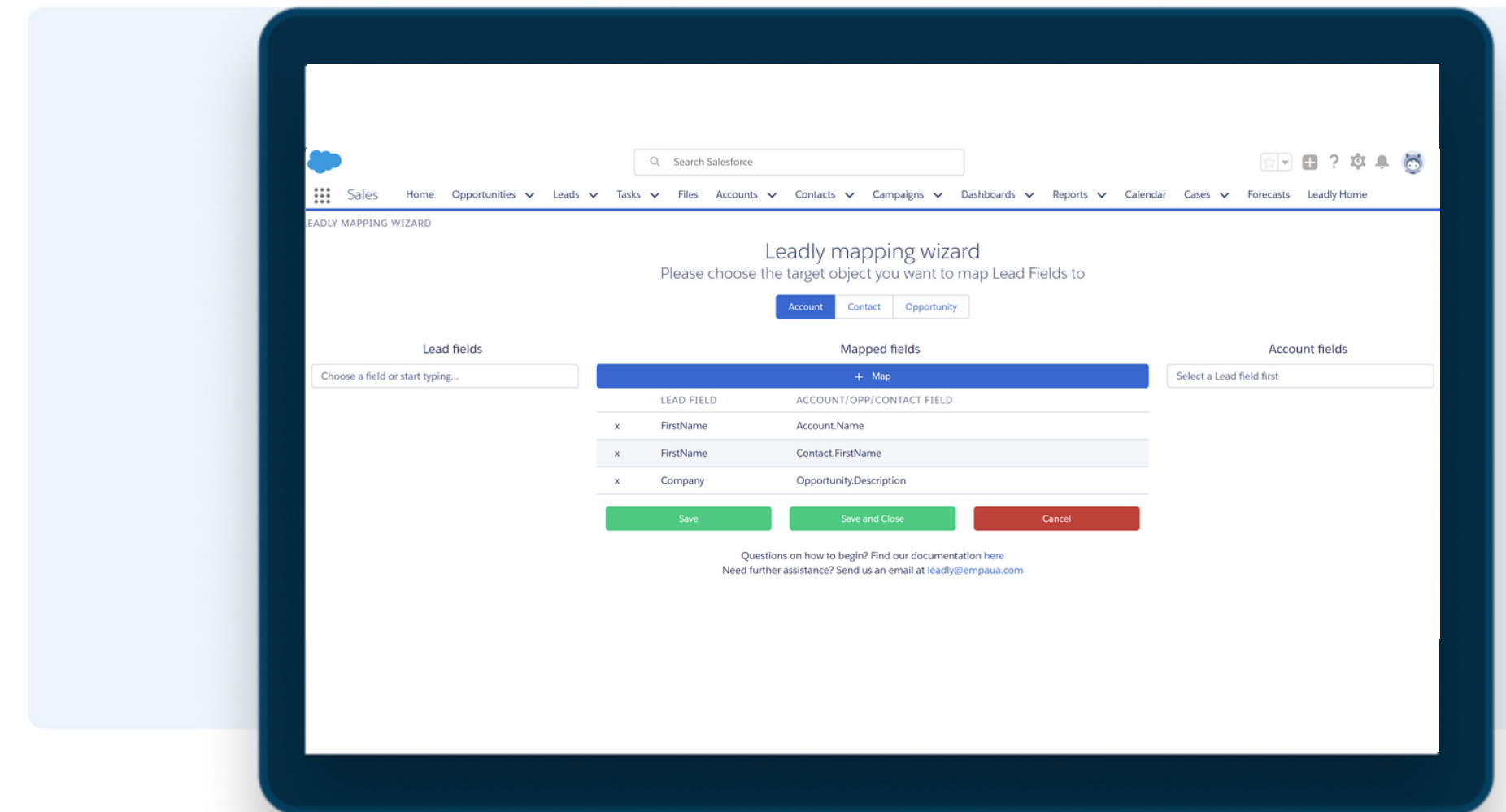




1. Map Lead fields

Let's start with the first feature, Field Mapping.

1. Click on Leadly Home.
 2. Click on Map Lead fields
 3. A Wizard will open
 4. Choose the target object you want
 5. Choose on the left side the Lead fields you want to map to the other object.
 6. Choose on the right side the fields you want to map with the Lead fields. Depended on the Object you chose above this will change here.
 7. Click on the Button + Map to add your Mapping and only then click on Save.
- to map Lead fields with: Account, Contact or Opportunity.
8. If you want to remove any mapping, please click on the X. If you are happy with the options selected, then click on Save or Save and Close.



The wizard will save you a lot of time and it's super easy to use, just search for the lead field you want to map and the target object field.



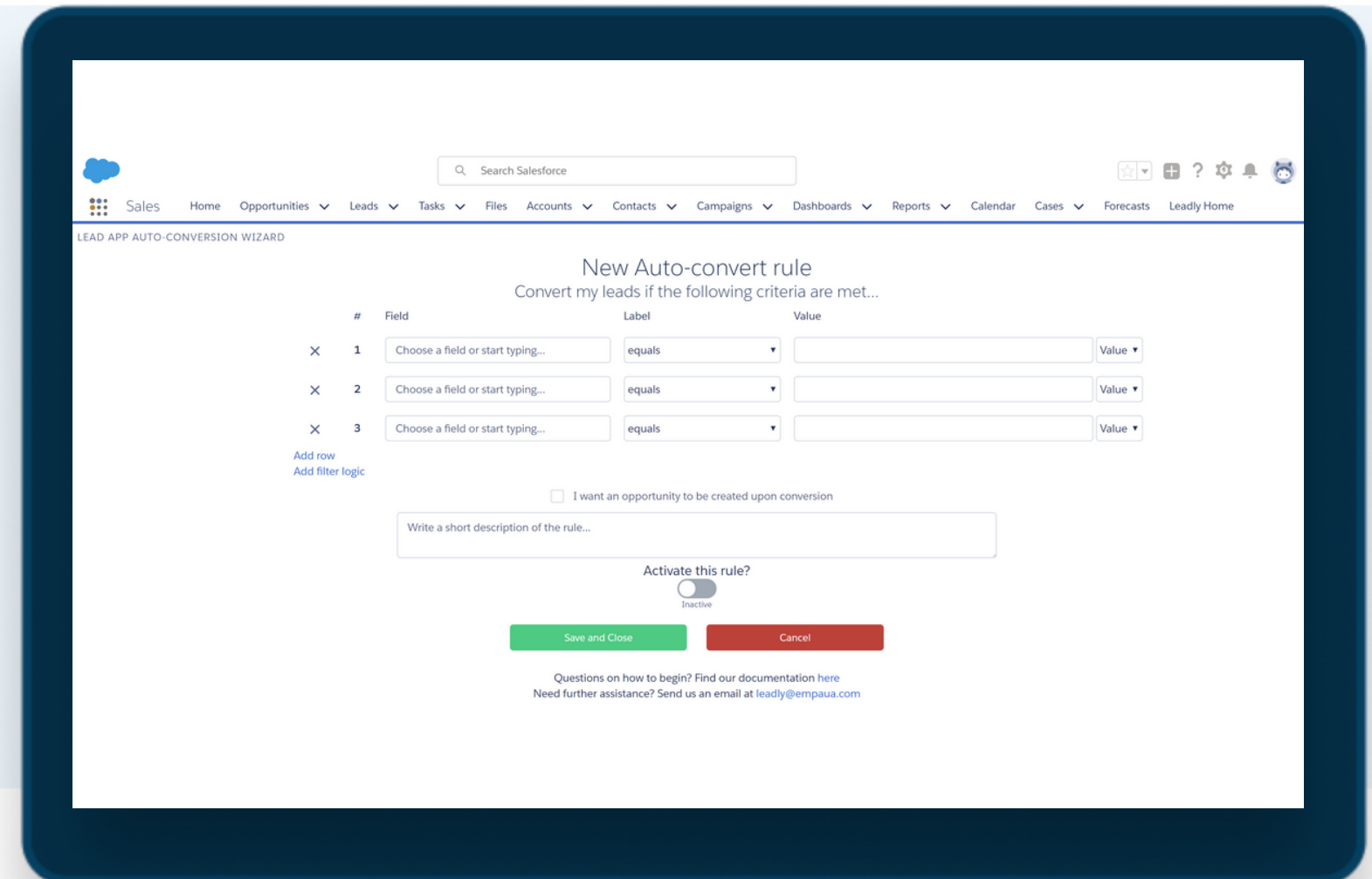
2. Auto-Conversion Rules

This is a super useful tool that will enable you to create automation during the lead conversion process.

For this explanation, we will use the following example:
The company "A" has a lead rating range (1-10) where the value 10 is the highest note a lead could get.

Additionally, the company considers Germany a key country for its growth strategy. Considering this, the goal is to automatically convert every lead with a rating greater than 5 and that comes from Germany.

1. Click on Leadly Home.
2. Click on Set auto-conversion rules.
3. A Wizard will open



LEAD APP AUTO-CONVERSION WIZARD

New Auto-convert rule
Convert my leads if the following criteria are met...

#	Field	Label	Value
×	1	Choose a field or start typing...	equals [] Value ▾
×	2	Choose a field or start typing...	equals [] Value ▾
×	3	Choose a field or start typing...	equals [] Value ▾

[Add row](#)
[Add filter logic](#)

☐ I want an opportunity to be created upon conversion

Write a short description of the rule...

Activate this rule?
☐ Inactive

[Save and Close](#) [Cancel](#)

Questions on how to begin? Find our documentation [here](#)
Need further assistance? Send us an email at leadly@empaua.com



To get the conversion rules from our example we need to create different rules:

The first step is selecting the field that will act as criteria; in this case, Rating and Country. For the first field, we will select the label (operator) Greater than and the value 5.

In the second line we select Country as a field, the label should be Equals and Germany as a value.

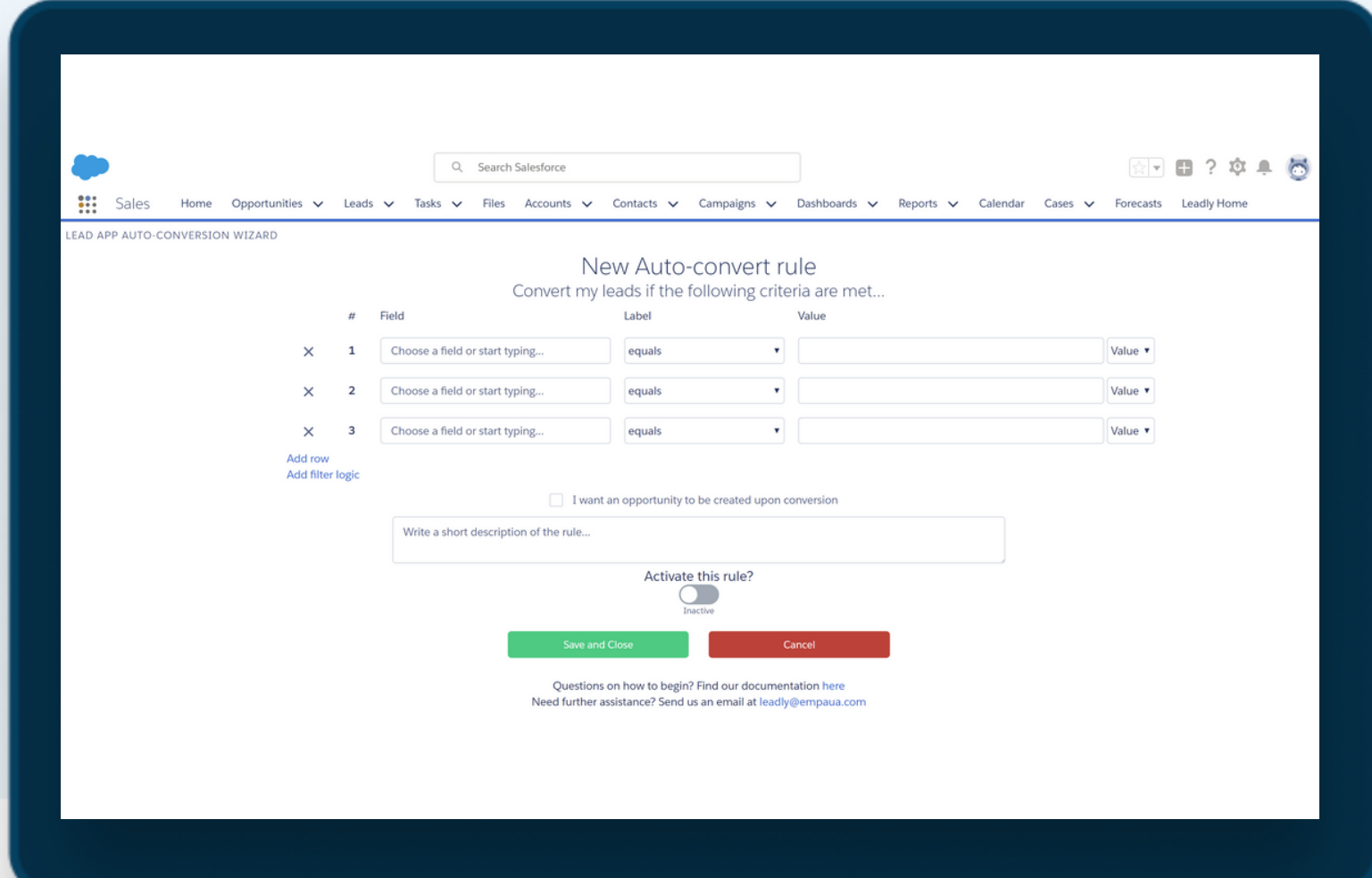
Keep in mind that this app also allows the possibility of evaluating two fields as a criterion for the conversion (pretty cool, if you ask me). If you want to do that, select Field instead of Value.

More lines can be added, as well as filter logic. There is also the chance of creating (or not) an opportunity upon conversion.

For this example, we will select this checkbox.

It is always recommended as a best practice to add a brief description of the purpose and characteristics of the rule.

At the end of the process, the screen should look like this:



LEAD APP AUTO-CONVERSION WIZARD

New Auto-convert rule
Convert my leads if the following criteria are met...

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1	Choose a field or start typing...	equals	Value
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3	Choose a field or start typing...	equals	Value

[Add row](#)
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Write a short description of the rule...

Activate this rule?
☐ Inactive

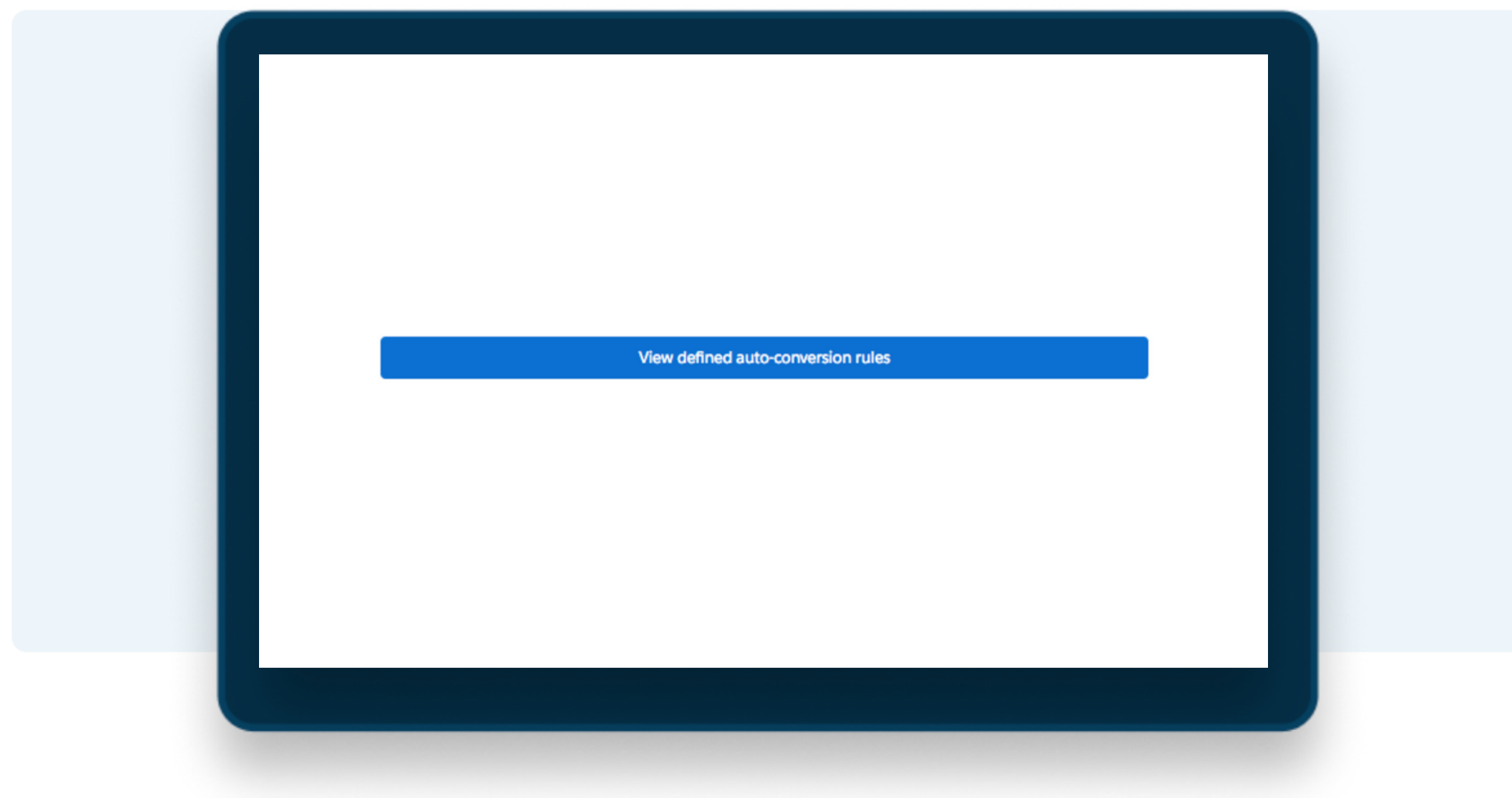
[Save and Close](#) [Cancel](#)

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After you are happy with your rules, activate your rule and click Save and Close.

You can check the created rules by click on the button View defined auto-conversion rules on the Leadly Home tab:





Useful Information



The rules will come into effect once the record(s) that meet the criteria of an active auto-conversion rule are created or edited. If you want to auto-convert multiple already existing leads, we recommend mass-updating the Leads, so the rules will fire.

It is also recommended to first test your auto-conversion rule is working by manually editing records first.



New Feature

To avoid having duplicates during the auto-conversion, you can also now enable the criteria to merge automatically to the same contact and account by checking the checkboxes on the Leadly Home Tab.

Merge Settings:

- ☒ Merge if Lead Email domain matches Contact Email domain EXACTLY
- ☒ Merge if Lead Company Field matches Account Name EXACTLY

Need more support?

Contact Us

www.empaua.com

info@empaua.com

