

xiQ for Salesforce Usage Guide

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1. Introduction

The new product integration will allow B2B sales reps to access xiQ's real-time account intelligence and sales triggers within Salesforce CRM.

Sales teams can use this data to sync their contacts and leads with xiQ's real time alerts on each customer and prospect account or enable more informed segmentation for use in ABM campaigns. Salesforce users will now be able to leverage xiQ's Artificial Intelligence enabled account-level data to identify high-value accounts in real time and build actionable segments for an integrated, more efficient ABM experience.

2. xiQ Features available in Salesforce CRM:

- I. Actionable insights on Company including Financials, interactive Account Dossiers, Sales Triggers, DISC profiles, social buzz and much more.
- II. Person dashboard synced to each contact to view engagement score, intent data, and rank leads.
- III. Review person profile on leads to access background information on prospects.
- IV. AI-generated DISC analysis to tailor conversations with prospects and leads.

3. Install Guide:

- I. Install the managed package in your org.
- II. Choose to install for all users.
- III. Grant Third Party Access for the app to work.

4. Configuration:

xiQ for Salesforce has Visualforce pages for Home, Accounts, Opportunity and Contacts. Follow the instructions below to configure all pages for Lightning and Classic Salesforce respectively.

4.1. Salesforce Lightning:

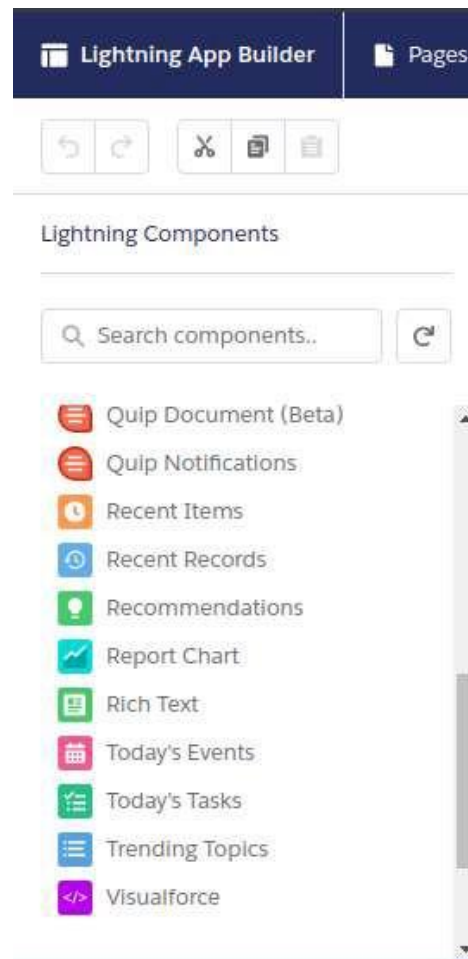
After installing, open the xiQ app from App Launcher.

Note: Accounts must have a website to sync and work with xiQ

Authorize your user using the button and enter your login credentials in the popup window. When it is complete, you must add the Visual Force pages in Home, Accounts, Contacts and Opportunities.

Home Page Layout

1. Navigate to Home tab and go to Edit page by clicking on the Setup icon.
2. From the left panel of Lightning Components, Drag and Drop a Visualforce Component where you want to.



3. Once this appears in the right panel choose **xiQ News** from the Visualforce Page Name dropdown. Add Label xiQ (Optional) and set height to 600 for optimal experience.

[Page](#) > Visualforce

☒ Show Label

Label 

Leave blank for default...

* Visualforce Page Name 

xiQNews



Height (in pixels)

600

▼ Set Component Visibility

Filters

[+ Add Filter](#)

Accounts and Opportunity Page

1. Navigate to Accounts tab, open an Account and go to Edit page by clicking on the Setup icon.
2. From the left panel of Lightning Components Drag and Drop a Visualforce Component where you want to.
3. After this appears in the right panel, choose **xiQAccounts** (for Opportunity choose **xiQOpportunities**) from the Visualforce Page Name dropdown. Add Label xiQ-Account (Optional) and set height to 600 for optimal experience.

Contacts Page

1. Navigate to Contacts tab, open a Contact and go to Edit page by clicking on the Setup icon.
2. From the left panel of Lightning Components Drag and Drop a Visualforce Component where you want to.
3. After this appears in the right panel, choose **xiQContacts** from the Visualforce Page Name dropdown. Add Label xiQ-Account (Optional) and set height to 600 for optimal experience.

Note: Contacts object must have an email address to see Intent Data and Analytics

4.2. Salesforce Classic:

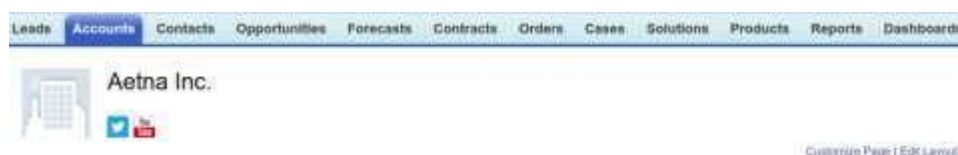
After installing open the xiQ app from App Launcher.

Go to xiQ Setup tab and press authorize with xiQ.

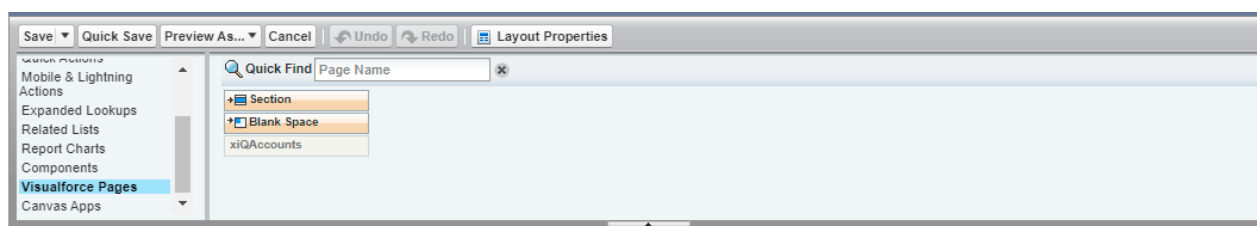
After authorization is complete, you must add the Visual Force pages in Home, Accounts, Contacts and Opportunities.

Accounts and Opportunity Page

1. Open an Account and click on Edit Layout.



2. From the Account Layout menu, click on Visualforce Pages and Drag and Drop **xiQAccounts** to your desired location.



Note: Accounts must have a website to sync and work with xiQ

Contacts Page

1. Open a Contact and click on Edit Layout.
2. From the Contact Layout menu, click on Visualforce Pages and Drag and Drop **xiQContacts** your desired location.

Note: Contacts object must have an email address to see Intent Data and Analytics

Support

For all inquiries and support please reach out to us at support@xiqinc.com

Thank you.