

AiChat Lead Capture App for Salesforce Implementation Guide

Version 0.2

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Welcome to AiChat Lead Capture

AiChat Lead Capture App makes it easy to capture leads from Facebook Lead Ad campaigns into Salesforce. After you set up AiChat Lead Capture, leads captured from Lead Ad campaigns are imported to Salesforce in real time, ready for your sales team to qualify and convert.

Below is an overview of the process.

NOTE : Before installing in your production environment, we suggest testing the app in a sandbox first.

1. Install AiChat Lead Capture App

- a. Install AiChat Lead Capture App from Salesforce AppExchange and package will install in your Salesforce org.

2. Aichat Lead Capture Connected App

- a. Configure the Aichat Lead Capture Connected App so that pre-authorized users or all users can access it. You need to perform this step only if you have any internal user access & permissions.

3. Grant access to Facebook Page

- a. Grant access to Aichat Leads Capture in Facebook page. Users must have admin access to the page.

Lead Capture is available only in Lightning Experience in: Enterprise, Performance, Unlimited, and Developer Editions.

Install AiChat Lead Capture App

AiChat Lead Capture App for Salesforce is distributed as an AppExchange package that you install in your Salesforce org. Before installing in your production environment, we suggest testing the app in a sandbox first.

To install packages:

“Download AppExchange Packages”

1. Go to the AiChat Leads Capture for Salesforce AppExchange listing and then click Get It Now.
2. Click Log in to the AppExchange.
3. Enter the login credentials for the org where you want to install the package.
4. Click Install in production.
5. Confirm that you're installing the package in the correct org, and then select the box to agree to our terms and conditions.
6. Click Confirm and Install!.
7. Enter your login credentials again.
8. Select Install for Admins Only. Leave the other options as-is.
9. Click Install. The package can take a few minutes to install.
10. Click Done to view the package in your org.

Configure the AiChat Lead Capture Connected App

Configure the AiChat Lead Capture Connected App so that pre-authorized or all users can access it. You only need to perform this step once and if you have any internal access & permissions.

1. From **Setup**, enter **Connected Apps** in the Quick Find box, and then click **Manage Connected Apps**.
2. Look for **Aichat Lead Capture Connected App** and click **Edit**.
3. In the “**OAuth policies**” section, for Permitted Users, select “**Admin approved users are pre-authorized**” or “**All users may self-authorize**”.



The screenshot displays the 'OAuth Policies' configuration window. It features a header 'OAuth Policies' and a main area with two settings: 'Permitted Users' and 'Enable Single Logout'. The 'Permitted Users' dropdown is currently set to 'All users may self-authorize'. The 'Enable Single Logout' checkbox is unchecked, and there is an information icon next to it.

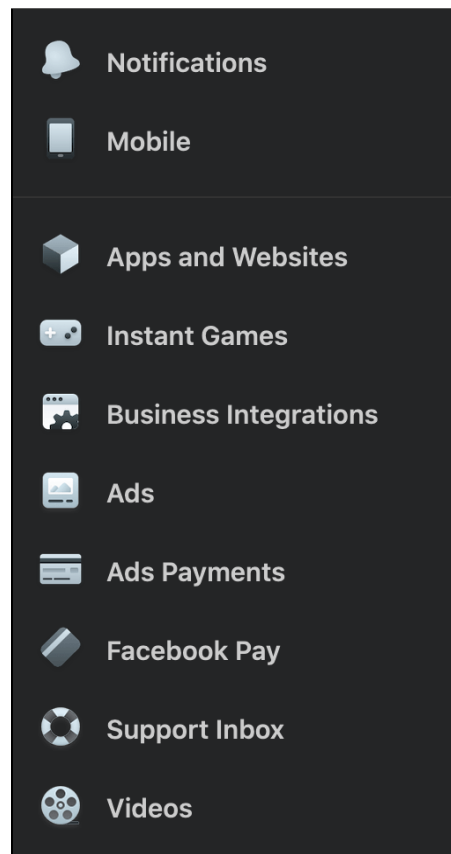
- 4.
5. Confirm the changes and then click Save.

Grant Access to Facebook page with Aichat Salesforce App Exchange

A User must also have Admin access to the Facebook page that's associated with the Lead Ad form. This will be ask when setting up your facebook page with Salesforce AiChat Lead Capture App.

Below are step for reference to add right permissions in Facebook.

1. Goto <https://www.facebook.com/settings>
2. Click on "Business Integrations" on left side of the pane.



- a.
3. Look for "Aichat Salesforce App Exchange" and click on "view and edit"



- 4.
5. A popup modal will appear with a list of your facebook pages.
6. Check your pages in below images with Managed permissions.
 - a. Manage and access Page conversations in Messenger
 - b. Show a list of the Pages you manage
 - c. Read content posted on the Page

- d. Manage accounts, settings, and webhooks for a Page
- e. Read user content on your Page
- f. Create and manage ads for your Page
- g. Create and manage content on your Page
- h. Manage comments on your Page

 **Aichat Salesforce App Exchange** ×

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INFO YOU ARE SHARING WITH THIS BUSINESS INTEGRATION:

Name and profile picture

REQUIRED

Email address

marafee1243@live.com ☒

WHAT BUSINESS FEATURES CAN BE MANAGED:

 Descriptions of what Aichat Salesforce App Exchange can do have been updated.

Manage and access Page conversations in Messenger

☒

Pages

☐

Sales Force

☒

☐

☐

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Cancel

Save

7.


Aichat Salesforce App Exchange
✕

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Show a list of the Pages you manage
☑

Show a list of the Pages you manage

Pages
⌵

Sales Force☑

██████████☐

██████████☐

[See all Pages](#)
▼

Read content posted on the Page
☑

Read content posted on the Page

Pages
⌵

Sales Force☑

██████████☐

██████████☐

[Terms](#) • [Privacy Policy](#) • [Give Feedback](#)

Cancel
Save

8.


Aichat Salesforce App Exchange
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Manage accounts, settings, and webhooks for a Page
☑

Manage accounts, settings, and webhooks for a Page

Pages
⌵

Sales Force☑

██████████☐

██████████☐

[See all Pages](#)
▼

Read user content on your Page
☑

Read user content on your Page

Pages
⌵

Sales Force☑

██████████☐

██████████☐

[Terms](#) • [Privacy Policy](#) • [Give Feedback](#)

Cancel
Save

9.

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Create and manage ads for your Page ☒

Create and manage ads for your Page

Pages ☒

Sales Force	☒
[Redacted]	☐
[Redacted]	☐

[See all Pages](#) ▼

Create and manage content on your Page ☒

Create and manage content on your Page

Pages ☒

Sales Force	☒
[Redacted]	☐
[Redacted]	☐

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10.

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Manage comments on your Page ☒

Manage comments on your Page

Pages ☒

Sales Force	☒
AC Salesforce Stg	☐
AC Coopervision My Staging	☐

[See all Pages](#) ▼

ADDITIONAL BUSINESS INTEGRATION SETTINGS:

Can this business integration send you notifications? Yes ▼

Who can see you use this business integration? Public ▼

This setting controls who on Facebook can see that you use this business integration, but not your activity or if someone tags you within the app. [Learn More](#)

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11.

12. Click on Save.