

Data Axle Genie for Salesforce - Install and Configuration

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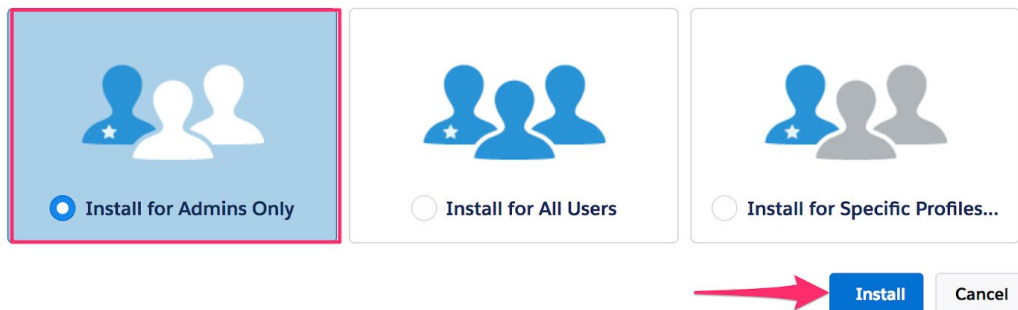
Introduction

The purpose of this documentation is to take you through the installation and configuration of the Data Axle Genie Prospector app for Salesforce. Once you install the Data Axle Genie Prospector package, you will need to assign Permission Sets, run the Data Axle Genie Setup app, and edit page layouts. Since you may use custom fields in the Field Mapping sections of the Data Axle Genie Setup app, we will show how to create custom fields and also how to Map Lead Fields for Lead conversion so that data on your custom Lead fields is carried over to the Contact record on Lead conversion. Next, there is a Duplicate Management sample showing you ways inside of Salesforce to prevent duplicate Salesforce records.

Install the Data Axle Genie Package

To install the **Data Axle Genie for Salesforce App**, you will need to have the package URL provided to you by Data Axle. Follow the steps in this section to install the package into your Salesforce org. The other means of installation is through the Salesforce AppExchange.

- Copy and paste the package link into your browser
- Enter your credentials to login to your Salesforce org
- Select “**Install for Admins Only**” > Click **Install**

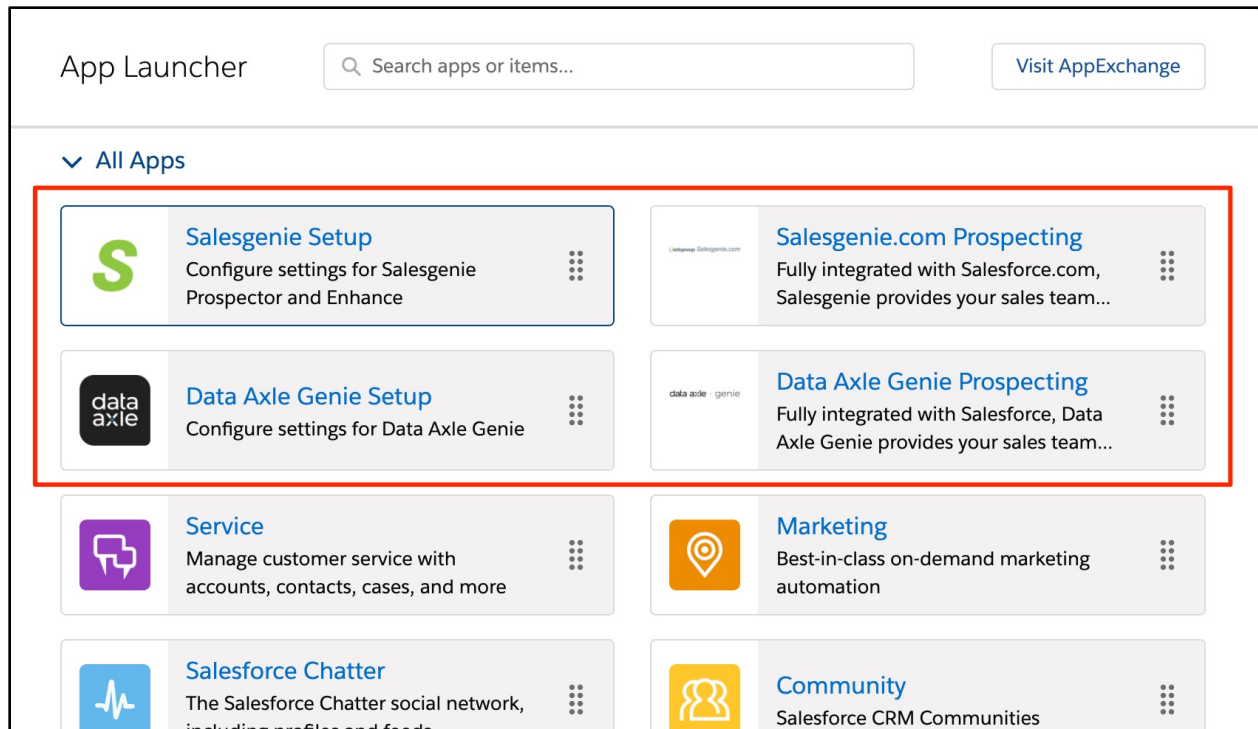


- Check “**Yes, grant access to these third-party web sites**” > Click **Continue**
- Click **Done** when installation is complete

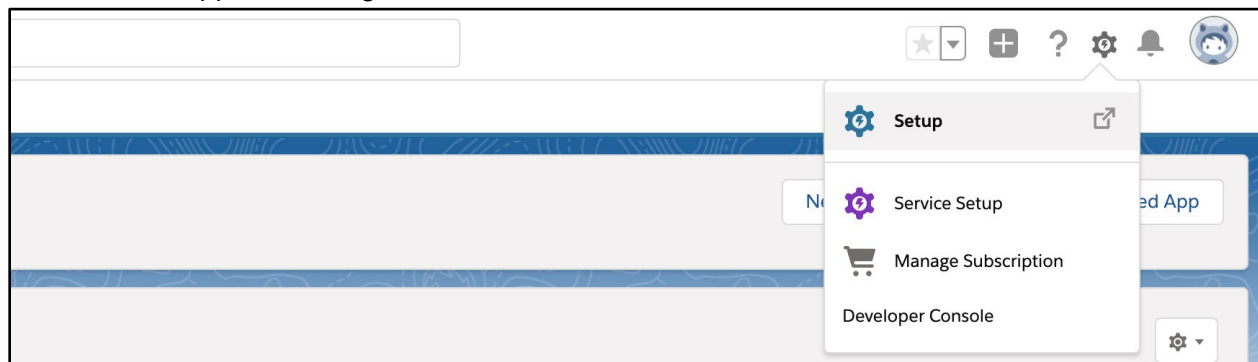
Disable Visibility for Deprecated Lightning/Classic Apps

The Data Axle Genie app for Salesforce was rebranded and new apps with updated branding, names, and description were created. To reduce confusion, removing visibility for the deprecated apps is recommended.

This is what the Lightning App Launcher will look like after the initial install/upgrade:



- To begin this process, Navigate to the **Apps Manager** in **Salesforce Setup** to view the list of Apps in the org



- Locate the **Salesgenie Setup** and **Salesgenie.com Prospecting** apps
 - These are the apps that have been deprecated

Setup Home Object Manager

App Manager

Apps

App Manager

Didn't find what you're looking for? Try using Global Search.

Lightning Experience App Manager

22 items • Sorted by App Name • Filtered by all appmenuitems - TabSet Type

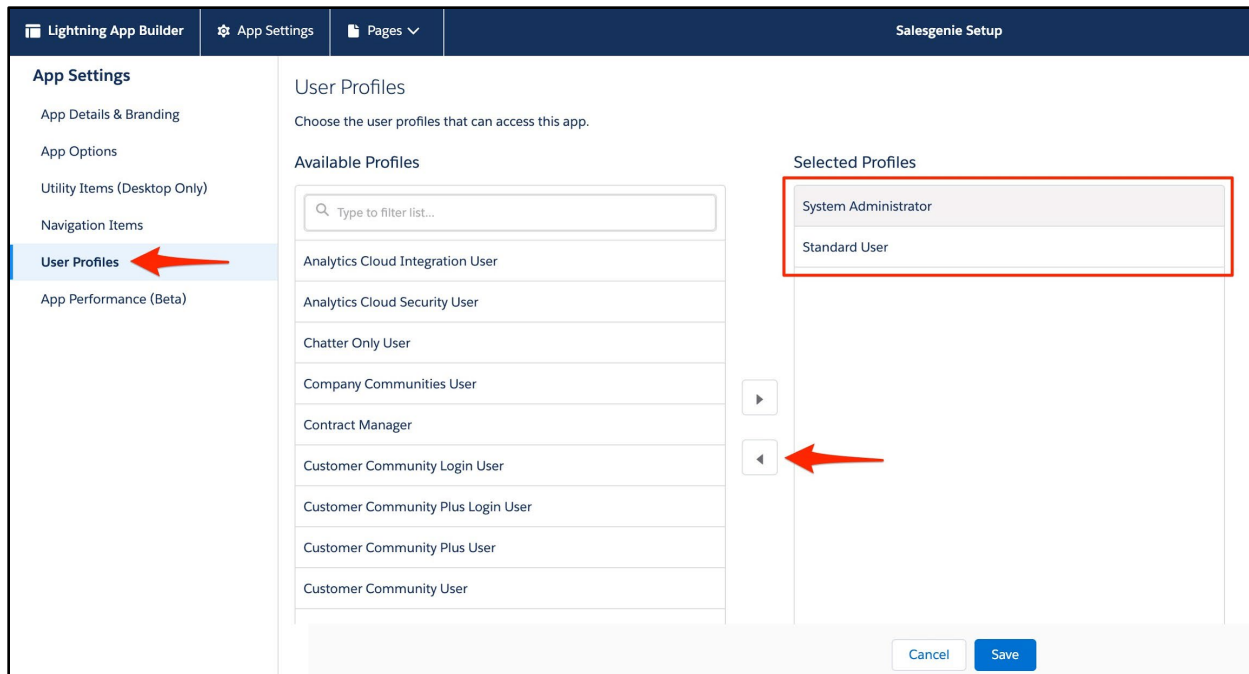
	App Name ↑	Developer Name	Description
8	Data Axle Genie Prospecti...	Data_Axle_Genie_Pros...	Fully integrated with Salesforce, Data Axle Genie provides your sales tea
9	Data Axle Genie Setup	Data_Axle_Genie_Setup	Configure settings for Data Axle Genie
10	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience
11	Marketing	Marketing	Best-in-class on-demand marketing automation
12	Platform	Platform	The fundamental Lightning Platform
13	Sales	Sales	The world's most popular sales force automation (SFA) solution
14	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and mo
15	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on on
16	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds
17	Salesforce CMS	SalesforceCMS	Manage content and media for all of your sites.
18	Salesgenie Setup	Salesgenie_Setup	Configure settings for Salesgenie Prospector and Enhance
19	Salesgenie.com Prospecting	Salesgenie_com	Fully integrated with Salesforce.com, Salesgenie provides your sales tea

Deprecated Apps

- Scroll to the right side of the page and look for the drop-down button for **Salesgenie Setup**
- Click it and select **Edit**

9/14/2020, 7:34 A...	Lightning (Managed)	✓	
prospe...	9/14/2020, 7:34 A...	Classic (Managed)	Edit
9/8/2020, 8:10 AM	Classic		

- Once in the menu for editing the app, click on **User Profiles** on the left side menu under **App Settings**
- Remove the **Selected Profiles** from the right column by clicking on each one and then on the bottom arrow, moving them back into the list of **Available Profiles**
- Once finished, click **Save**
 - With the list of Selected Profiles empty, that means there are no users which will see the deprecated Apps in their App launcher



- Return to the **App Manager** and go to **Salesgenie.com Prospecting**
- Scroll to the right and click on the dropdown
 - Select **Edit**

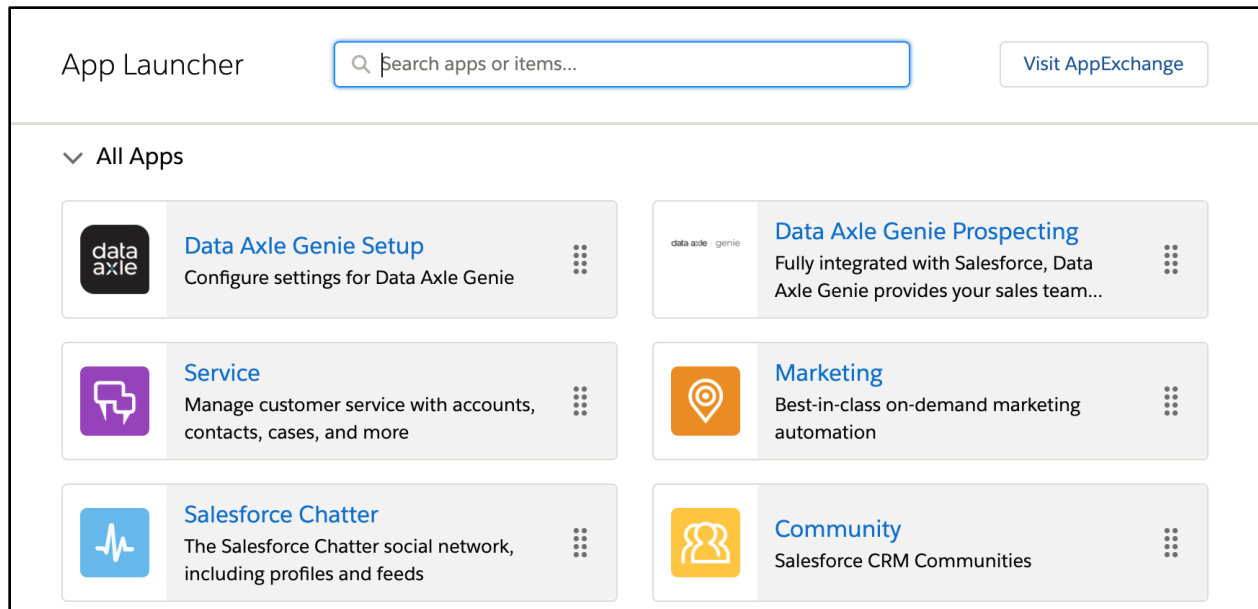
nts into their prospe...	9/14/2020, 7:34 A...	Classic (Managed)	✓	▼
	9/8/2020, 8:10 AM	Classic	Edit	
creen	9/8/2020, 8:10 AM	Lightning	Delete	
blished sites.	9/8/2020, 8:10 AM	Classic		

- Once in the settings page for the **Salesgenie Prospecting App**, scroll down to the bottom to the **Assign to Profiles** section and uncheck any/all boxes

Assign to Profiles			
Profile	☐ Visible	☐ Default	
Analytics Cloud Integration User	☐	☐	
Analytics Cloud Security User	☐	☐	
Chatter Only User	☐	☐	
Company Communities User	☐	☐	
Contract Manager	☐	☐	
Read Only	☐	☐	
Solution Manager	☐	☐	
Standard Platform User	☐	☐	
Standard User	☐	☐	
System Administrator	☒	☐	

Save Save & New Cancel

- Once finished, the App Launcher should look like this with the **Salesgenie Setup** and **Salesgenie.com Prospecting** apps no longer appearing:



- This will prevent confusion among users of the app since they will only see the updated **Data Axle Genie Apps**

Assign Permission Sets

You may return to this step later to assign permission sets to your users when you are ready to start letting them use the app.

There are three permission sets included in this package: Data Axle Genie Setup User, Data Axle Genie Prospector User, and Data Axle Genie Enhance User. **Data Axle Genie Enhance has been deprecated, so only users who have been grandfathered in from previous versions of the app will have/need access to it via the permission set.**

The Data Axle Genie Prospector perm set will be assigned to the users who need access to the Data Axle Genie Prospecting tab where they will be able to build lists to import new Leads.

The Data Axle Genie Setup User will be assigned to the user who will be running the Data Axle Genie Setup app so that they can configure Prospector.

Brief note on using custom fields (not a required step, and this doesn't pertain to custom fields that were part of package):

- If you are using custom fields on Contact, Lead or Account that you have created in your org and will be using in the mapping sections of Data Axle Genie Setup, you will need to make sure your users have Read and Edit field permissions.
 - Search "**Permission Sets**" in the Quick Find
 - If using custom fields for Prospector (Lead):

- Go to **Object Settings** > Select **Lead** > Click **Edit** > In the Field Permission section, give **Read** and **Edit** access to your custom fields

Repeat these steps for each of permission set in order to assign them to your Salesforce users:

- Navigate to the Quick Find and search “**Permission Sets**” > Click the permission set

Q permission Set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

Filter: All | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
☐ Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
☐ Clone	Customer Experience Analytics Admin	Create and customize Customer Experience Analytics apps.	Customer Experience Analytics Apps
☐ Clone	Customer Experience Analytics User	View Customer Experience Analytics apps.	Customer Experience Analytics Apps
☐ Clone	Data Axle Genie Enhance User	Use Data Axle Genie Enhance	
☐ Clone	Data Axle Genie Prospector User	Use Data Axle Genie Prospector	
☐ Clone	Data Axle Genie Setup User	Configure settings for Data Axle Genie	
☐ Clone	Einstein Analytics Platform Admin	Create and customize Einstein Analytics apps, dashboards.	Analytics Platform

- Click **Manage Assignments**

Q permission Set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Permission Set

Data Axle Genie Prospector User

Find Settings... | Clone | Manage Assignments

Permission Set Overview

Description	Use Data Axle Genie Prospector
License	
Session Activation Required	☐
Last Modified By	Kai Ming Leung, 9/9/2020, 12:20 PM

- Click **Add Assignments**

Q permission Set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for?
Try using Global Search.

SETUP
Permission Sets

Assigned Users
Data Axle Genie Prospector User
« Back to: Permission Set

A | B | C | D | E | F | G | H | I | J | K | L

Add Assignments Remove Assignments

Full Name ↑	Alias	Username	Last Login	Role	Active
No records to display.					

Add Assignments Remove Assignments

- Select the Users > Click **Assign**

Assign Users
All Users

View: All Users Edit Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Assign Cancel

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
☐ Edit	Chatter Expert	Chatter	chatty.00df20000019hfea0.6lqenzinmo6@chatter.salesforce.com			✓	Chatter Free User	
☐ Edit	Integration_CPQ	cpqusr	cpqintegration@00df20000019hfea0.ext			✓	CPQ Integration User	
☒ Edit	Thornton, Justin	JThor	justin+infogrouphandoff@appiphony.com	7/12/2018 7:20 PM		✓	System Administrator	

- Click **Done**

Q permission Set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for?
Try using Global Search.

SETUP
Permission Sets

Assignment Summary
Data Axle Genie Prospector User

✓ Permission set Data Axle Genie Prospector User has been assigned to 1 user.

Done

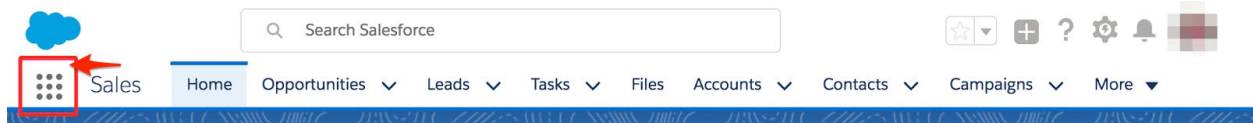
Full Name	Username	User License
Kai Ming Leung	kai+infoproductesting@appiphony.com	Salesforce

Done

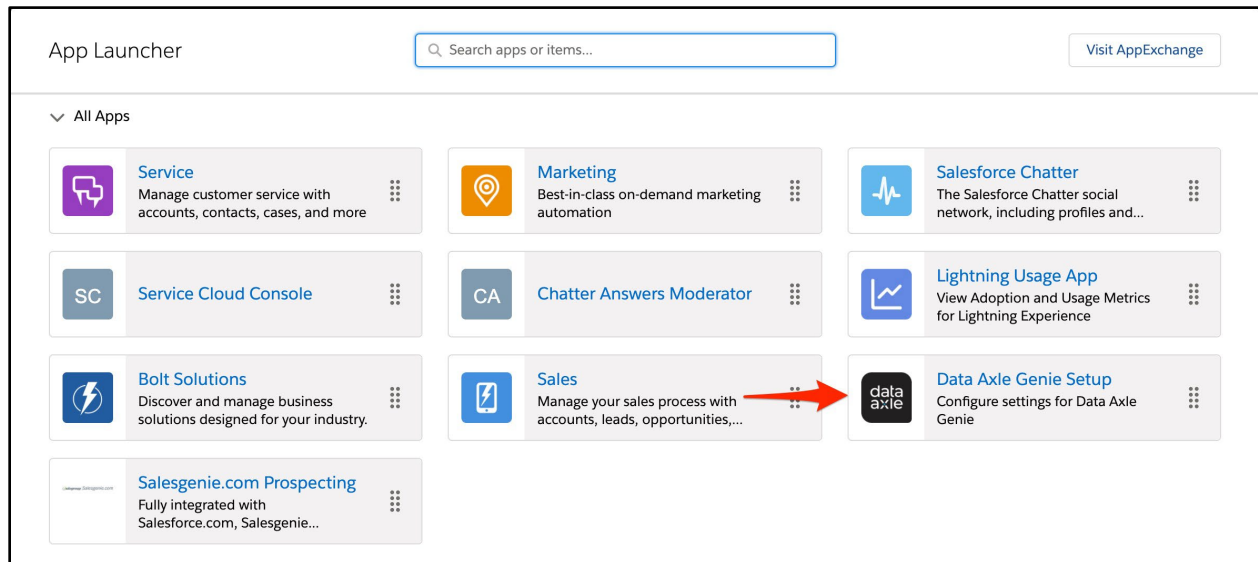
- Repeat steps to assign the other two permission sets to their respective users

Run the Data Axle Genie Setup App

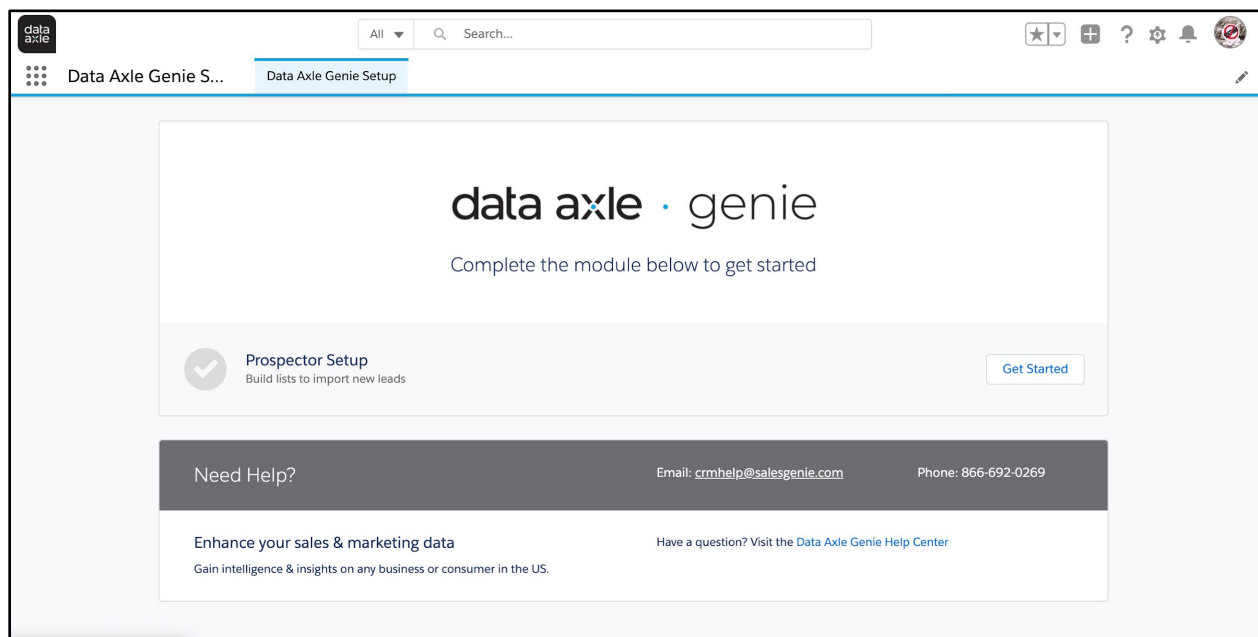
- Click the **App Launcher**



- Select **Data Axle Genie Setup**



- To configure settings for Prospector so that your users can build lists to import new Leads, click **Get Started**



- The first part of Prospector Setup is System Connections where you will need to provide Email and Password to establish connection with Data Axle Genie. If you need to create a new account, click **Create New Account**

The screenshot shows the 'Prospector Setup' interface. At the top, there's a progress bar with one active step. Below the title 'Prospector Setup', the section is titled 'System Connections'. A message states: 'Please provide your Data Axle Genie account credentials to establish a connection. If you do not currently have a Data Axle Genie account, you can create one using the provided form.' The form contains two input fields: '* Email' and '* Password'. Below these fields, there is a link that says 'Don't have a Data Axle Genie account?' followed by a button labeled 'Create New Account'.

- Enter in **First Name, Last Name, Company Name, Phone, Email and Password** > Click **Submit**

This screenshot shows the same 'Prospector Setup' interface but with more form fields visible. The 'System Connections' section still has the same introductory message. The form now includes fields for '* First Name', '* Last Name', '* Company Name', '* Phone', '* Email', and '* Password'. At the bottom of the form, there are two buttons: 'Cancel' and 'Submit'.

- Once your account has been created, click **Next**
- The next step is Lead Field Mapping where you will determine how data coming from Data Axle Genie is mapped to Lead object fields in Salesforce > Click **Edit** to review default mappings and add additional mappings

Prospector Setup

Lead Field Mapping

Determine how data coming from Data Axle Genie is mapped to Lead object fields in Salesforce.

DATABASE	ACTIONS
Business	
Consumer	
New Movers	
Canada Business	
New Business	
Canada New Business	

- You will see a list of default mappings. You may also add and remove additional mappings, as well as use custom Salesforce fields that you create
 - *You should also be sure to add these fields onto your page layout*

Business

SALESFORCE FIELD	DATA AXLE GENIE FIELD	REMOVE
Annual Revenue	Sales Volume	
City	City	
Company	Company	
Country	Country	
Fax	Fax	
First Name	First Name	
Industry	Primary Line of Business	
Last Name	Last Name	
Employees	Number Of Employees	
Phone	Phone	

Cancel Save

- When finished, click **Save**

+ Add Mapping

Cancel Save

- Repeat this for each Database > Click **Next** when finished

Prospector Setup

Lead Field Mapping

Determine how data coming from Data Axle Genie is mapped to Lead object fields in Salesforce.

DATABASE	ACTIONS
Business	
Consumer	
New Movers	
Canada Business	
New Business	
Canada New Business	

Back Exit  Next

- Click **Finish**

Prospector Setup

You've completed Prospector Setup!



You can reconfigure your settings at any time in the Setup Assistant's home screen.

Back Exit  Finish

- With Setup complete, an Admin may return at any time to make changes to the field mappings as required.

Supplementary Configuration

Map Lead Fields for Lead Conversion

In the Field Mappings section of the Data Axle Genie Setup app, you will be able to use custom Salesforce fields in your mappings. However, keep in mind that when converting Leads to Contacts, you will need to map your custom Lead fields to the corresponding Contact fields in order to make sure your data transfers to the Contact upon Lead conversion.

Reference the Salesforce resource below for more information on mapping custom Lead fields for Lead conversion:

https://help.salesforce.com/articleView?id=customize_mapleads.htm&type=5

This section will show you an example of creating a custom field and then how to make sure that the data will get carried over from Lead to Contact on Lead conversion.

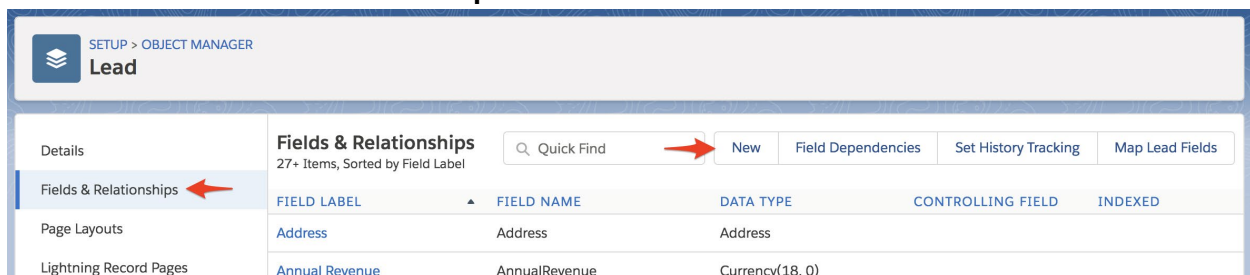
Create a custom field on Lead and Contact:

- Click the **Object Manager** > Select Lead



The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager' (highlighted with a red box). Below the navigation bar, the 'Object Manager' section is displayed with a search bar containing 'Lead'. A table lists objects, with 'Lead' selected and highlighted by a red arrow. The table has columns: LABEL, API NAME, DESCRIPTION, LAST MODIFIED, DEPLOYED, and CUSTOM.

- Select **Fields & Relationships** > Click **New**



The screenshot shows the 'Fields & Relationships' section for the 'Lead' object. The left sidebar has 'Fields & Relationships' selected and highlighted by a red arrow. The main area shows a table of fields with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists 'Address' and 'Annual Revenue' fields. A 'New' button is highlighted with a red arrow in the top right corner of the main area.

- Select the **Data Type** for your custom field > Click **Next**

SETUP > OBJECT MANAGER
Lead

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Object Limits
Record Types
Related Lookup Filters
Search Layouts

☐ Percent
☐ Phone
☐ Picklist
☐ Picklist (Multi-Select)
☒ Text
☐ Text Area
☐ Text Area (Long)
☐ Text Area (Rich)
☐ Text (Encrypted) ⓘ
☐ Time
☐ URL

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
 Allows users to enter any phone number. Automatically formats it as a phone number.
 Allows users to select a value from a list you define.
 Allows users to select multiple values from a list you define.
 Allows users to enter any combination of letters and numbers.
 Allows users to enter up to 255 characters on separate lines.
 Allows users to enter up to 131,072 characters on separate lines.
 Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
 Allows users to enter any combination of letters and numbers and store them in encrypted form.
 Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
 Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

- Enter a **Field Label** and any required details based on the Field Type
- Enter a **Field Name**
- Enter a **Description**
- Click **Next**

Lead
New Custom Field

Help for this Page ⓘ

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label [Field Label] ⓘ

Please enter the maximum length for a text field below.

Length 55

Field Name [Field Name] ⓘ

Description [Description]

Repeat the steps above to create a custom field on Contact. This field will be used when you Map Lead Fields in the next section.

Map Lead Fields:

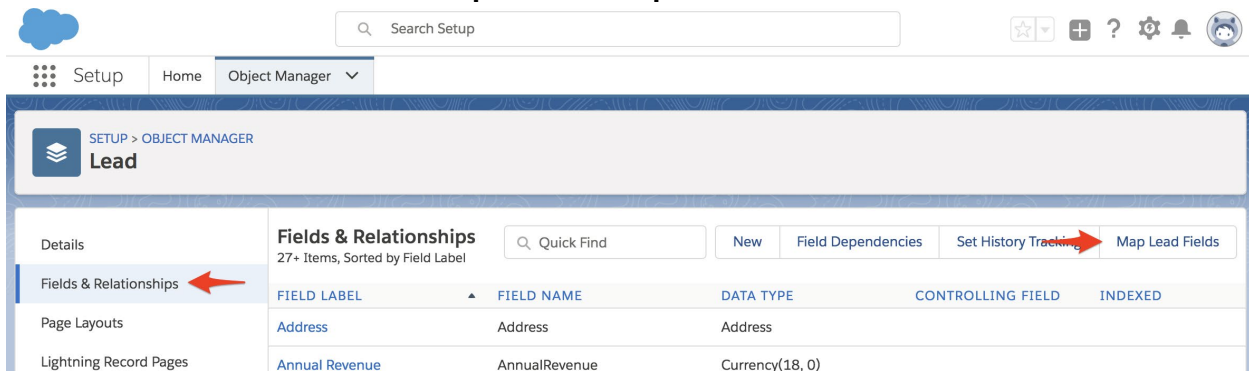
- Click the **Object Manager** > **Select Lead**



The screenshot shows the Salesforce Object Manager interface. The 'Object Manager' tab is selected in the top navigation bar. The 'Lead' object is listed in the table below. A red arrow points to the 'Lead' object.

LABEL	API NAME	DESCRIPTION	LAST MODIFIED	DEPLOYED	CUSTOM
Lead		Lead			

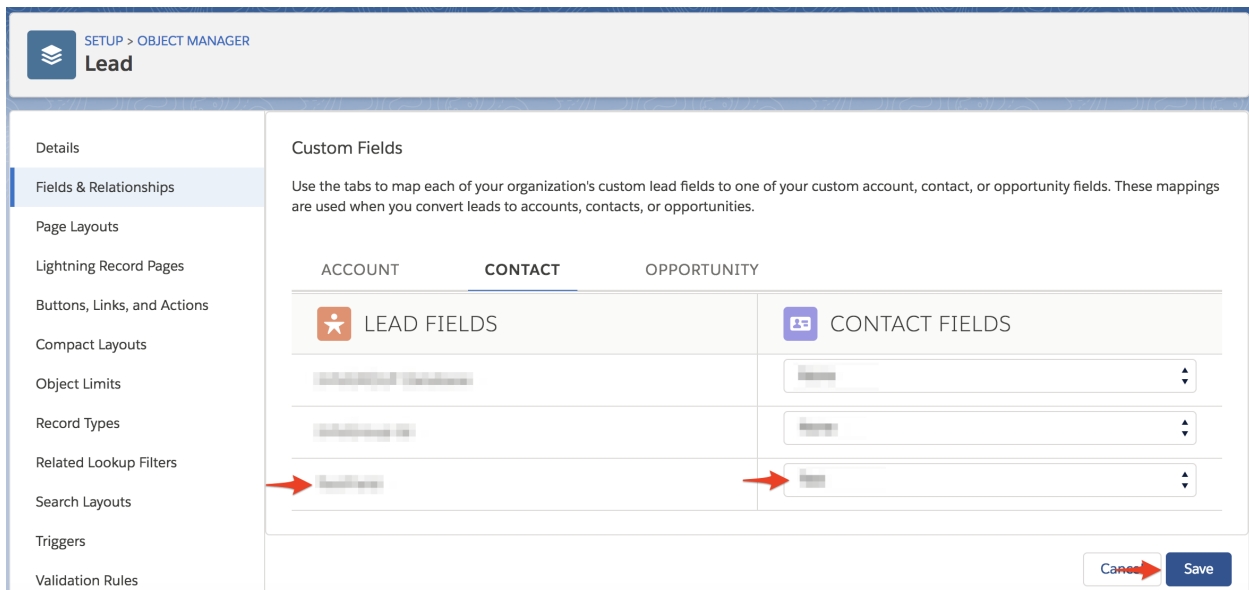
- Select **Fields & Relationships** > Click **Map Lead Fields**



The screenshot shows the 'Fields & Relationships' tab for the 'Lead' object. The 'Map Lead Fields' button is highlighted with a red arrow. The table below lists the fields for the 'Lead' object.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address	Address		
Annual Revenue	AnnualRevenue	Currency(18, 0)		

- Note your custom **Lead** field > Click the **Contact** tab
- Select your corresponding custom Contact field to map to your custom Lead field
- Click **Save**



The screenshot shows the 'Map Lead Fields' tab for the 'Lead' object. The 'Contact' tab is selected. The table below shows the mapping of custom lead fields to custom contact fields. A red arrow points to the 'Map Lead Fields' button.

ACCOUNT	CONTACT	OPPORTUNITY
LEAD FIELDS	CONTACT FIELDS	

Duplicate Management Sample

The purpose of the Duplicate Management sample is to show an example of how you may prevent duplicates in Salesforce by creating and activating a Matching Rule and Duplicate Rule. This sample will set up two rules that when the Salesforce User tries to create a Contact with a First Name, Last Name, and Mailing Street that matches another those fields on another Contact, they will be unable to do so. The fields specified above will be part of the Matching Rule, and are strictly for sample purposes as other fields may be used. This may also be created similarly for other objects as well. To take this a step further, we will use fuzzy matching on the Last Name.

For more information on Matching Rules reference this link:

https://help.salesforce.com/articleView?id=matching_rule_map_of_reference.htm&type=0

For more information on Duplicate Rules reference this link:

https://help.salesforce.com/articleView?id=duplicate_rules_map_of_reference.htm&type=0

Follow these steps to set up your Matching Rule:

- Navigate to the Quick Find and search “**Matching Rules**” under *Duplicate Management*
- Click **New Rule**

Setup Home Object Manager

Q Matching Rules

Data

Duplicate Management

Matching Rules

Didn't find what you're looking for? Try using Global Search.

SETUP Matching Rules

All Matching Rules [Help for this Page](#)

What Are Matching Rules? [\[Expand \]](#)

View: All Matching Rules [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New Rule

Action	Rule Name	Object	Status	Description	Last Modified Date	Last Modified By
Deactivate	Standard Account Matching Rule	Account	Active	Matching rule for account records. More info	6/28/2018	JThor
Deactivate	Standard Contact Matching Rule	Contact	Active	Matching rule for contact records. More info	6/28/2018	JThor

- Select **Object** - Contact
- Click **Next**

Matching Rule [Help for this Page](#)

New Matching Rule

Step 1 of 2

Step 1: Select object

[Next](#) [Cancel](#)

Select the object to which this matching rule applies.

Object Contact

- Configure your Matching Rule
 - Enter **Rule Name** - Custom Contact Matching Rule
 - **Unique Name** will automatically populate
 - Enter **Description** - Matches First Name, Last Name, Mailing Street

New Matching Rule
Contact Help for this Page ?

Step 2: Configure Matching Rule Step 2 of 2

Previous Save Cancel

Rule Details ! = Required Information

Object Contact
 Rule Name Custom Contact Matchii
 Unique Name Custom_Contact_Match i
 Description Matches First Name, Last Name, Mailing Street

- Specify your matching criteria
 - **Field** - First Name, **Matching Method** - Exact
 - **Field** - Last Name, **Matching Method** - Fuzzy: Last Name
 - **Field** - Mailing Street, **Matching Method** - Exact
- Click **Save**

Matching Criteria

Tell the rule which fields to compare and how.

Field	Matching Method i	Match Blank Fields i	
First Name	Exact	☐	AND
Last Name	Fuzzy: Last Name	☐	AND
Mailing Street	Exact	☐	AND
--None--	Exact	☐	AND
--None--	Exact	☐	

[Add Filter Logic...](#)

Previous **Save** Cancel

- Click **Activate**

Matching Rule Help for this Page ?

Custom Contact Matching Rule

Matching Rule Detail Edit Delete **Activate**

Object	Contact
Rule Name	Custom Contact Matching Rule
Unique Name	Custom_Contact_Matching_Rule
Description	Matches First Name, Last Name, Mailing Street
Matching Criteria	(Contact: FirstName EXACT MatchBlank = FALSE) AND (Contact: LastName FUZZY: LAST NAME MatchBlank = FALSE) AND (Contact: MailingStreet EXACT MatchBlank = FALSE)
Status	Inactive
Created By	User QA, 6/29/2018 4:01 PM
Modified By	User QA, 6/29/2018 4:01 PM

- Click **OK**

Matching Rule Activation



We're activating your matching rule. We'll send an email to justin@appiphony.com when the activation process is complete.



OK

Follow these steps to set up your Duplicate Rule:

- Navigate to the Quick Find and search “**Duplicate Rules**” also under *Duplicate Management*
- Click **New Rule** > Select **Contact**

Q Duplicate Rules

▼ Data

▼ Duplicate Management

→ Duplicate Rules

Didn't find what you're looking for?
Try using Global Search.

SETUP
Duplicate Rules

All Duplicate Rules [Help for this Page](#)

What Are Duplicate Rules? [\[Expand \]](#)

View: All Duplicate Rules

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Rule Name	Description	Rule	Active	Last Modified By	Last Modified Date
Standard Account Duplicate Rule	Duplicate rule for account records	Account Matching	✓	JThor	6/28/2018
Standard Contact Duplicate Rule	Duplicate rule for contact records	Contact Matching	✓	JThor	6/28/2018

New Rule ▼

- Account
- Contact
- Error Log
- Lead
- SG User Admin

- Enter **Rule Name** - Custom Contact Duplicate Rule
- Enter **Description** - Custom Contact Duplicate Rule
- Specify **Record-Level Security** - Enforce sharing rules
- Specify what happens when a user tries to save a duplicate record
 - **Action On Create** - Allow, Alert, Report
 - **Action On Edit** - Allow, Alert, Report

SETUP
Duplicate Rules

New Duplicate Rule
Contact [Help for this Page](#)

Duplicate Rule Edit [Save](#) [Save & New](#) [Cancel](#)

Rule Details | = Required Information

Rule Name Custom Contact Duplicate Rule

Description Custom Contact Duplicate Rule

Object Contact

Record-Level Security ☒ Enforce sharing rules ☐ Bypass sharing rules

Actions

Specify what happens when a user tries to save a duplicate record.

Action On Create Allow ☒ Alert ☒ Report

Action On Edit Allow ☒ Alert ☒ Report

Alert Text Use one of these records?

- Define how duplicate records are identified
 - **Compare Contact With** - Contacts
 - **Matching Rule** - Custom Contact Matching Rule
- Click **Save**

Matching Rules

Define how duplicate records are identified.

 **Compare Contacts With**

 **Matching Rule**

Matching Criteria
 (Contact: FirstName EXACT MatchBlank = FALSE) AND (Contact: LastName FUZZY:LAST NAME MatchBlank = FALSE) AND (Contact: MailingStreet EXACT MatchBlank = FALSE)

Field Mapping  Mapping Selected

Conditions

Optionally, specify the conditions a record must meet for the rule to run.

Field	Operator	Value	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

[Add Filter Logic...](#)



- Click **Activate**

Contact Duplicate Rule

Custom Contact Duplicate Rule

 [Help for this Page](#) 

Duplicate Rule Detail

