Aichat Lead Capture App for Salesforce Guide

This app enables businesses to easily set up multiple leads generation campaigns via Facebook, capture leads information via Messenger bot in an intuitive conversational way, and sync up with Sales Cloud automatically.

This app can be used by marketing/CRM managers who want to generate and capture more qualified leads via Facebook Ads and Facebook Messenger more effectively.

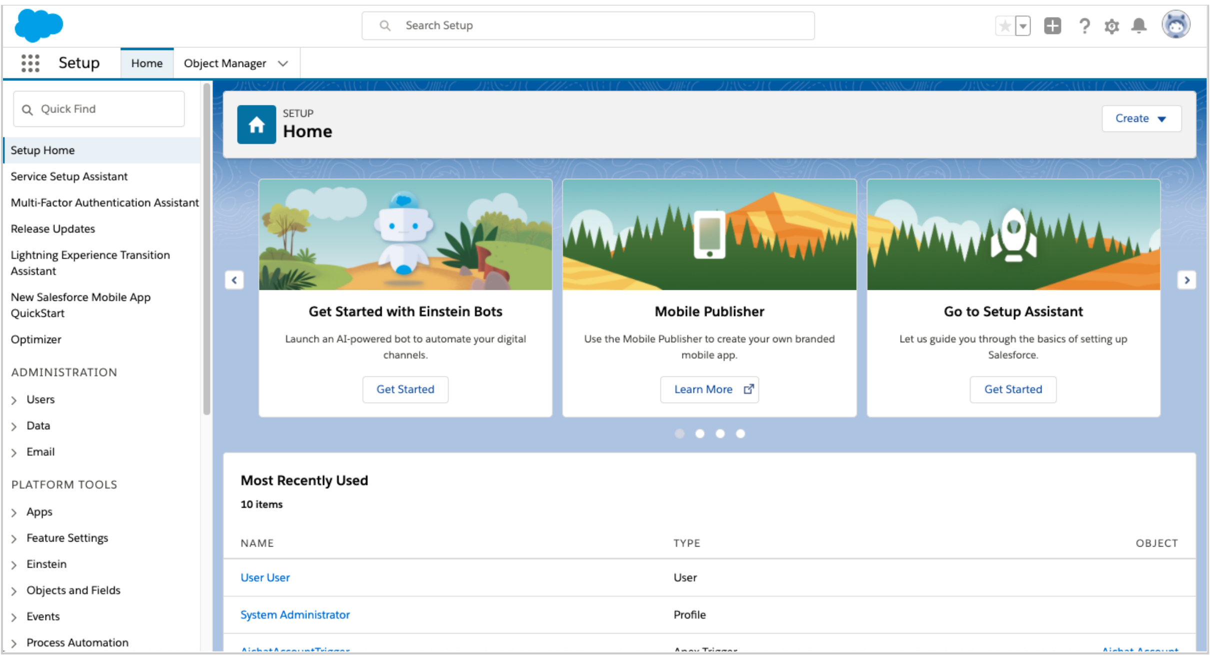
Before using the AiChat Lead Capture App, be sure you have these ready:

- Facebook page of your business
- Salesforce Sales Cloud account
- AiChat Lead Capture App installed in your Sales Cloud

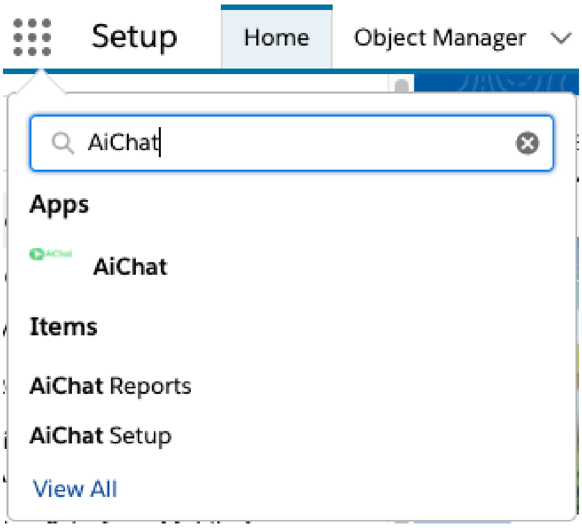
Opening the AiChat Lead Capture App

To open the AiChat Lead Capture App, please follow these instructions:

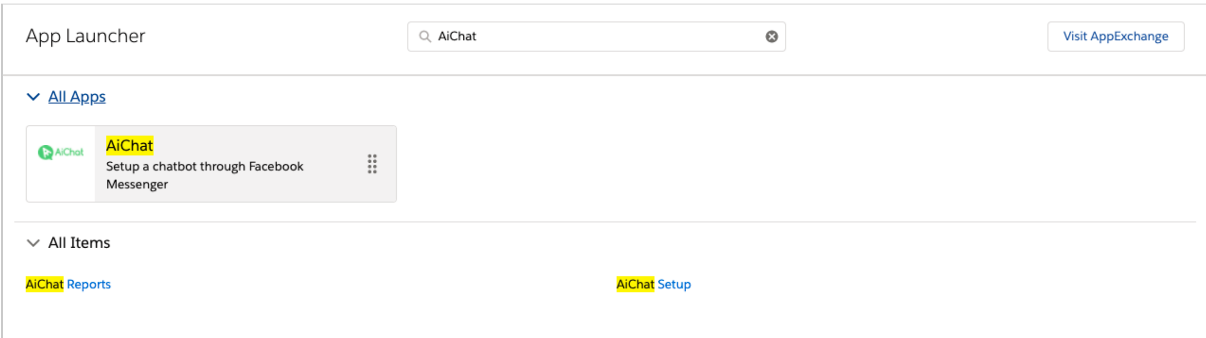
1. Go to http://appexchange.salesforce.com and log in to your account. You will see the main screen of Salesforce AppExchange.



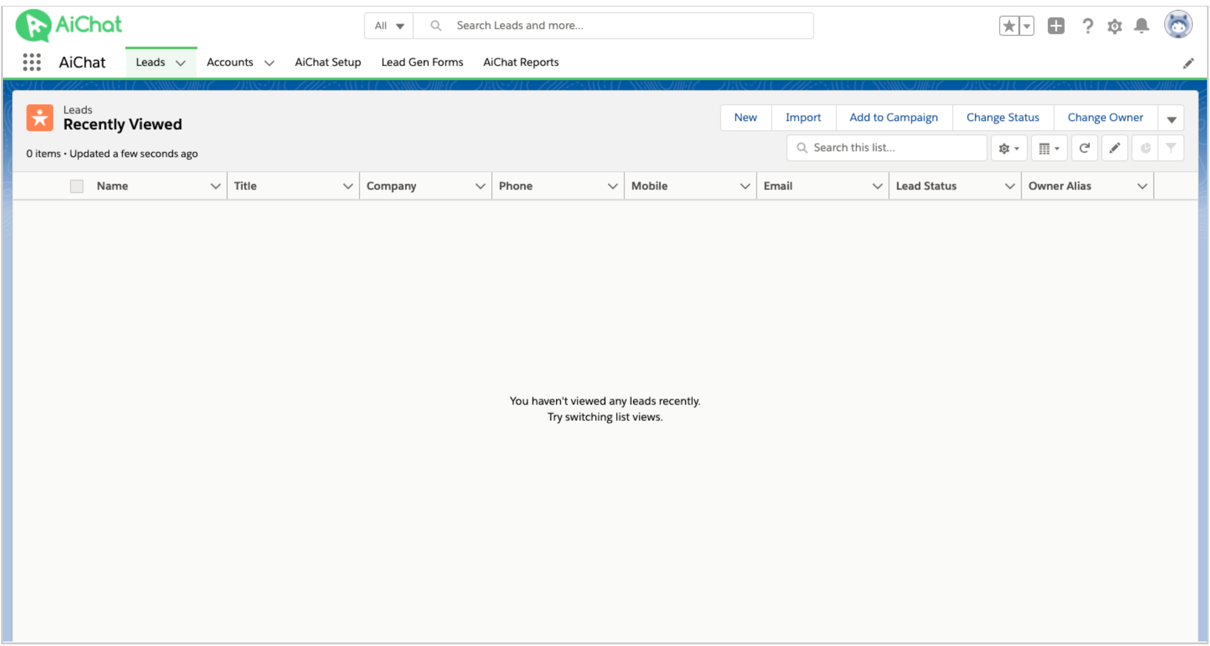
2. Click the App Launcher on the top left, as shown by the icon, then type “AiChat” in the search box. You will find the AiChat Lead Capture app.



The other way to search the AiChat Lead Capture App is by clicking **View All** in the App Launcher dropdown. The App Launcher will pop up, and you can easily search the app.



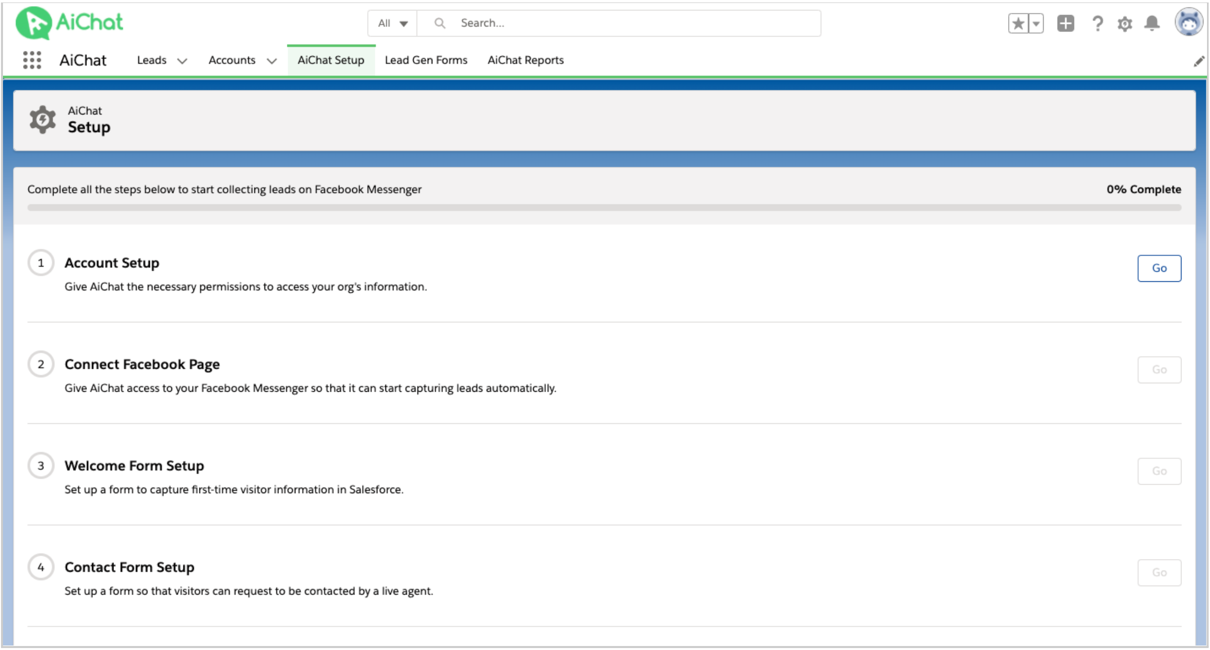
3. Once you click the AiChat app, you are welcomed to the AiChat Lead Capture App screen. This is where you will create lead generation forms for your Facebook business page.



Initial setup of AiChat Lead Capture App

Now that you have opened the AiChat Lead Capture App for the first time, you will need to configure it before your brand could start collecting leads through Facebook Messenger.

Click the **AiChat Setup** tab. There are 5 steps to complete the setup.

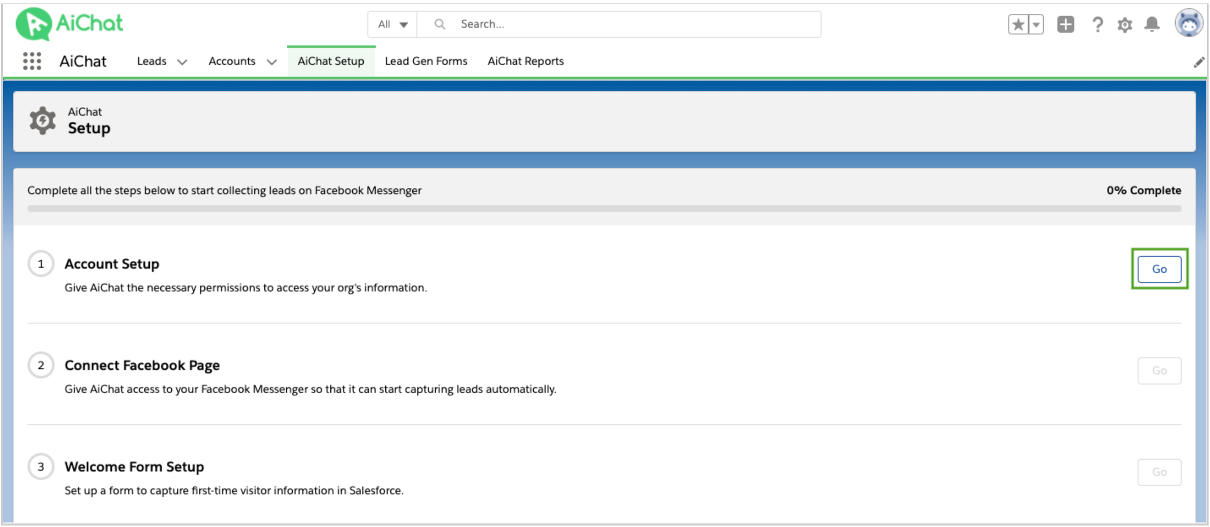


1. Account Setup

By setting up your account, you give AiChat the necessary permission to access your org's information.

Please follow these instructions:

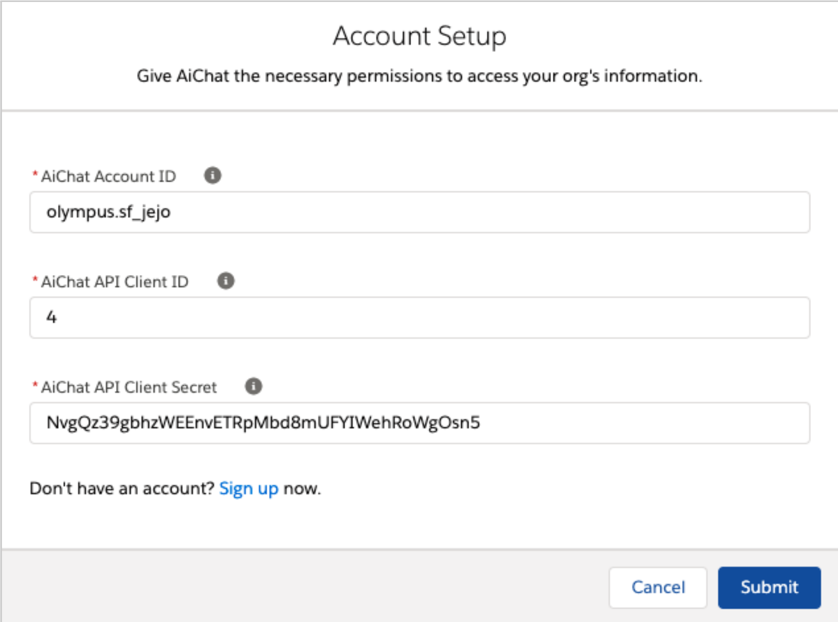
1. In the AiChat Setup page, you will see **Account Setup**.



Click the **Go** button on the right side and the **Account Setup** dialog box will pop up.

Note

If you have already received your credentials (consist of AiChat Account ID, AiChat API Client ID, and AiChat API Client Secret), follow steps 2-6. If you have not received the credentials, please jump to steps 7-12.



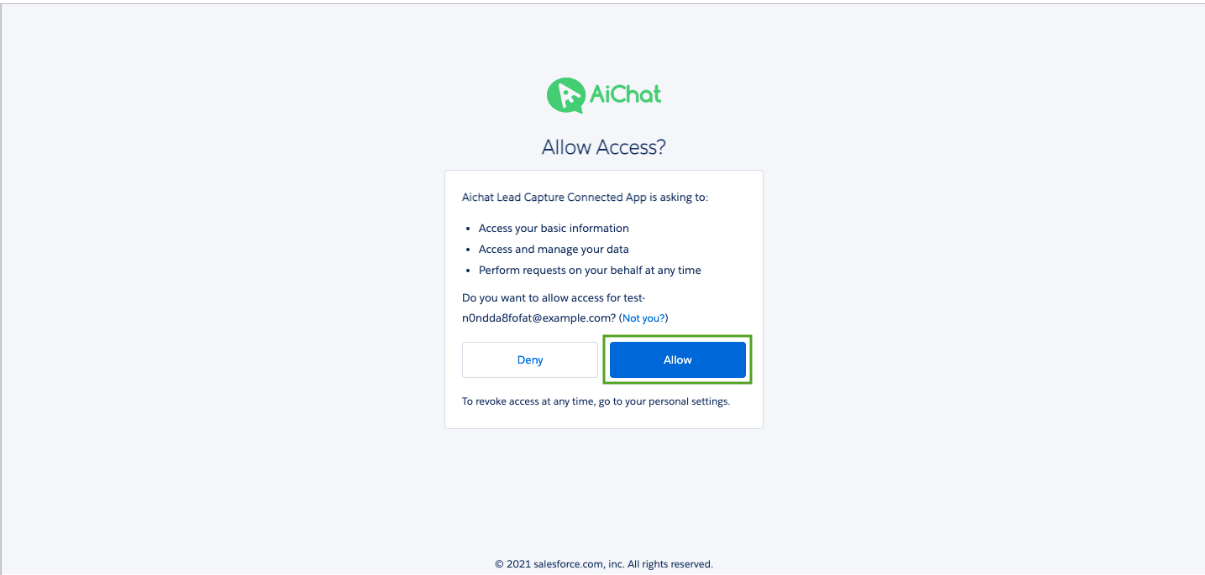
2. Please input your Account ID in the **AiChat Account ID** field.

3. Please input your API Client ID in the **AiChat API Client ID** field.

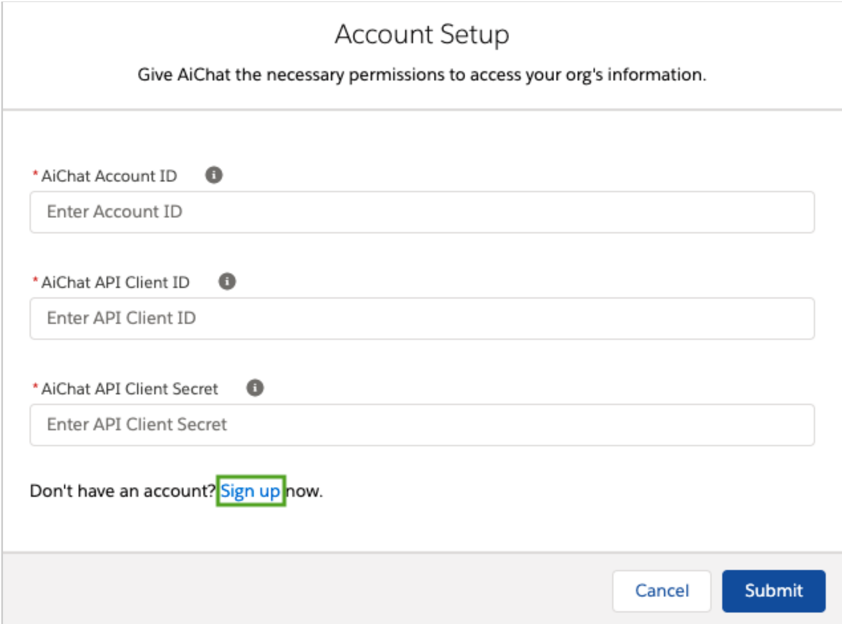
4. Please input your API client secret in the **AiChat API Client Secret** field.

5. Click the **Submit** button, and you will land on the authentication page.

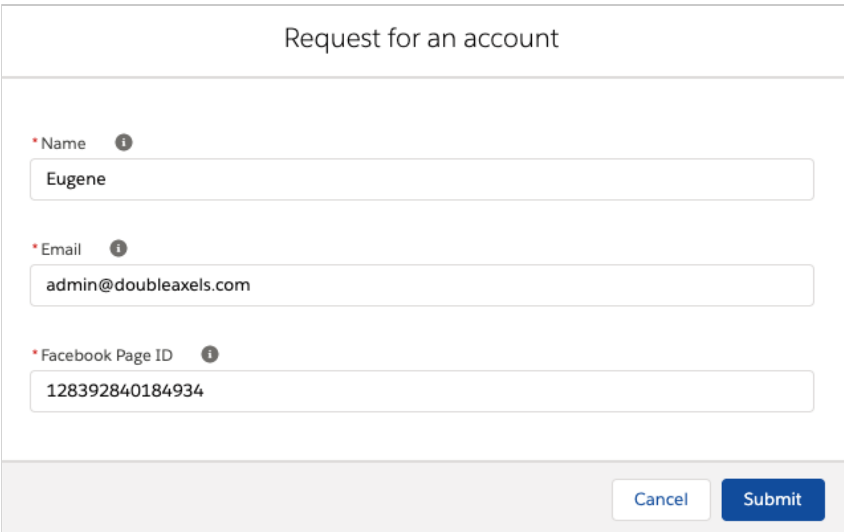
6. Finally, click the **Allow** button. Now you have your account set up.



7. If you do not have the app account yet, send a request to AiChat by clicking the **Sign up** link.



The **Request for an account** dialog box will pop up.



8. Enter your name in the **Name** field.

9. Please input your email address in the **Email** field.

10. Please input the ID of your Facebook Business page in the **Facebook Page ID** field.

11. Click the **Submit** button to send the request to AiChat. You should receive an acknowledgement email.

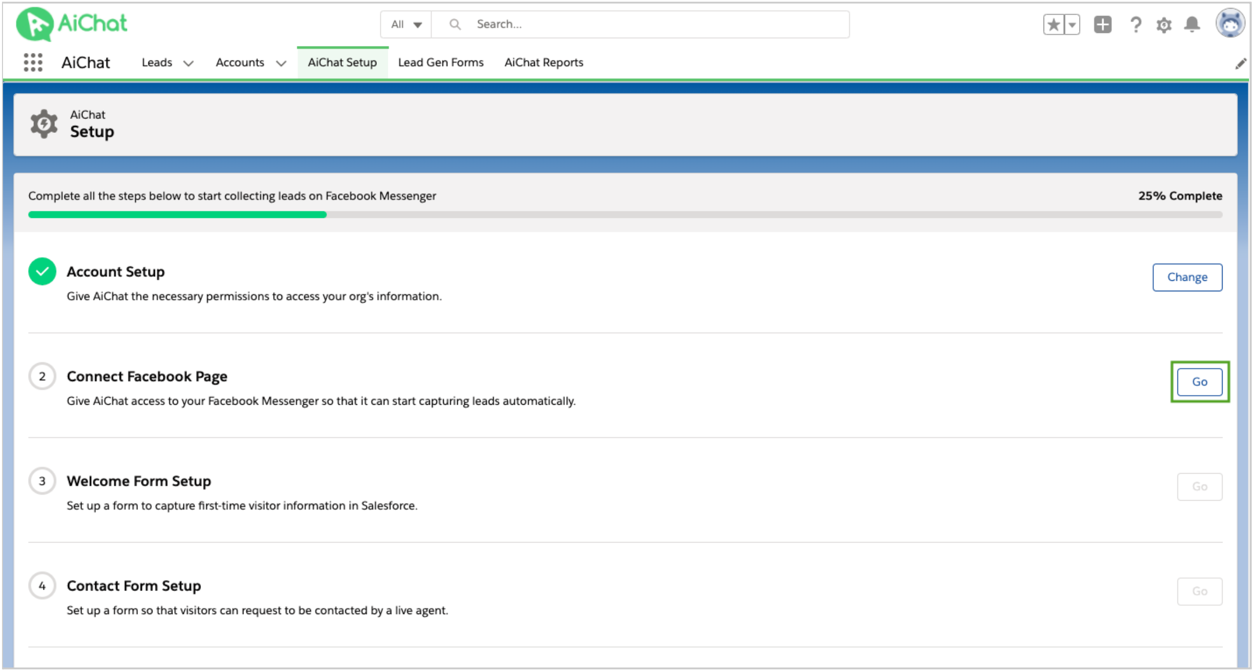
12. The credentials will be sent to you via email within 2-3 business days. Continue to steps 2-6 once you have received the credentials.

2. Connect Facebook page

By connecting your Facebook business page, you give AiChat access to your Facebook Messenger so that it can start capturing leads automatically.

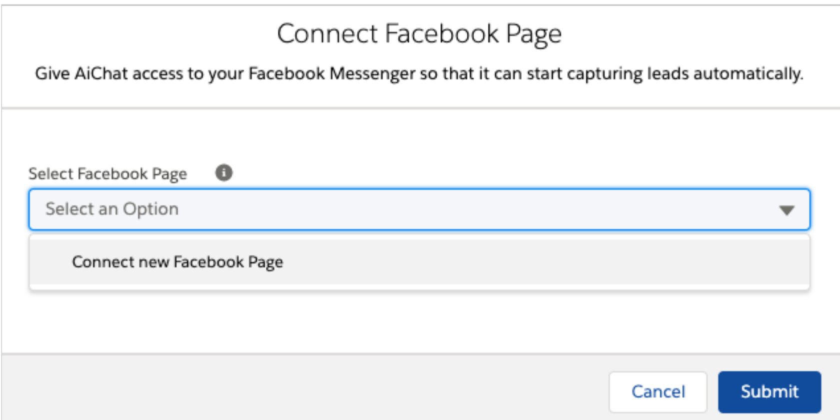
To connect, please follow these instructions:

1. In the Setup Page, you will also see that **Connect Facebook page** is now active.

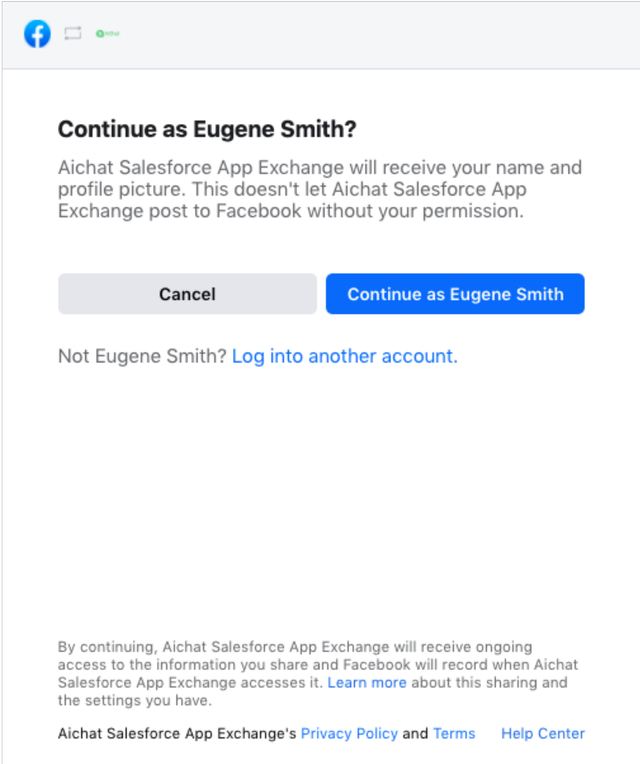


Click the **Go** button on the right side and the **Connect Facebook Page** dialog box will pop up.

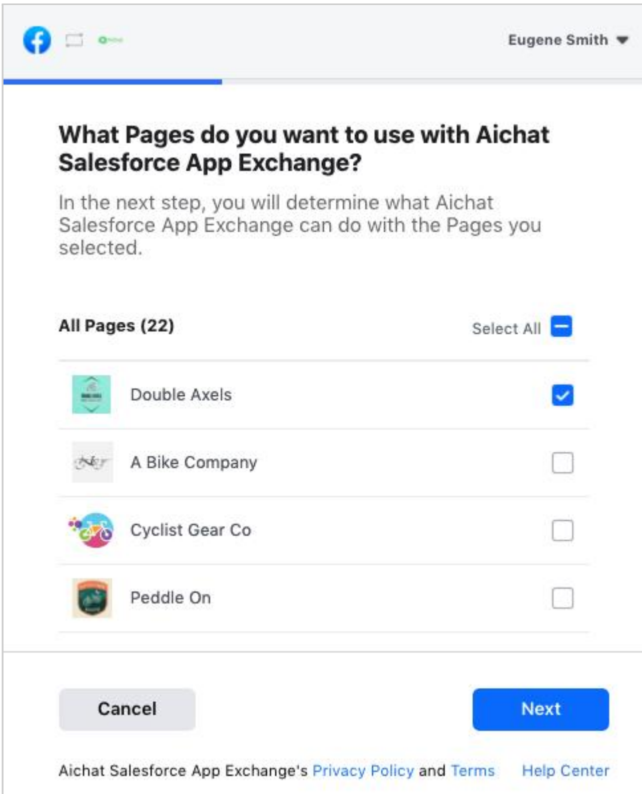
2. Click the dropdown menu to expand it, then select **Connect new Facebook Page**.



3. You will be redirected to Facebook. Log in to your Facebook account.

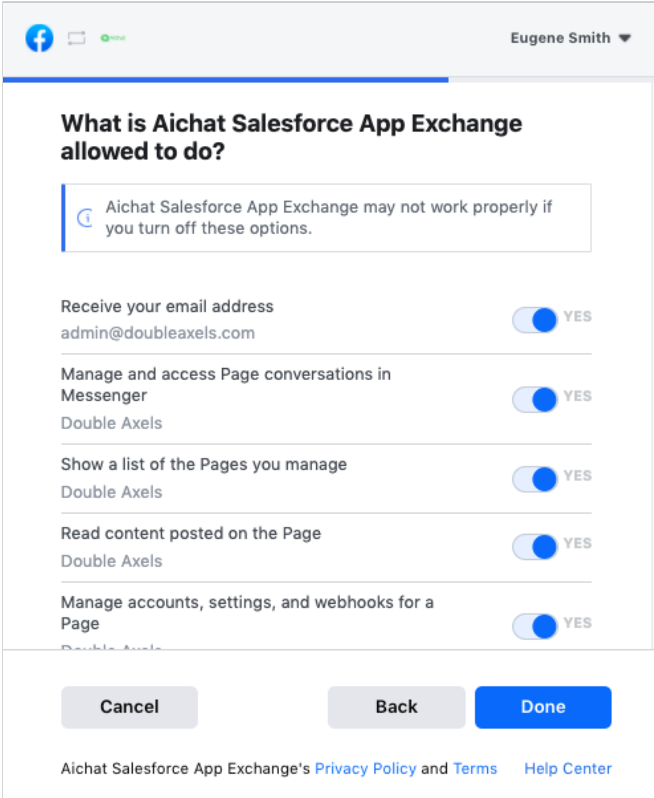


4. Another dialog box will pop up. This allows you to select the business page you want to integrate with the AiChat Salesforce App Exchange. In this example, your business is a bicycle shop called “Double Axels” and you have had the Facebook business page ready.



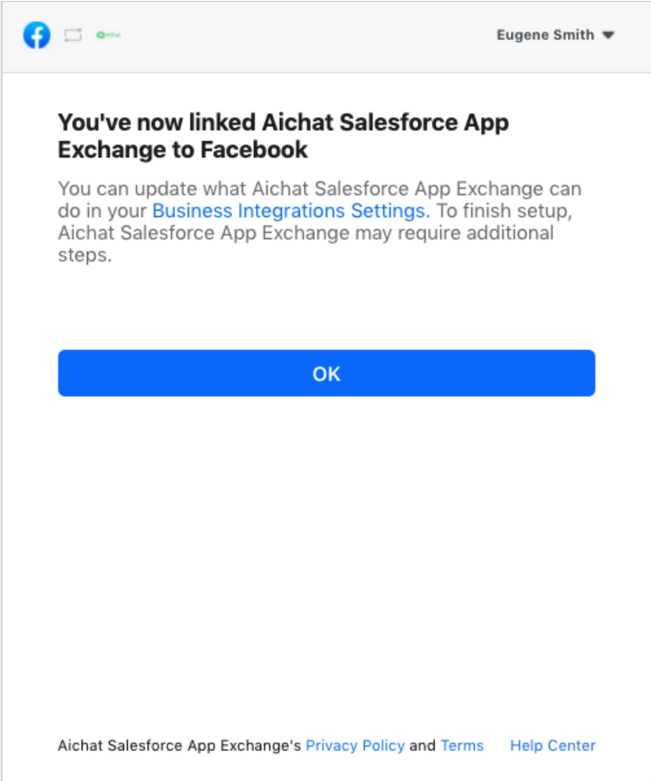
Tick the checkbox on the right side of your business page, then click **Next**.

5. Another dialog box will pop up. This allows you to activate the functions of AiChat Salesforce App Exchange on your business page.



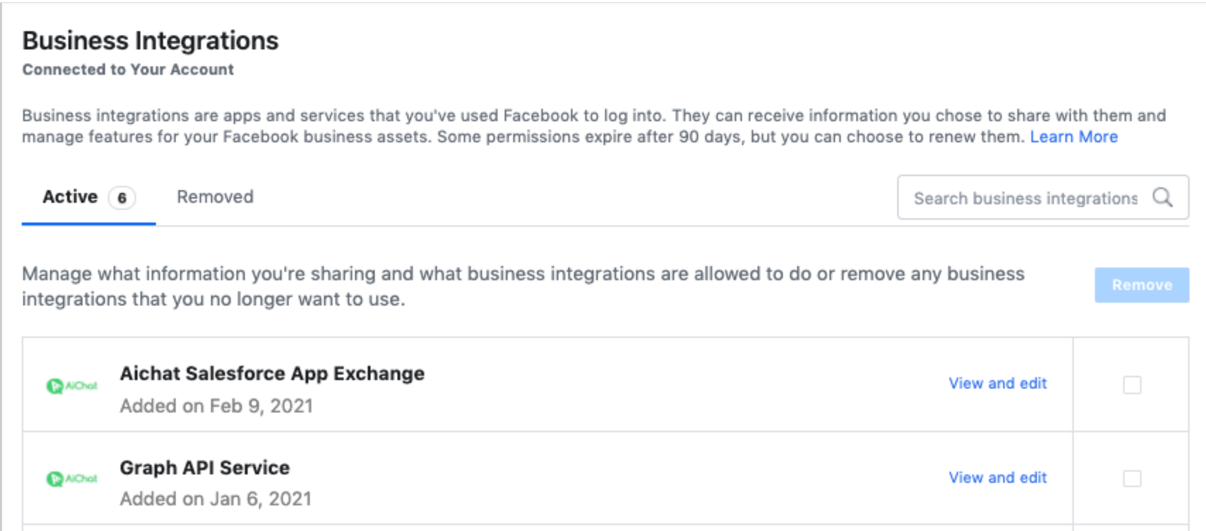
Ensure that you enable all the functions. Otherwise, the app might not work properly. Click **Done** afterward.

6. You will be informed that the AiChat Salesforce App Exchange is linked to your Facebook business page.

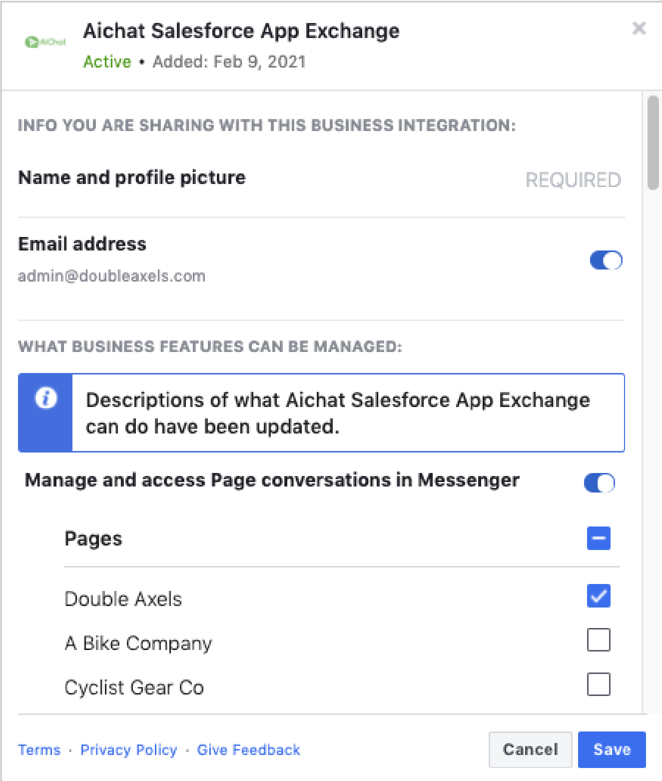


7. Tweak the integration settings of the AiChat app and Facebook business page by clicking the **Business Integrations Settings** hyperlink in the notification box (see image in step 6).

8. A new tab in your browser containing the **Business Integration Settings** page will open automatically. Scroll down until you see **AiChat Salesforce App Exchange**, then click **View and Edit** on the right side.



9. In the **AiChat Salesforce App Exchange** dialog box, ensure that all the boxes on the right of your Facebook business page name is checked. Also ensure the other items (Email address, etc.) are toggled on.



Once complete, you can click the **Save** button to close the dialog box. You will return to the Business Integration page.

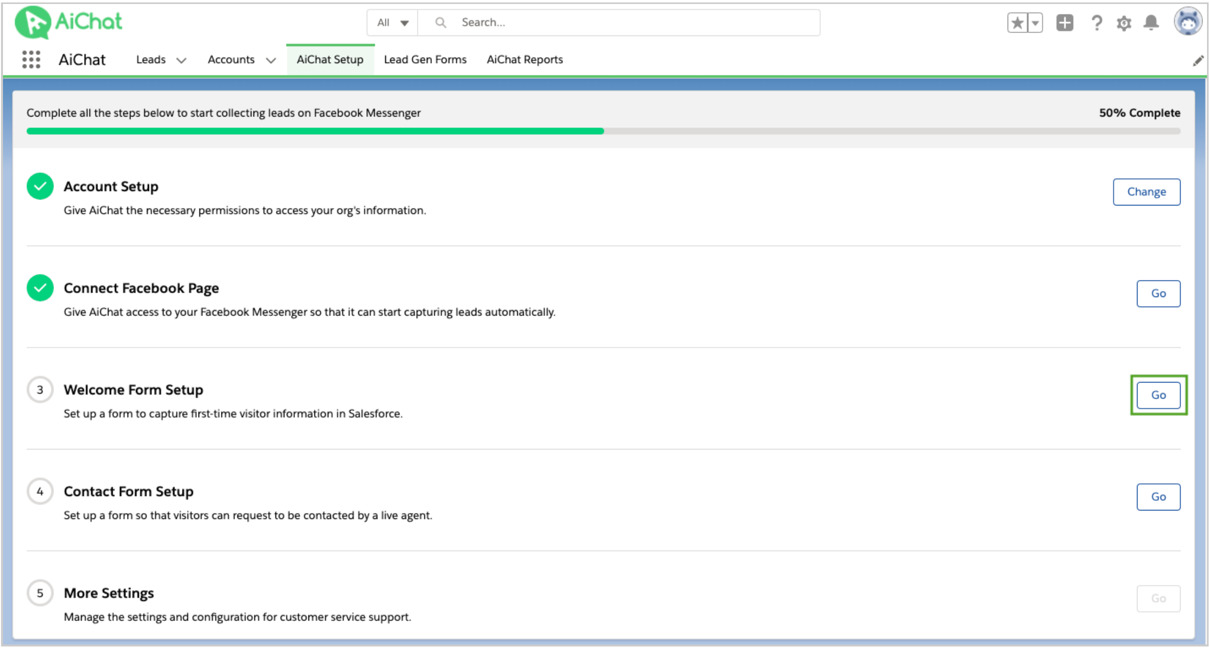
10. Return to the dialog box in Step 6 by clicking the tab that contains this dialog box. Click **OK** afterwards.

3. Welcome Form Setup

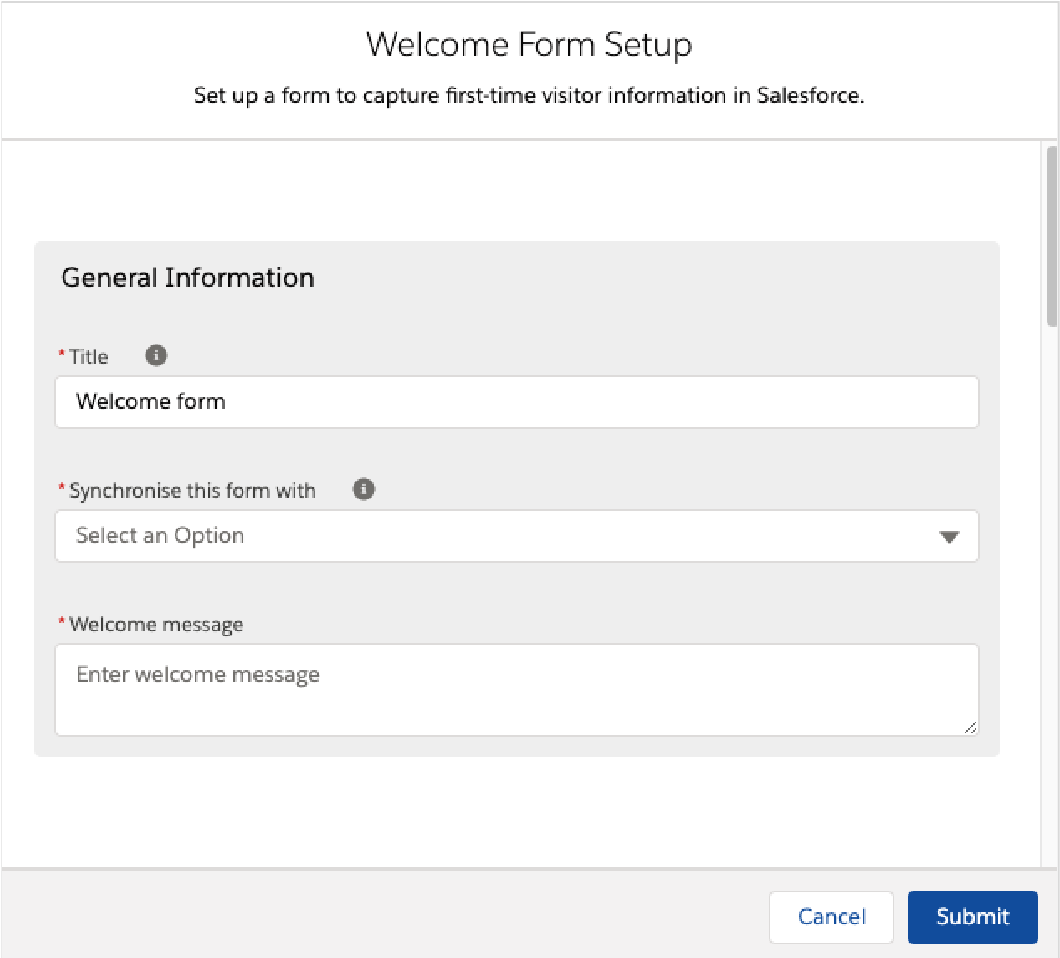
Set up a form so that first time visitors' information gets captured in Salesforce. In this example, you welcome customers by asking them which type of information from your bicycle shop they want sent to them regularly.

To complete the setup, please follow these instructions:

In the Setup Page, you will see that **Welcome Form Setup** is now active.

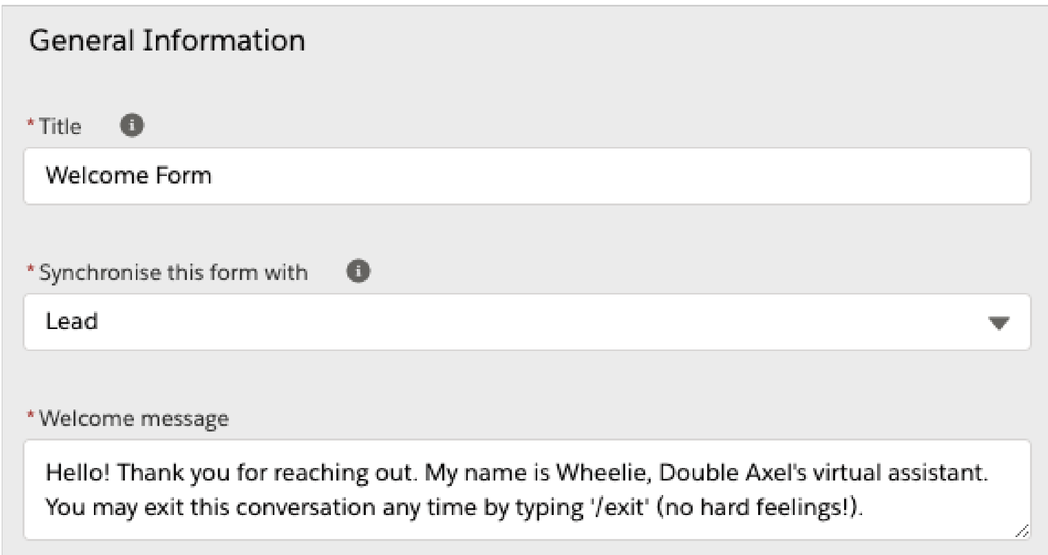


Click the **Go** button on the right side and the **Welcome Form Setup** dialog box will pop up.



3.1 General Information

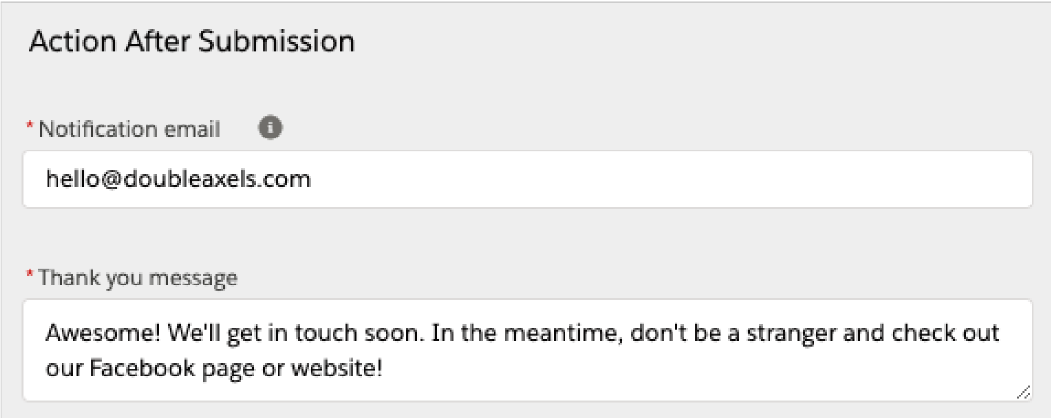
Fill in the general details of the form in the **General Information** box.



1. In the **Welcome message** field box, type your crafted welcome message. This will be the response the customer receives after he/she sends the first message to your brand in Facebook Messenger.

3.2 Action After Submission

Configure what happens after the form has been submitted in the **Action After Submission** box.

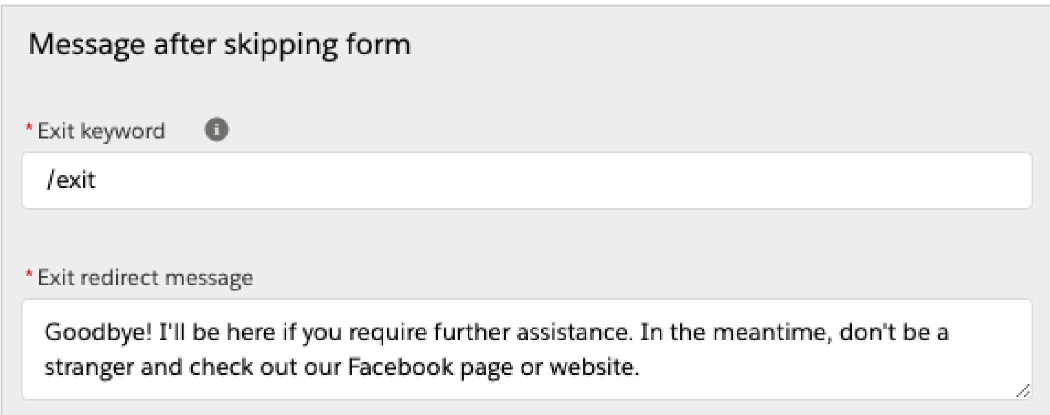


1. By filling in the **Notification email** field with your email, you or your business admin will receive a notification via email that the business page has just captured a new lead.

2. As for the **Thank you message**, it will be shown after the customer provides all the details in the welcome form.

3.3 Message After Skipping Form

As the bot prompts the Welcome form to the customer, the customer might also choose to skip this step right away. The settings can be configured in the **Message After Skipping Form** box.



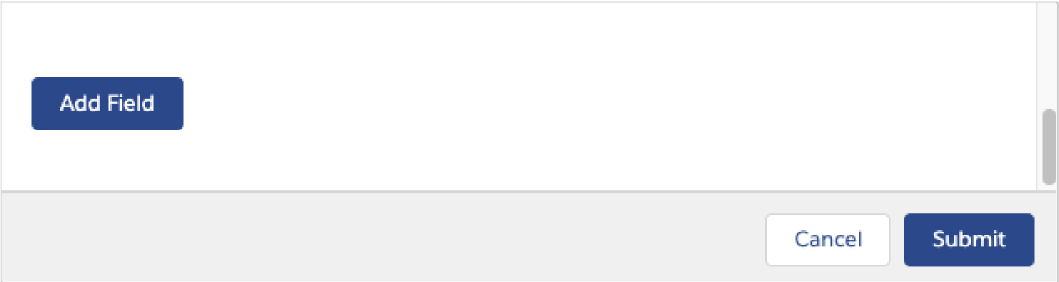
1. Fill in the **Exit keyword** field. If the customer types in the specified exit keyword, the form will be skipped to the exit redirect message.

2. In the **Exit redirect message** field box, type your crafted exit redirect message. This will be the response the customer receives after exiting the form.

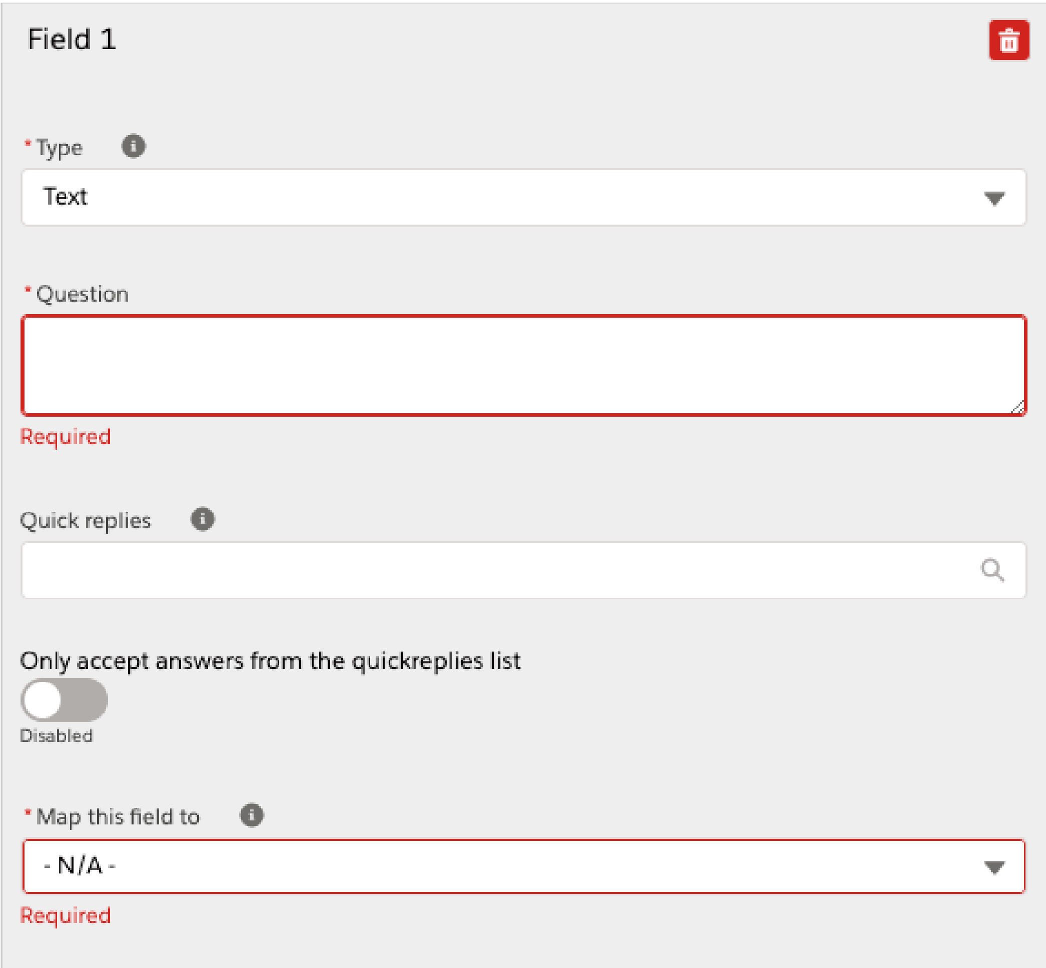
3.4 Fields

You can add form fields to get more information from your customer. These will appear between the welcome message and thank you message on the customer's end. Note that the form must contain at least one field.

To add fields, click the **Add Field** button on the bottom left of the dialog box.



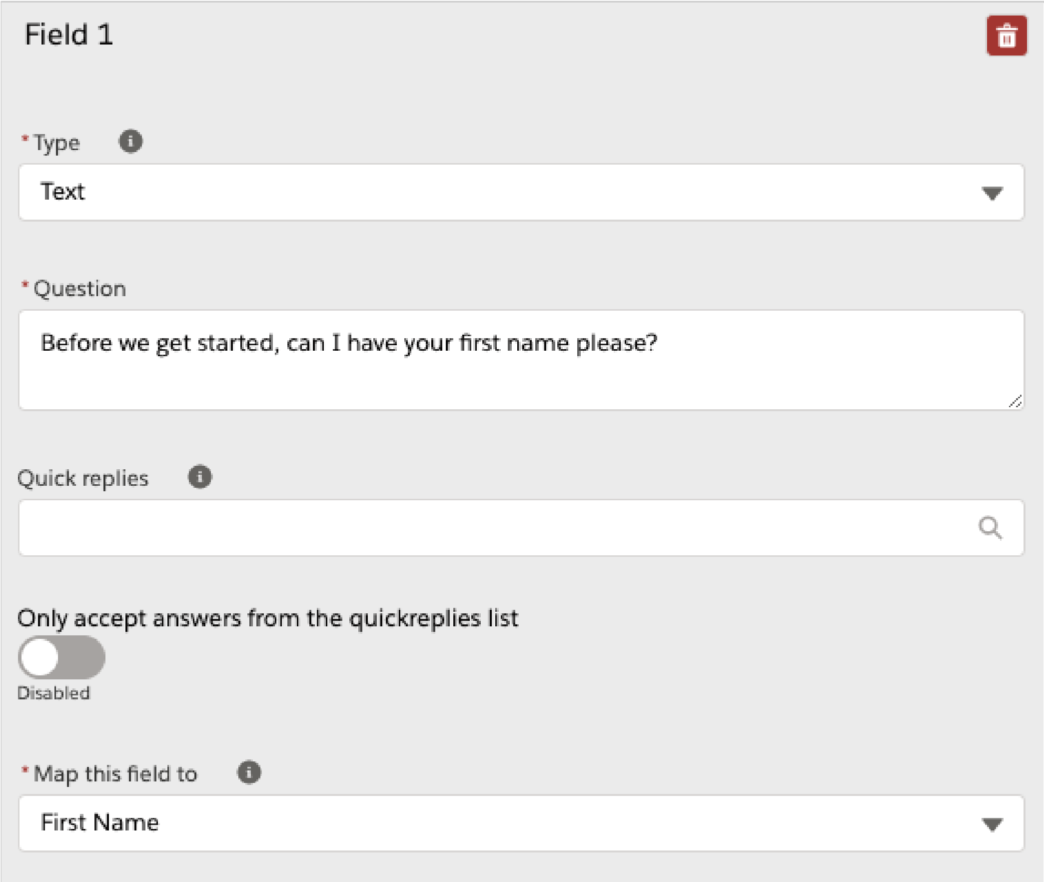
A box labelled "Field 1" will appear. Each new field added will be assigned a number in sequential order. To delete fields, click the icon located at the top right of each field.



Using the abovementioned bicycle shop as an example, you want to ask the customer for his/her personal information as part of your lead generation efforts.

Steps 1-6 will take you through the process of setting up the fields for first name, last name, type of information or updates the customer wants to receive, email and mobile phone number.

1. The first step is to ask for the customer's first name. To do this, add a new field (which will automatically be labelled **Field 1**).

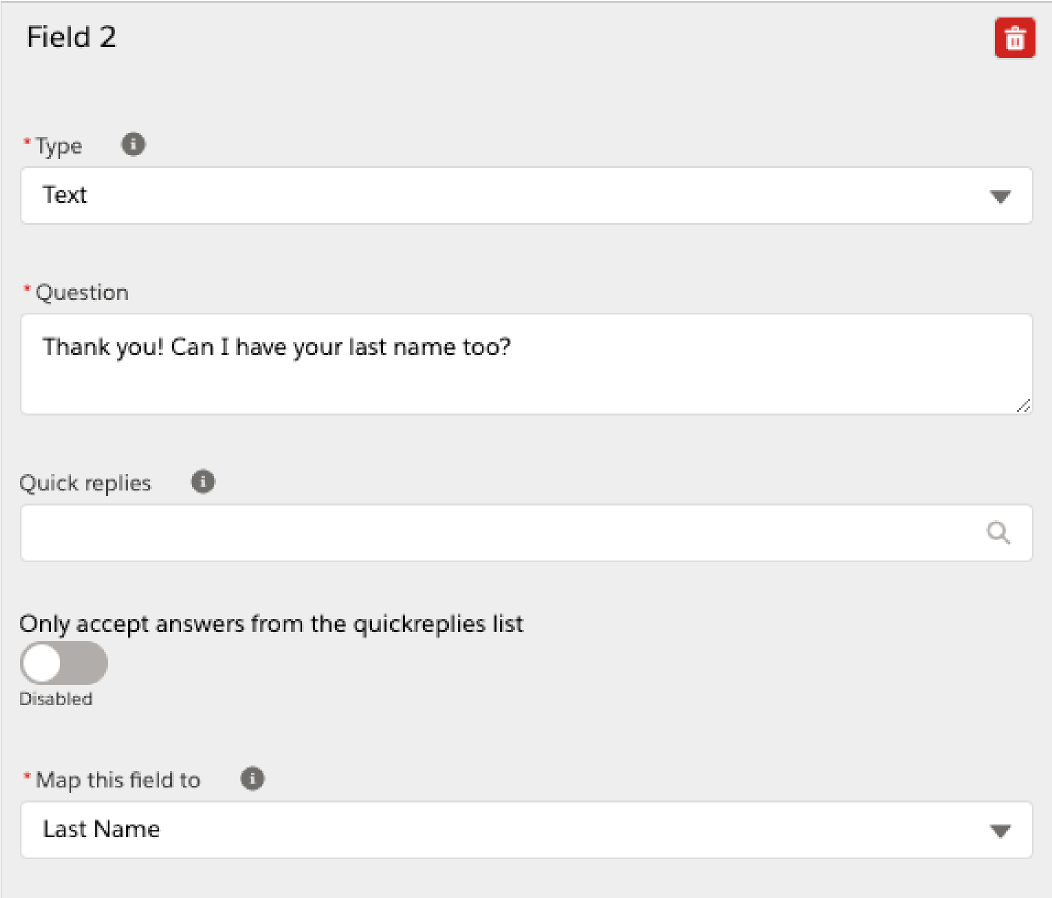


Select *Text* in the **Type** dropdown list. After that, type your message in the **Question** field.

Leave the **Quick replies** field empty.

In the **Map this field to** dropdown list, select *First Name*. In context, this dropdown list contains every field available in the company's Sales Cloud. By mapping the customer's input to these available fields, the lead would automatically be stored in your Salesforce account.

2. On to the next step, you want to ask for the customer's last name. To do this, add a new field (which will automatically be labelled **Field 2**).

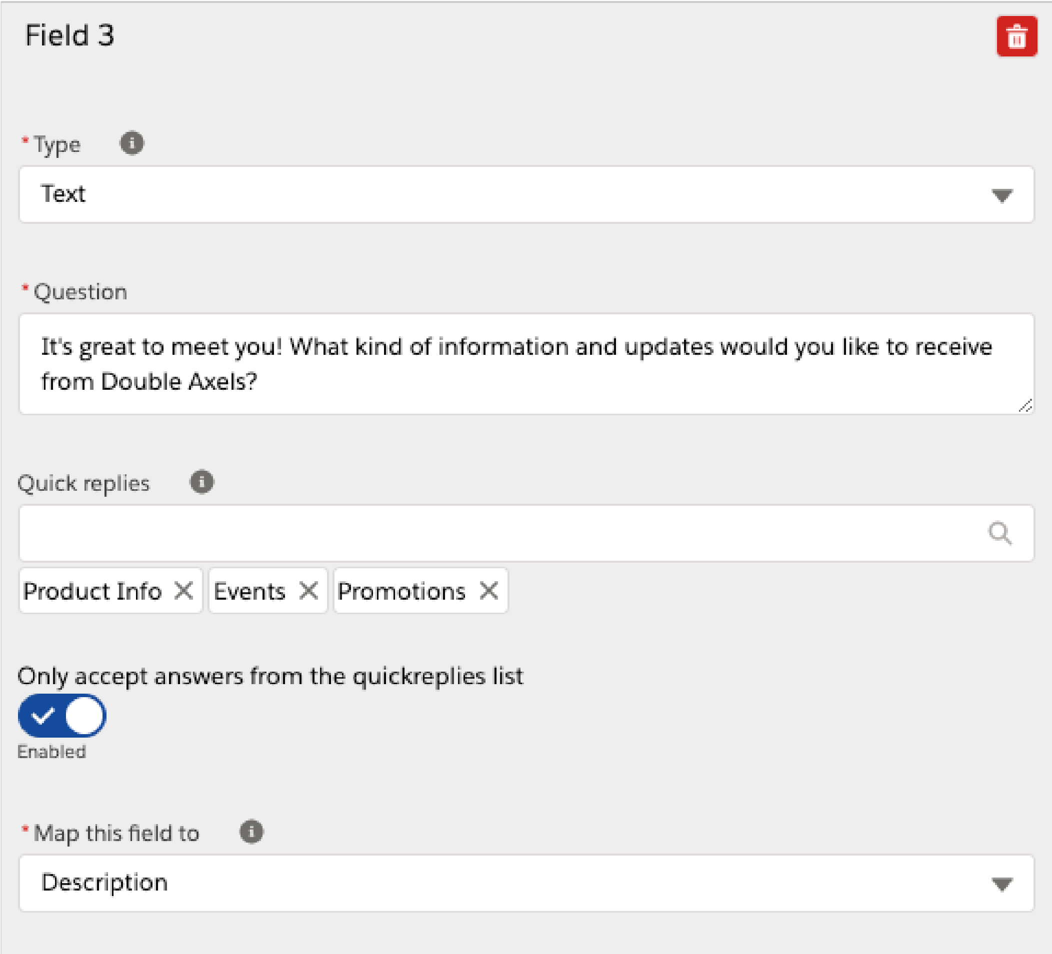


Select *Text* in the **Type** dropdown list and type your message in the **Question** field.

Leave the **Quick replies** field empty.

In the **Map this field** to dropdown list, select *Last Name*.

3. In the next step, you want to ask which type of information and update the customer wants to receive regularly from your bicycle shop. This will require the customer to choose an answer from multiple options. To do this, add a new field (which will automatically be labelled **Field 3**).



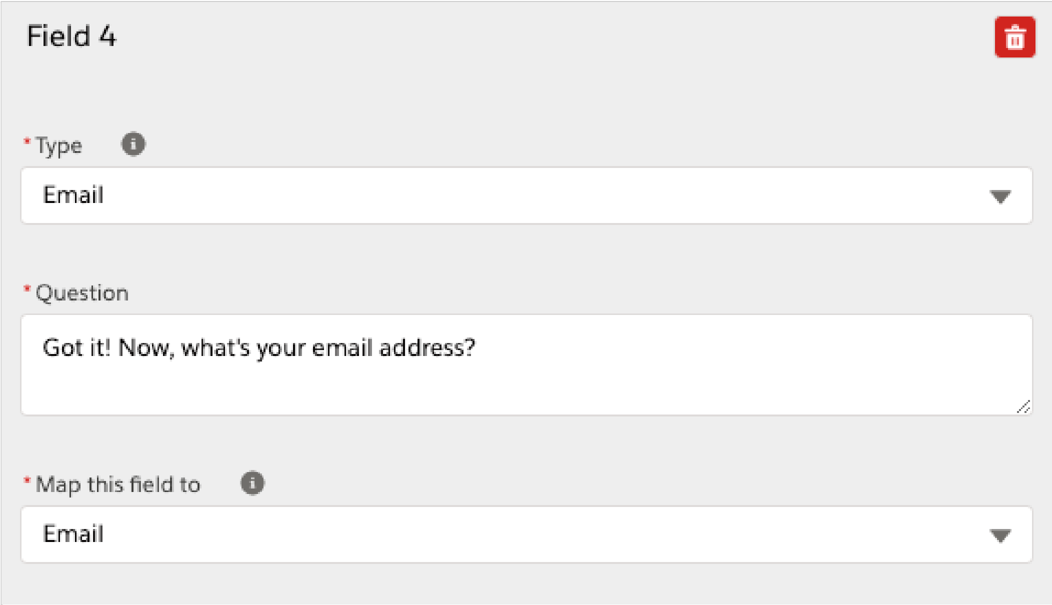
Select *Text* in the **Type** dropdown list and type the query in the **Question** field.

In the **Quick replies** field, simply type your quick reply and press enter. Do it repeatedly for the other quick replies. Please note that you can type a maximum of **10** different quick replies, and a 20-character limit for each quick reply.

By enabling **Only accept answers from the quickreplies list** switch, Messenger will not accept answers other than the quick replies and repeat prompting the query.

In the **Map this field to** field, select Description.

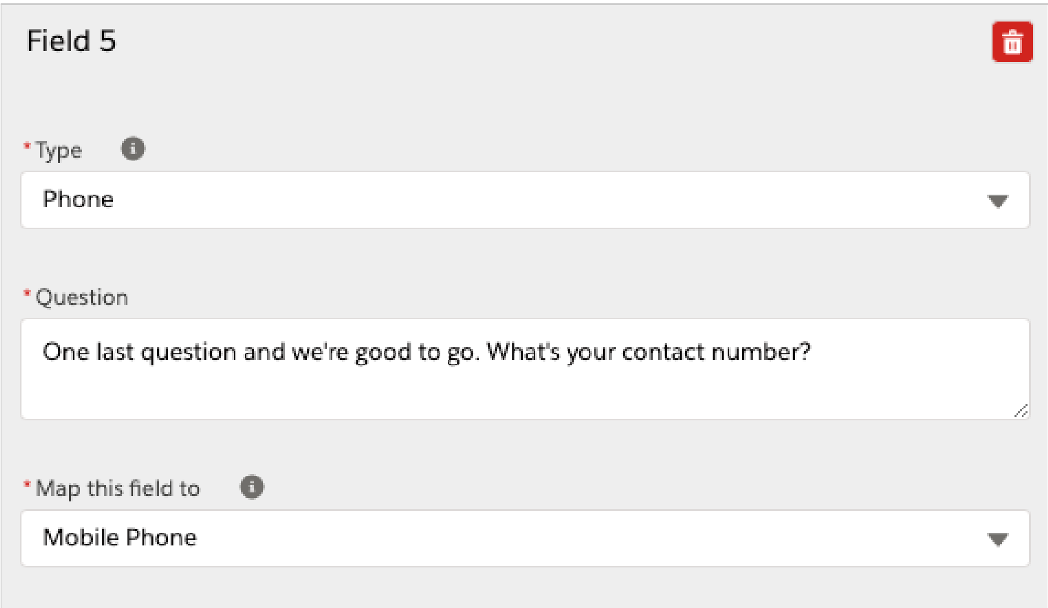
4. In the next step, you want to ask for the customer's email. To do this, add a new field (which will automatically be labelled **Field 4**).



Select *Text* in the **Type** dropdown list and type your message in the **Question** field.

In the **Map this field** to dropdown list, select *Email*.

5. Finally, you want to ask for the customer's phone number. To do this, add a new field (which will automatically be labelled **Field 5**).



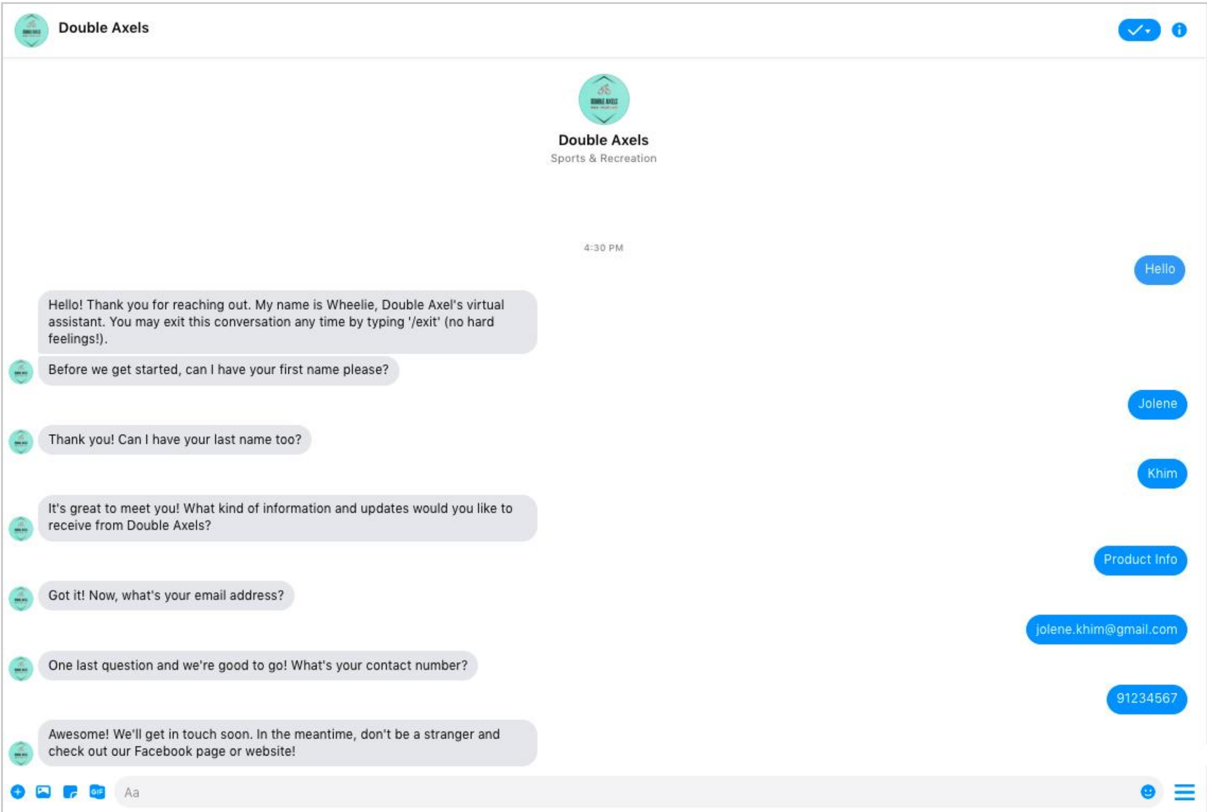
Select *Text* in the **Type** dropdown list and type your message in the **Question** field.

In the **Map this field** to dropdown list, select *Mobile Phone*.

6. Once all the fields have been created, click **Submit** to complete the Welcome Form setup.

Note

The screenshot below shows how the Welcome Form will look like on the customer's end.

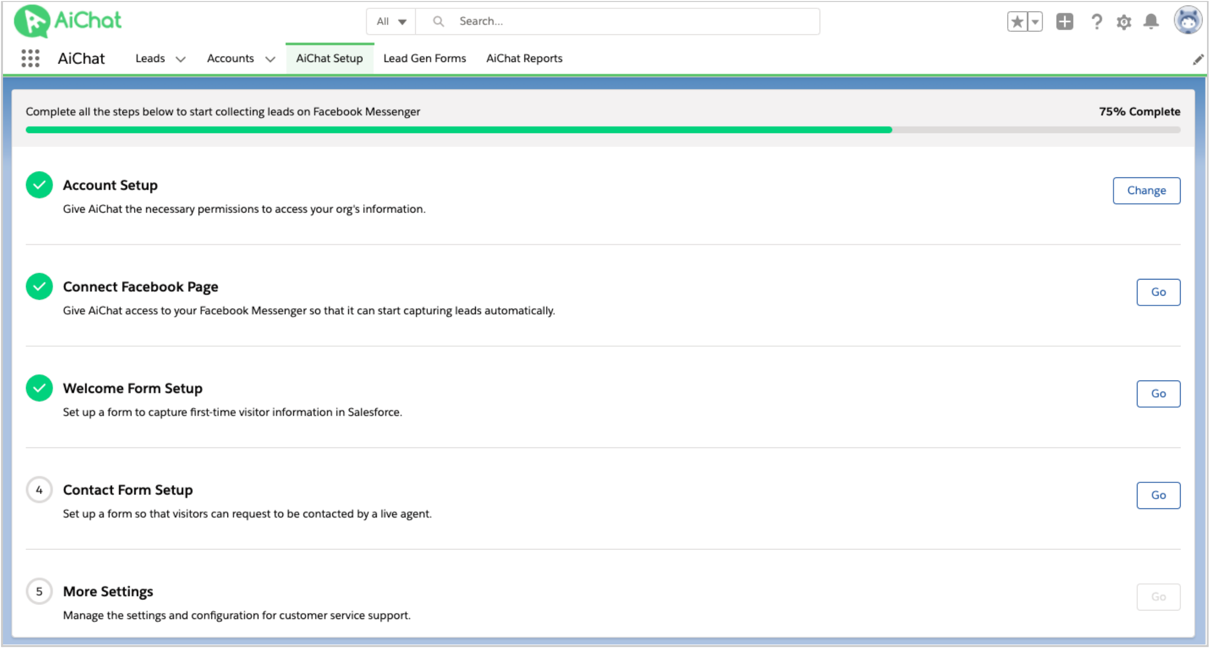


4. Contact Form Setup

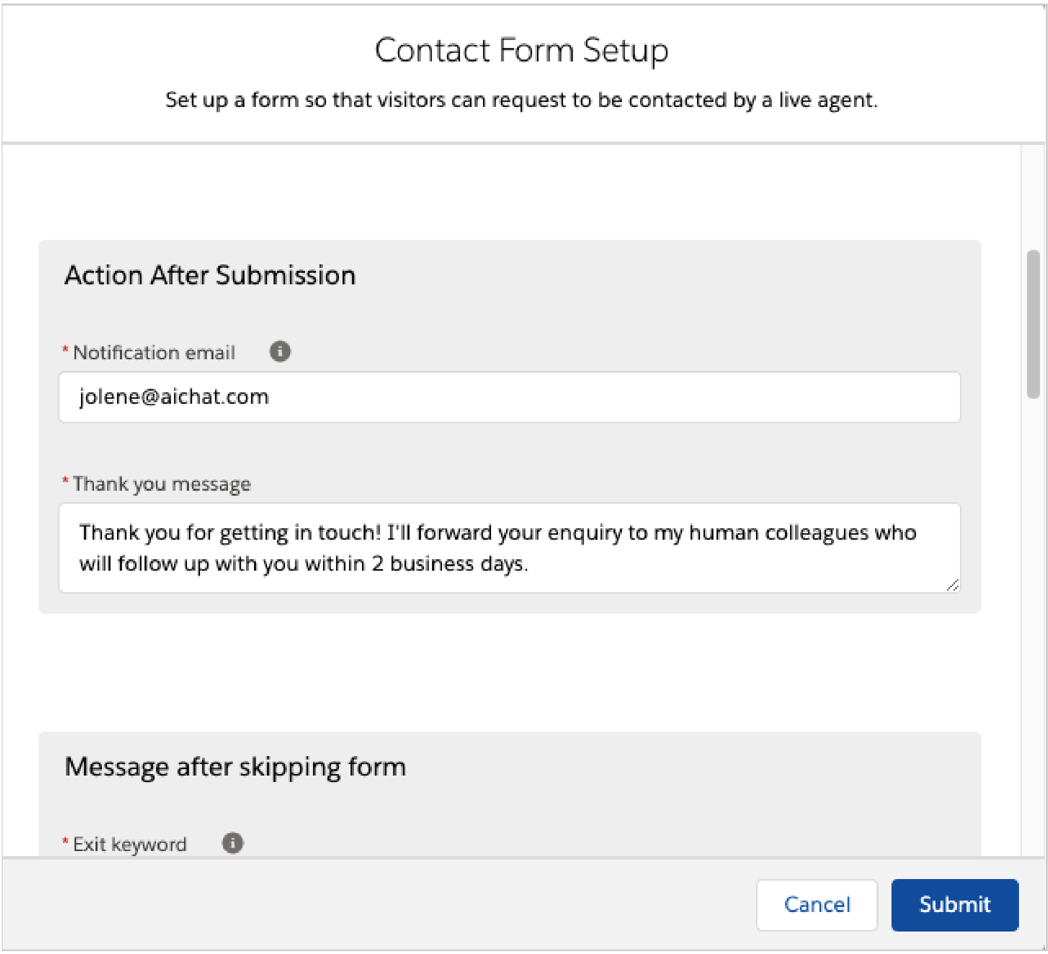
Set up a form so that visitors can request to be contacted by a live agent. Customers might have other enquiries after skipping or completing the Welcome Form. This form is created to cater to such scenarios.

To complete the setup, please follow these instructions:

In the Setup Page, you will see that the **Contact Form Setup** is now active.

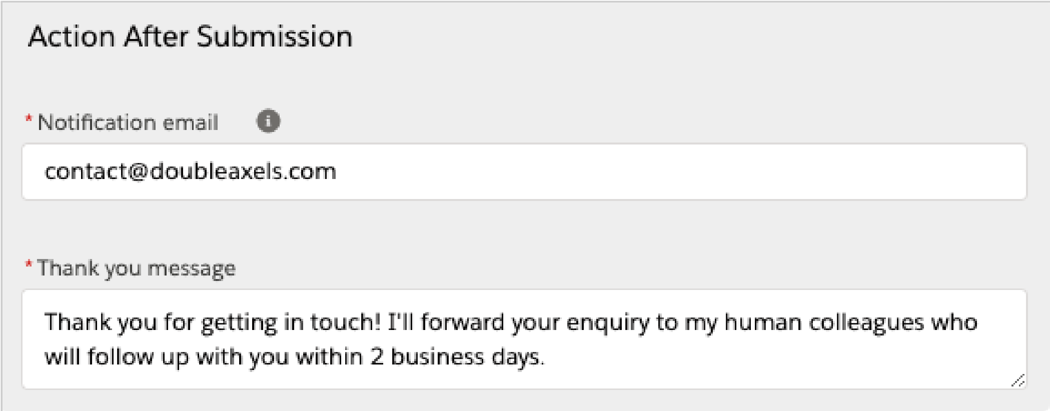


Click the **Go** button on the right side and the **Contact Form Setup** dialog box will pop up.



4.1 Action After Submission

Configure what happens after the form has been submitted in the **Action After Submission** box.

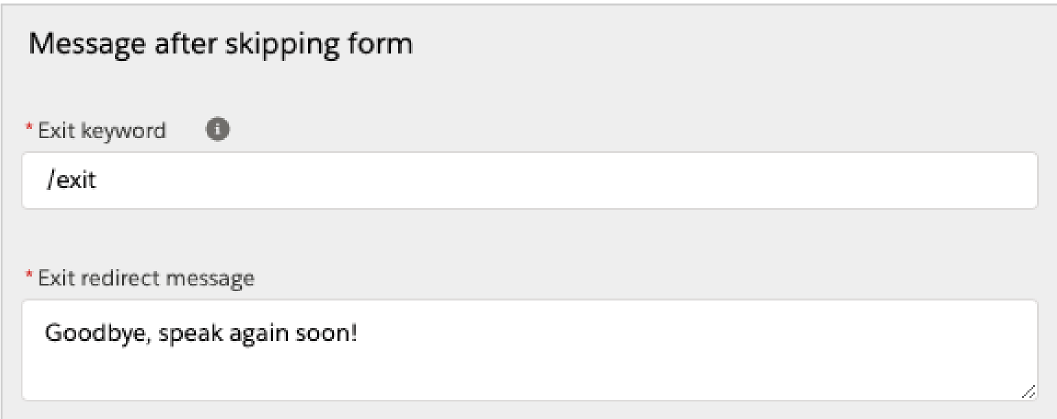


1. By filling in the **Notification email** field with your email, you or your business admin will receive a notification via email that a customer has an inquiry.

2. As for the **Thank you message**, it is a confirmation message that the customer's enquiry has been acknowledged. This message will be seen on the customer's end.

4.2 Message After Skipping Form

The customer could also skip the contact form. The settings can be configured in the **Message After Skipping Form** box.



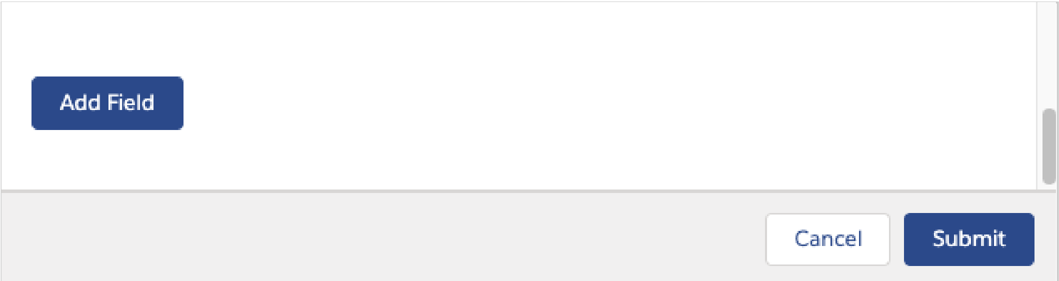
1. Fill in the **Exit keyword** field. If the customer types in the specified exit keyword, the form will be skipped to the exit redirect message.

2. In the **Exit redirect message** field box, type your crafted exit redirect message. This will be the response the customer receives after exiting the form.

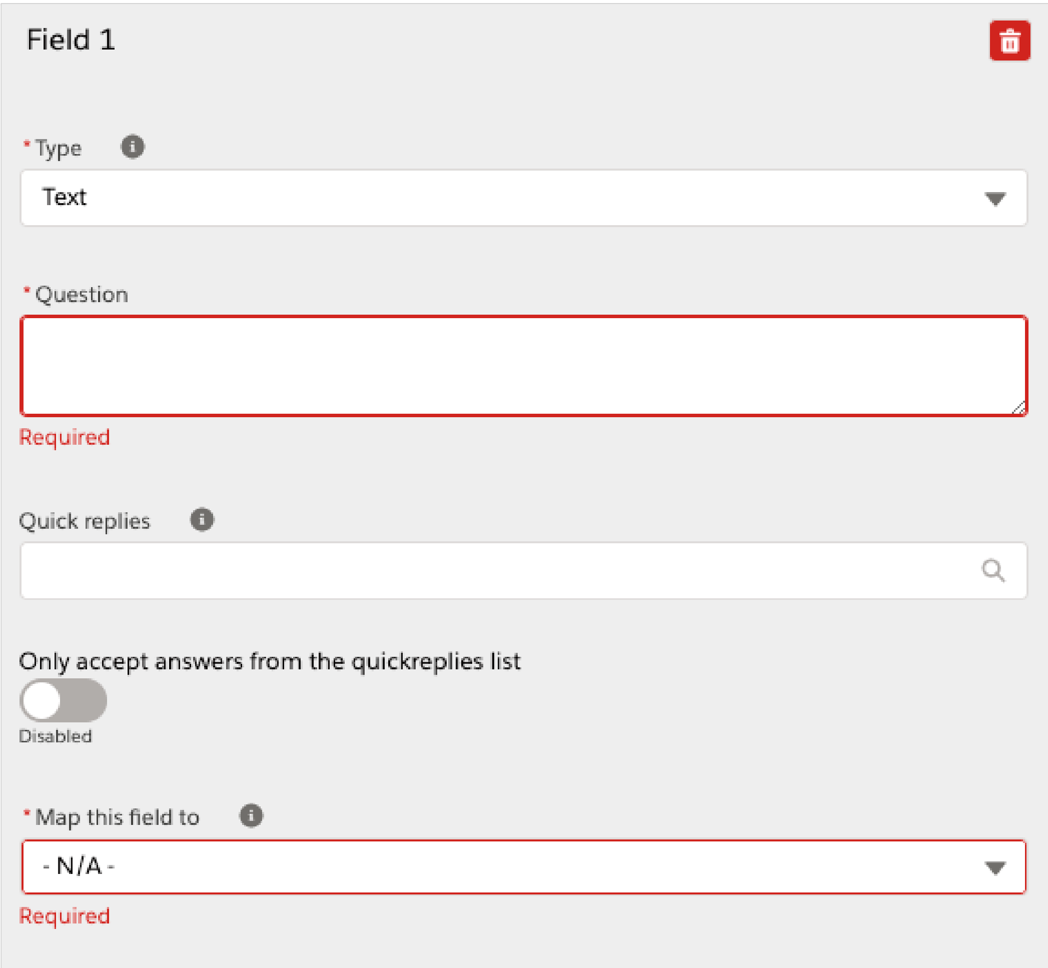
4.3 Fields

You can add more fields to get the customer's enquiries and information. These will appear before the thank you message on the customer's end.

To add fields, click the **Add Field** button on the bottom left of the dialog box.



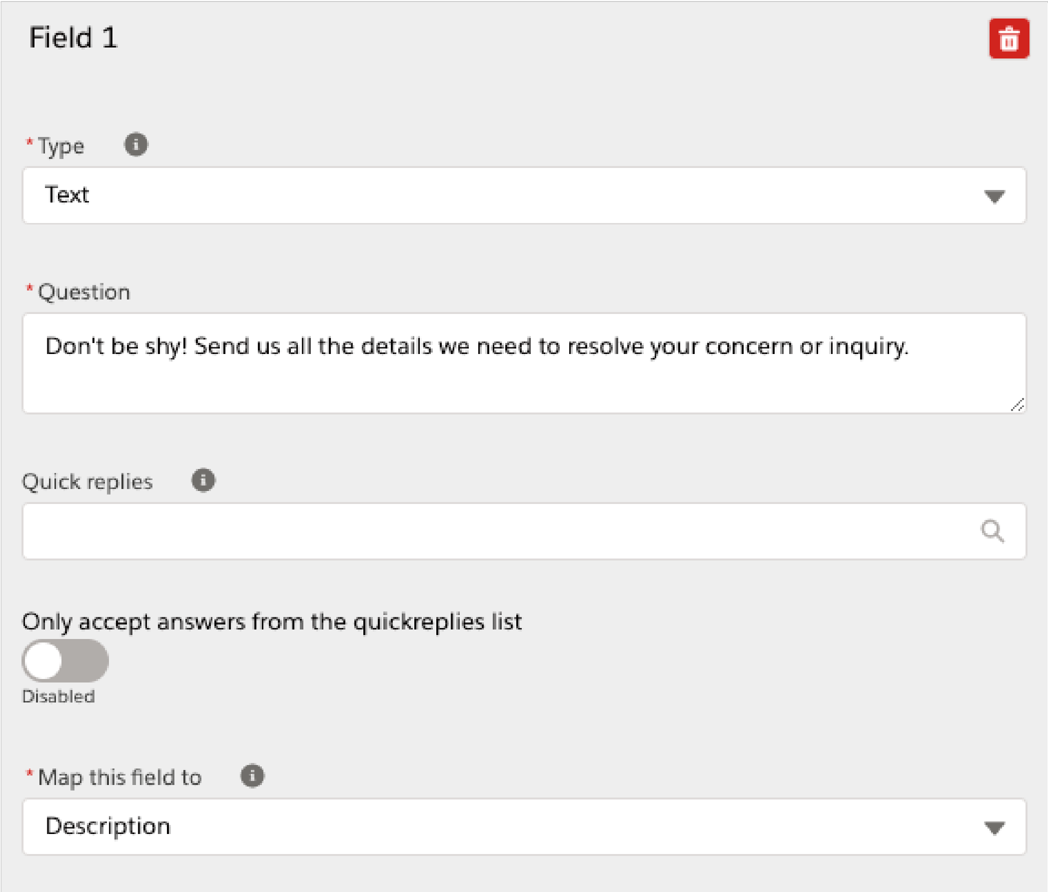
A box labelled “Field 1” will appear. Each new field added will be assigned a number in sequential order. To delete fields, click the icon located at the top right of each field.



Using the abovementioned bicycle shop as an example, you want to ask the customer for his/her personal information so you or your business admin can do a follow-up.

Steps 1-2 will take you through the process of setting up the fields for inquiry submission and email.

1. You would want the customer to submit his/her inquiry. To do this, add a new field (which will automatically be labelled **Field 1**).

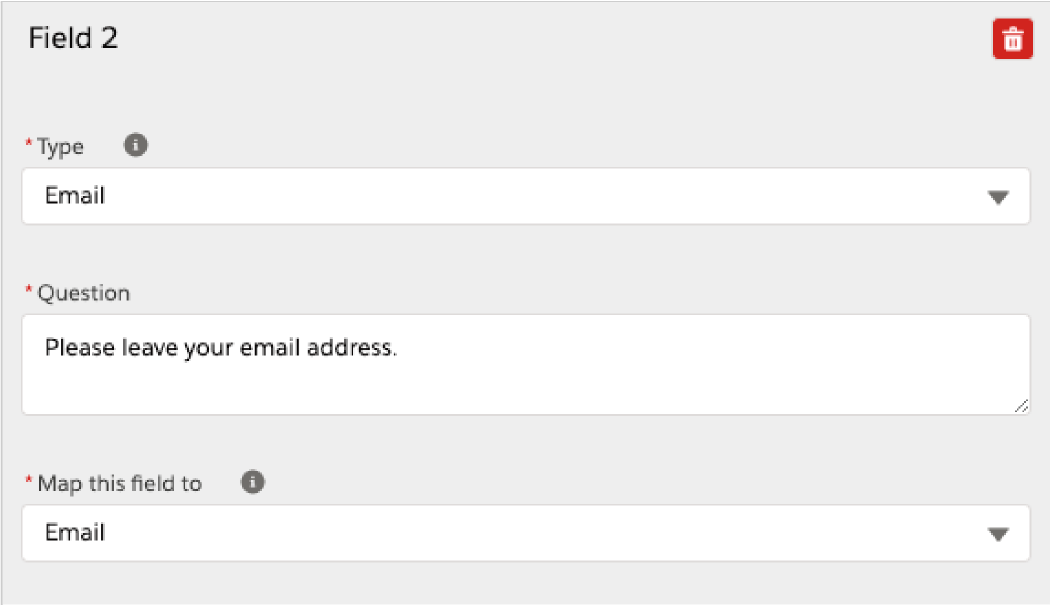


Select *Text* in the **Type** dropdown list. After that, type your message in the **Question** field.

Leave the **Quick replies** field empty.

Then in the **Map this field to** dropdown list, select *Description*.

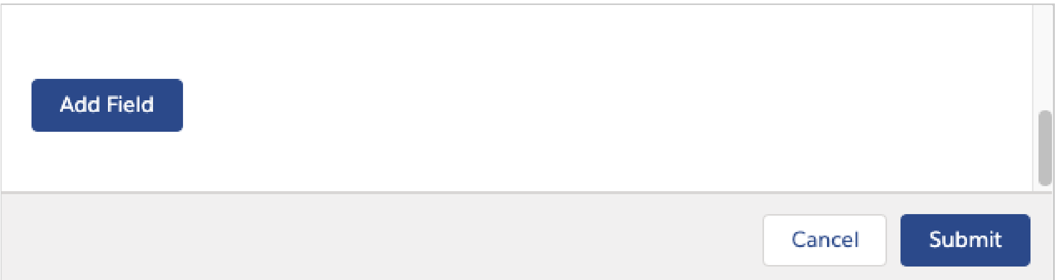
2. On to the next step, you want to ask for the customer’s email. To do this, add a new field (which will automatically be labelled **Field 2**).



Select *Text* in the **Type** dropdown list and type your message in the **Question** field.

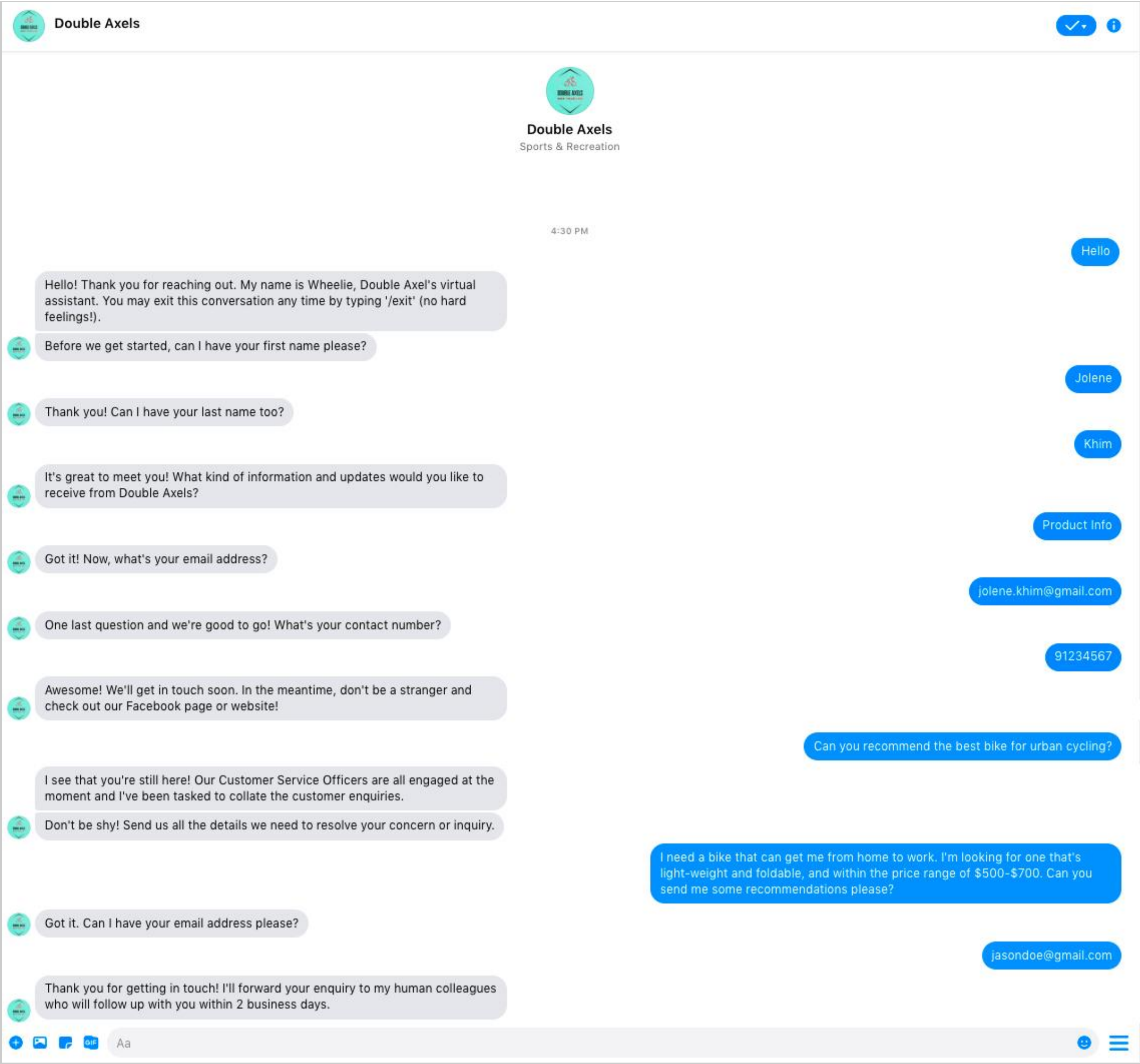
In the **Map this field** to dropdown list, select *Email*.

3. Once all the fields have been created, click **Submit** to complete the Contact Form setup.



Note

The screenshot below shows how the Contact Form will look like on the customer's end.

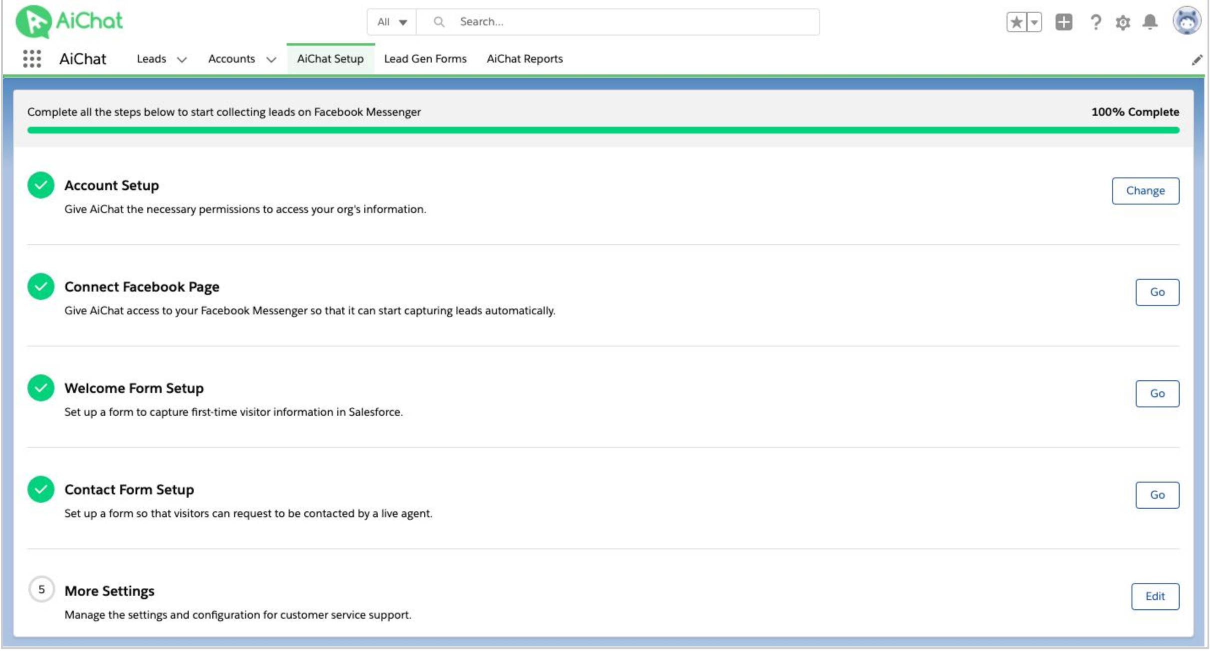


5. More Settings

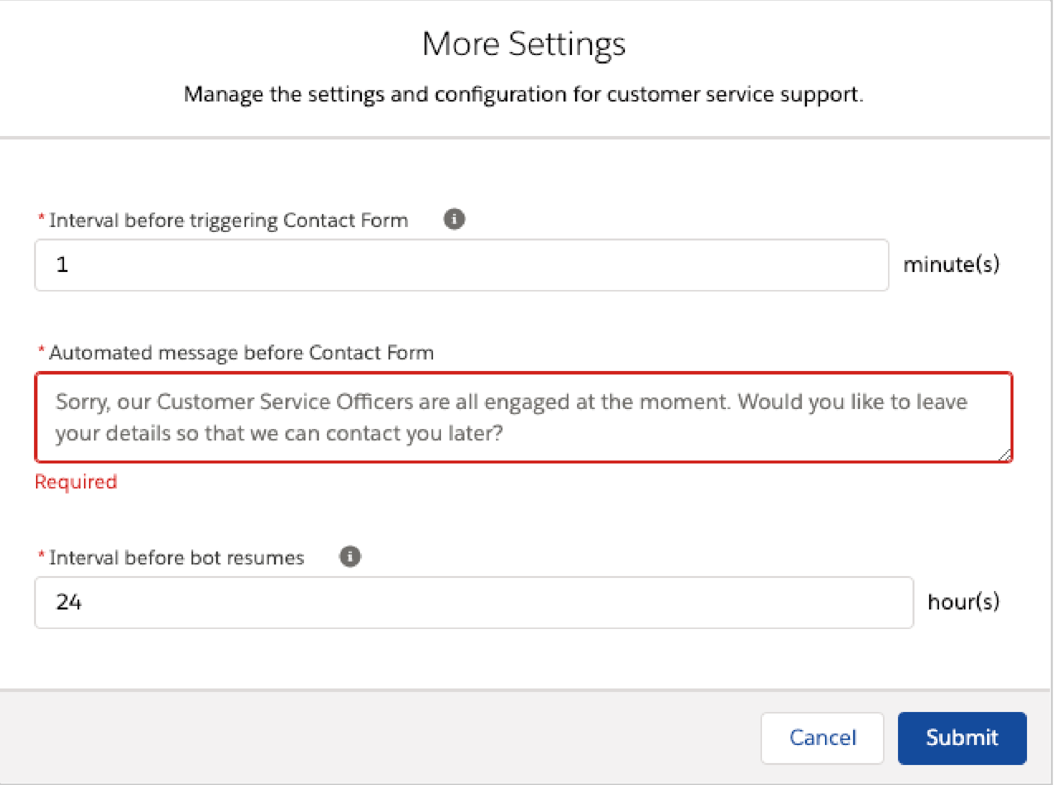
You can modify other configurations in the **More settings** menu. For example, you want to set an automated response message when your Customer Service Officers are not available.

To modify the settings, please follow the instructions:

1. In the Setup Page, you will see that **More Settings** is now active.



Click the **Edit** button on the right side and the **More Settings** dialog box will pop up.



2. Your customers might take the initiative to start another chat (usually enquiries) after skipping or completing the Welcome Form. Set a delay between the customer's new message and when the Contact Form will be shown by entering the duration in the **Interval before triggering Contact Form** field.

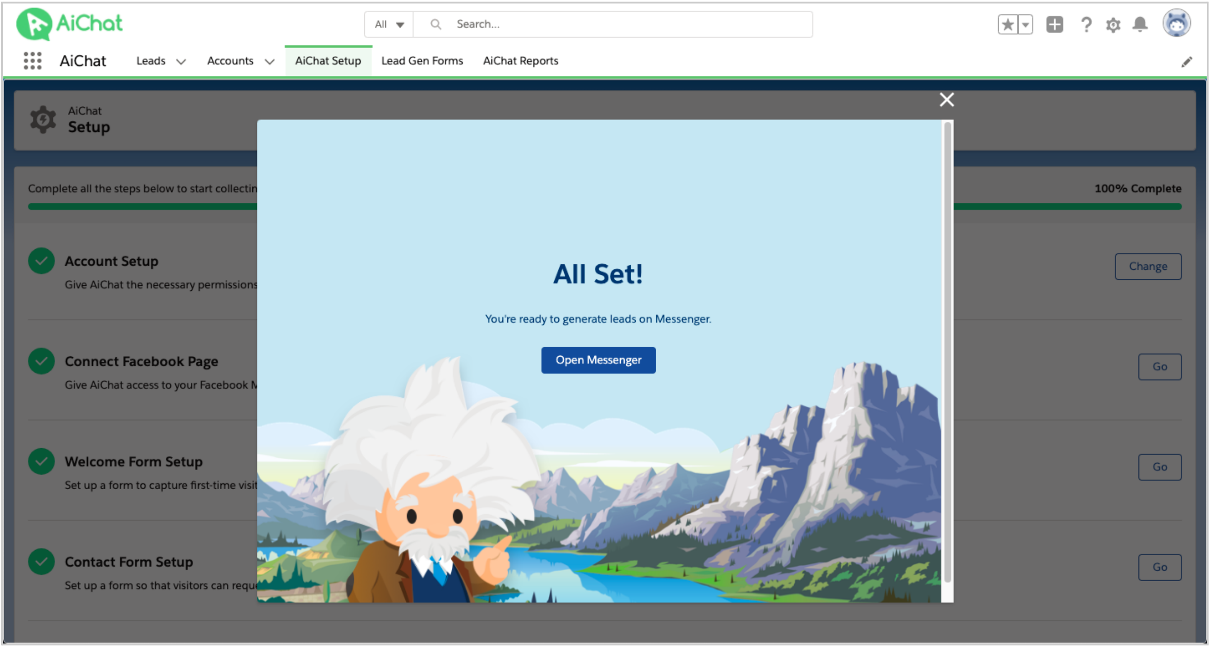
3. As chat routing is not a feature of the AiChat Lead Capture App, there needs to be a message to inform customers that your Customer Service Officers are not available.

Type your message in the **Automated message before Contact Form** field. The customer will see this message first before the Contact Form.

4. While your customer is chatting with the live agent, the bot should be set to pause for a certain duration of time so it does not interrupt the live chat. In the **Interval before bot resumes** field**,** enter the hours preferred.

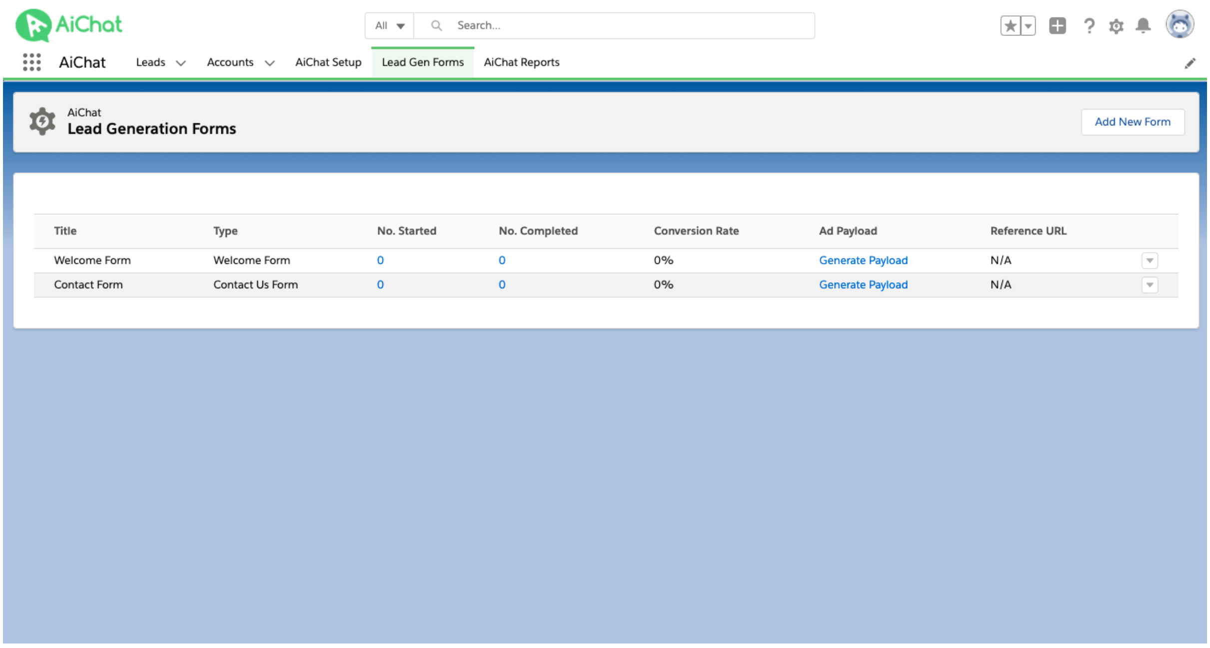
The pause starts from the customer's last message. Once the time limit is passed, automated messaging will resume.

5. Now the setups are all completed. You will see a pop-up indicating that you are ready to create lead capture tasks for your business.



Setting up a new lead capture form

All the lead generation forms are stored in the AiChat Lead Capture app. You can access these forms by clicking the **Lead Gen Forms** tab.



You can see the existing lead generation forms listed under Title and Type. Meanwhile, the other columns contain more information related to the forms, namely:

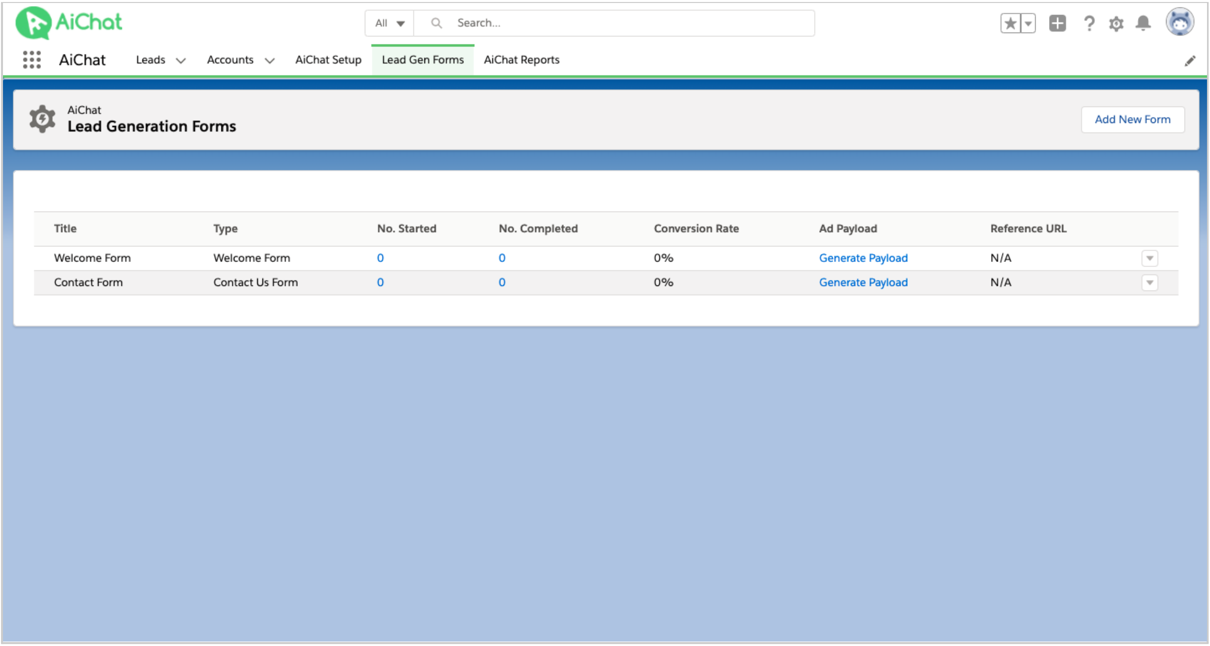
- No. Started: The amount of times a lead form is accessed by the users targeted by the ad
- No. Completed: The amount of times a lead form is filled out from start to finish. In other words, users that manage to complete the form are converted into leads for your business.
- Conversion Rate: The percentage of users who have completed the leads form. It is calculated by dividing the No. of Forms Completed by the No. of Forms Started and converting the figure into a percentage. Check the formula below:

Conversion Rate = (No. of Forms Completed / No. of Forms Started) * 100%

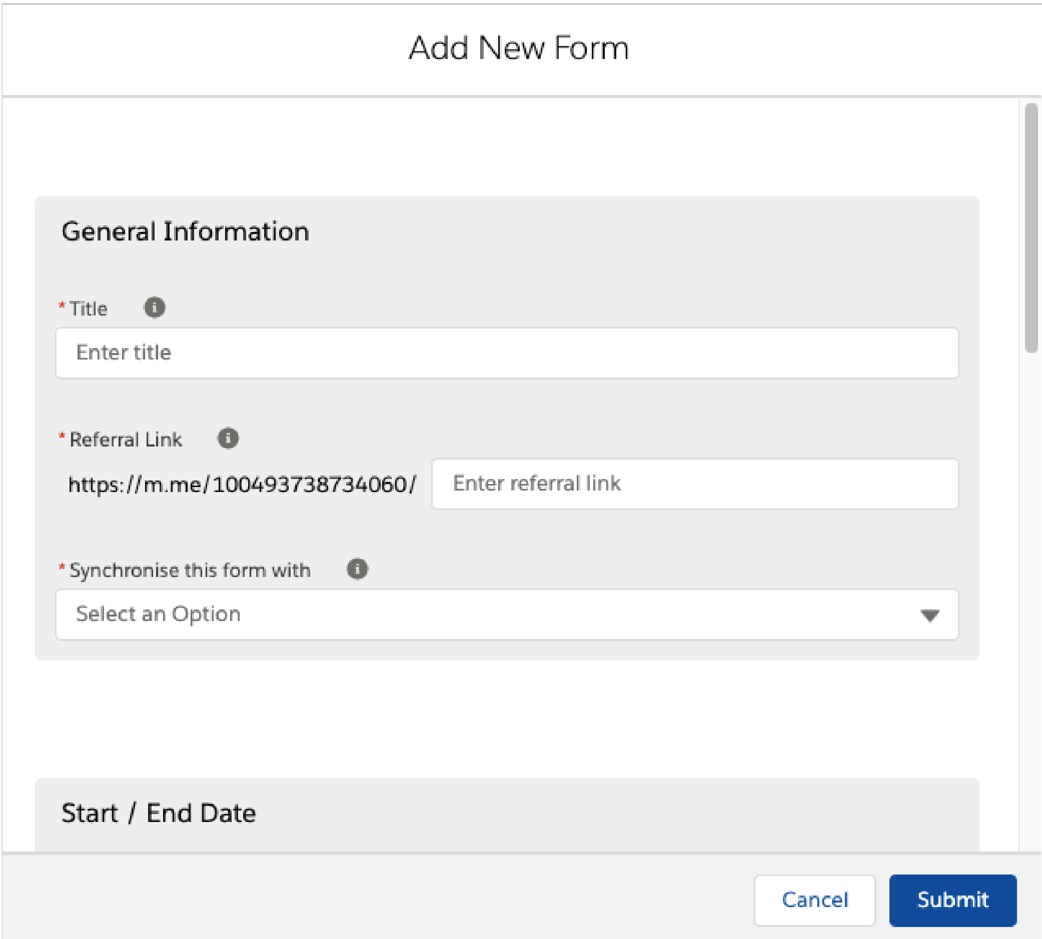
1. Create a new leads generation form

Besides the Welcome Form and Contact Form that you set up earlier, you can create multiple leads generation forms for your business needs. These forms are only presented to visitors over a special 'referral' link.

To create a new form, please follow these instructions. This is an example of a form for a cycling event called the "Cycle360 Charity Event", where traffic comes from a Click-to-Messenger ad (more details in Section 1.6).

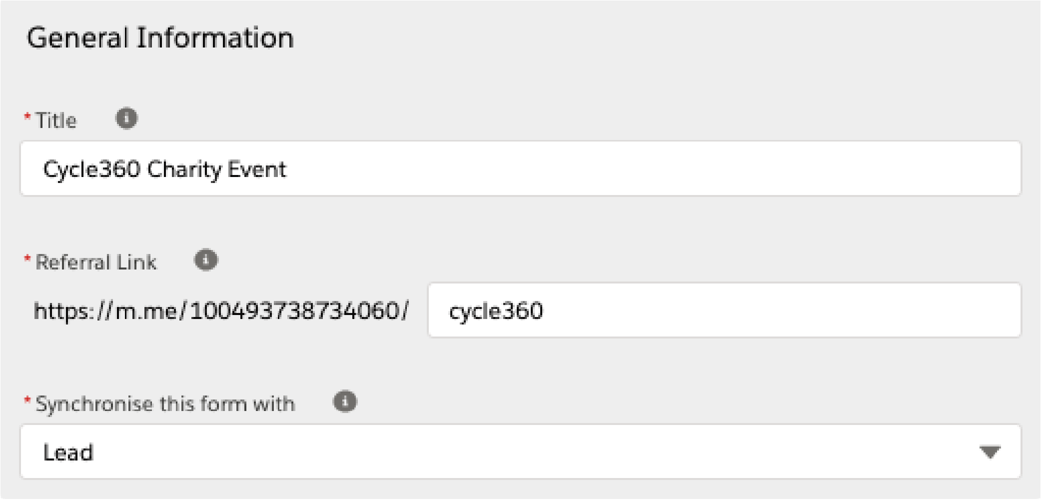


Click **Add New Form** at the top right. The **Edit Form** dialog box will pop up.



1.1 General Information

Fill in the general details of the form in the **General Information** box.



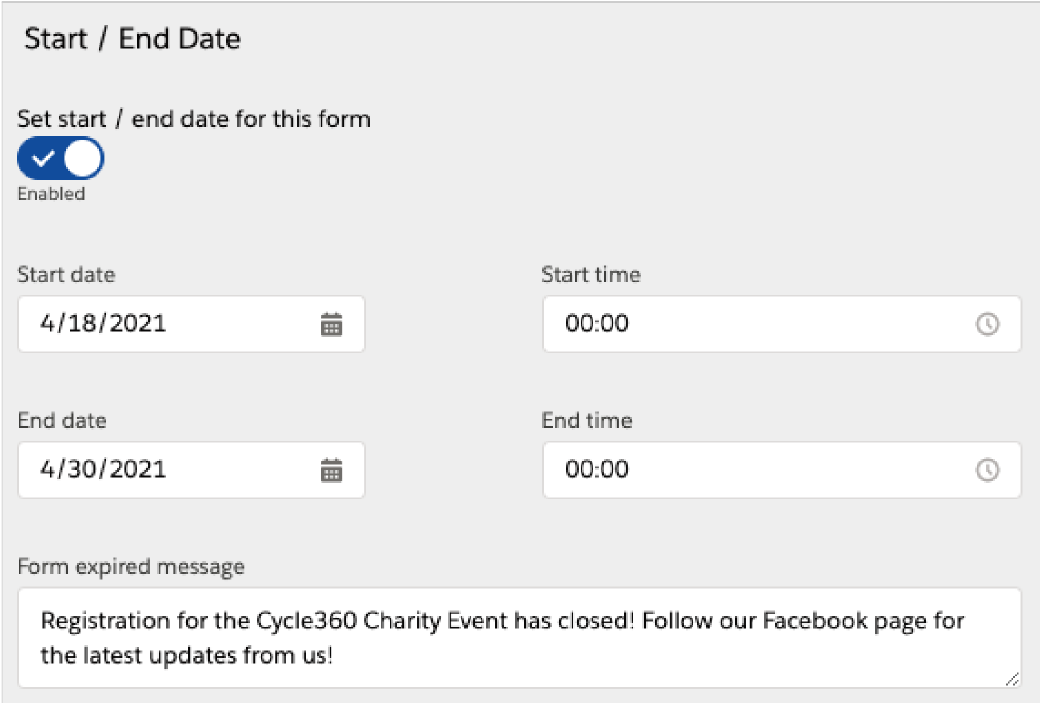
1. Enter the **Title** of the leads generation form.

2. Enter the **Referral Link** of the lead generation form. This link can be embedded in marketing collaterals including, but not limited to, Facebook ads, SMS, and electronic direct mails (EDMs). It provides customers a direct link to this form.

3. You will also be required to synchronize the new form. Select Lead from the **Synchronize this form with** dropdown list.

1.2 Start / End Date

If your business campaign is running for a certain length of time, you can set the dates in the **Start / End Date** box. Please ensure that **Set start / end date for this form** is enabled, so the **Start date** and **End date** fields will appear.



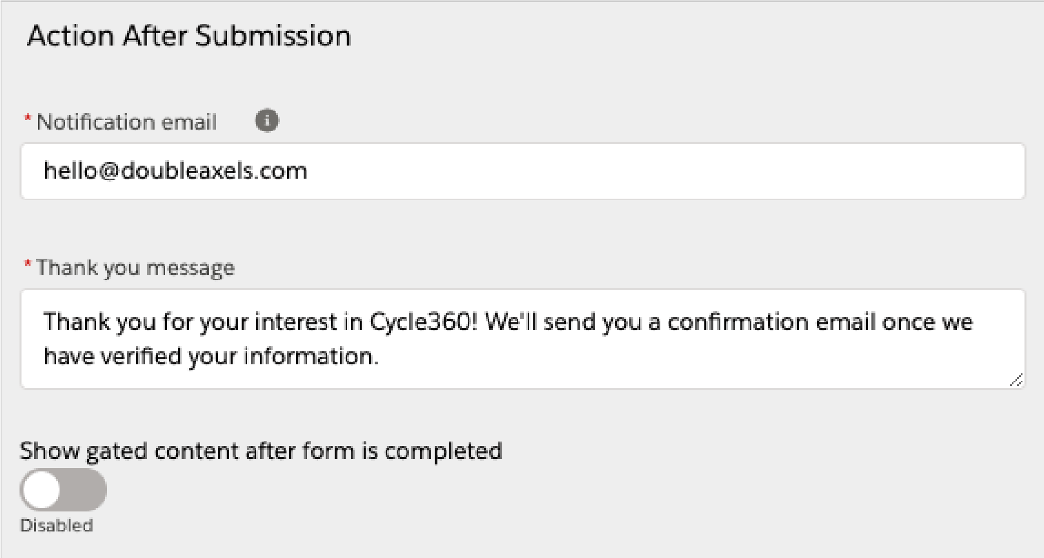
1. In the **Start date** field, click the calendar icon and set the exact date. Set a time in the **Start time** field. The leads generation form will be accessible to customers starting from this date and time.

2. Once you set the date and time in the **End date** and **End Time** fields respectively, the same form will also expire after that date.

3. You can also type in a fallback message in the **Form expired message** field. If customers, by any chance, accessed the referral link to the form after the campaign is over, this message would be shown instead.

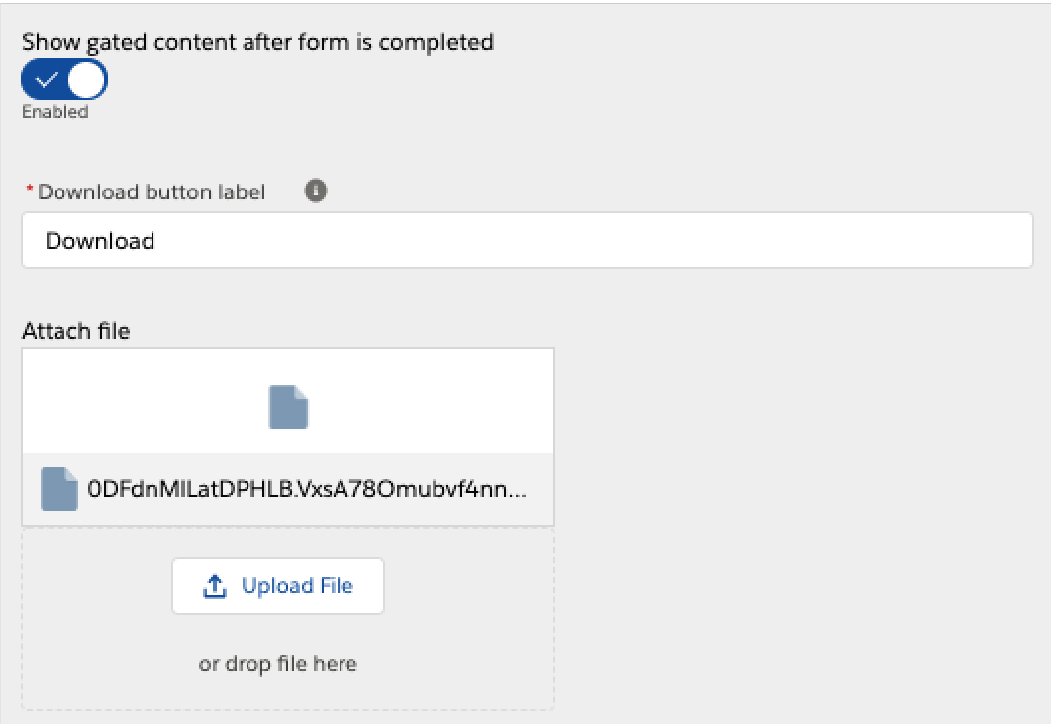
4. In the **Action After Submission** segment, fill in the **Notification email** and **Thank you message** fields. By filling the notification email field with your email, you or your business admin will receive a notification via email that the business page has just captured a new lead.

1.3 Action After Submission



1. By filling in the **Notification email** field with your email, you or your business admin will receive a notification via email that a lead has been captured.

2. As for the **Thank you message**, it will be shown after the customer provides all the details.

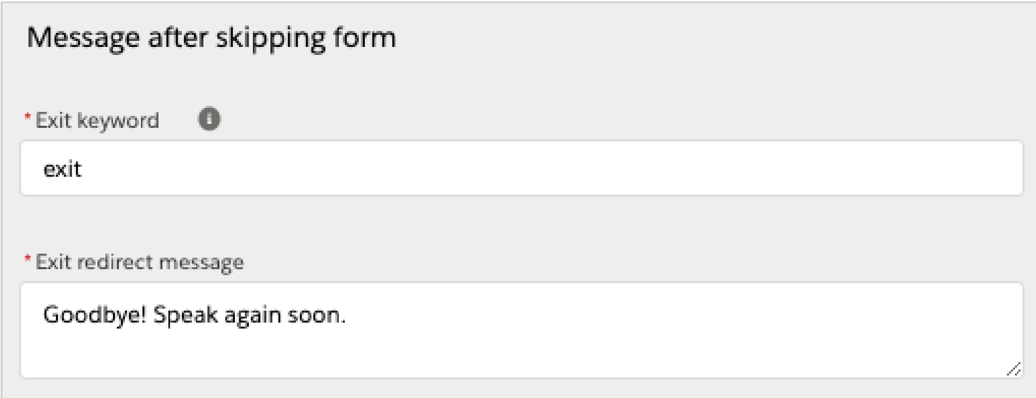


3. You may choose to send additional content after the customer has completed the form. Enable **Show gated content after form is completed** and type in the button label (e.g. "Download").

4. Upload the content and attach it to the form by clicking the **Upload File** button.

1.4 Message after skipping form

As the bot prompts the welcome form to the customer, the customer might also choose to skip right away.



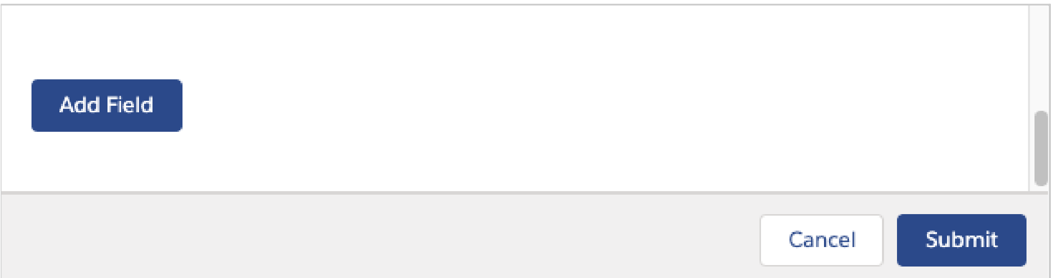
1. Fill in the **Exit keyword** field. If the customer types in the specified exit keyword, the form will be skipped to the exit redirect message.

2. In the **Exit redirect message** field box, type your crafted exit redirect message. This will be the response the customer receives after exiting the form.

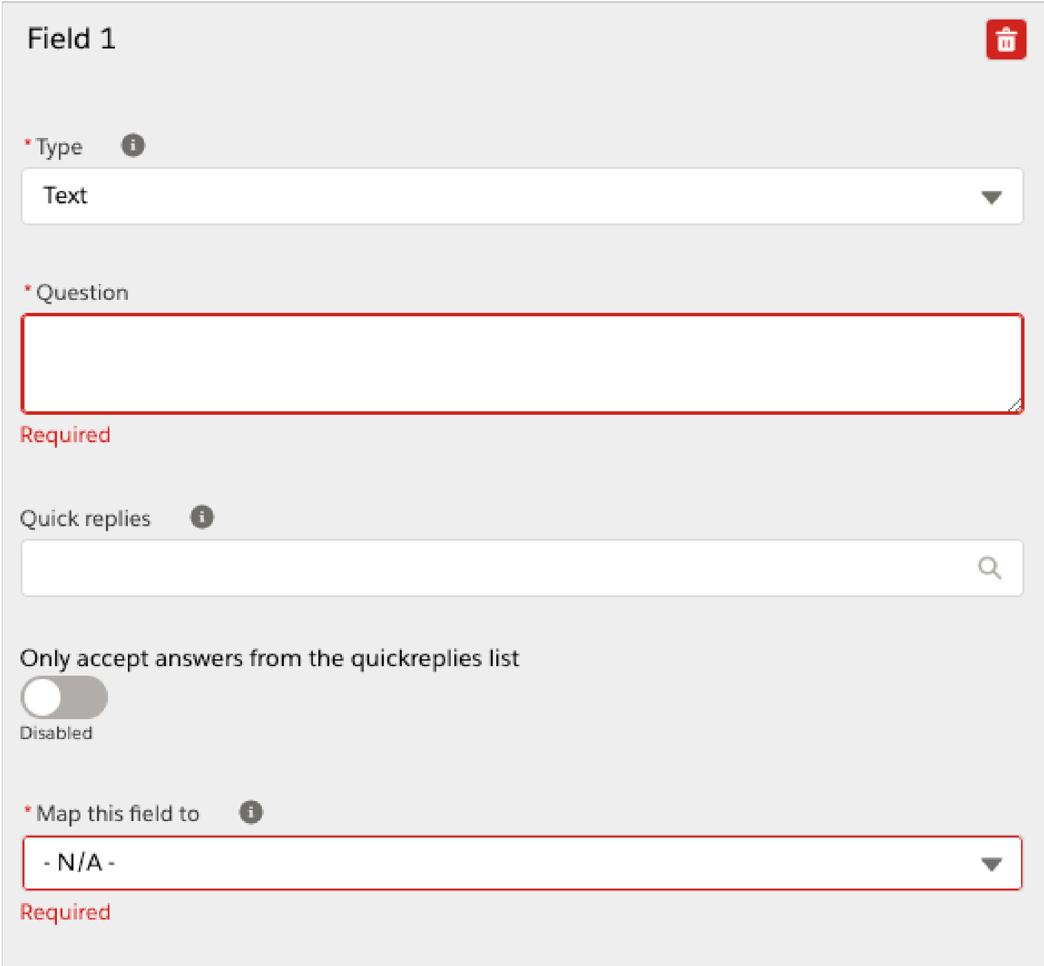
1.5 Fields

You can add more queries to get more information from your customer or in this example case, the participant of the cycling event. These will appear between the welcome message and thank you message on the customer's end.

To add fields, click the **Add Field** button on the bottom left of the dialog box.



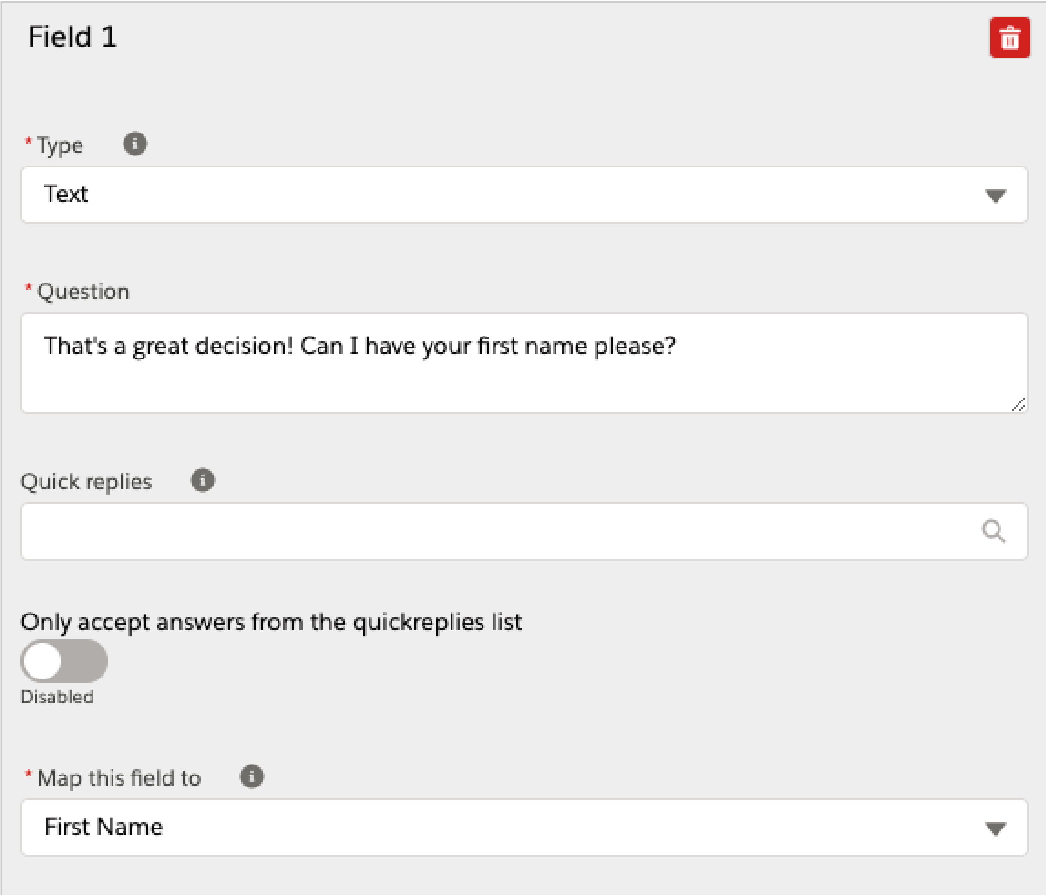
A box labelled "Field 1" will appear. Each new field added will be assigned a number in sequential order. To delete fields, click the icon located at the top right of each field.



Using the abovementioned Cycle360 event as an example, you want to ask for the customer for his/her personal information as part of your lead generation efforts.

Steps 1-5 will take you through the process of setting up the fields for first name, last name, preferred race category, email and mobile phone number.

1. The first step is to ask for the customer's first name. To do this, add a new field (which will automatically be labelled **Field 1**).

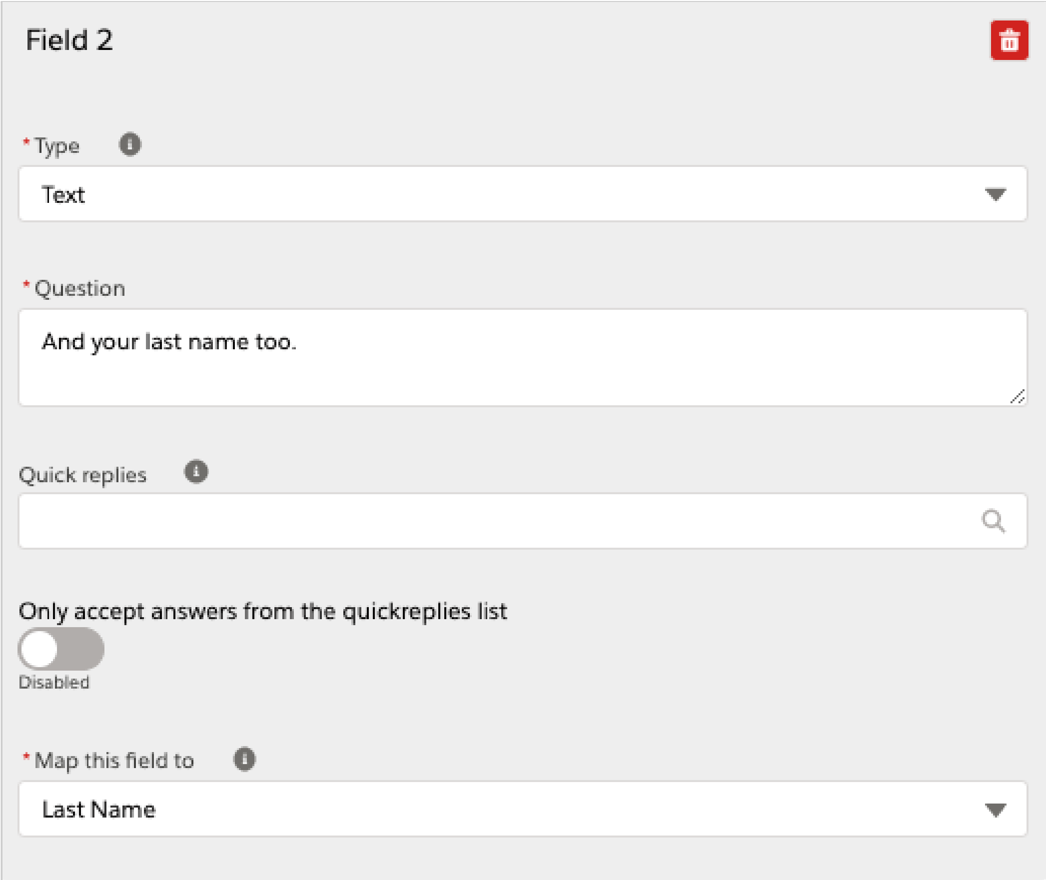


Select *Text* in the **Type** dropdown list. After that, type your message in the **Question** field.

Leave the **Quick replies** field empty.

Then in the **Map this field to** dropdown list, select *First Name*.

2. On to the next step, you want to ask for the customer's last name. To do this, add a new field (which will automatically be labelled **Field 2**).

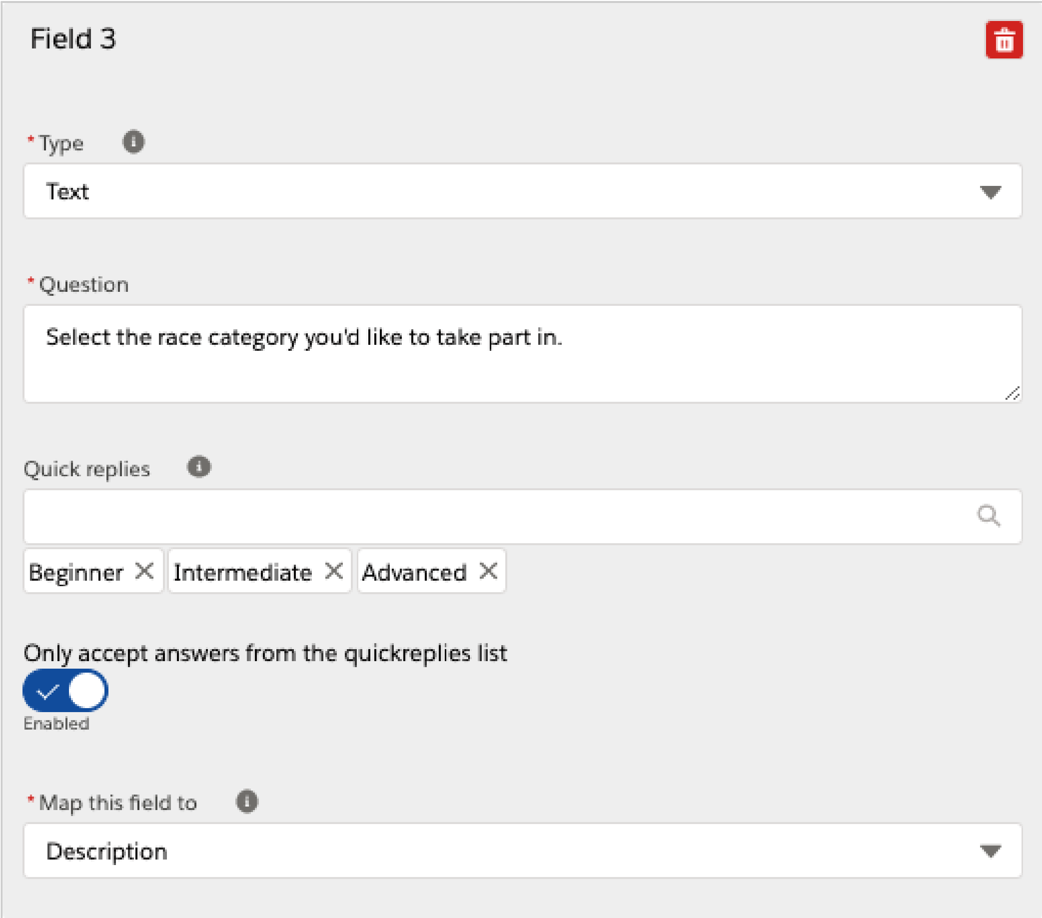


Select *Text* in the **Type** dropdown list and type your message in the **Question** field.

Leave the **Quick replies** field empty.

In the **Map this field** to dropdown list, select *Last Name*.

3. In the next step, you want to ask for the race category the customer wishes to participate in. This will require the customer to choose from the multiple options. To do this, add a new field (which will automatically be labelled **Field 3**).



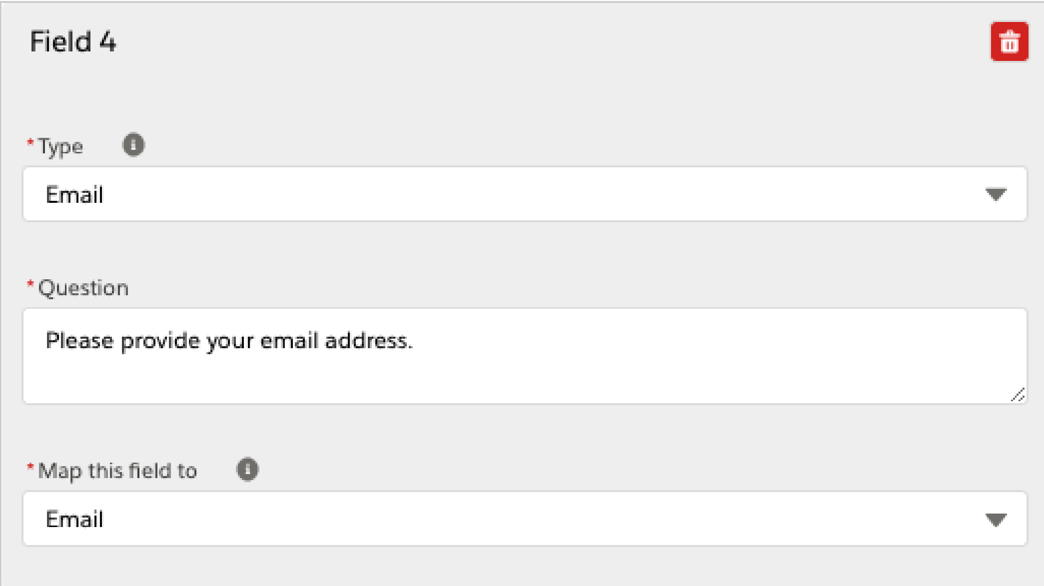
Select *Text* in the **Type** dropdown list and type the query in the **Question** field.

In the **Quick replies** field, simply type your quick reply and press enter. Do it repeatedly for the other quick replies. Please note that you can type a maximum of **10** different quick replies, and a 20-character limit for each quick reply.

By enabling **Only accept answers from the quickreplies list** switch, Messenger will not accept answers other than the quick replies and repeat prompting the query.

In the **Map this field to** field, select Description.

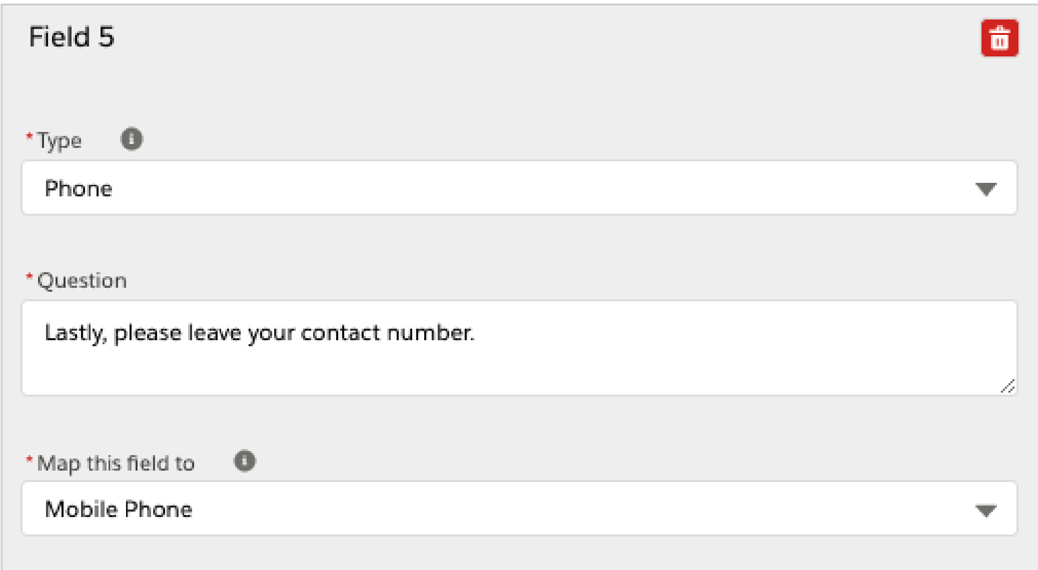
4. In the next step, you want to ask for the customer's email. To do this, add a new field (which will automatically be labelled **Field 4**).



Select *Text* in the **Type** dropdown list and type your message in the **Question** field.

In the **Map this field** to dropdown list, select *Email*.

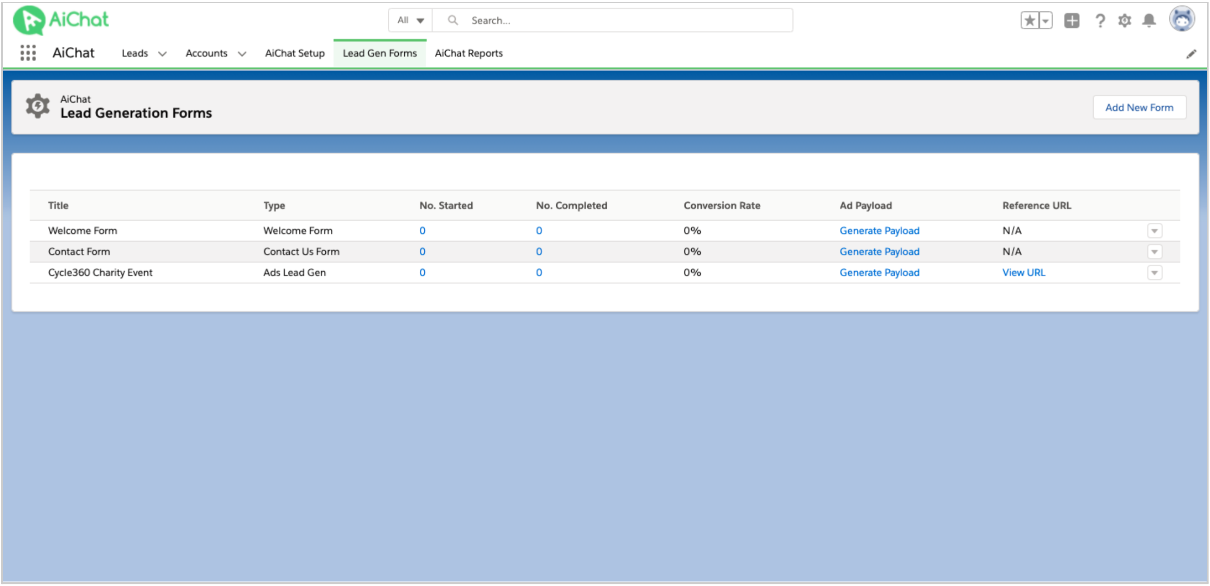
5. Finally, you want to ask for the customer’s phone number. To do this, add a new field (which will automatically be labelled **Field 5**).



Select *Text* in the **Type** dropdown list and type your message in the **Question** field.

In the **Map this field** to dropdown list, select *Mobile Phone*.

6. Click **Submit** button to save the new form you created. Back on the **Lead Generation Forms** page, you will see a new form (Cycle360 Charity Event) listed.

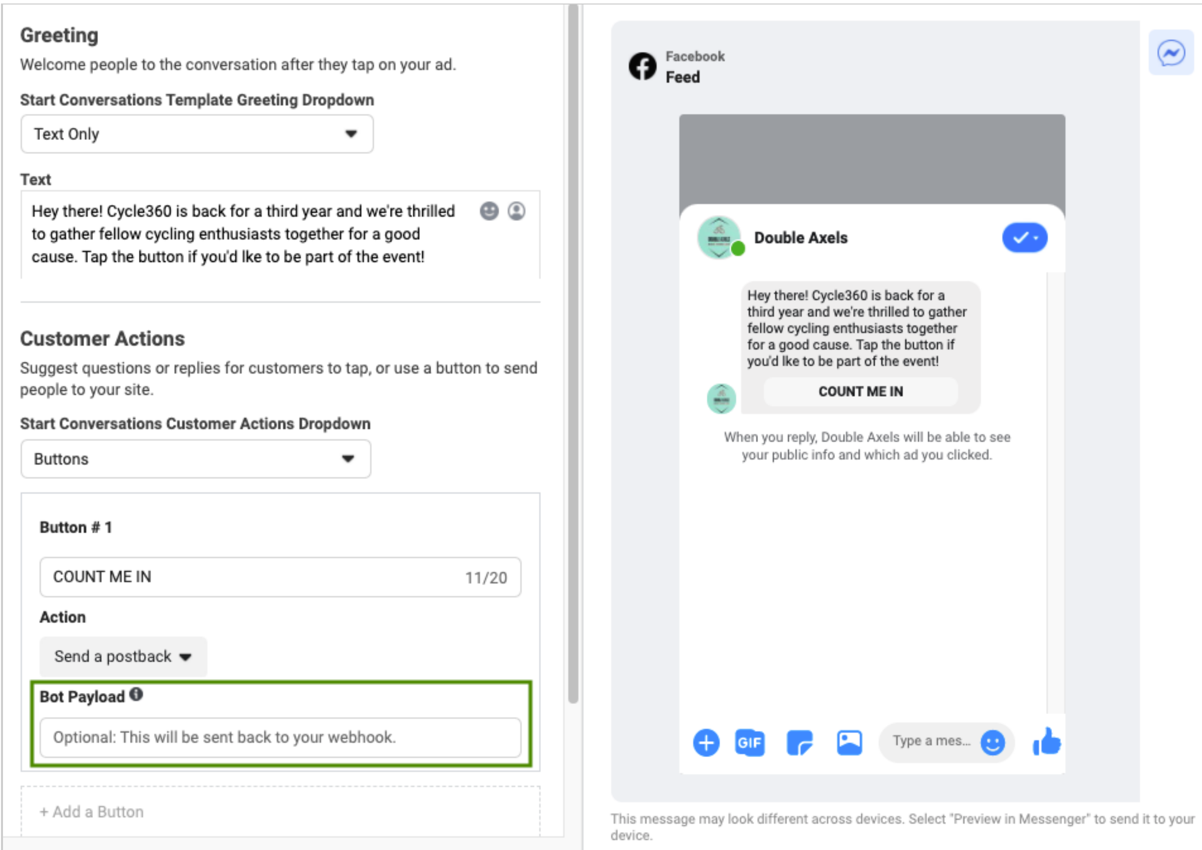


1.6 Click-to-Messenger Ad

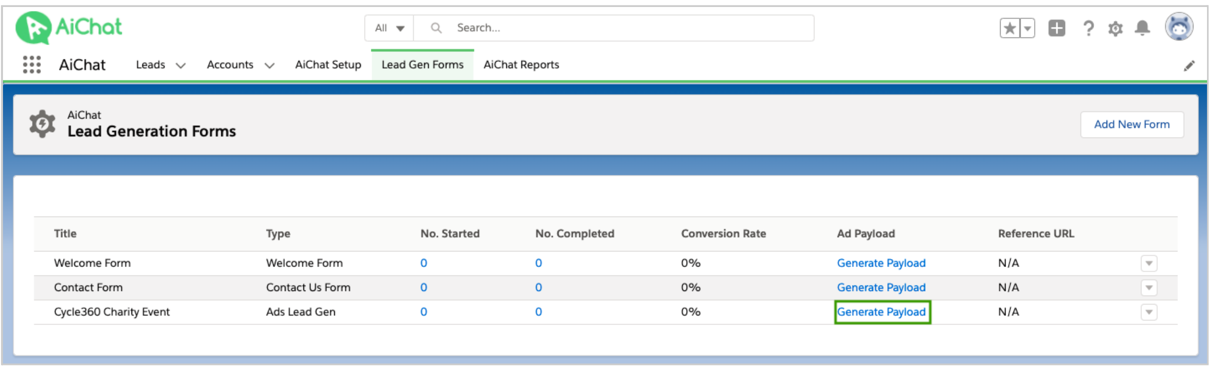
On the customers' end, what they will see first is the Click-to-Messenger ad in their Facebook feed.

Clicking the **Sign Up** button on the ad leads customers to Messenger, and the first message they get in Messenger is *"Hey there! Cycle360…"* and the CTA (**Count me in** button) that leads to the form.

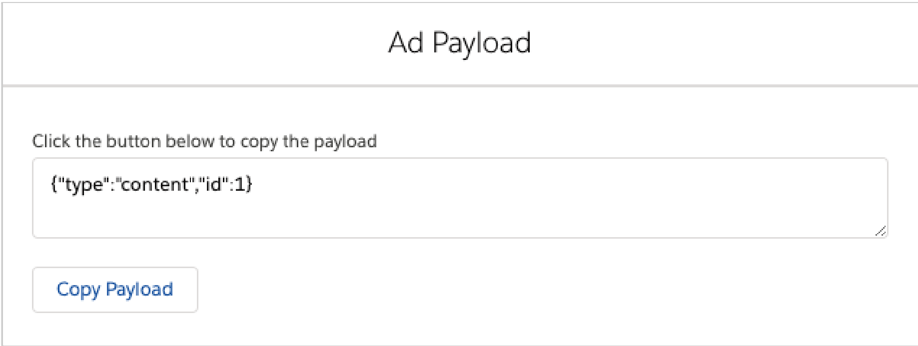
In order to enable access to the form, it is mandatory to 'load' the form in the ad. Thus we need to configure it first in Facebook Ads Manager by inserting a payload script into the **Bot Payload** field.



You can obtain this script from the **Lead Generation Forms** tab in the AiChat Lead Capture app. Simply click **Generate Payload** under the Ad Payload column of the “Cycle360 Charity Event” form.

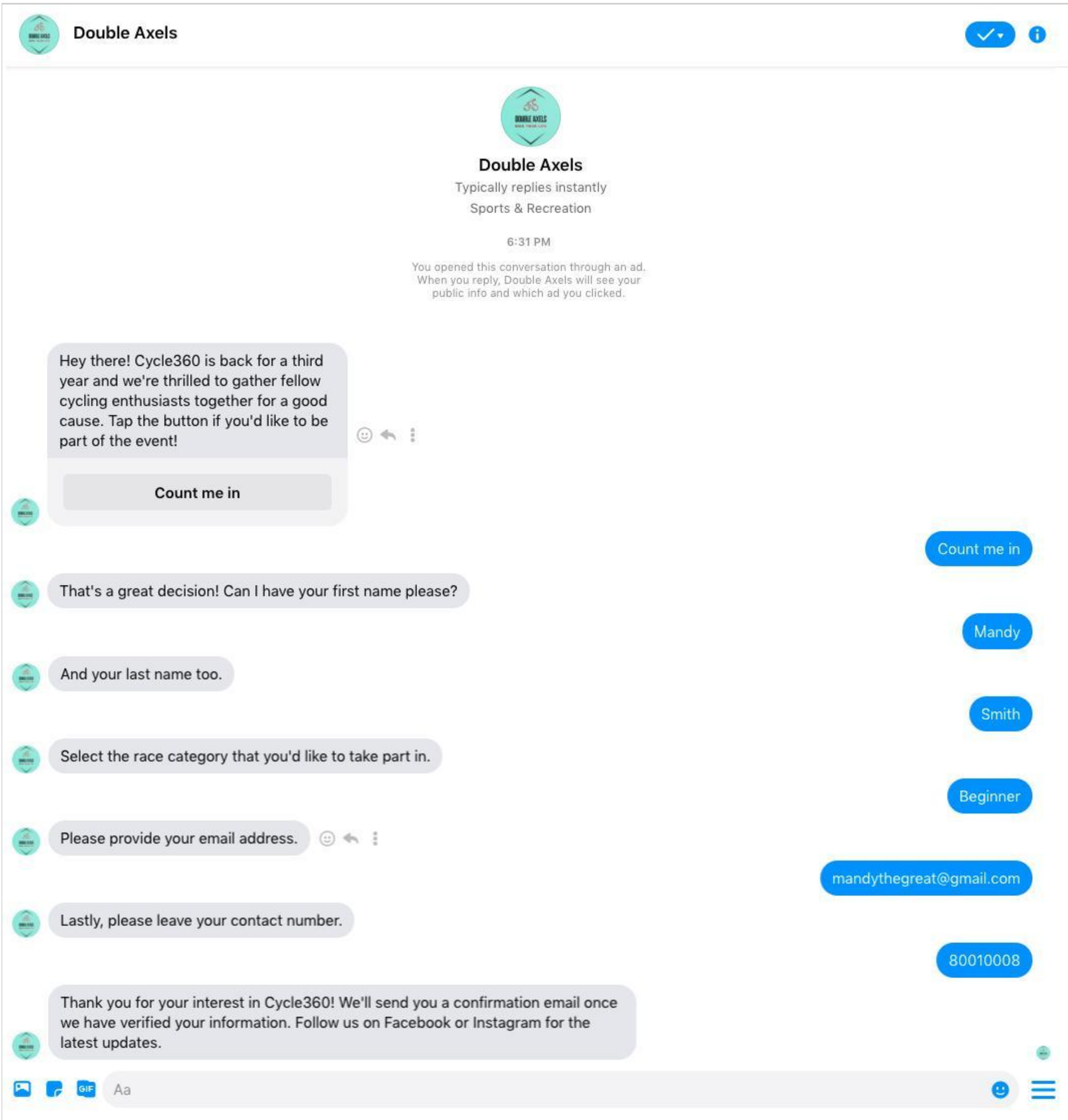


Copy the script and paste it into the **Bot Payload** field in Ads Manager before publishing your ad.



Note

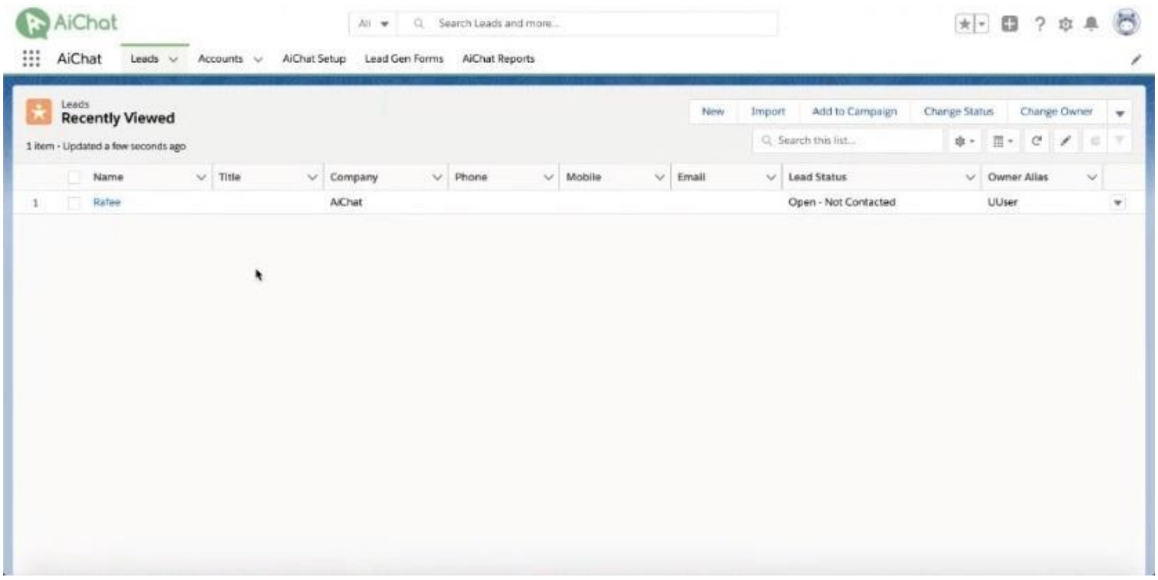
The screenshot below shows how the Cycle360 Charity Event lead generation form will look like on the customer's end.



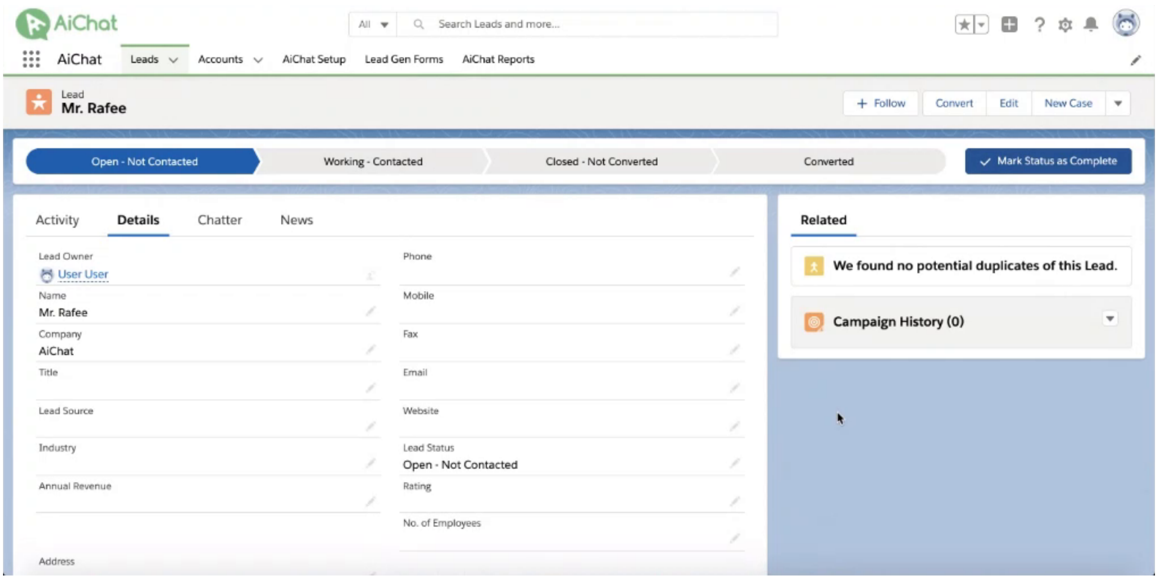
2. Check the details of the leads captured

You can also check the details of the leads you captured by the forms. To do so, please follow these instructions:

1. On the AiChat Lead Capture App page, click the **Leads** tab. You will see a list of leads that you captured via Facebook.



2. To see the details of a lead you captured, click the lead's name. You will be redirected to the lead's page.



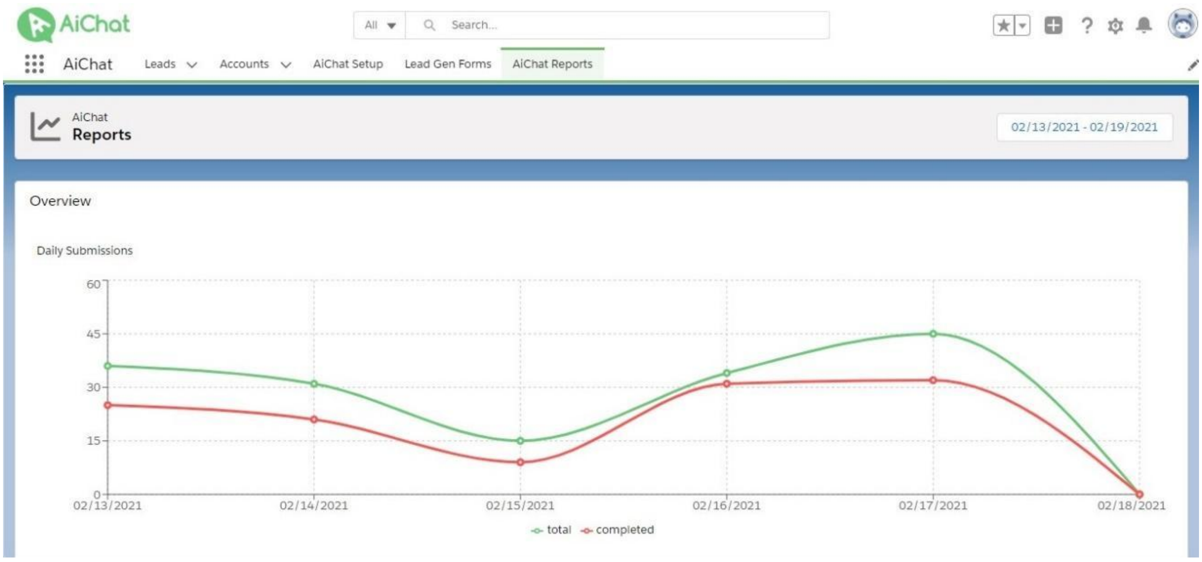
Since the forms created have the customer's information mapped to Salesforce, the same information appears in the details.

Generating leads report

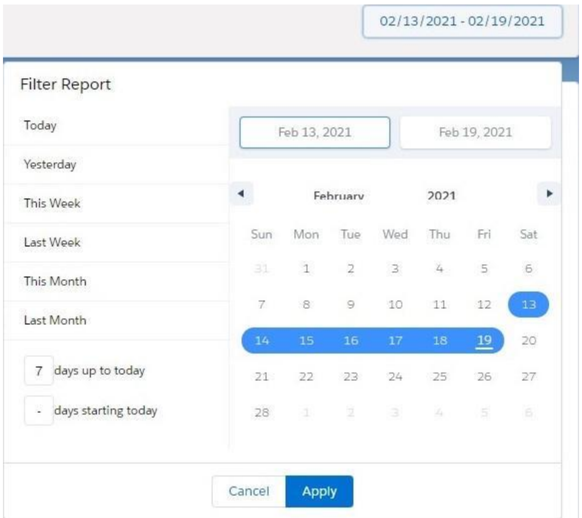
As the person who runs a business, you would want to review the performance of the leads generation forms and use them to decide what steps your business needs to take in the future.

To generate the leads report, please follow these instructions:

1. Click the **AiChat Reports** tab, and you will see the **Reports** page. This page contains the charts of all the leads captured.

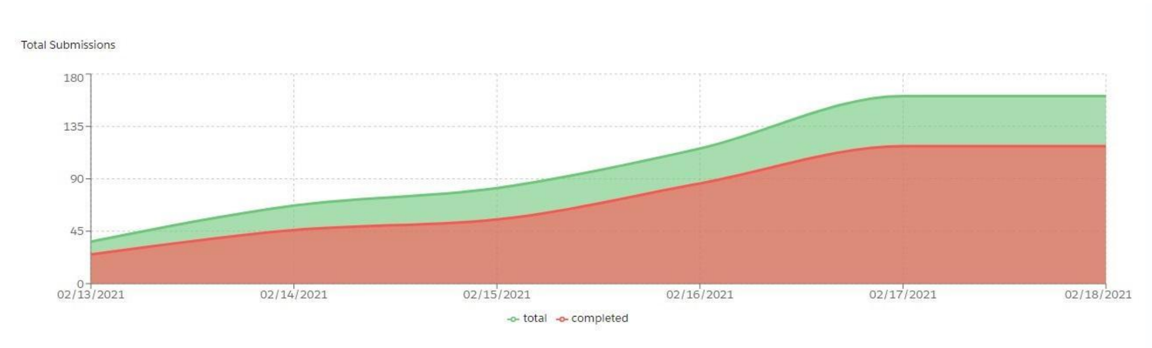


2. You can opt to see the leads captured on a certain date range. Simply click the Date Range button at the top right and filter the dates as you preferred.

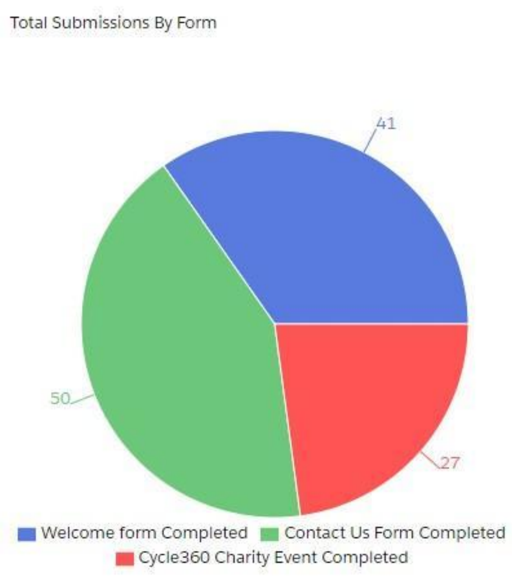


3. In the **Overview** segment, the charts encompasses all the leads generation forms you created. The **Daily Submissions** chart shows the total number of forms prompted and the number of forms completed.

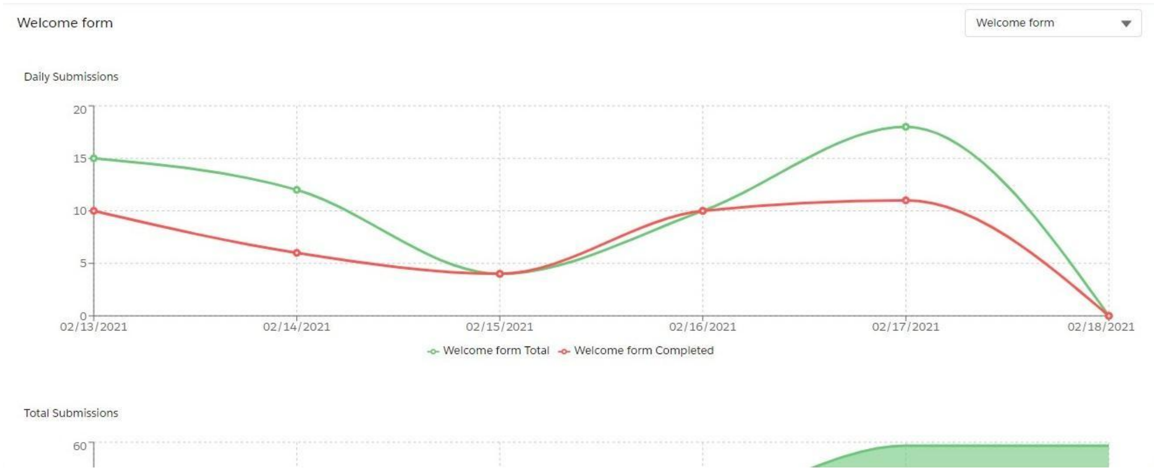
In the **Total Submissions** chart, you can see the accumulation of the total number of forms prompted and the number of forms completed.



In the **Total Submissions By Form** pie chart, you can see the number of each form completed.



4. Besides the Overview, you can also see the reports for each form. The report consists of two charts only, **Daily Submissions** and **Total Submissions**.



If you want to check the report of the other forms, click the dropdown on the top right and select the form you preferred. You will see the Daily Submissions and Total Submissions charts of the preferred form.