

INSTALLING CONTACT LEAD MERGE

Installing Contact Lead Merge is simple and it works like any other application that you may have installed from AppExchange.

Installing the app

To install this app just go to the app available in appexchange and click on the “Get It Now” and “LogIn” using your credentials.

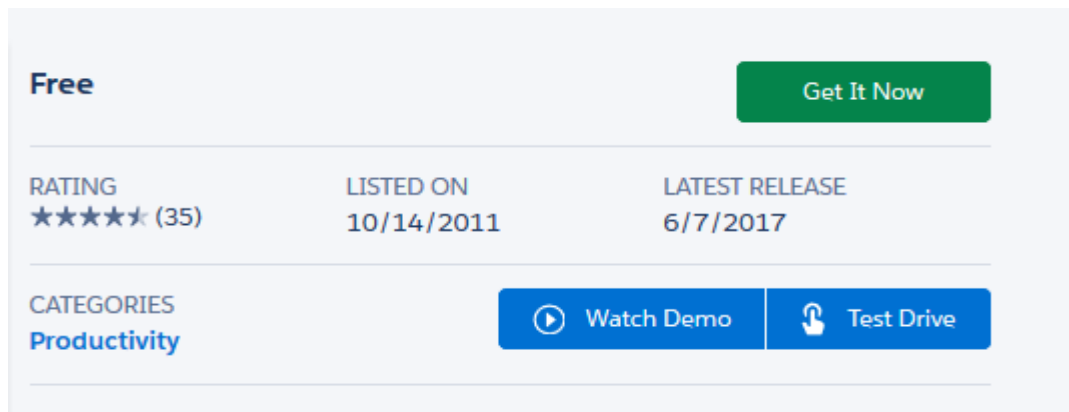


Figure 1: downloading Contact Lead Merge

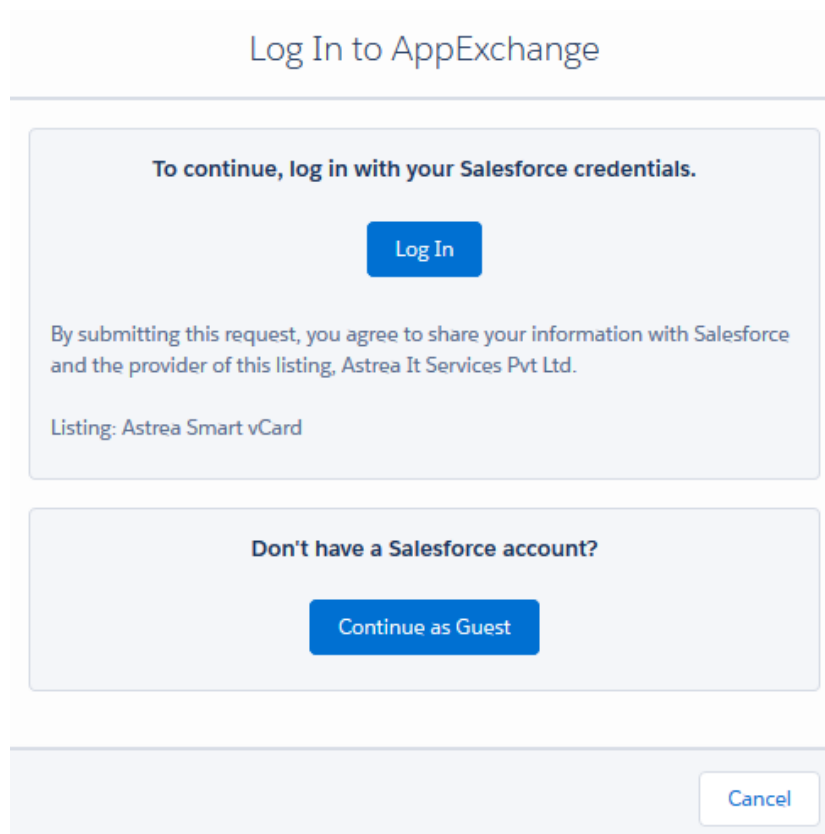


Figure 2: Choose one option before installation

Sign In

Sign in using your Salesforce credentials.

How would you like to continue?

After signing in to the org and again clicking on “Get It Now” button, you will be shown a page about where you plan to install it in either production or in the sandbox .

Where do you want to install this package?

Before you install in a production org, we suggest testing in a sandbox.

Install in a Production Environment
Install where you or your users work, including developer orgs.

Install in a Sandbox
Test in a copy of a production org.

Cancel

Figure 3: where to install?

Agree to Terms & Confirm the Installation

You will be shown a confirmation page about your profile details and what you are installing. Check the box to agree to the terms and click “Confirm and Install”.

Here are the details we'll share from your profile

*** First Name** Shobhit *** Company** Astrea IT Services

*** Last Name** Sharma *** Country** India

*** Job Title** Software Developer **State/Province**

*** Email** [Redacted]

Phone

*** ☒ I have read and agree to the terms and conditions.**

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

☐ Allow the provider to contact me by email, phone, or SMS about other products or services I might like

Cancel Confirm and Install

Figure 4: Terms And Conditions

SETUP OF ASTREA CONTACT LEAD MERGE

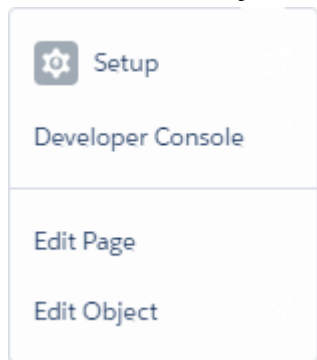
Once the package is installed, you will just need to add the required quick action to any account or lead object page as follows:

Step 1:-

Go to any object record and click on  icon.

Step 2:-

Click on “Edit Object” option.

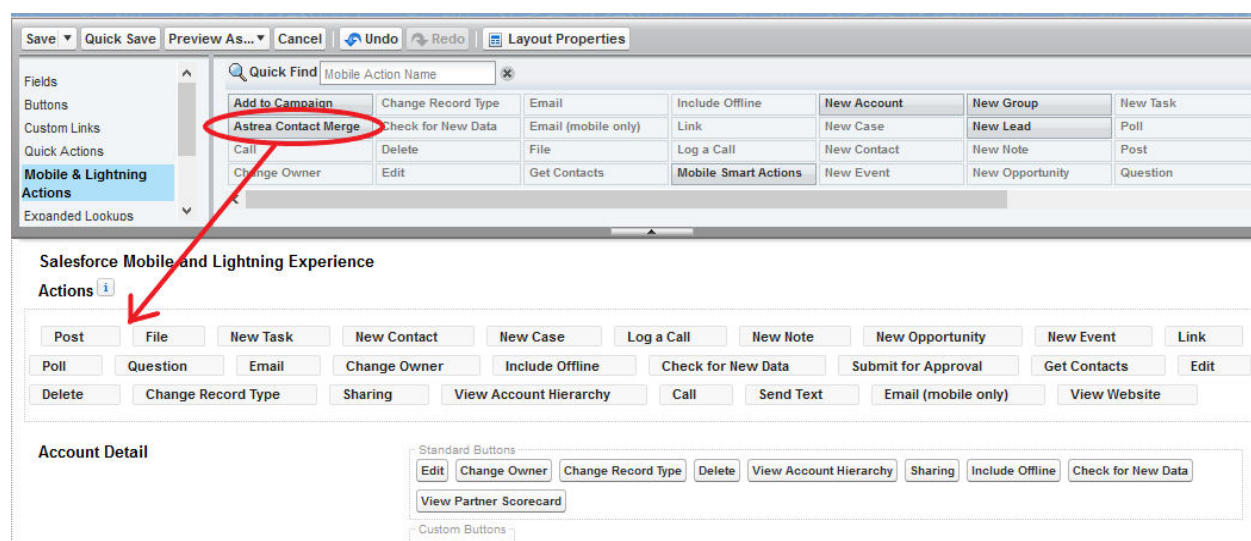


Step 3:-

Choose Page Layout option and select “Account Layout” in case of Account record and “Lead Layout” in case of Lead Layout.

Step4:-

Then Select “Mobile & Lightning Action”. Then Click On save button After All this your quick action will be available in drop down.



Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Mobile Action Name

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Astrea Lead Merge	Change Record Type	Delete	File	Mobile Smart Actions	New Event	New Opportunity
Astrea Lead Merge	Check for New Data	Edit	jjjjj	New Account	New Group	New Task
Call	Clone	Email	Link	New Case	New Lead	Poll
Change Owner	Convert	Email (mobile only)	Log a Call	New Contact	New Note	Post

Salesforce Mobile and Lightning Experience

Actions

Post	File	New Task	Log a Call	New Case	New Note	New Event	Link	Poll	Question	Email
Submit for Approval	Clone	Check for New Data	Delete	Sharing	Change Record Type	Edit	Change Owner			
Convert	Call	Send Text	Email (mobile only)	Astrea Lead Merge						