



Lead Capture for Sales Cloud Implementation Guide

Version 1.1, Winter '18



@salesforcedocs

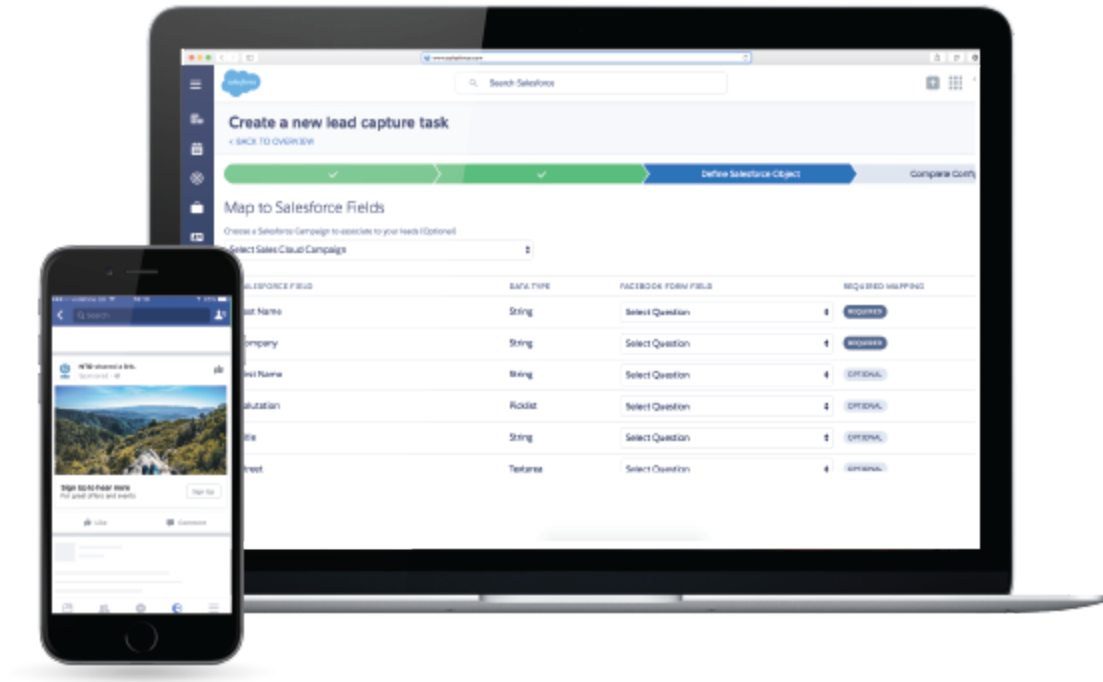
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Welcome to Lead Capture for Sales Cloud



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

Before you start using Lead Capture, install and configure the app in your Salesforce org. Here's an overview of the process.

- 1. Install Lead Capture for Sales Cloud**

Lead Capture for Sales Cloud 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.

- 2. Configure the Lead Capture for Sales Cloud Connected App**

Configure the Lead Capture for Sales Cloud connected app so that pre-authorized users can access it. You only need to perform this step once.

- 3. Grant Access to Lead Capture for Sales Cloud**

Assign the Salesforce Lead Capture permission set to users in your org. Users with this permission set can create lead capture tasks to import leads from Facebook.

Lead Capture is available in both Salesforce Classic and Lightning Experience in: Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Install Lead Capture for Sales Cloud

Lead Capture for Sales Cloud 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.

USER PERMISSIONS

To install packages:

- “Download AppExchange Packages”
 1. Go to the [Lead Capture for Sales Cloud 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 Lead Capture for Sales Cloud Connected App

Configure the Lead Capture for Sales Cloud connected app so that pre-authorized users can access it. You only need to perform this step once.

USER PERMISSIONS

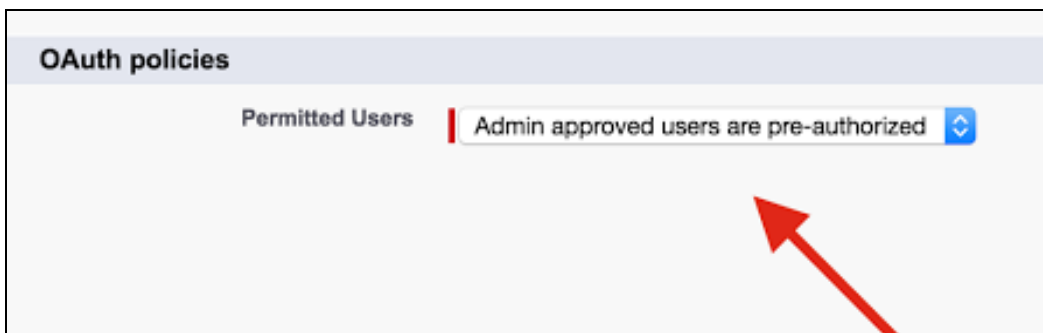
To read a connected app:

- “Customize Application”

To manage a connected app:

- “Customize Application” AND either “Modify All Data” OR “Manage Connected Apps”

1. From Setup, enter Connected Apps in the Quick Find box, and then click **Manage Connected Apps**.
2. For the Salesforce Lead Capture connected app, click **Edit**.
3. In the “OAuth policies” section, for Permitted Users, select **Admin approved users are pre-authorized**.



4. Confirm the changes and then click **Save**.

Grant Access to Lead Capture for Sales Cloud

Assign the Salesforce Lead Capture permission set to the users in your org who manage Facebook Lead Ad campaigns. The permission set grants access to the Lead Capture app, plus the ability to:

- Create lead capture tasks.
- Read and update leads.
- Read and update the Facebook Lead ID custom field on leads.



Note: To create lead capture tasks, users must also have Admin access to the Facebook page that's associated with the Lead Ad form they're importing.

USER PERMISSIONS

To assign a permission sets:

- “Assign Permission Sets”
 1. From Setup, enter **Users** in the Quick Find box, and then click **Users**.
 2. From the list of users, click the username of the person who needs access to the app. In the example below, we're granting access to a user named John Doe.

The screenshot shows the 'All Users' page in Salesforce. At the top, there's a title 'All Users' and a sub-header 'On this page you can create, view, and manage users.' Below that, there's a 'View:' dropdown set to 'All Users' and a 'Create New View' button. A navigation bar at the top right shows letters A through M. Below the navigation bar are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. The main content is a table with the following columns: Action, Full Name, Alias, Username, Last Login, and Role. The table contains four rows of user data. A red arrow points to the 'Stable Lead Capture' user row.

Action	Full Name	Alias	Username	Last Login	Role
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d0y0000008kepuay.b1cyqifgzuk@chatter.salesforce.com		
<input type="checkbox"/> Edit	Doe, John	jdoe	jdoe@example.com		Channel Sales Team
<input type="checkbox"/> Edit	Stable Lead Capture	LStab	leadcapstable@gmail.com	15/09/2016 11:14	
<input type="checkbox"/> Edit	User, Integration	integ	integration@00d0y0000008kepuay.com		

3. Click **Permission Set Assignments** and then click **Edit Assignments**.
4. Select the Salesforce Lead Capture permission set and then click **Add**.
5. Click **Save**.

Repeat this process for other users who need access to the app.