

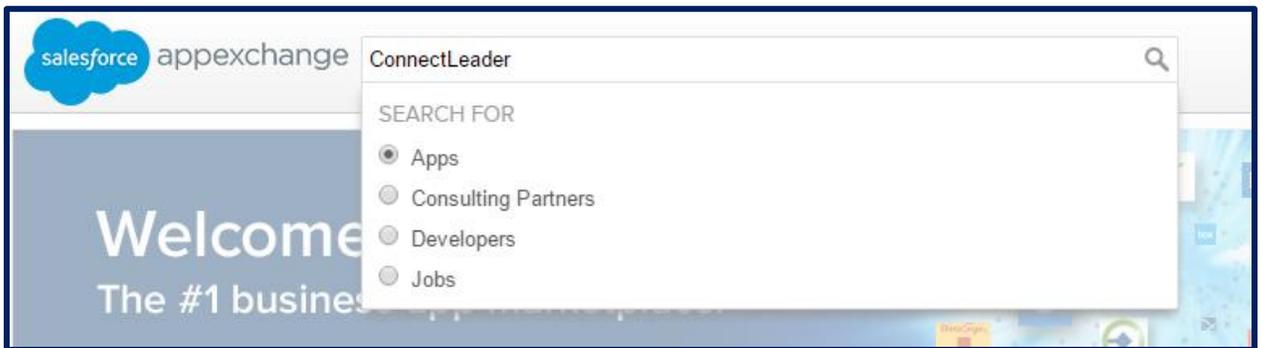
# Installation Guide - ConnectLeader for Salesforce

The steps below walk you through Installing ConnectLeader for Salesforce, to get the documentation for setting ConnectLeader for Salesforce up please contact [support@connectleader.com](mailto:support@connectleader.com)

Please see [Steps to Uninstall ConnectLeader for Salesforce](#) at the end of this document to uninstall a previous version of ConnectLeader from Salesforce.

## How to find ConnectLeader App in AppExchange:

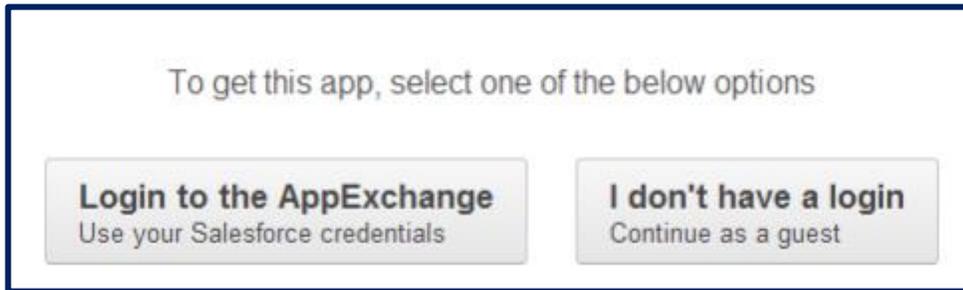
1. Browse <https://appexchange.salesforce.com>
2. Search for the package by typing ConnectLeader into the Search bar [image: search window]



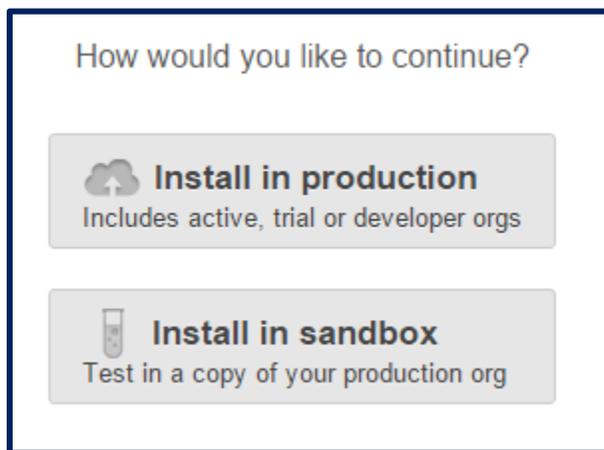
3. Click on the “ConnectLeader Sales Acceleration Software” app.
4. Once you have landed on the Overview page of the app, click the “Get It Now” button.



5. Once clicked you will be asked to click the “Login to the AppExchange” button. Enter your Salesforce credentials (login and password). Once verified, you will be logged in.



6. Once logged in, you may decide to install the app in the sandbox version or the production version. We suggest installing the sandbox version first so you may review the features and functionality. You may then repeat this step to install into your Salesforce production.

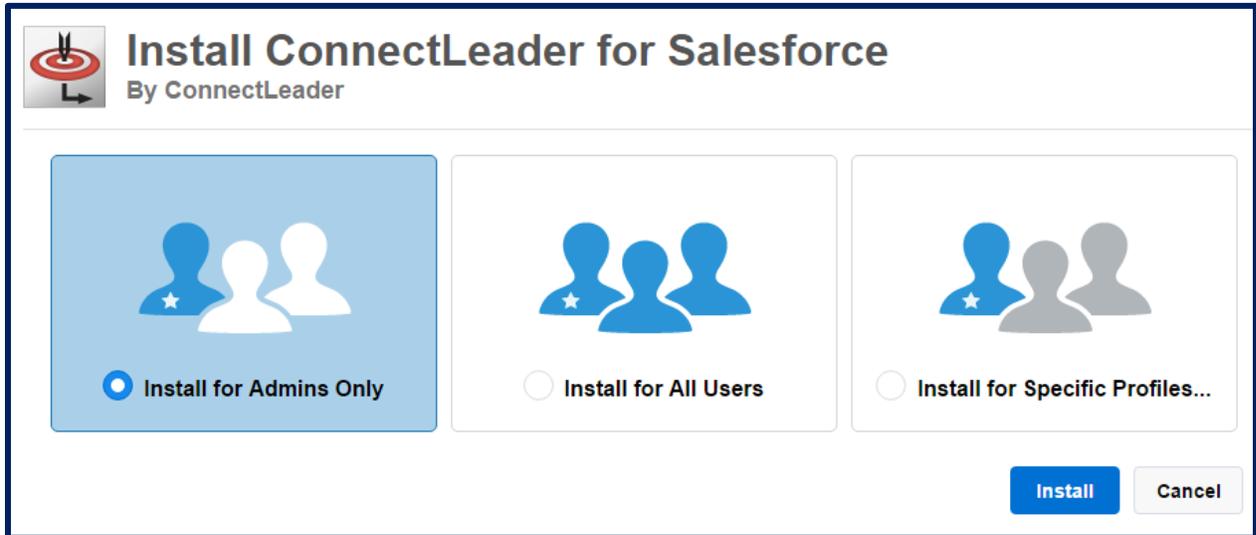


7. Review and “Agree” to Terms and Conditions. Click “Confirm and Install”
8. You will be asked to enter your credentials again.
9. After verification, you will be re-directed to the package installation page and you may continue to install the package by following the steps given below.

## How to install the package in your Production/Sandbox:

Once Salesforce verifies the user credentials, you will be taken to the package installation page.

1. Grant access to admins only. Later you can allow the users to access the app using Permission Sets.



**Install ConnectLeader for Salesforce**  
By ConnectLeader

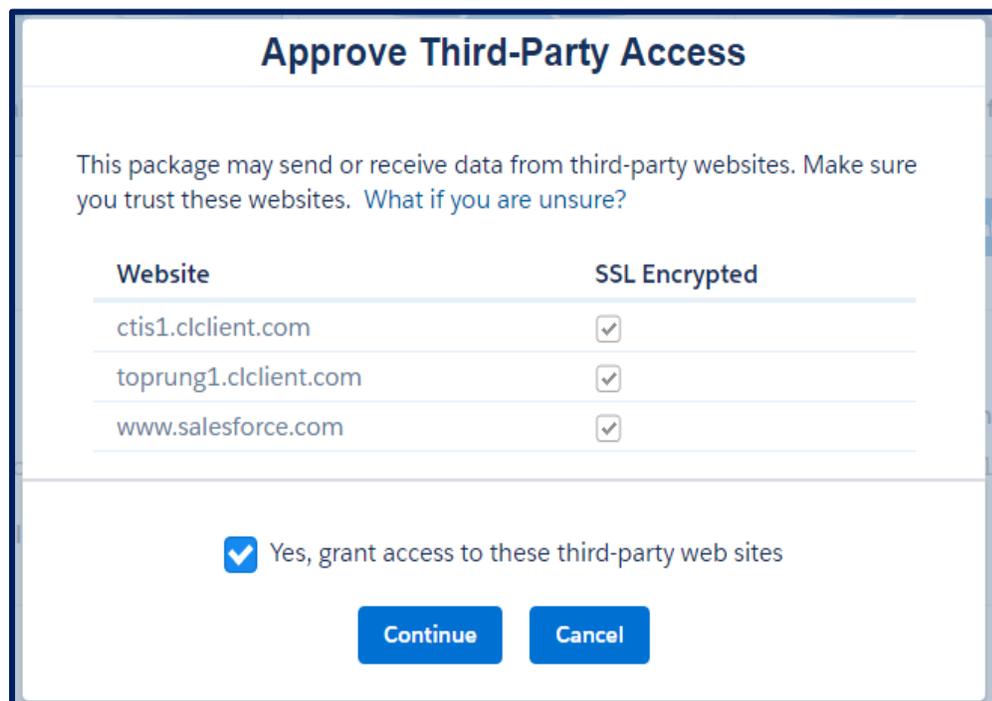
Install for Admins Only

Install for All Users

Install for Specific Profiles...

**Install** **Cancel**

2. Next, Approve Third-Party Access.



**Approve Third-Party Access**

This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?

Website	SSL Encrypted
ctis1.clclient.com	<input checked="" type="checkbox"/>
toprung1.clclient.com	<input checked="" type="checkbox"/>
www.salesforce.com	<input checked="" type="checkbox"/>

Yes, grant access to these third-party web sites

**Continue** **Cancel**

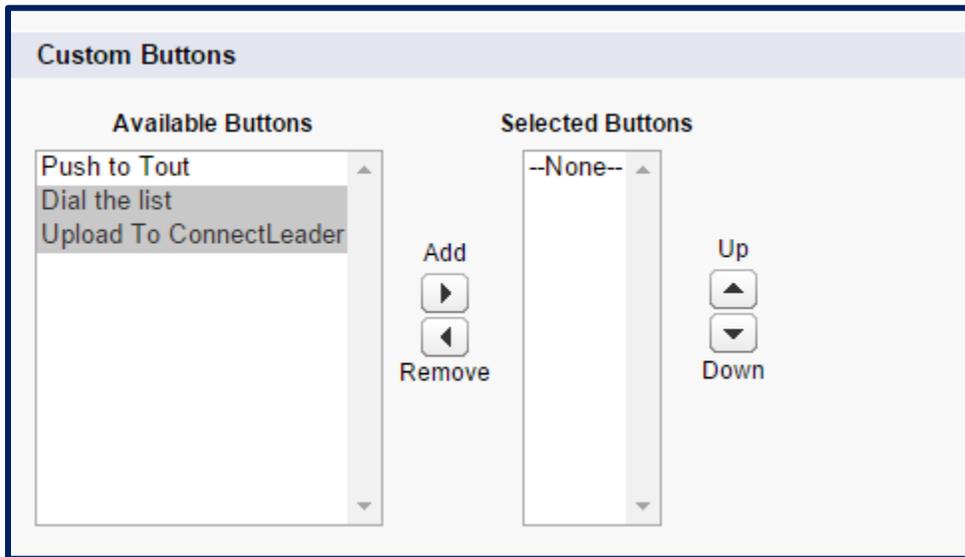
3. Once the “Continue” button is clicked, the installation of the package will continue and you should receive an “Installation Complete!” message.



You have now successfully installed the “ConnectLeader for Salesforce” App.

## How to Uninstall ConnectLeader for Salesforce App

**Step 1:** Go to Setup → Customize (Under App Setup) → Leads → Search Layouts → Click Edit next to “Leads List View” → Choose the “Upload to ConnectLeader” and “Dial the List (If applicable)” from Selected Buttons, click Remove and then click save. Repeat the same for Contacts.



**Step 2:** Go to Setup → Manage Users → Permission Sets → ConnectLeader Field Permissions → Manage Assignments → Click all users and remove them → Click Save and then click Done.

**Step 3:** Go to Setup → Installed Packages (under App Setup) → Click uninstall next to “ConnectLeader for Salesforce” → Scroll down the page → Choose “Do not save a copy of this package’s data after uninstall” and choose “Yes, I want to uninstall this package” and click “Uninstall”.

