Data Axle Genie for Salesforce - Install and Configuration

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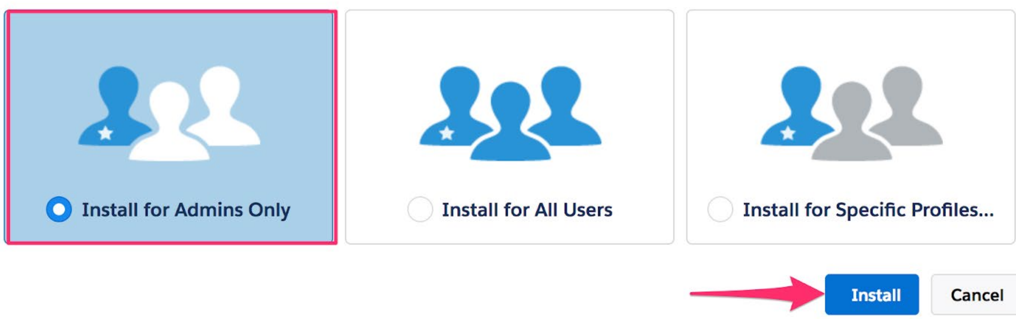
Introduction
The purpose of this documentation is to take you through the installation and configuration of the Data Axle Genie Prospector app for Salesforce. Once you install the Data Axle Genie Prospector package, you will need to assign Permission Sets, run the Data Axle Genie Setup app, and edit 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**

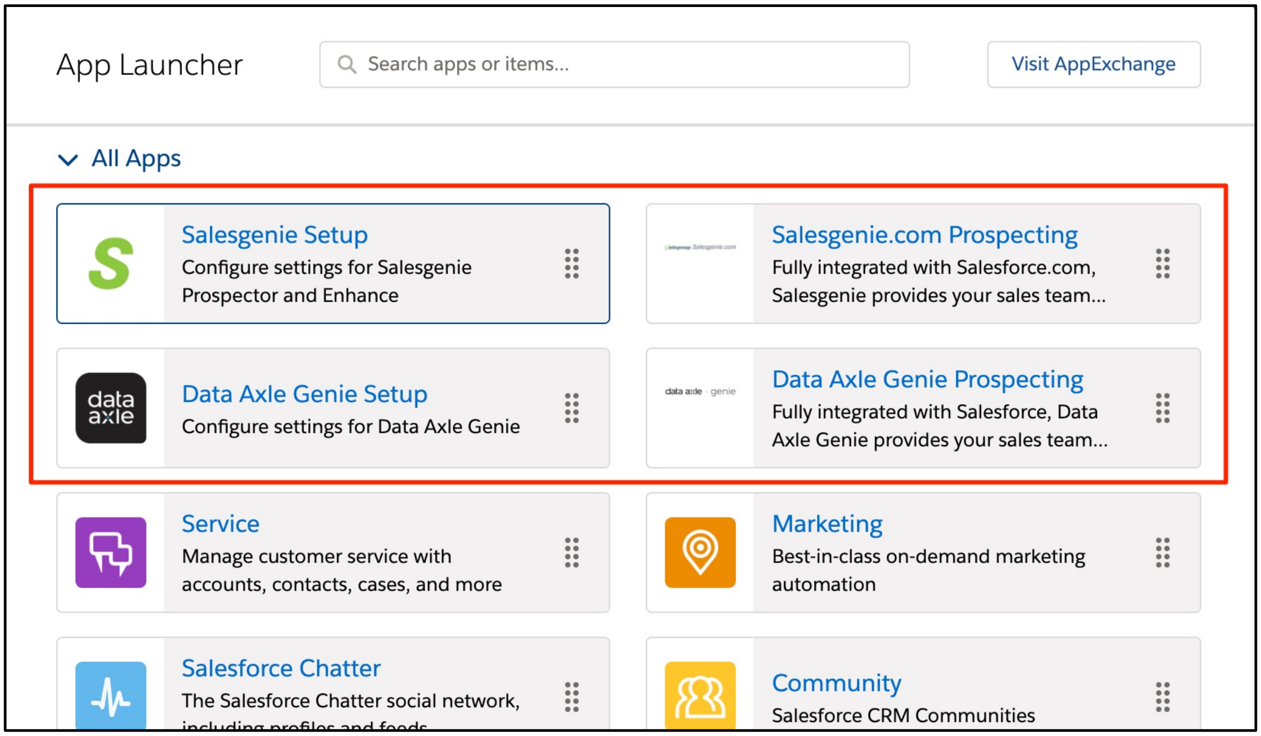


- Check "**Yes, grant access to these third-party web sites**" > Click **Continue**
- Click **Done** when installation is complete

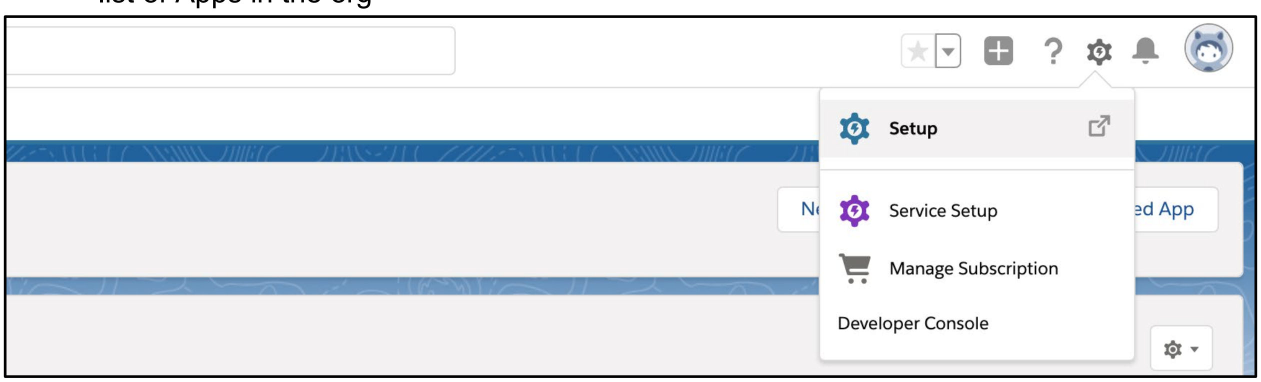
Disable Visibility for Deprecated Lightning/Classic Apps

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.

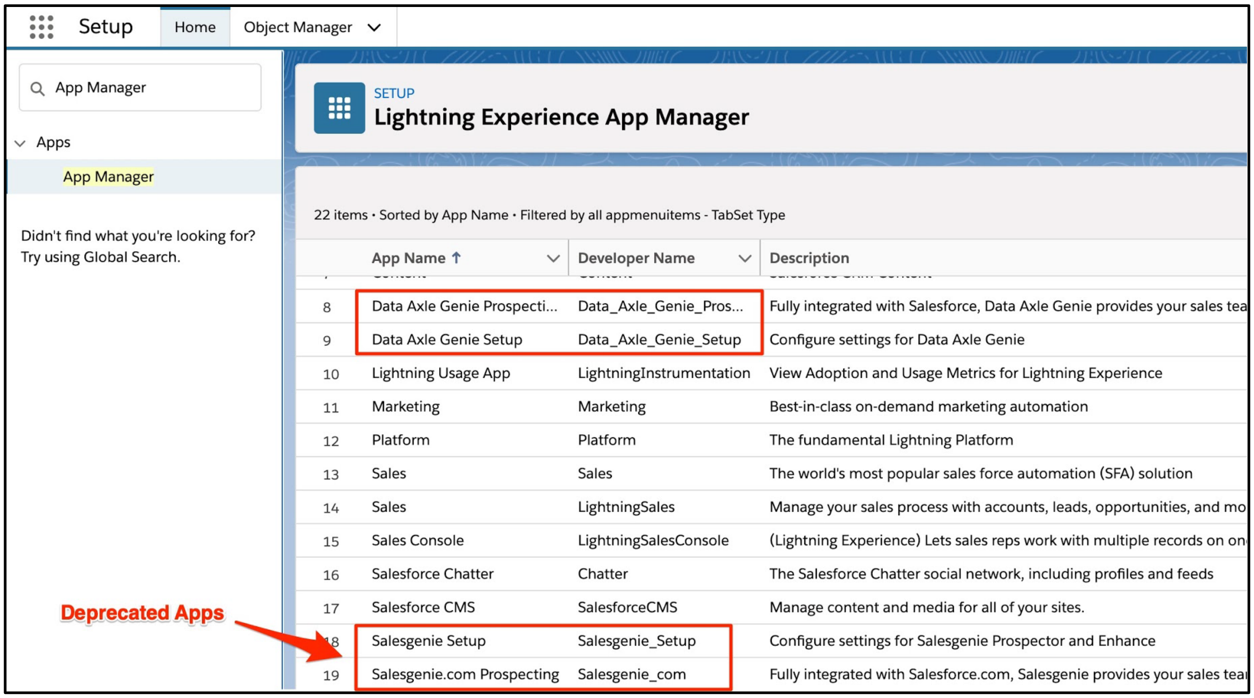
This is what the Lightning App Launcher will look like after the initial install/upgrade:



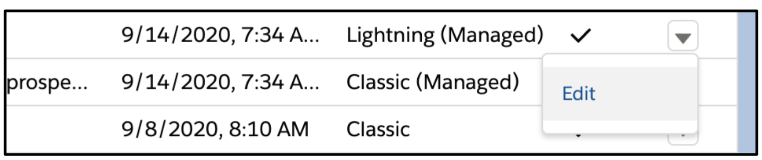
- To begin this process, Navigate to the **Apps Manager** in **Salesforce Setup** to view the list of Apps in the org



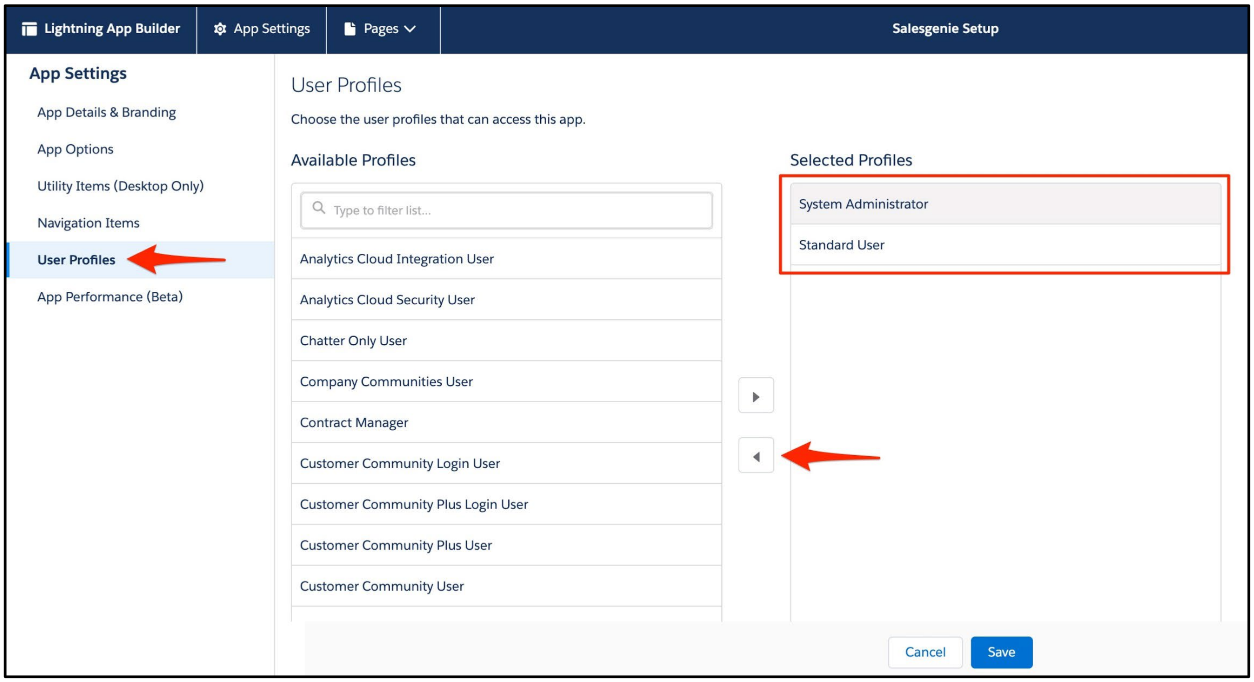
- Locate the **Salesgenie Setup** and **Salesgenie.com Prospecting** apps
  - These are the apps that have been deprecated



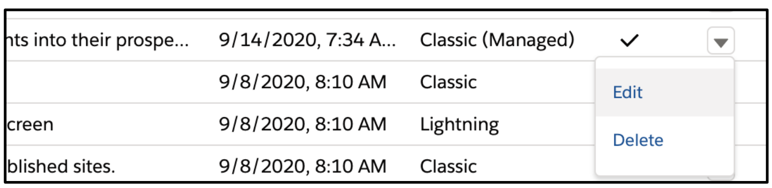
- Scroll to the right side of the page and look for the drop-down button for **Salesgenie Setup**
- Click it and select **Edit**



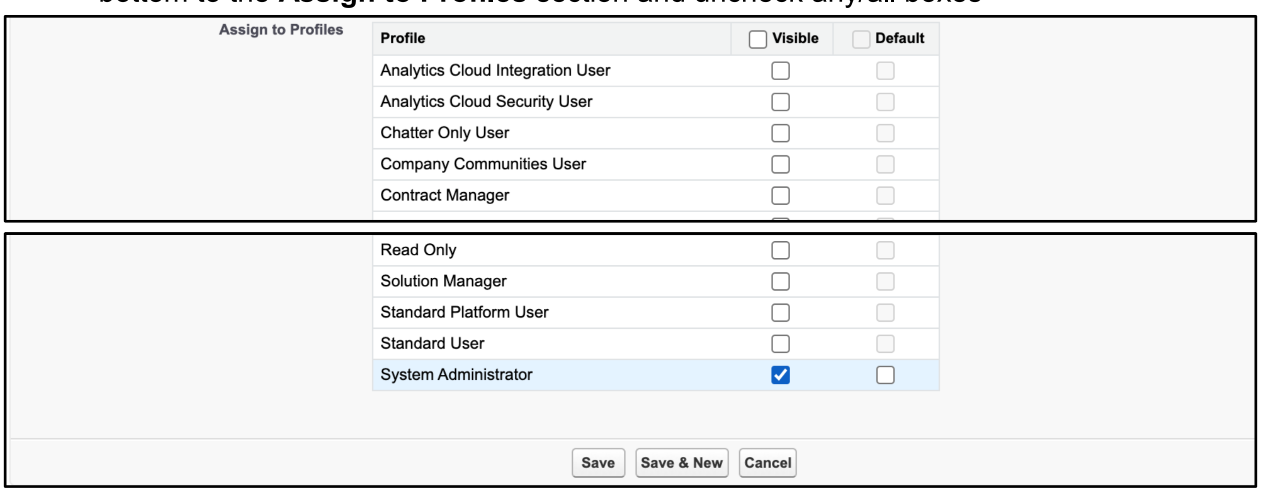
- Once in the menu for editing the app, click on **User Profiles** on the left side menu under **App Settings**
- Remove the **Selected Profiles** from the right column by clicking on each one and then on the bottom arrow, moving them back into the list of **Available Profiles**
- Once finished, click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



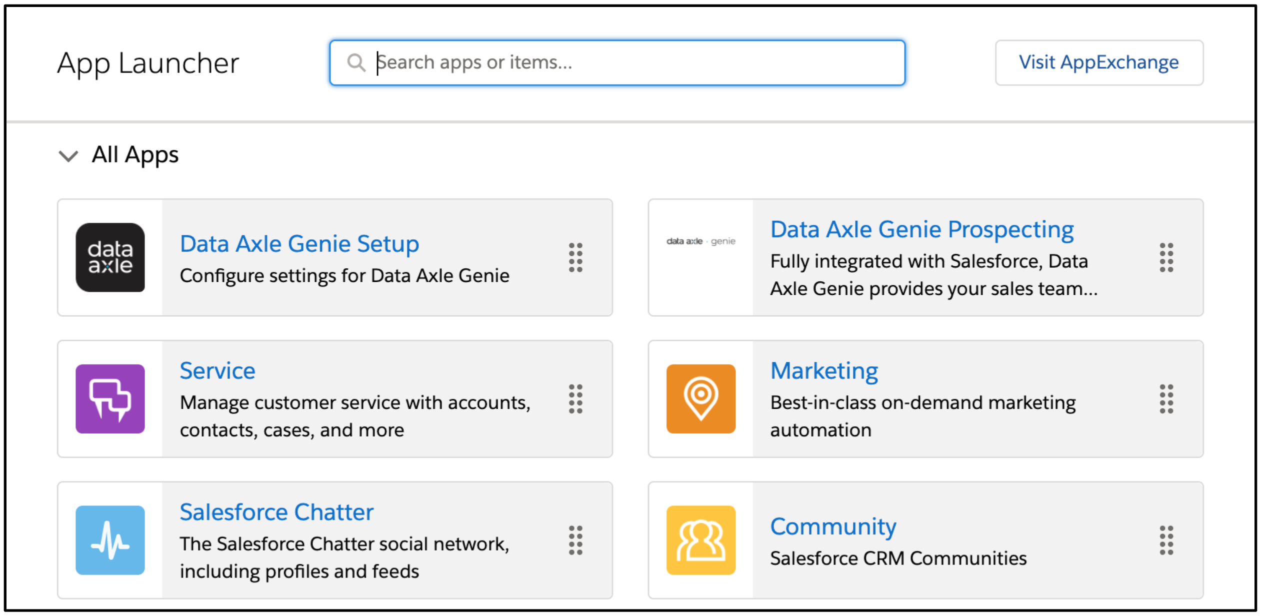
- Return to the **App Manager** and go to **Salesgenie.com Prospecting**
- Scroll to the right and click on the dropdown
    - Select **Edit**



- 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



- 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.

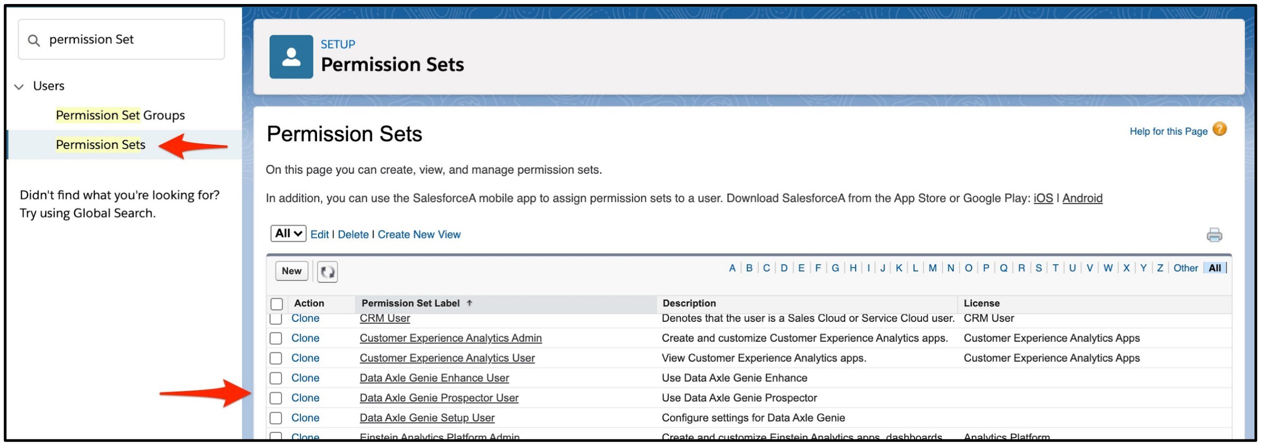
Brief note on using custom fields (not a required step, and this doesn't pertain to custom fields that were part of package):

- 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):

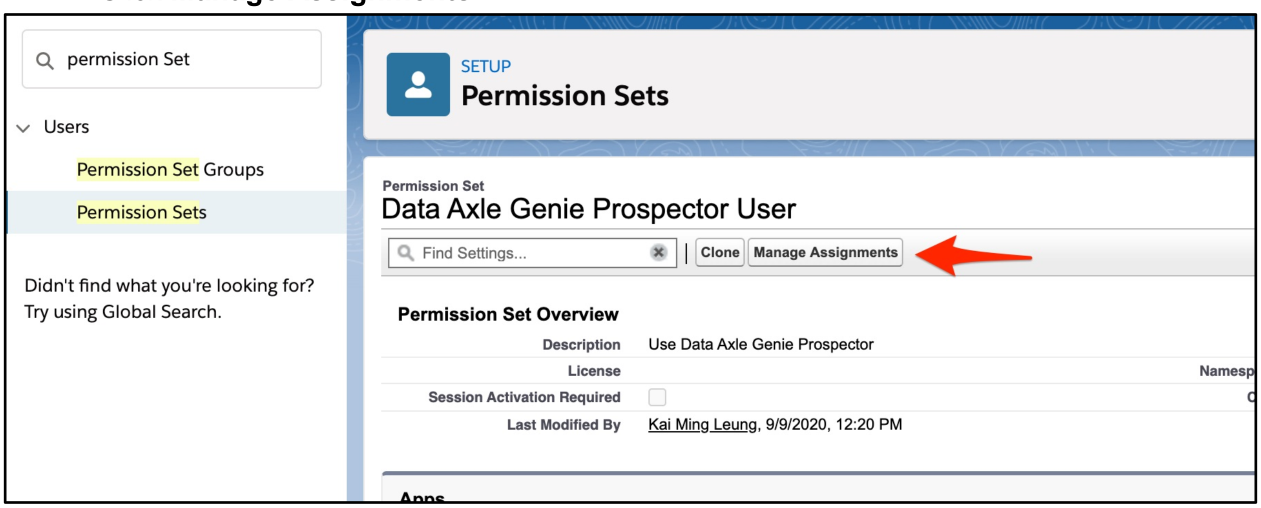
- Go to **Object Settings** > Select **Lead** > Click **Edit** > In the Field Permission section, give **Read** and **Edit** access to your custom fields

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

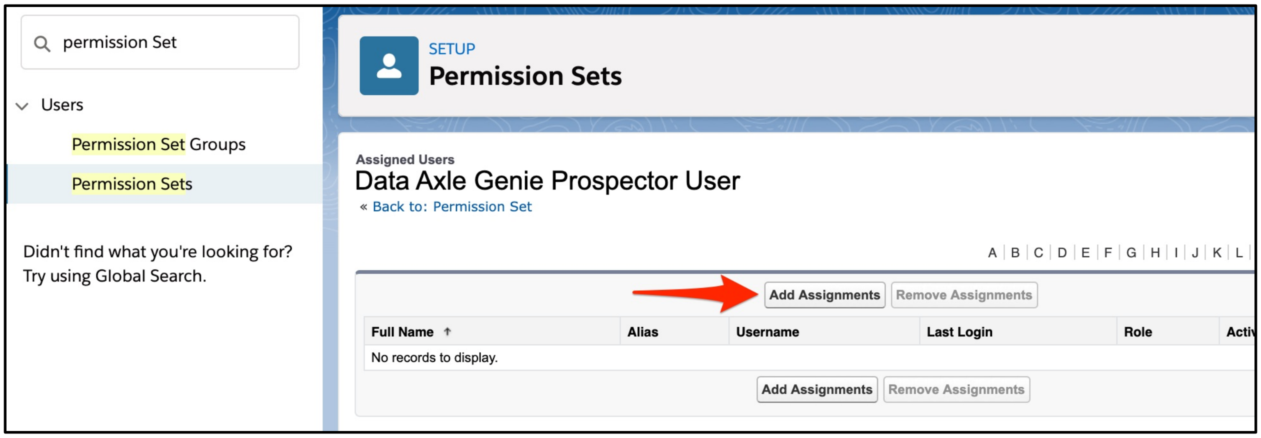
- Navigate to the Quick Find and search “**Permission Sets**” > Click the permission set



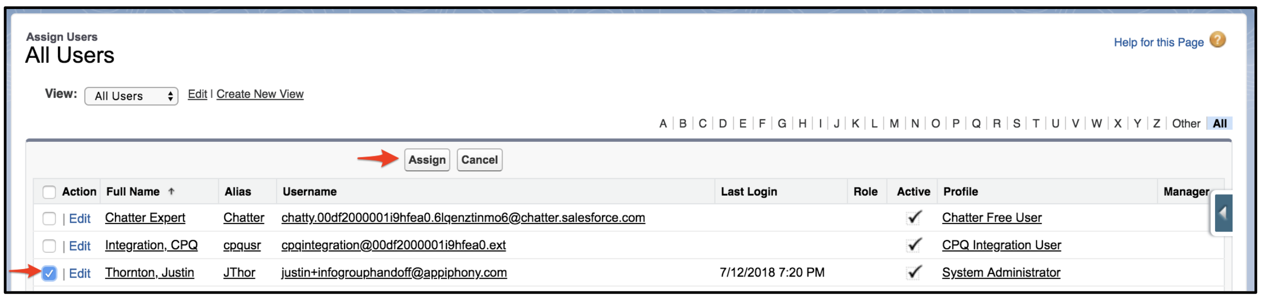
- Click **Manage Assignments**



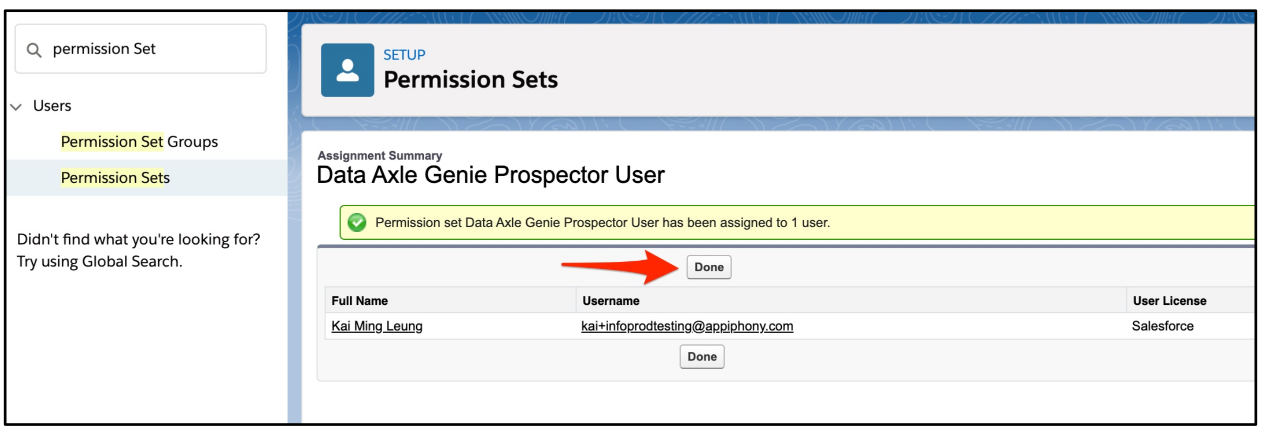
- Click **Add Assignments**



- Select the Users > Click **Assign**



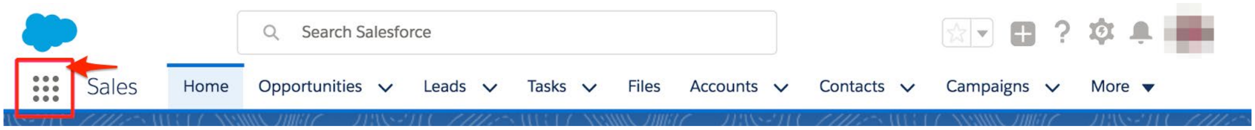
- Click **Done**



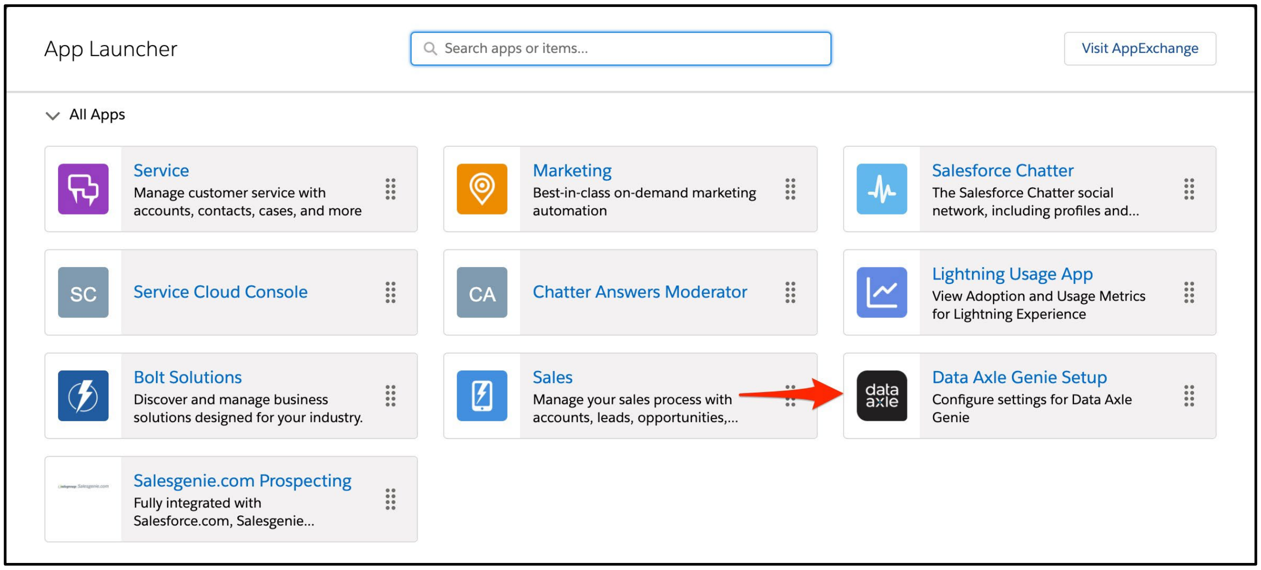
- Repeat steps to assign the other two permission sets to their respective users

Run the Data Axle Genie Setup App

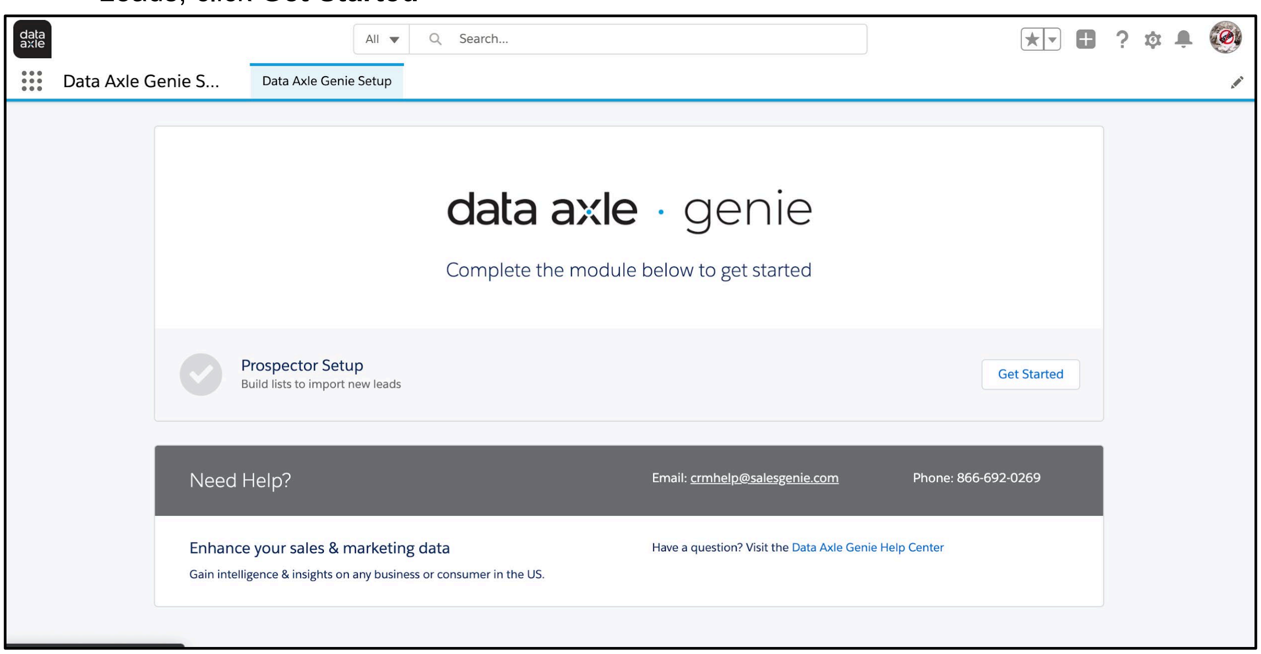
- Click the **App Launcher**



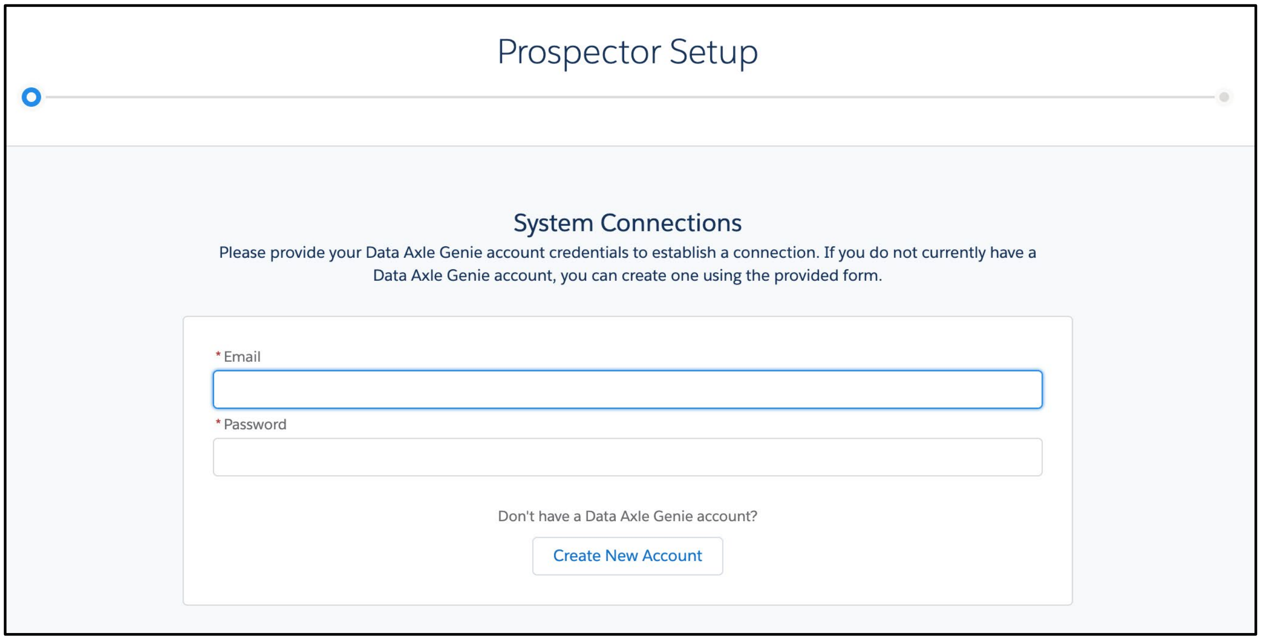
- Select **Data Axle Genie Setup**



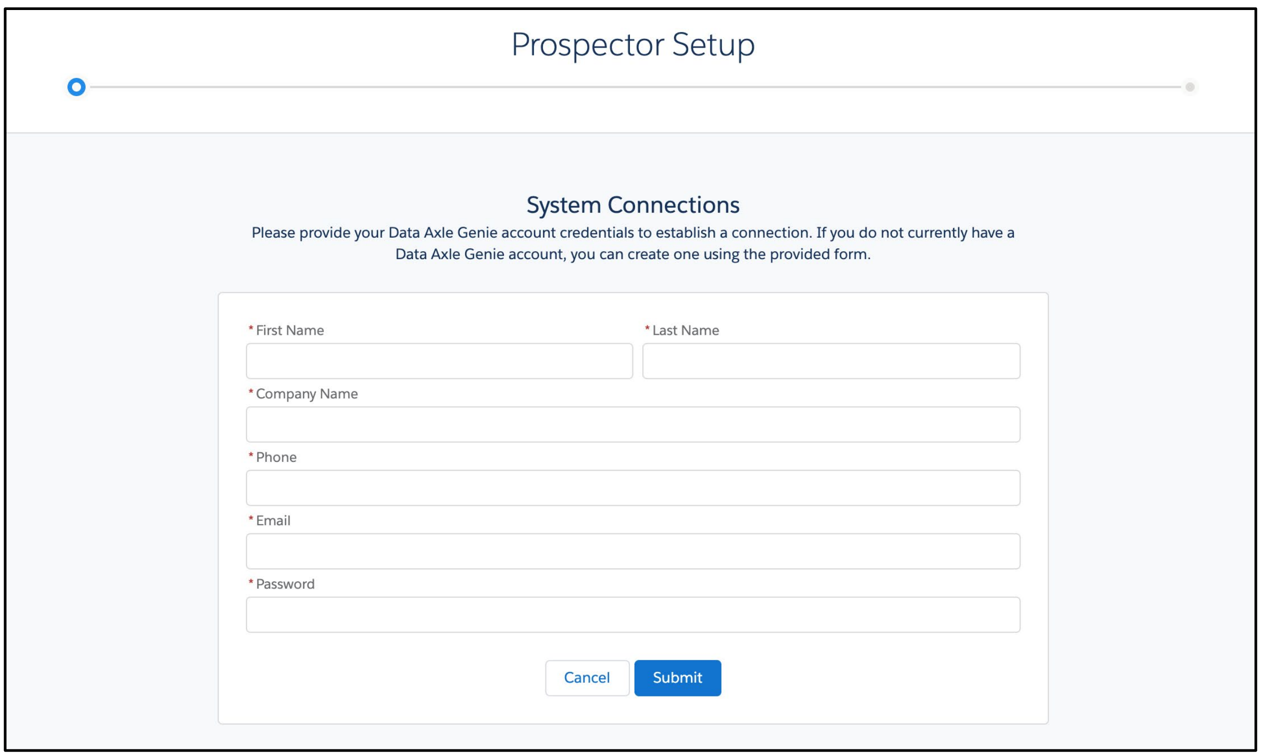
- To configure settings for Prospector so that your users can build lists to import new Leads, click **Get Started**



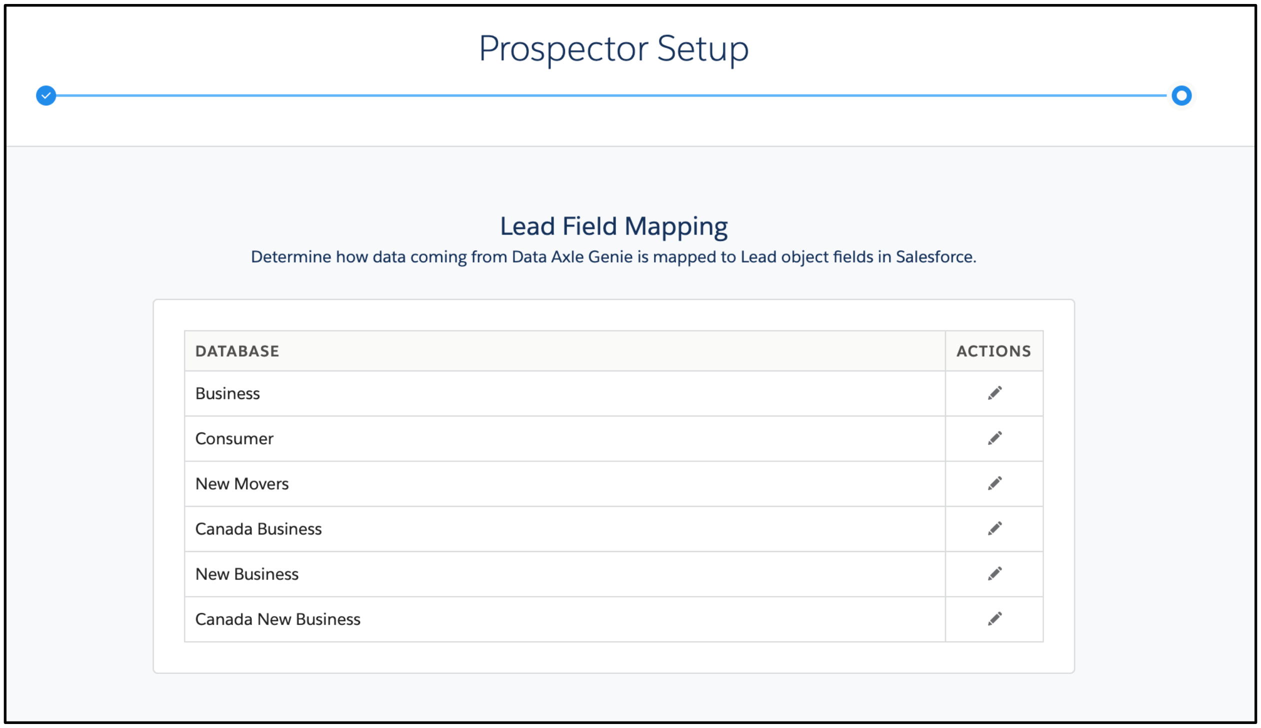
- The first part of Prospector Setup is System Connections where you will need to provide Email and Password to establish connection with Data Axle Genie. If you need to create a new account, click **Create New Account**



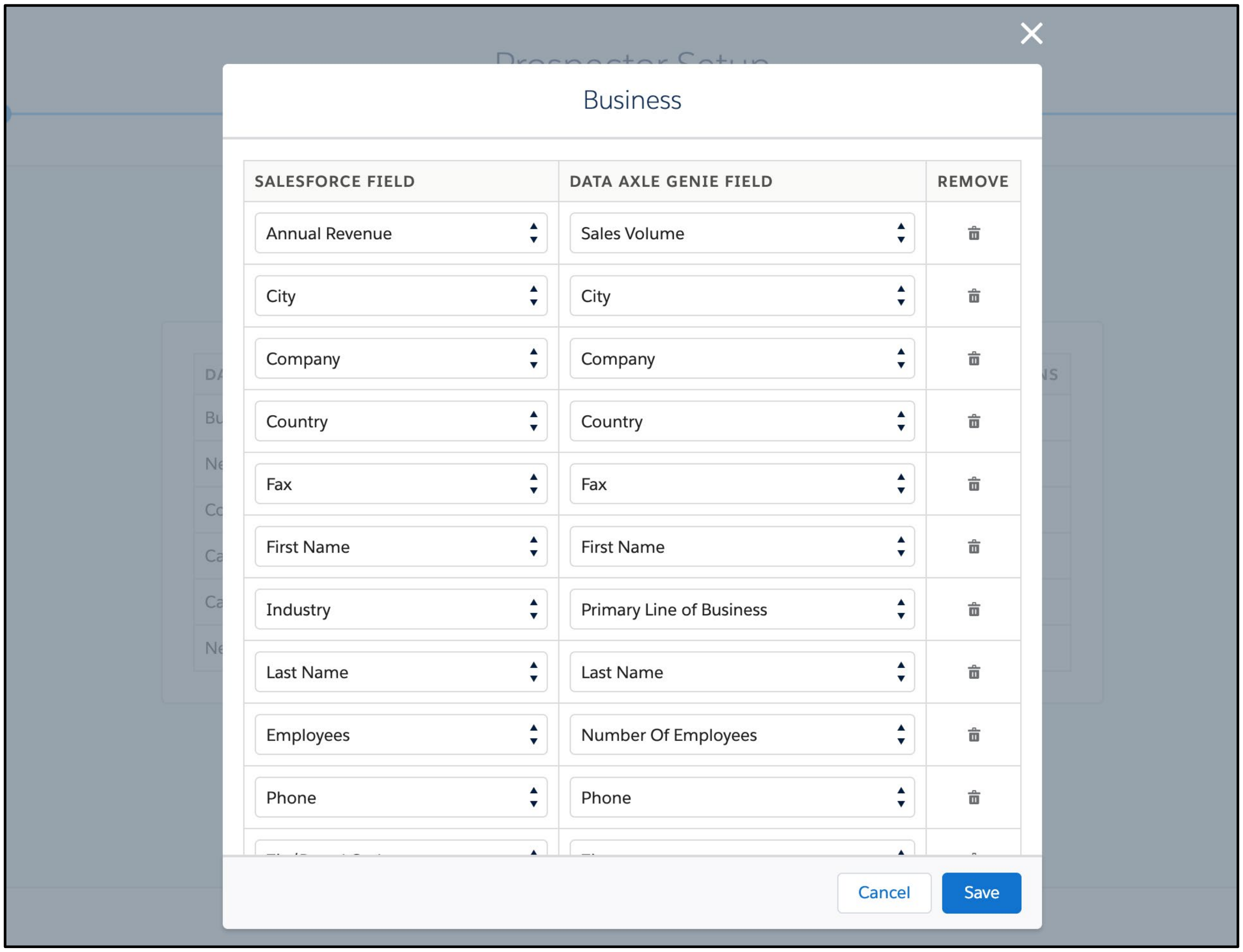
- Enter in **First Name**, **Last Name**, **Company Name**, **Phone**, **Email** and **Password** > Click **Submit**



- 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

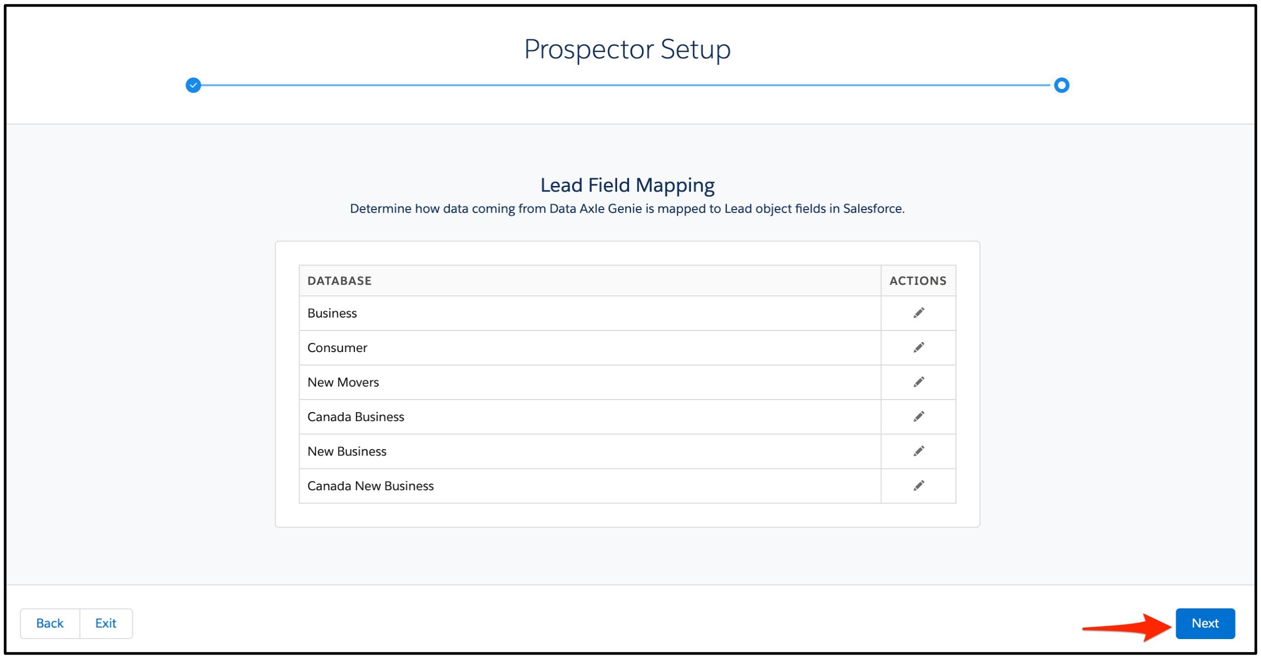


- You will see a list of default mappings. You may also add and remove additional mappings, as well as use custom Salesforce fields that you create
    - *You should also be sure to add these fields onto your page layout*

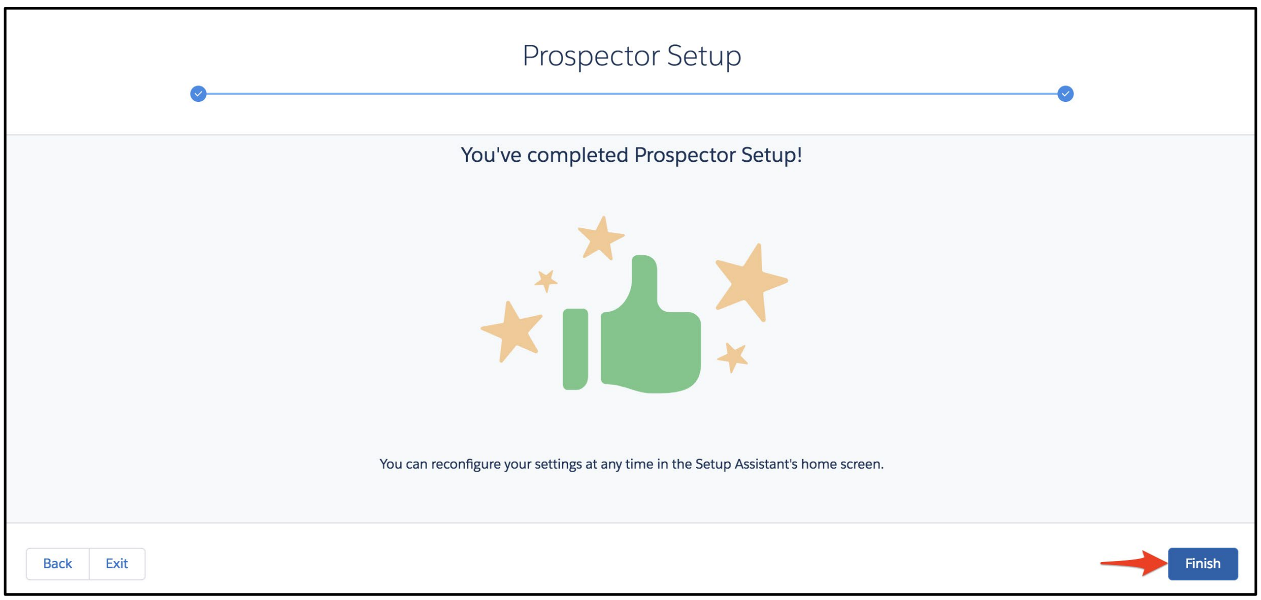


- When finished, click **Save**

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



- Click **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

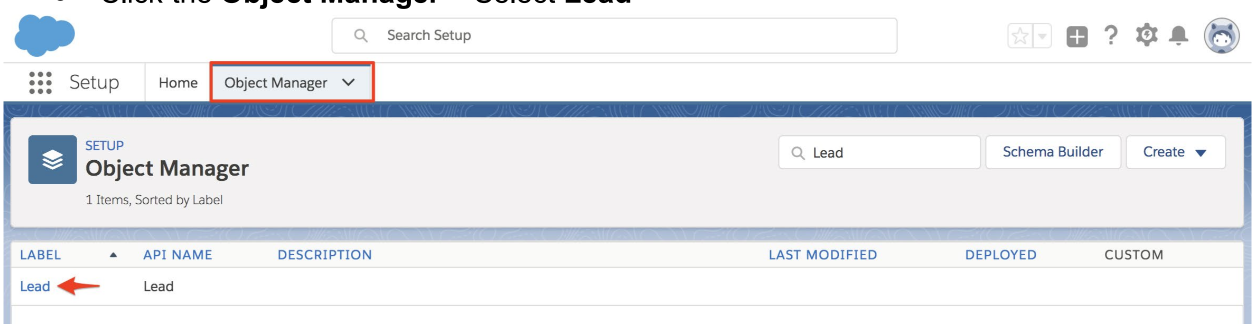
In the Field Mappings section of the Data Axle Genie Setup app, you will be able to use custom Salesforce fields in your mappings. However, keep in mind that when converting Leads to Contacts, you will need to map your custom Lead fields to the corresponding Contact fields in order to make sure your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

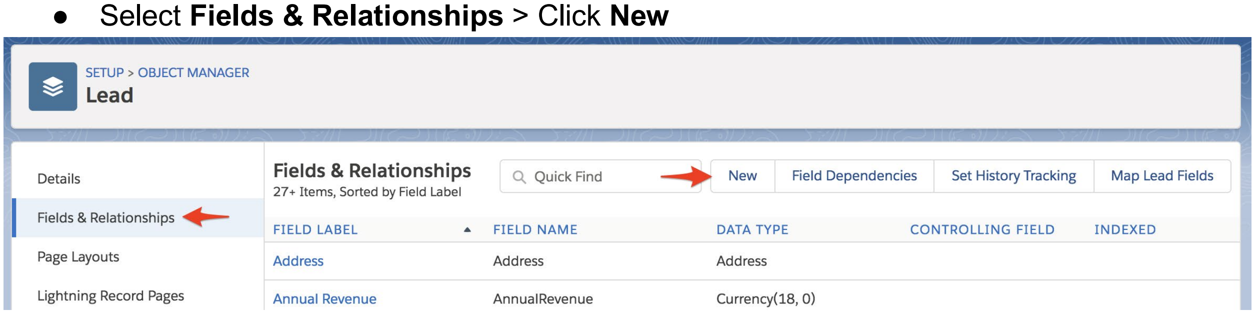
This section will show you an example of creating a custom field and then how to make sure that the data will get carried over from Lead to Contact on Lead conversion.

Create a custom field on Lead and Contact:

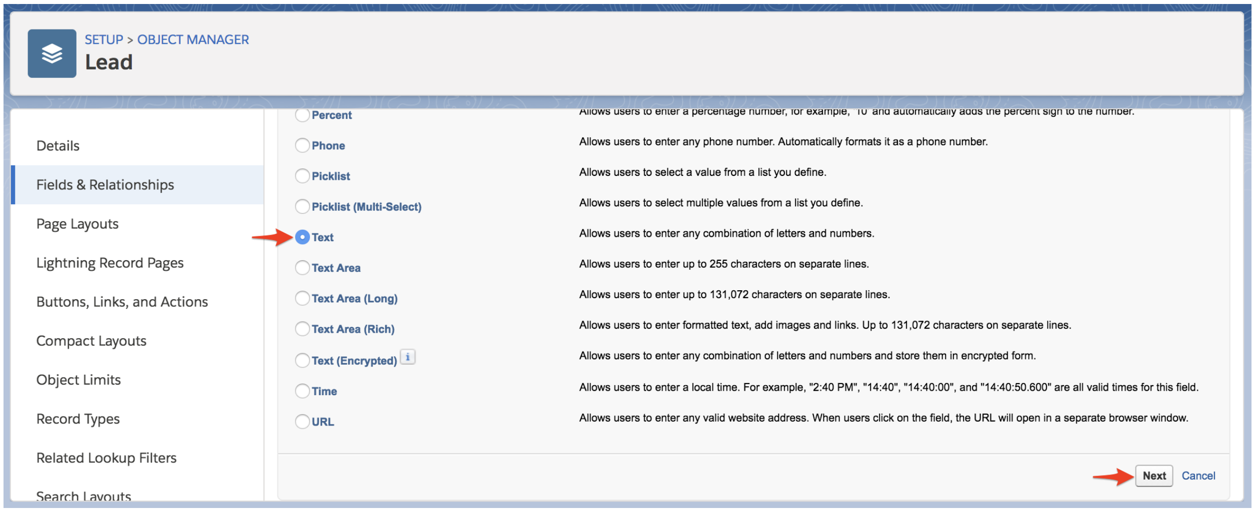
- Click the **Object Manager** > Select **Lead**



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



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

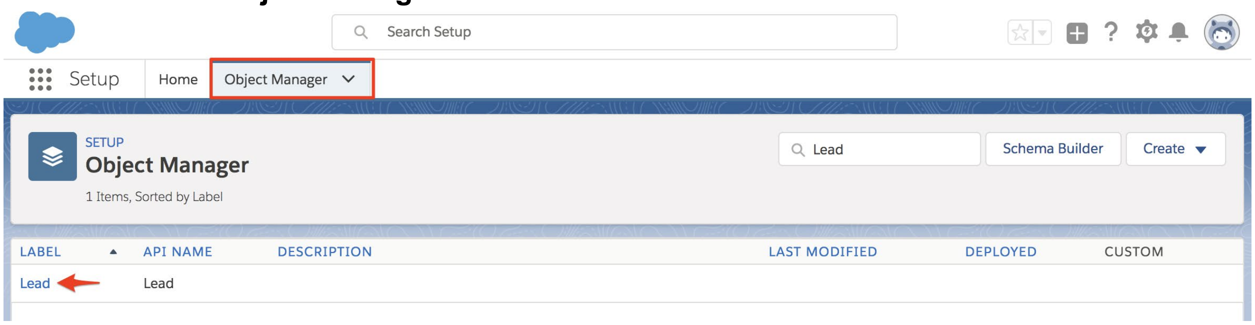


- Enter a **Field Label** and any required details based on the Field Type
- Enter a **Field Name**
- Enter a **Description**
- Click **Next**

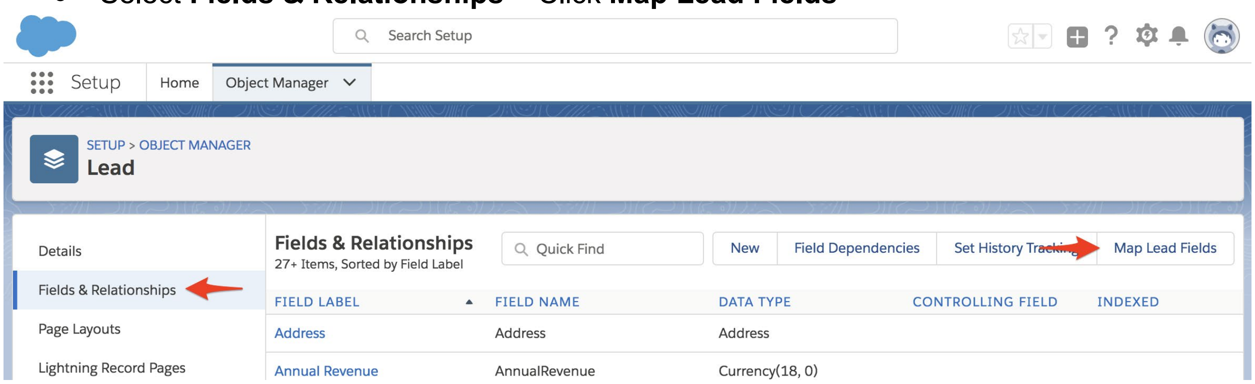
Repeat the steps above to create a custom field on Contact. This field will be used when you Map Lead Fields in the next section.

Map Lead Fields:

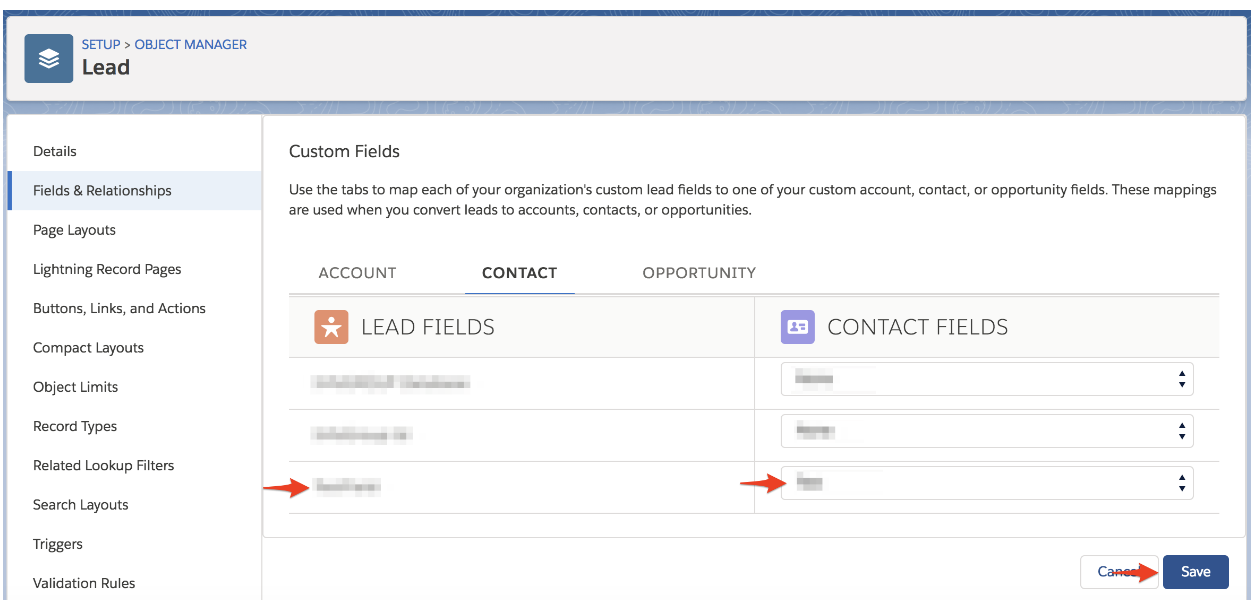
- Click the **Object Manager** > Select **Lead**



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



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



Duplicate Management Sample

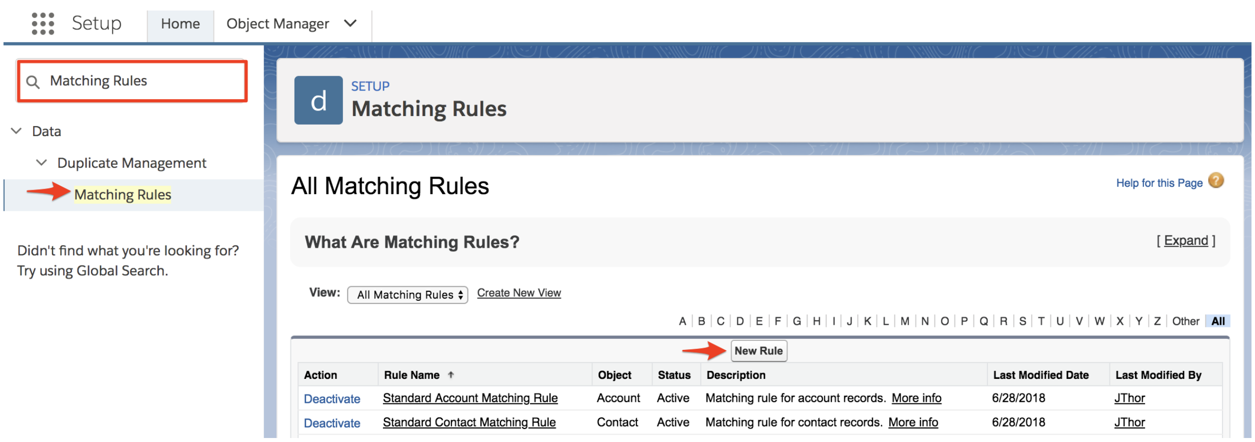
The purpose of the Duplicate Management sample is to show an example of how you may prevent duplicates in Salesforce by creating and activating a Matching Rule and Duplicate Rule. This sample will set up two rules that when the Salesforce User tries to create a Contact with a First Name, Last Name, and 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:

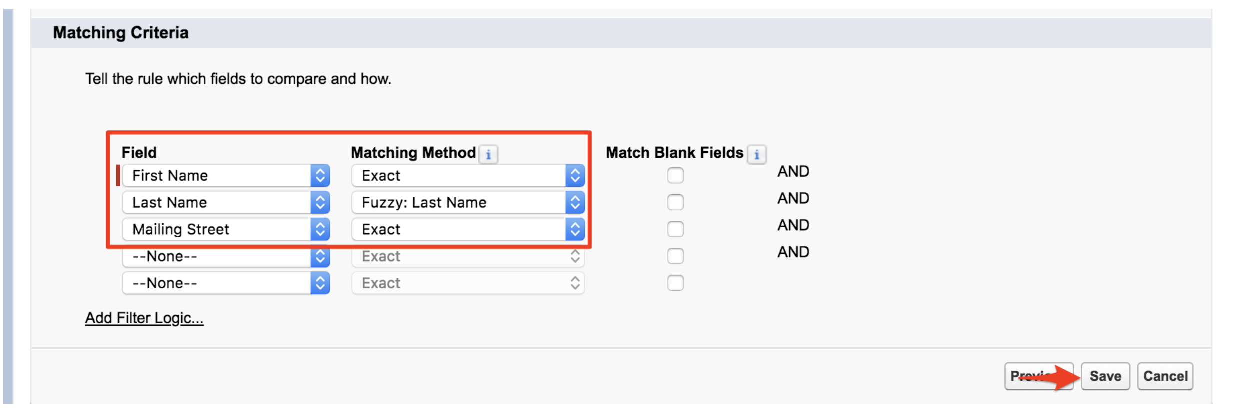
- Navigate to the Quick Find and search “**Matching Rules**” under *Duplicate Management*
- Click **New Rule**



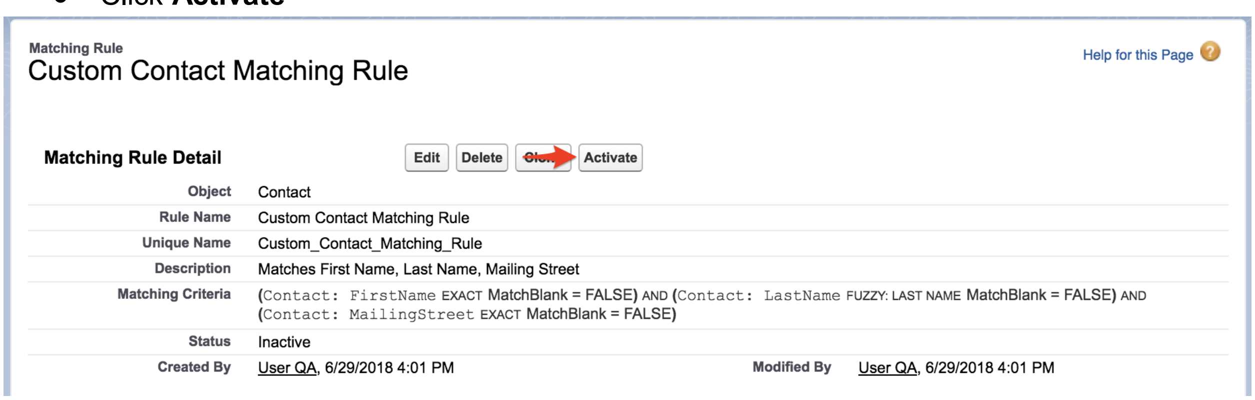
- Select **Object -** Contact
- Click **Next**

- 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

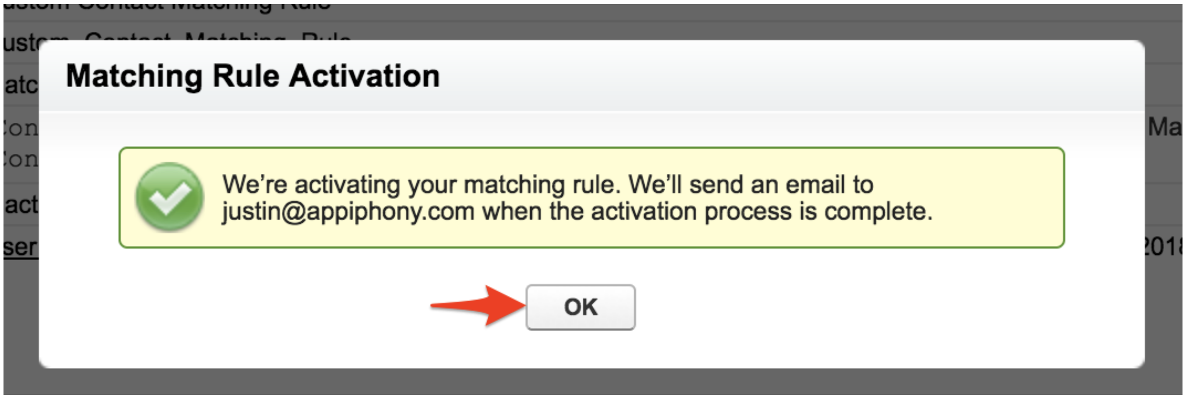
- Specify your matching criteria
    - **Field** - First Name, **Matching Method** - Exact
    - **Field** - Last Name, **Matching Method** - Fuzzy: Last Name
    - **Field** - Mailing Street, **Matching Method** - Exact
- Click **Save**



- Click **Activate**

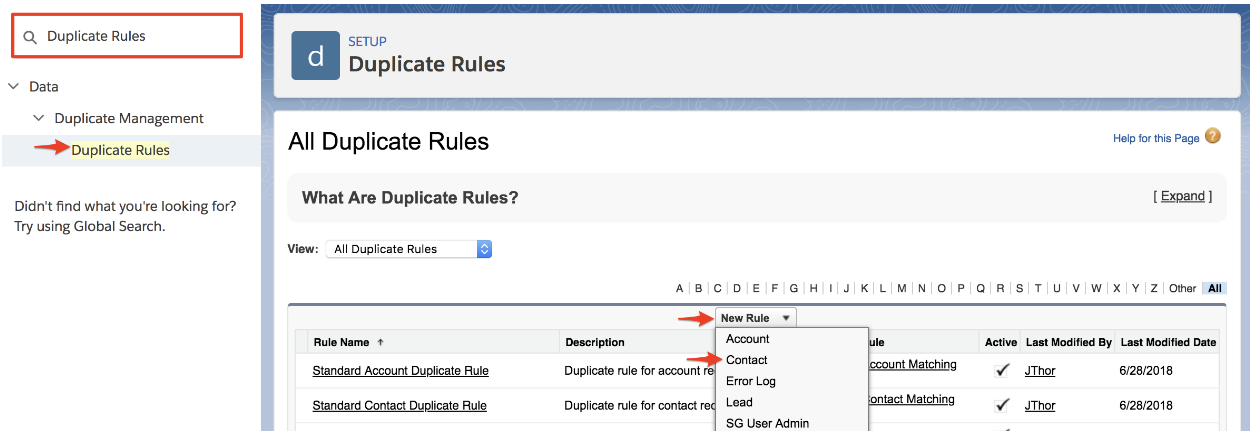


- Click **OK**

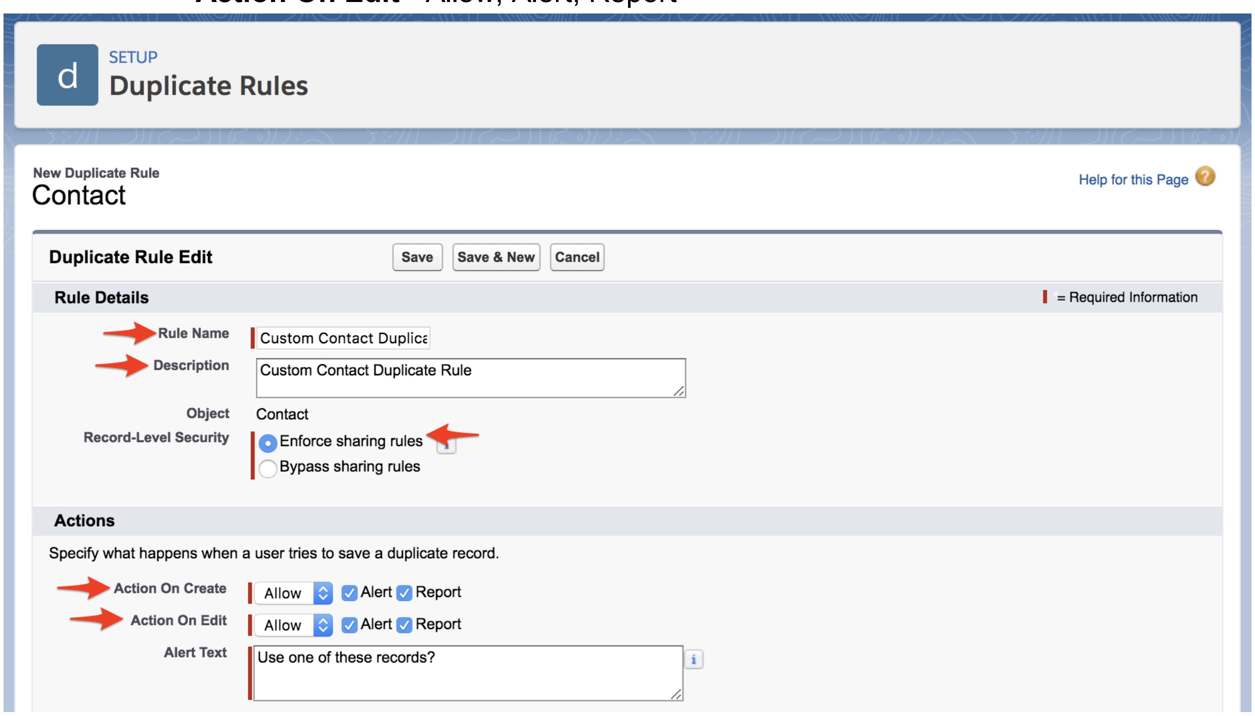

Matching Rule Activation
We're activating your matching rule. We'll send an email to justin@appiphony.com when the activation process is complete.
OK

Follow these steps to set up your Duplicate Rule:

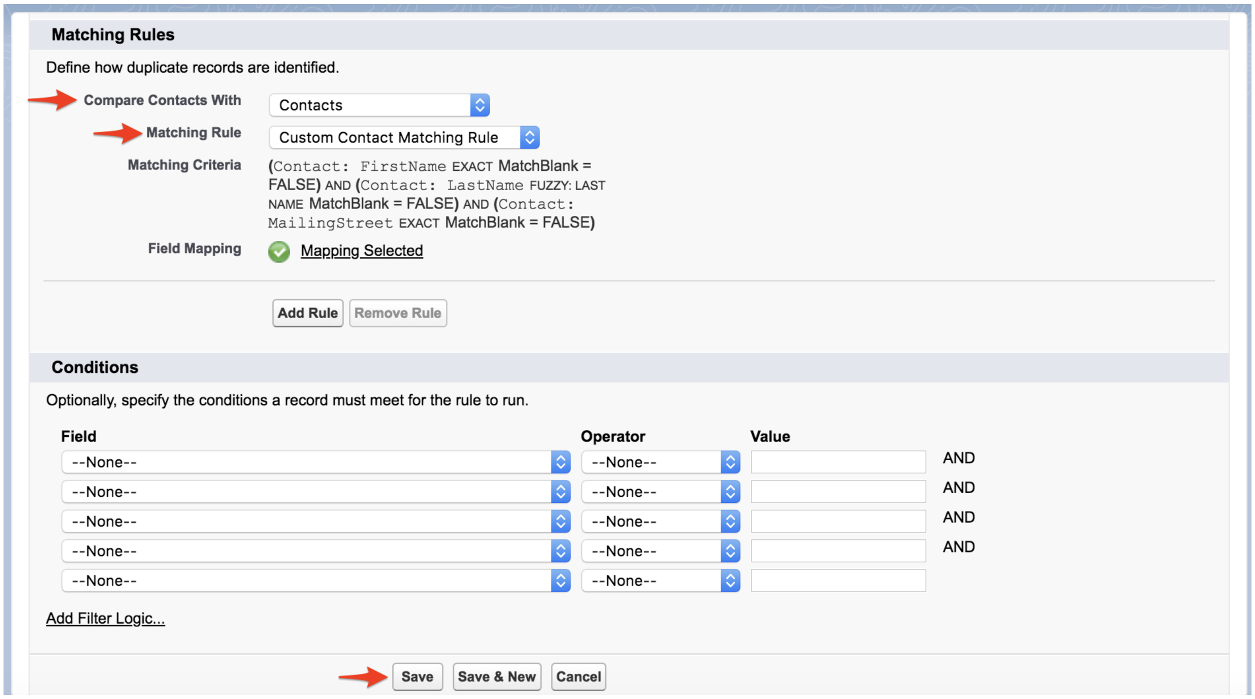
- Navigate to the Quick Find and search “**Duplicate Rules**” also under *Duplicate Management*
- Click **New Rule** > Select **Contact**



- 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



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



- Click **Activate**