WE Insights for Salesforce

Installation Instructions

Version 9.6

October - 2020

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Big Picture

1. Connect with your WE admin to understand which features you have contracted for
2. Install and configure WE Insights for Salesforce app using this guide
3. WE Admin: Ensure WE users are correctly setup
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Introduction to WE Insights for Salesforce

WE Salesforce Connector establishes a powerful link between our WealthEngine Platform and Salesforce, providing you valuable and easy-to-access, comprehensive wealth insight. Salesforce users get direct access to more than 50 WE wealth scores and ratings. With WE Salesforce Connector you have what you need to take your marketing, business development or fundraising efforts to the next level with new insight and productivity.

Powerful Capabilities

- **One Click**: Add wealth intelligence to exiting lead, contact or person account records with click of a button
- **Bulk Append**: Not only get wealth data on a single lead, contact or person account but also on <u>an entire list</u> with a click of a button from within Salesforce
- **Reporting**: Easily report on wealth data and your data using standard SF reporting and analytics tools
- **Prospecting**: Direct integration with WE's prospecting tool, WE Prospect
- **Search**: The ability to send new leads directly to Salesforce from WE Search
- ***Model Scores:** The ability to score any Salesforce Record against any model in your WealthEngine account
- **Auto-Append**: Option to automatically append wealth data upon insert of new records
- ***SHIELD Optimized:** This version of WE Insights for Salesforce is automatically configured to work with SHIELD if you Salesforce Org is configured with this security protocol
- **Customizable**:
  - o Ability to customize viewable fields and page layout per your needs
  - o Choose which fields are used for searching against WealthEngine
  - o User based permissions and usage metrics

*Features new to WE Insights for SF v.9.2

WE Insights for Salesforce Installation

Requirements

To install WE Insights for Salesforce you will need the following:

- Be an administrator for an active Salesforce CRM environment
- An active WealthEngine Platform account
- A subscription to WealthEngine's Salesforce Connector

The WE Insights for Salesforce is compatible with: **Enterprise, Unlimited, Non-Profit Success Pack** and **Developer** editions.

WE Insights for Salesforce is not compatible with: **Contact Manager**, **Professional**, or **Group** editions.

If you do not have both the WealthEngine Platform access and a Salesforce Connector subscription, please call the WealthEngine sales team at 301.215.5980 for more information.

Step 1: Install the App using the Link Below

- **Sandbox:** http://test.salesforce.com/packaging/installPackage.apexp?p0=04t0H000000kxG5
- **Production**: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0H000000kxG5

Step 2: Choose Security Level

- Option 1: Grant access to admins only
- Option 2: Grant access to all users - *recommended*
- Option 3: Select security settings

  **Note: Please err on the side of granting access to a larger number of profiles, any that could need access to the WE app now or down the line, because adjusting permissions later can be rather difficult. Our app using licensing so ultimately access will be controlled by user.
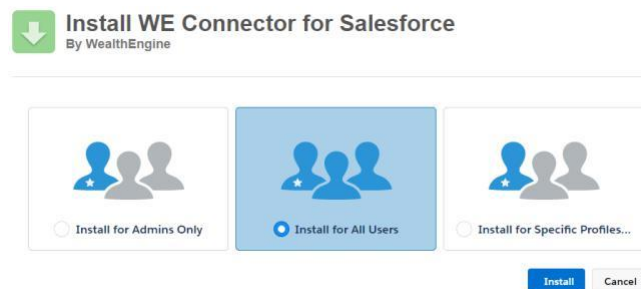
Step 3: Approve Third-Party Access

In order for the WealthEngine app to interact with Salesforce, you will need to approve us as a third-party site that is able to send and receive information from Salesforce.

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
api-dev-sf.welabs.net	☑
api-pre-sf.welabs.net	☑
api-qa-sf.welabs.net	☑
api.wealthengine.com	☑
ws.wealthengine.com	☑

☑ Yes, grant access to these third-party web sites

[Continue] [Cancel]

Install Complete

You will be brought to the Install Complete page after the WE Insights for Salesforce Package has completed installation. Please note, that you may experience a slight delay of a minute or two as the package is installed.

Install WE Connector for Salesforce
By WealthEngine

Installing and granting access to all Users...

Lightning Setup

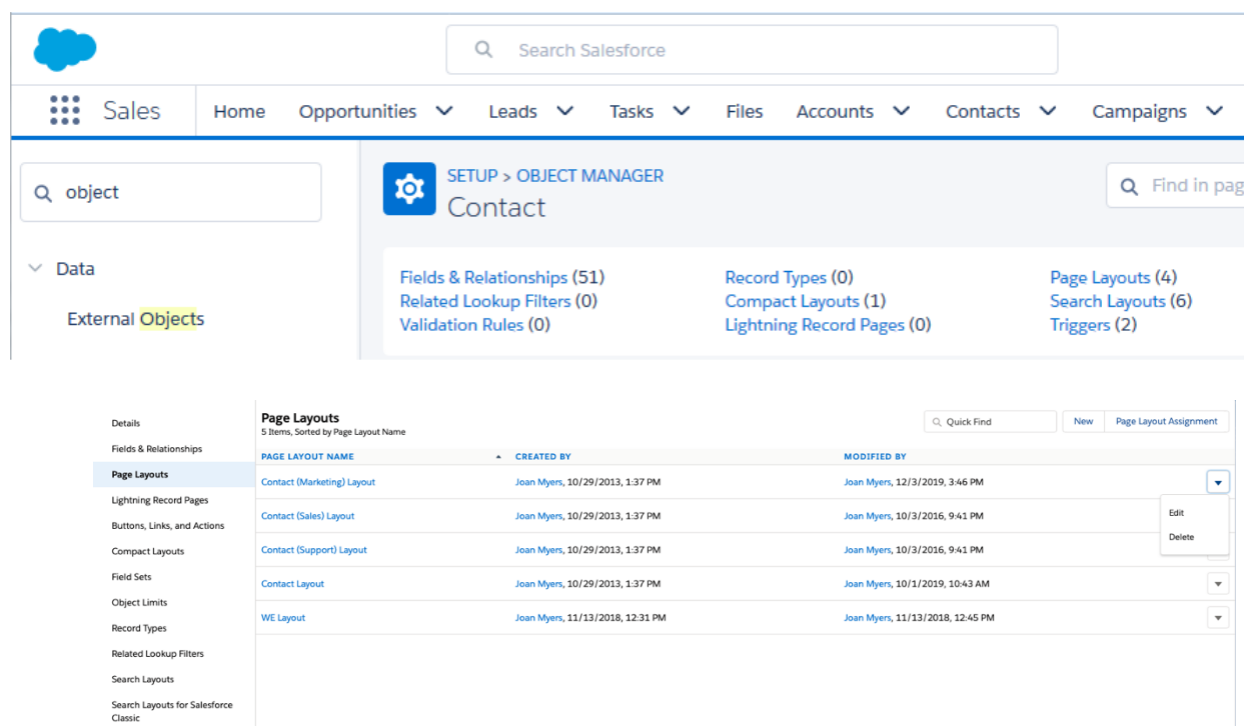## General/Search User Setup: Configure Page Layouts for WE Data

The next step is to edit the Salesforce pages to display the WealthEngine data. The WealthEngine data can be added to the page layouts of the Lead, Contact or Person Account pages. Use the steps below to configure the various pages you want the WealthEngine data to be displayed. You will need to repeat the steps for each page layout and object you wish to have the WealthEngine data visible.

Options: Whether you are using Lightning or Classic, contacts of leads, you have 2 options for configuring the WealthEngine data and functionality on your page layouts.

1. **Related List and Buttons**: This method uses standard Salesforce functionality, related list and buttons to allow the user to see and interact with WealthEngine. The benefits are it uses standard Salesforce functionality and allows you to chose which WE fields to display.

2. **Visualforce Page**: This setup method removes the customization options but gives you the preset fields recommended by WealthEngine and all functionality easily in one component. This is the recommended approach for most clients.
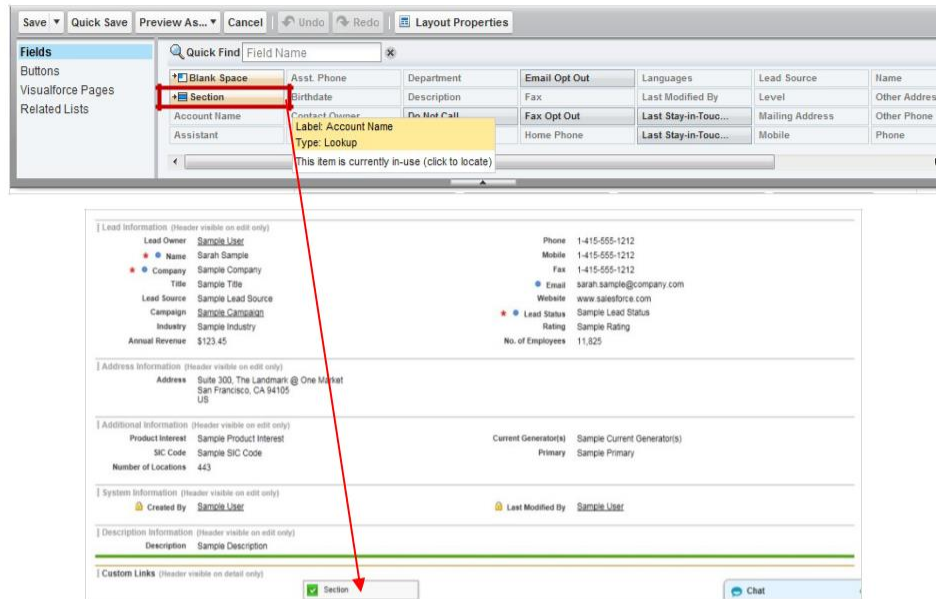
Option 1 Steps: Related List

1. **Setup** -> **Object Manager**
2. Select **Lead** or **Contact** or **Person Account**
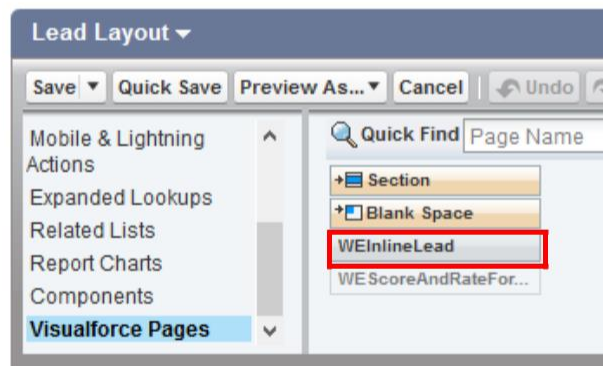3. Choose **Page Layouts**

4. In the list of Page Layouts, click on the **Edit** action for the layout to which you want to include the WealthEngine app.

5. Drop a **Section** from the Page Layout frame to the Page Detail area and drop it on to the page layout.

6. In the Section Properties window, name the Section **WealthEngine**. Uncheck the Edit Page and Detail Page options in **Display Section Header On** box. Choose the **1 Column** layout and click on **OK**.

7. In the Contact (or Lead or Person Account) Layout frame, select **Visualforce Pages** and drag and drop the **WEInlineContact…** (or Lead or Account) page and drop it in the new **WealthEngine** section you created in the previous step.
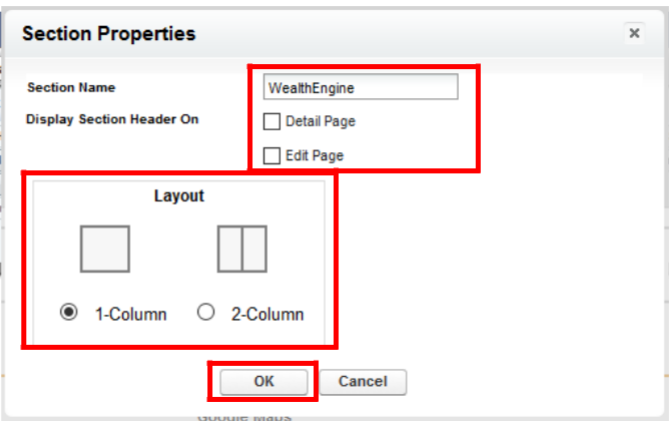
8. Click on the ⚲ icon in the top right corner of the Visualforce page to change its properties. Set the height to 1 pixel and click OK.

Visualforce Page Properties ✕

Width (in pixels or %)	100%
Height (in pixels)	1
Show scrollbars	☐
Show label	☐

OK   Cancel

9. In the Contact (or Lead or Person Account) Layout frame, select **Related Lists** and drag and drop the Results Related List on the page.

Contact Layout ▾

Save ▾ | Quick Save | Preview As... ▾ | Ca

Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts
Components
Visualforce Pages

🔍 Quick

Activity H
Approval
Assets
Campaign

Section Properties ✕

Section Name	WealthEngine
Display Section Header On	☐ Detail Page
	☐ Edit Page

Layout

⦿ 1-Column   ◯ 2-Column

OK   Cancel

S Sessions
rk Orders

10. Click on the [wrench icon] in the top of the new Results related list to edit the properties. Use the wizard to add the fields to the Results Related List that you want to see. Suggested fields are listed below or choose different fields that were best for your team.
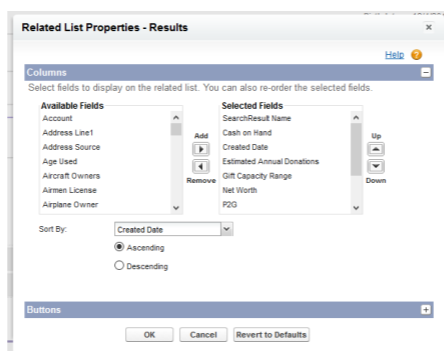
» Non-Profit Suggested Fields:	» Commercial Suggested Fields:
» Created Date	» Created Date
» P2G Score	» Net Worth
» P2G Description	» Cash on Hand
» Gift Capacity Range	» Age
» Estimated Annual Donations	» Income
» Net Worth	» Direct Stock Holding
» Total Assets	» Real Estate
» Cash on Hand	»
» Age	»

»

11. Choose to sort by Created Date in Descending order, this will ensure the most recent result is always listed first.

»

12. Open the button section and uncheck New.

13. Save the Page Layout. Repeat steps 4-11 on any other page layout and/or object you would like to use the app with.

14. Lastly, we need to add the custom component to the page using the Lightning page editor. Navigate to a lead, contact or person account record in your system and then click Edit Page from the Setup drop-down in the to right corner.
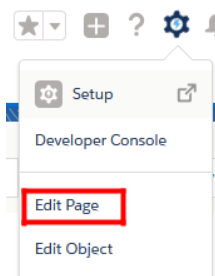
15. In the right navigation, scroll down to the Custom-Managed section and you will want to add the **WEInlineComponent** to the page per your preference. This component contains the two buttons that will be used to interact with the WE app.
    *Note: The custom managed components will only work if you have MyDomain implemented. To learn about MyDomain and how to implement see the Salesforce help article located here.
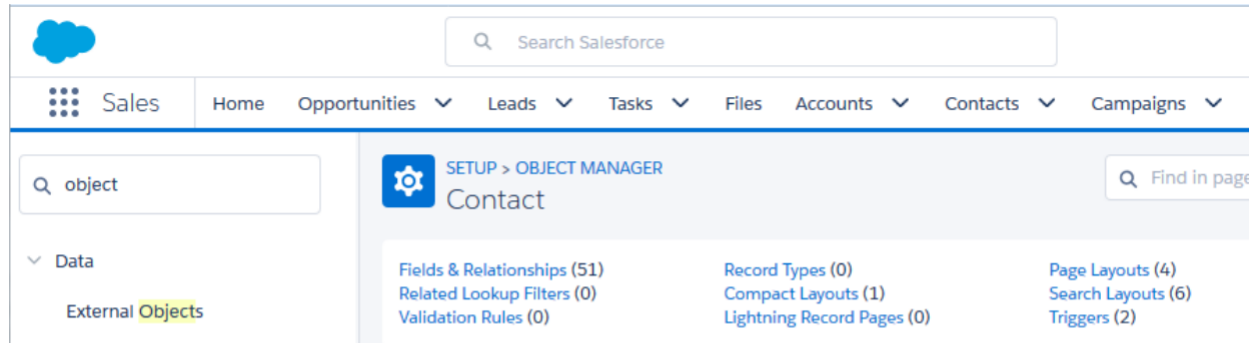
»
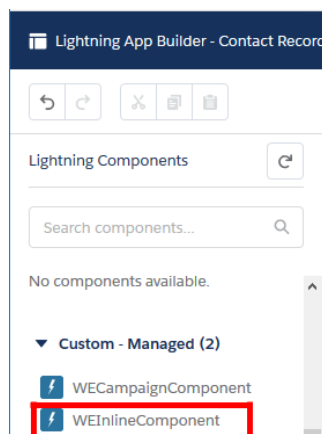
16. Save the page and activate as needed. Repeat steps 13-14 for any other objects or lightning pages you would like to add this WealthEngine functionality to.

Option 2 Steps: Visualforce Page

1. **Setup -> Object Manager**
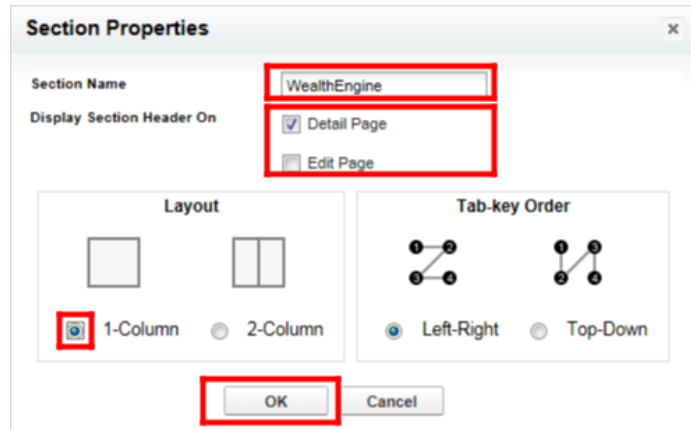2. Select **Lead** or **Contact** or **Person Account**
3. Choose **Page Layouts**

4. In the list of Page Layouts, click on the **Edit** action for the layout to which you want to include the WealthEngine app.
5. Once you have decided where the WealthEngine section should appear on the Page Layout, drag a **Section** from the Page Layout frame to the Page Detail area and drop it on to the page layout.

6. In the Section Properties window, name the Section **WealthEngine**. Keep the Detail Page checked and uncheck the Edit Page option in **Display Section Header On** box. Choose the **1 Column** layout and click on **OK**.
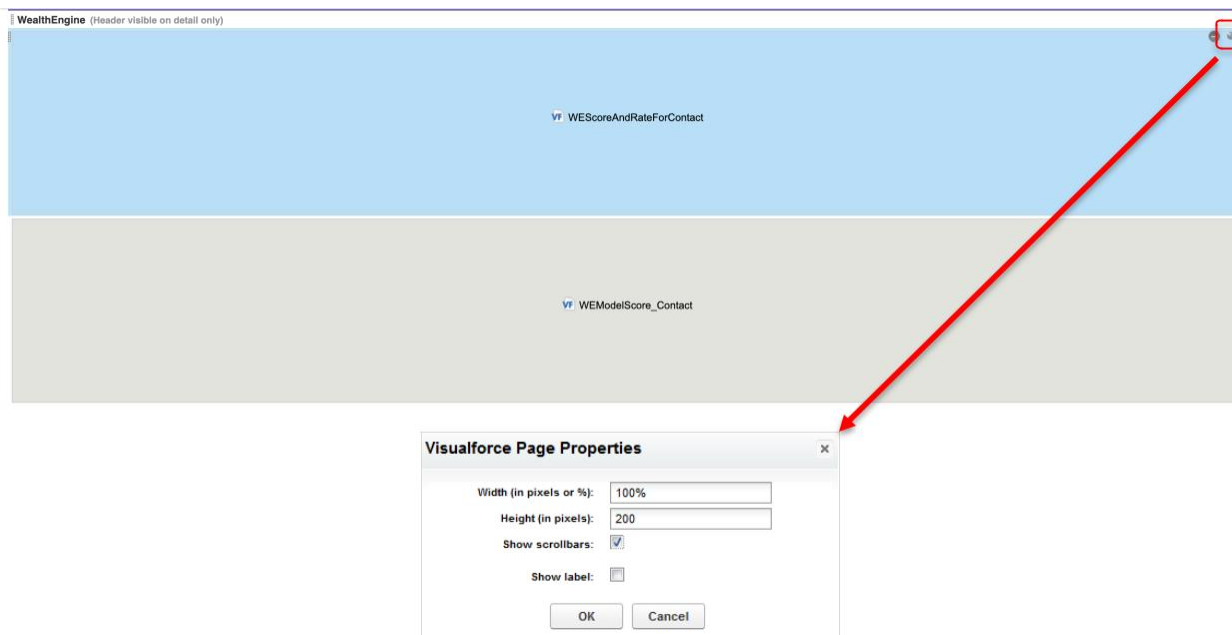

»

7. In the Contact (or Lead or Person Account) Layout frame, select **Visualforce Pages** and drag and drop the **WEScoreAndRateFor...** and **WEMODELScore_** page and drop them in the new **WealthEngine** section you created in the previous step.

8. Click on the Properties icon (the "wrench" on the top right of the section). On the Visualforce Page, check **Show scrollbars** and click **OK**.

9. Click the **Save** button at the top of the page.

10. Repeat the same above steps for any other page layouts you would like to add the WealthEngine app to.

Prospecting User Setup

For Prospecting, the user will need access to the WealthEngine tab as well as an additional field on the lead object.

1. If they have a WE app license, they should already have access to the WealthEngine tab but to double-check, go to Setup > Manage Users > Profiles and ensure that for the user's profile, ensure the WealthEngine tab is listed as Default On.

2. Navigate to the lead page layout again by going to **Setup** > **Customize** > **Lead** > **Page Layouts**. Select to edit the applicable page layout. From the Lead Layout frame select the **WE Prospect List Name** field and drop on the page. Save the page layout.

Bulk List Append (Screening) User Setup

1. Ensure the user is a Marketing User by going to Setup > Manage Users > Users viewing their user settings. Check the box next the Marketing User if not already and save. This will give them access to create and edit Campaigns.

2. Add the custom component to the page using the Lightning page editor. Navigate to campaign record in your system and then click Edit Page from the Setup drop-down in the top right corner.

3. In the right navigation, scroll down to the Custom-Managed section and you will want to add the **WECampaignComponent** to the page per your preference. This component contains the two buttons that will be used to interact with the WE app.
   *Note: The custom managed components will only work if you have MyDomain implemented. To learn about MyDomain and how to implement see the Salesforce help article located here.
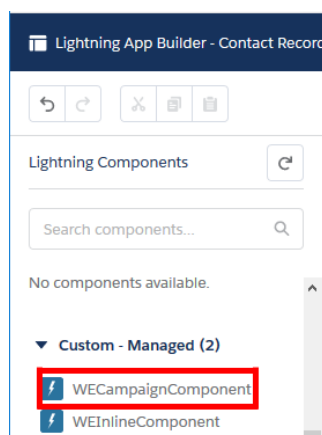
4. Navigate to the campaign page layout by going to Setup > Customize > Campaign > Page Layouts and clicking Edit next to the campaign page layout you would like to add the WE app functionality to.

5. Also in the Campaign Layout frame, select Fields and drop the **WE Batch Status** and **WE Batch Status Indicator** fields onto the page.
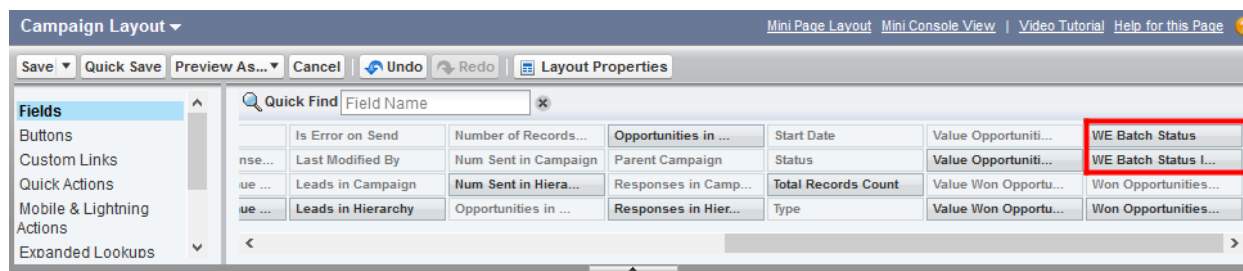
6. Save the page layout and repeat with any other page layouts you want to add the fields/button to.

Classic Setup

General/Search User Setup: Configure Page Layouts for WE Data

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1. **Related List and Buttons**: This method uses standard Salesforce functionality, related list and buttons to allow the user to see and interact with WealthEngine. The benefits are it uses standard Salesforce functionality and allows you to chose which WE fields to display.

2. **Visualforce Page**: This setup method removes the customization options but gives you the preset fields recommended by WealthEngine and all functionality easily in one component. This is the recommended approach for most clients.

Option 1 Steps: Related List

1. Select **Setup | Customize** in the left hand navigation.
2. Under Customize, select the object you wish to configure: **Lead or Contacts or Person Accounts**
3. Select **Page Layouts**:

4. In the list of Page Layouts, click on the **Edit** action for the layout to which you want to include the WealthEngine app.

5. Drop a **Section** from the Page Layout frame to the Page Detail area and drop it on to the page layout.
6. In the Section Properties window, name the Section **WealthEngine**. Uncheck the Edit Page and Detail Page options in **Display Section Header On** box. Choose the **1 Column** layout and click on **OK**.

7. In the Contact (or Lead or Person Account) Layout frame, select **Visualforce Pages** and drag and drop the **WEInlineContact...** (or Lead or Account) page and drop it in the new **WealthEngine** section you created in the previous step.

8. Click on the ⚒ icon in the top right corner of the Visualforce page to change its properties. Set the height to 1 pixel as user will not actually interact with this element.

9. In the Contact (or Lead or Person Account) Layout frame, select **Related Lists** and drag and drop the Results Related List on the page.

10. Click on the ⚒ in the top of the new Results related list to edit the properties. Use the wizard to add the fields to the Results Related List that you want to see. Suggested fields are listed below or choose different fields that were best for your team.

»

Non-Profit Suggested Fields:	Commercial Client Suggested Fields:
• Created Date	• Created Date
• P2G Score	• Net Worth
• P2G Description	• Total Assets
• Gift Capacity Range	• Cash on Hand
• Estimated Annual Donations	• Age
• Net Worth	• Income
• Total Assets	• Direct Stock Holdings
• Cash on Hand	• Real Estate Value
• Age	

11. Choose to sort by Created Date in Descending order, this will ensure the most recent result is always listed first.

»

12. Open the button section and uncheck New.

13. In the Contact (or Lead or Person Account) Layout frame, select **Buttons** and drop the **Get Wealth Info** and **WE Research Details** buttons onto the page.

14. Save the page layout and repeat 5-12 for any additional page layouts or objects you would like to use the WealthEngine app with.

Option 2 Steps: Visualforce Page

1. Select **Setup | Customize** in the left hand navigation.
2. Under Customize, select the object you wish to configure: **Lead or Contacts or Person Accounts**
3. Select **Page Layouts**:

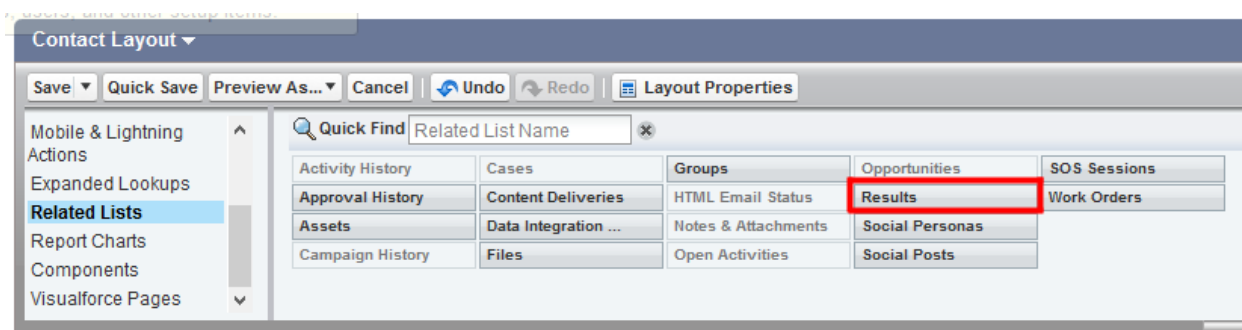4. In the list of Page Layouts, click on the **Edit** action for the layout to which you want to include the WealthEngine app.

5. Once you have decided where the WealthEngine section should appear on the Page Layout, drag a **Section** from the Page Layout frame to the Page Detail area and drop it on to the page layout.

6. In the Section Properties window, name the Section **WealthEngine**. Keep the Detail Page checked and uncheck the Edit Page option in **Display Section Header On** box. Choose the **1 Column** layout and click on **OK**.

7. In the Contact (or Lead or Person Account) Layout frame, select **Visualforce Pages** and drag and drop the **WEScoreAndRateFor...** and **WEMODELScore_** page and drop them in the new **WealthEngine** section you created in the previous step.

8. Click on the Properties icon (the "wrench" on the top right of the section). On the Visualforce Page, check **Show scrollbars** and click **OK**.

9. Click the **Save** button at the top of the page.

10. Repeat the same above steps for any other page layouts you would like to add the WealthEngine app to.

Prospecting User Setup

For Prospecting, the user will need access to the WealthEngine tab as well as an additional field on the lead object.

1. If they have a WE app license, they should already have access to the WealthEngine tab but to double-check, go to Setup > Manage Users > Profiles and ensure that for the user's profile, ensure the WealthEngine tab is listed as Default On.

2. Navigate to the lead page layout again by going to **Setup** > **Customize** > **Lead** > **Page Layouts**. Select to edit the applicable page layout. From the Lead Layout frame select the **WE Prospect List Name** field and drop onto the page. Save the page layout.

Bulk List Append (Screening) User Setup

1. Ensure the user is a Marketing User by going to Setup > Manage Users > Users viewing their user settings. Check the box next the Marketing User if not already and save. This will give them access to create and edit Campaigns.

2. Navigate to the campaign page layout by going to Setup > Customize > Campaign > Page Layouts and clicking Edit next to the campaign page layout you would like to add the WE app functionality to.

»

3. In the Campaign Layout frame, select **Buttons** and drag and drop the **Get Wealth Info** button onto the page.

4. Also in the Campaign Layout frame, select Fields and drop the **WE Batch Status** and **WE Batch Status Indicator** fields onto the page.

5. Save the page layout and repeat with any other page layouts you want to add the fields/button to.

Other Admin Settings

Auto-Append

You have the option as an admin to turn on our auto-append feature. This will automatically get wealth data on newly created leads, contacts and/or person accounts in your Salesforce org. This does require data services credits purchased with WealthEngine so you will want to check with your WE admin before turning this feature on.

First navigate to the WE Configuration tab. To turn on this feature, simply check the boxes in the insert or edit columns and select any of the filters that you would like this to be turned on for and click Save. This can be turned off at any time by unchecking the box and clicking Save.
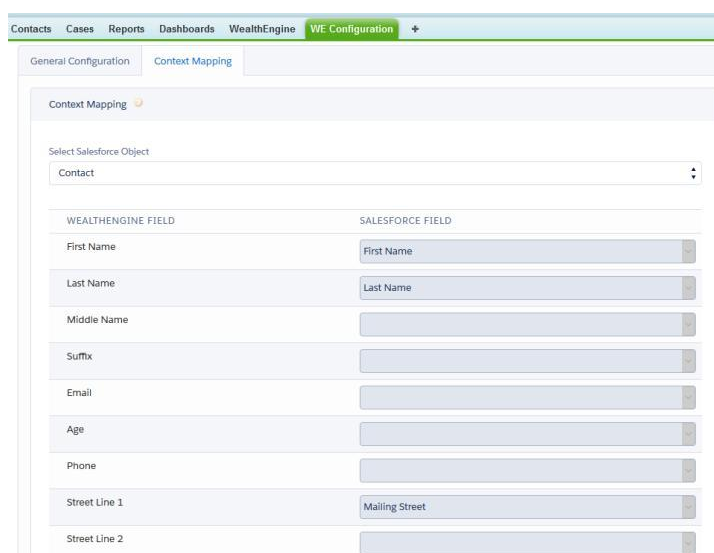
Data/Field Mapping

CONTEXT MAPPING:

We have also added the ability for each organization to set which SF fields are used when sending data to WE. Upon install, the default name and address fields are mapped but these can be changed if the selected fields are not the primary fields your organization is using for these values. Also, there is a list of other possible values that do not have a default SF field including Age, email, total giving, etc. These can be mapped on an organization level to custom fields you are using on those objects. For any non-profit client considering doing a bulk list append (screening) we encourage you to map giving fields (esp. total giving) to allow you to take advantage of some of the reports in WE.

First navigate to the **WE Configuration** tab. Click on **Context Mapping**. Select the object(s) you are using from the drop-down menu. First you will see the default mappings. If you would like to change this, simply click Edit at the bottom of the page. Map the fields using the drop-down menus and then click **Save** once complete. This can be adjusted as needed at any time simply by following these same steps.

MODEL MAPPING:

We have also added the ability for each organization to score any lead, contact or person account against models built within the WealthEngine platform.

For models made within the WE9 platform, please ensure that the model is updated to have its own API endpoint. To do so, please navigate to the model tab within the WE9 and click on the model you'd like to score against within your Salesforce Instance. Click the checkbox for "Enable API Access" and create a "Name for API Call" then click OK.
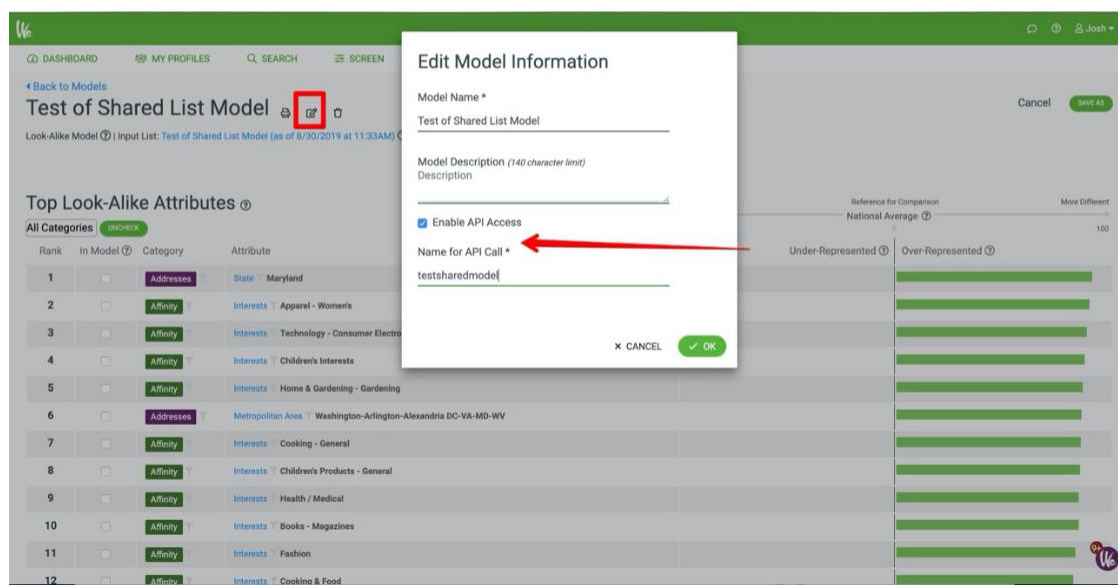
For custom models made by our data scientist team, please work with your Client Engagement Manager to receive the Model Name and Model Input Fields required.

Mapping the Model:

First navigate to the **WE Configuration** tab. Click on **Model Mapping**. Select the object(s) you are using from the drop-down menu. First you will see the default mappings. This will then display any models already mapped. To map a new model, click on "Add Row". To map your model, add the name (either designated in Name for API Call in WE Platform or provided by Client Engagement Manager). Look Alike Models created within the WealthEngine platform do not require any additional mappings. However, if this is a custom model that requires input, please add the Model Input Field Name provided by your Client Engagement Manager. Finally, if an input field is required, you must map it to a field on the Salesforce Object select. Map the fields using the drop-down menus and then click **Save** once complete. This can be adjusted as needed at any time simply by following these same steps.
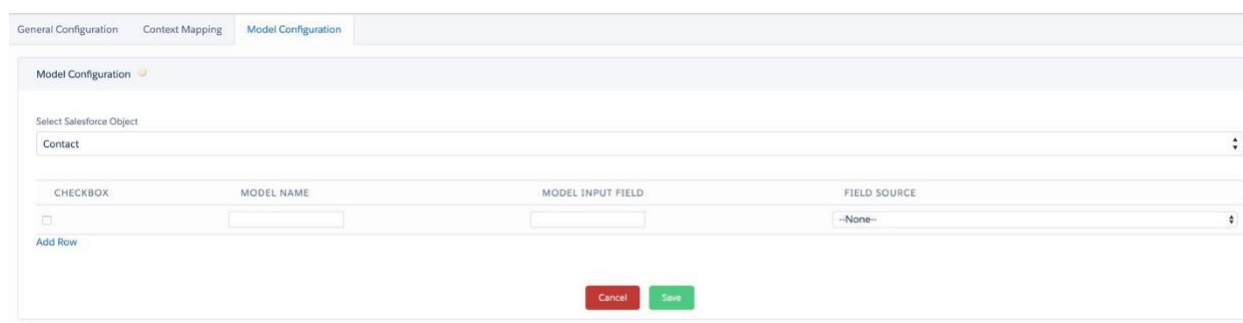
Assign Licenses

With the WE Insights for Salesforce app your organization will have purchased a set number of WE for Salesforce Connector licenses which need to be assigned to users within your organization. Only users who have a licensed seat assigned to their SF user account will be able to see and use the WE Insights features.

1. Setup → Installed Packages
2. On the line with the WealthEngine package, you will see your allowed licenses, used licenses, and expiration date for your package. Upon download you will only have the default 20 but this can be adjusted to your purchased number of seats. Contact customer support at customerservice@wealthengine.com to make this change if necessary.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date
Uninstall	Manage Licenses	WE Insights for Salesforce	WealthEngine	2.6.2	WE_FW8_NP	Active	1	1	Does not Expire

Description
WealthEngine™ is the leading provider of on-demand solutions for sophisticated wealth identification, prospect research and analytics on individuals t...

3. Select **Manage Packages** to edit the licensed users.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date
Uninstall	Manage Licenses	WE Insights for Salesforce	WealthEngine	2.6.2	WE_FW8_NP	Active	1	1	Does not Expire

Description
WealthEngine™ is the leading provider of on-demand solutions for sophisticated wealth identification, prospect research and analytics on individuals t...

4. Use the **Add Users** and **Remove** buttons to assign licenses per your needs. Once you hit your license limit, the add users button will no longer work until another user is removed or additional licenses are purchased.

Package Details
WealthAnalytics for Salesforce
Back to Previous Page

Help for this Page

Package Name	WealthAnalytics for Salesforce	Publisher	WealthEngine
Status	Active	Allowed Licenses	2
Expiration Date	11/29/2014	Used Licenses	1

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

Licensed Users   Add Users   Remove Multiple Users

Action	Full Name ↑	Role	Active	Profile
Remove	Commercial, FW8		✓	System Administrator

Connect Your Salesforce and WE Accounts

The WealthEngine app authenticates and checks for user-based permissions by verifying that the Salesforce user email matches the WE username. Once that check is done, it will then verify whether the user has the correct permissions on the WE side. So at this point, you will want to loop in your WE admin to ensure all the users have been setup on the WE side. That WE admin will also then need to make a master connection between the WE org and your SF org as detailed in the following steps.

WE Admin Step 1: Ensure your users are properly set up in WE

In order to use the enhanced WE Insights, the WE username of each of your WE users must be the same as the email address in each respective user's Salesforce account. Also, the WE users need to have the Salesforce Connector – Professional seat in WE. Step one is to get these two items set up for your users within the WE admin portal.

To access your admin portal, log into your WealthEngine account, click on your name in the top right corner and then select Manage Account from the drop-down. If you have never used the WE admin feature, we suggest you watch a brief intro video first to get yourself acquainted.
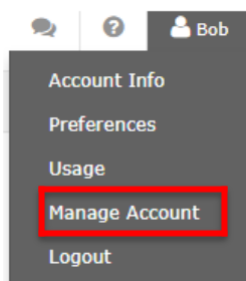
1. Take a look at your users. Do the usernames match the emails of the SF users who will be using the integration with WE? These need to match in order to make the connection between the two systems work. You can edit a WE username to match the SF email by clicking on the user and the then editing their profile.
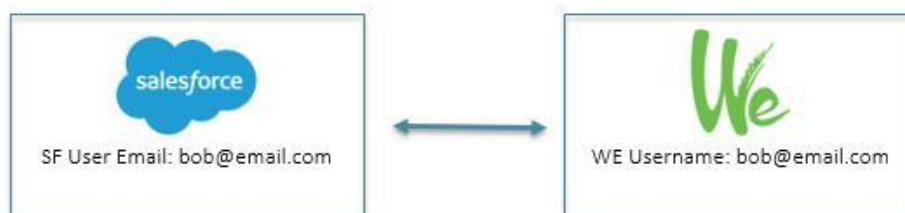
2. If you do not have all your WE users created, do so using the New User button and entering the required information.
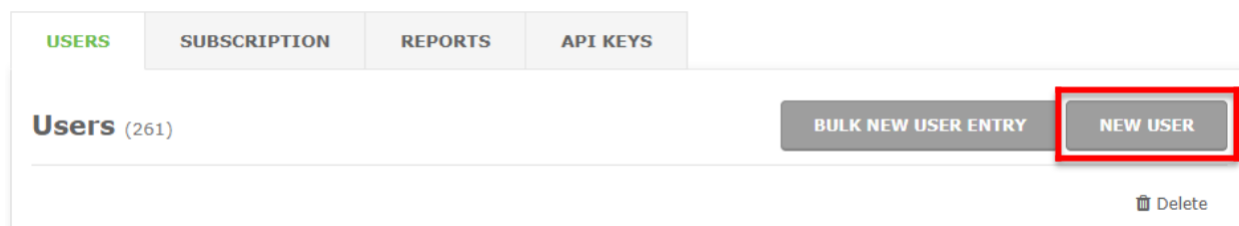
3. Once you have your usernames squared away, you will need to provision each user with the new Salesforce Connector - Professional plan. Your account will have automatically been assigned the new plan but it has yet to be assigned to users.
   a. Click on the user you want to assign the Salesforce Connector – Professional plan to.
   b. Check the box next to the Salesforce Connector plan

c. Click Save.

Seats & Limits

◉ Active ○ Inactive   Reset Password

Solution	Plan	Seat	Available Seats	Limits	Usage Allocation	Expires
Fundraising - Basic	WE Search - Professional	☑	2/10	Number of Searches	Unlimited	11/08/2018
Fundraising - Basic	WE Admin	☑	2/10			11/08/2018
n/a	Salesforce Connector - Professional	☐	4/10			11/16/2018
n/a	WE Data Services Screening - 10K	☑	3/10	Screened Records	Shared Pool	11/08/2018
Fundraising - Basic	WE Platform Nonprofit	☑	2/10			11/08/2018
n/a	Salesforce Connector for NP - Professional	☐	1/1			11/08/2018

Cancel   **SAVE**

WE Admin Step 2: Connect WE to SF

1. A WE Admin will need to log into their WE account and click on their name in the top right. Select Integrations from the drop-down menu.

💬   ❓   👤 Bob

Account Info

Preferences

Usage

Integrations

Manage Account

Logout
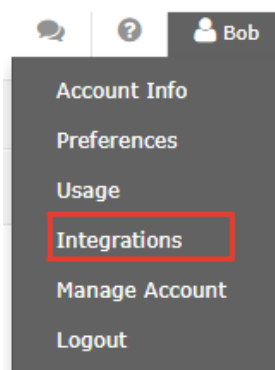
2. On the next page, click on the Log In button under the Production or Sandbox Salesforce link, whichever you are trying to connect to.
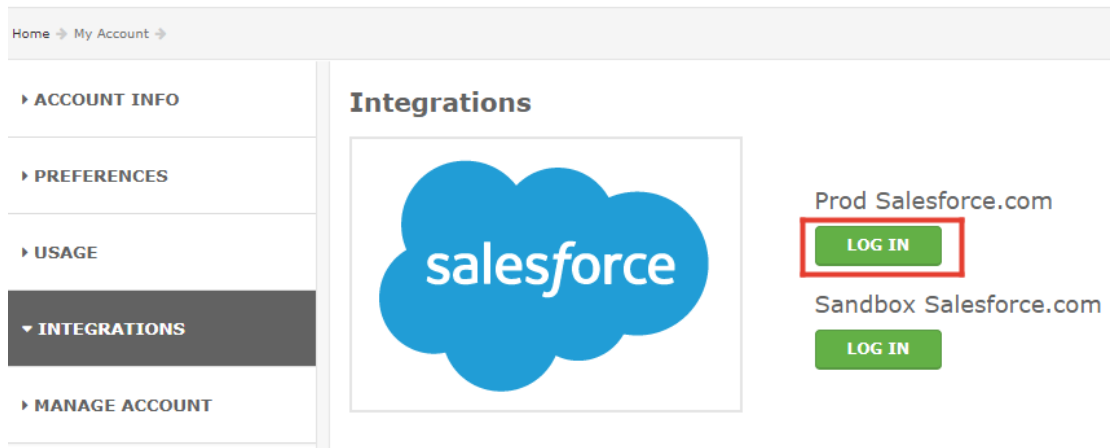
3. If you are not already logged into SF, it will prompt you to log into the account you would like to connect to.
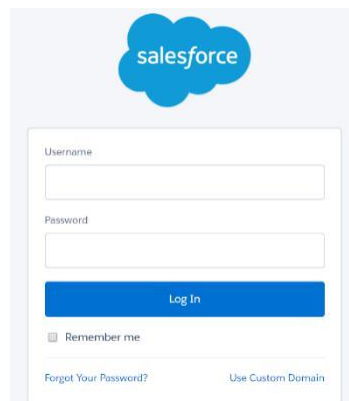
4. Once logged into SF, click on the Allow button to allow WealthEngine the access needed for our app.
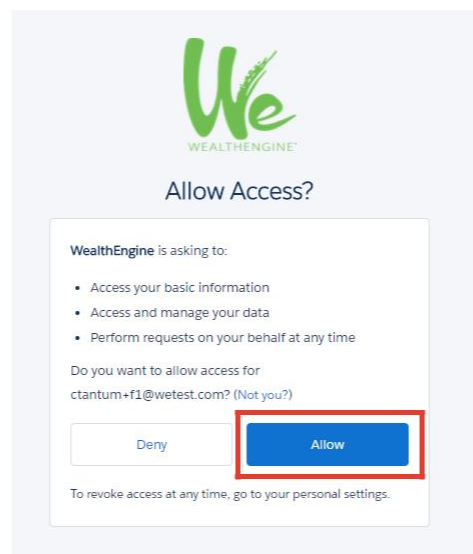
Test WE Insights for Salesforce

1. Login as a user who has WE access and a WE user setup as described in the previous section. In Lightning or Classic, navigate to a **Lead or Contact or Person Account** record.
2. Whether you put the buttons at the top of the page or used the Visualforce, click the **Get Current Results** button.

3. If the connection is properly authenticated, a new Result will return with WE data. If it is not, you will get a Sorry you do not have access to this service error. See the common errors section below for steps to resolve this.

	Created Date	Net Worth	Total Assets	Cash on Hand	Age	Income	Direct Stock Holdings	Real Estate Value
View | Del	11/30/2017	$10MM-$25MM	$10MM-$25MM	$100K-$500K	41	$100K-$250K	Unable to rate	Unable to rate

Recommended: Custom Permissions by Profile/User

Tab Settings

There are two WealthEngine tabs associated with our package; WE Configuration and WealthEngine.

The WealthEngine tab allows the user to connect to the WE platform for searching and prospecting. This should be default on for all WE users unless you have some read-only users. In that case, it is preferred to turn that tab as default off. This is because none of the buttons will actually work for the user and so they will just get error messages.

The WE Configuration tab allows for the auto-append and context mapping detailed earlier in this document. This tab should only be default on for the system administrator and possibly a WE admin.

To toggle tabs on and off, you would do it from the profile or permission set level.

> Setup > Manage Users > Profile > Custom Tab Settings > WealthEngine

Read-Only User

The read-only user option allows a Salesforce user to see and report on the WE data within SF but does not allow them to get any new data or link to the WE site via the Research Details button or buttons on the Home Page. If they try to use these features, they will simply get a "You do not have access to this service" error message. For this type of user, it is advised that you turn both custom tabs to default off as listed in the pervious section. Also, if you are using the option 1: related list it is best to give those users a page layout that does not include the buttons.

Congratulations! WE Insights for Salesforce is ready to use.

Documentation

Now that you have installed the WE Insights for Salesforce, refer to the User Documentation for an in-depth guide on how to use the WE Insights for Salesforce features.

Common Error Messages and Their Solutions

Sorry, You Do Not Have Access to That Service

This error message will occur when a Salesforce user does not have a WE user properly setup or their WE user does not have permission to use this service. Depending upon the situation, this can be a setup issue or correct depending upon your client contract with WealthEngine. To troubleshoot, first review your WealthEngine subscription to understand what access you have. Next, ensure your WE users are properly provisioned with the access they should have. Lastly, ensure your WealthEngine user's usernames match their Salesforce emails.

> Valid Reasons for this Error Message:
>
> 1. Real-only Users: Read-only users will get his message when they try to click on any button associated with WealthEngine, they are only permitted to see the data in Salesforce, not get new data or link to the WE site.
> 2. No Data Services Access or Credits: If the user does not have data service credits or access allotted to their WE user, they will not be able to use the Get Wealth Info button on the campaign.
> 3. No Prospecting Access: If the user does not have Prospecting access or credits, they will not able to use the Prospect button on the WealthEngine tab.

The connection between WealthEngine and Salesforce has not been established.

This means the connection between WealthEngine and Salesforce has not been properly established to allow the integration to work. Please refer to pages 25-26 of this guide to connect WealthEngine and Salesforce.

Support

WealthEngine staff is committed to your success. If you encounter problems during the WE Insights for Salesforce installation, please contact our Customer Care Team. We provide support for our products via email, telephone or live chat Monday through Friday from 9:00 am - 6:00 pm eastern standard time.

Support Email: customerservice@wealthengine.com
Support Telephone: 855-200-0665
Live Chat: Available via the WealthEngine Platform