How to Enable Account Engagement for User

1. Go to this link: - https://help.salesforce.com/s/articleView?id=000380206&type=1
2. Click on "**Account Engagement AppExchange package**" link

3. Select "Production Environments"
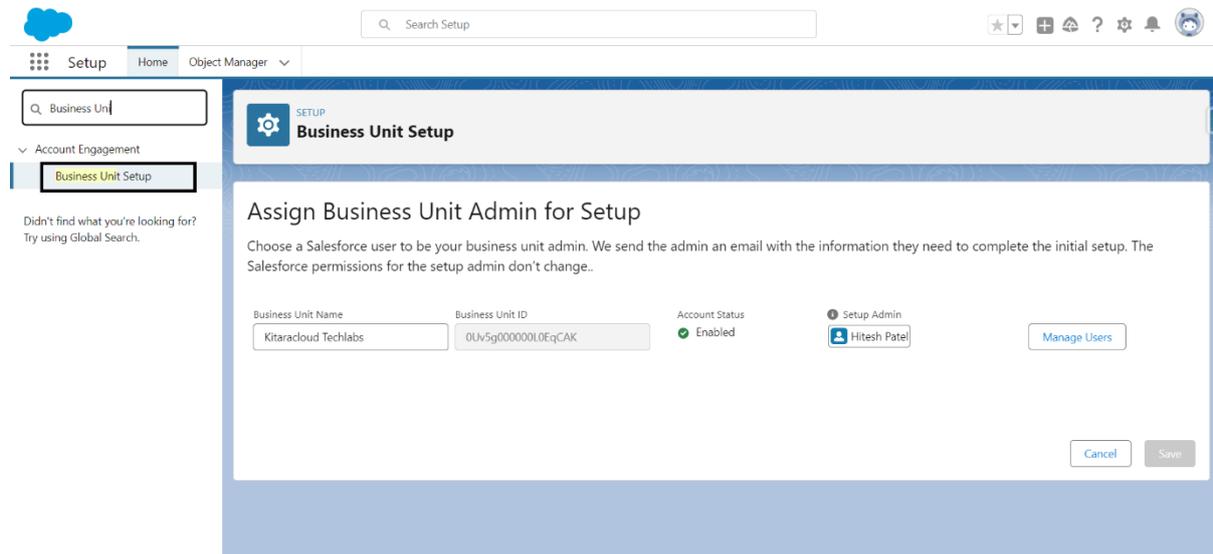
4. Login with your credentials → Select the option "**Install for Admins Only**" → click the "**Install**" button.
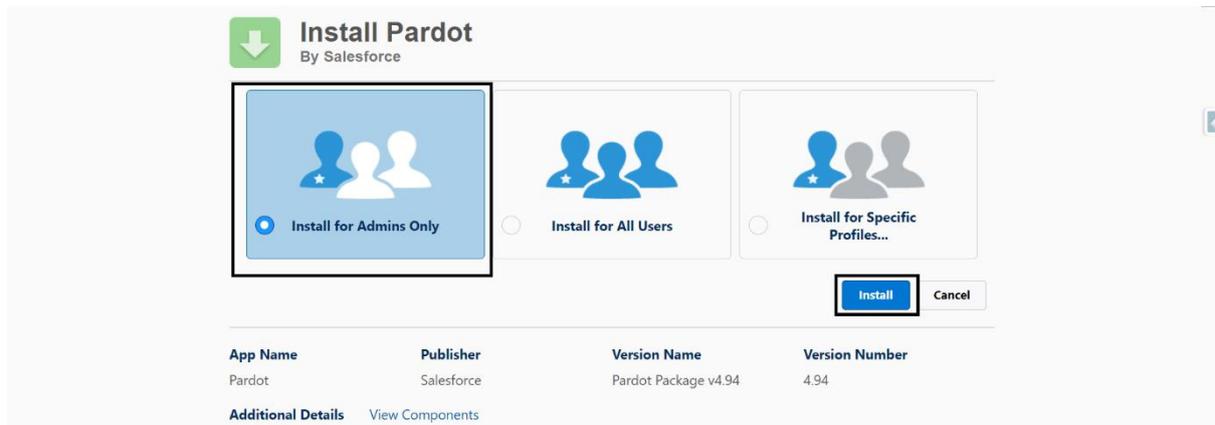
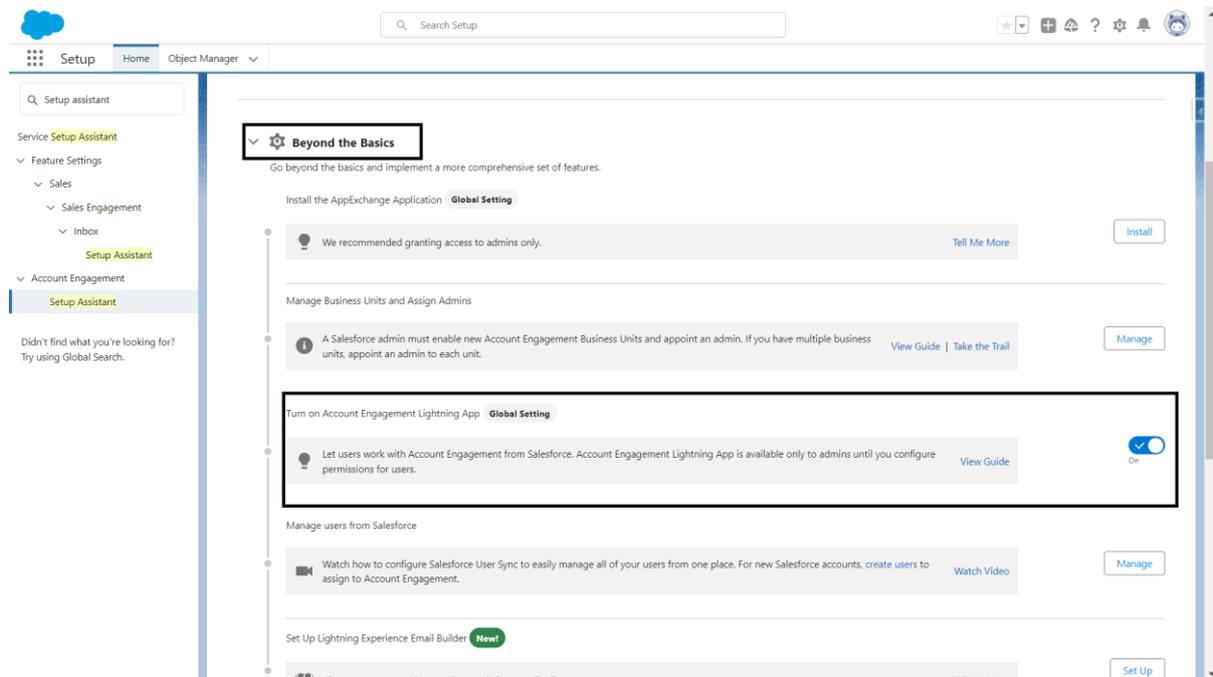5. Select check same as below screenshot → Click on "**Continue**"
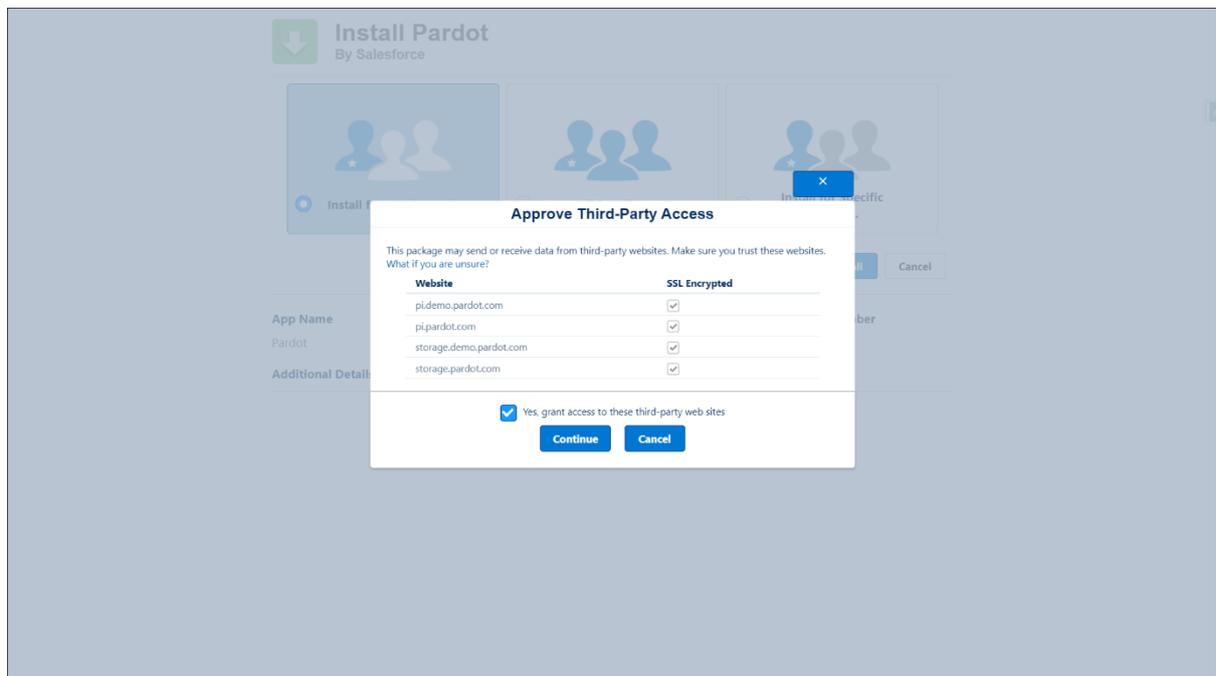
6. After Installation Successful, Go to Setup → Quick Find → Search for "**Business Unit Setup**" → Follow the steps on the screen and setup the User as Admin → click the "**Save**" button.
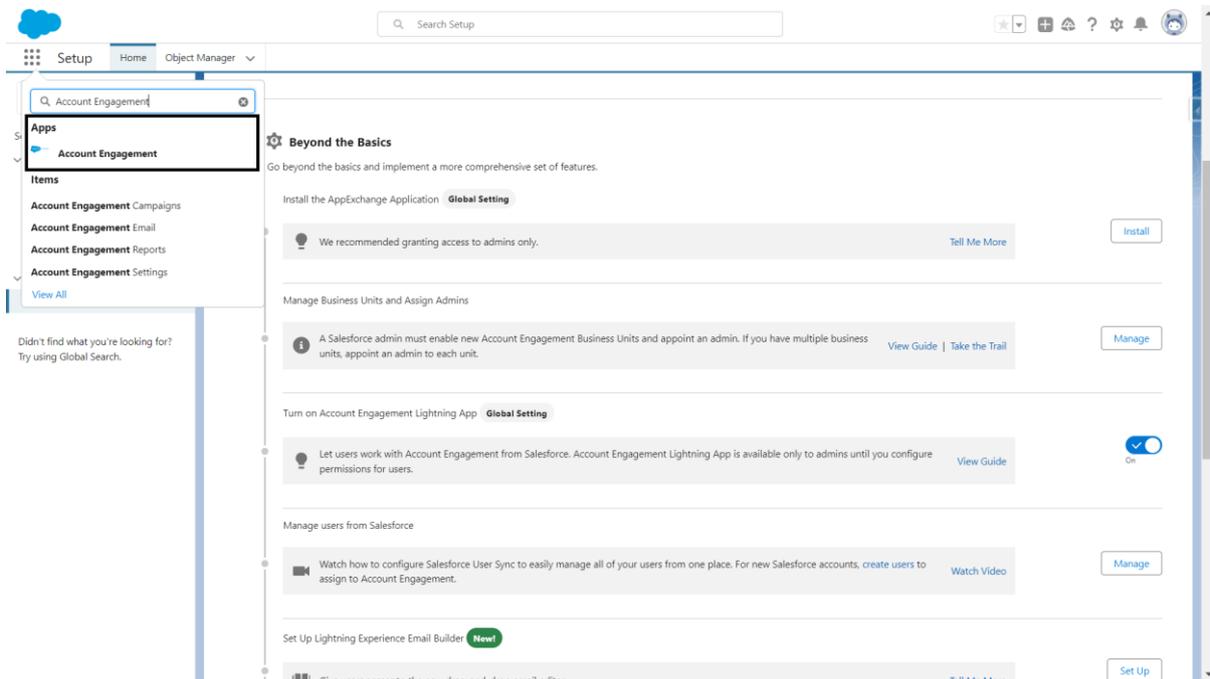

7. Go to Setup → Quick find → Search for "**Setup Assistant**" → Go to "**Beyond basics**" Section → Enable "**Account Engagement**" Lightning App
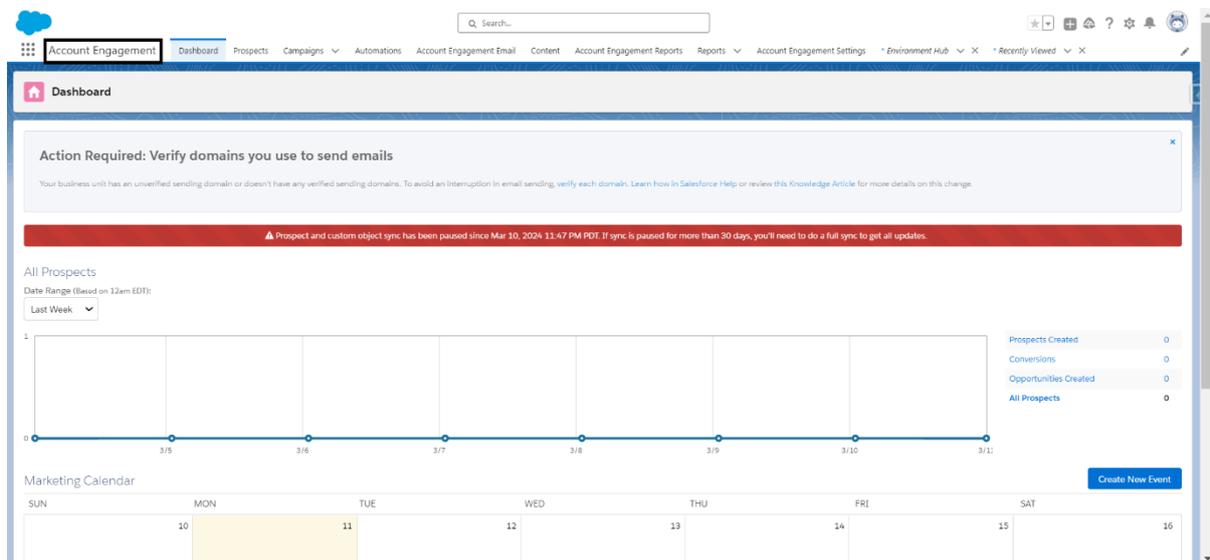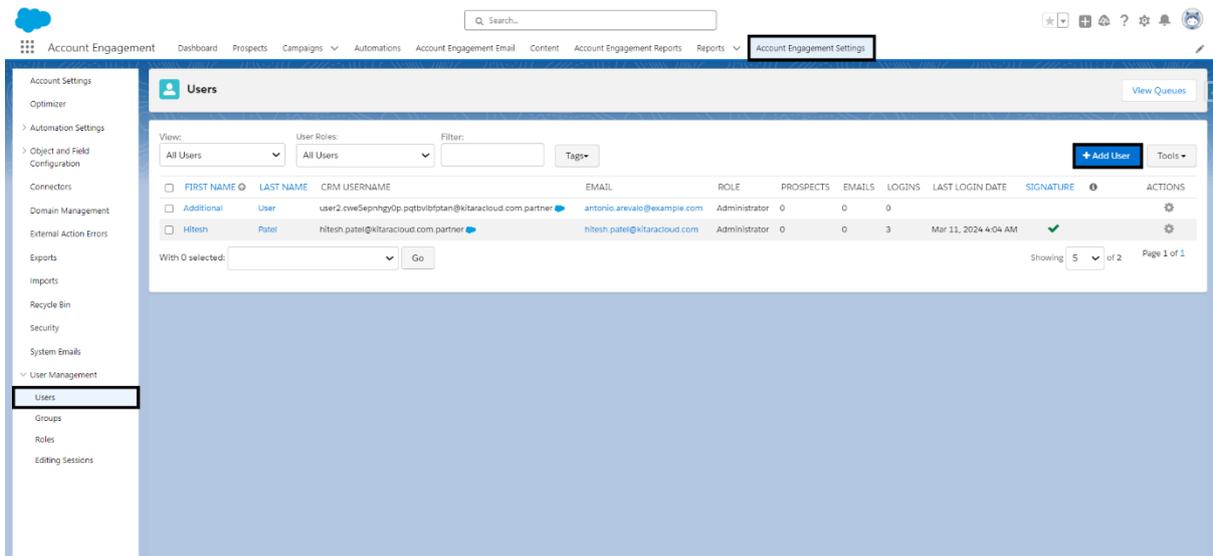
8. Now, "**Account Engagement**" app should be visible in your app launcher.

9. Navigate to "**Account Engagement**" from App Launcher.

10. Go to "**Account Engagement Settings**" → Select "**User**" under "**User Management**" →
Click the "**Add User**" button.

11. Create a new user within the Account Engagement platform mirroring the details of the
corresponding Salesforce user.

12. Go to "**Setup**" → Search for "User" in Quick Find → Select the "**User**" corresponding user which we created in Account Engagement.

13. Assign "**Account Engagement User**" Permission set to the user.
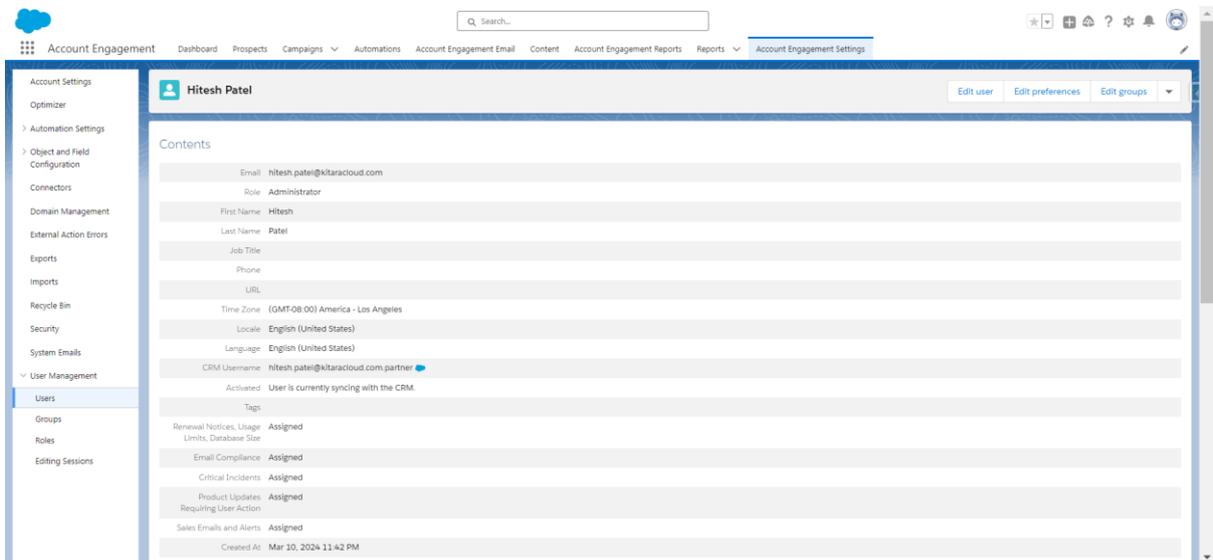
14. Go to Setup → Search for "**App Manager**" in Quick Find.

15. From App Manager click on the dropdown next to "**b2bma_canvas**" App → Select "**Manage**".

16. Scroll down to "**Profiles**" Section → Click the "**Manage Profiles**" button & add the "**Profile**" of the User to whom you want to enable the Account Engagement.
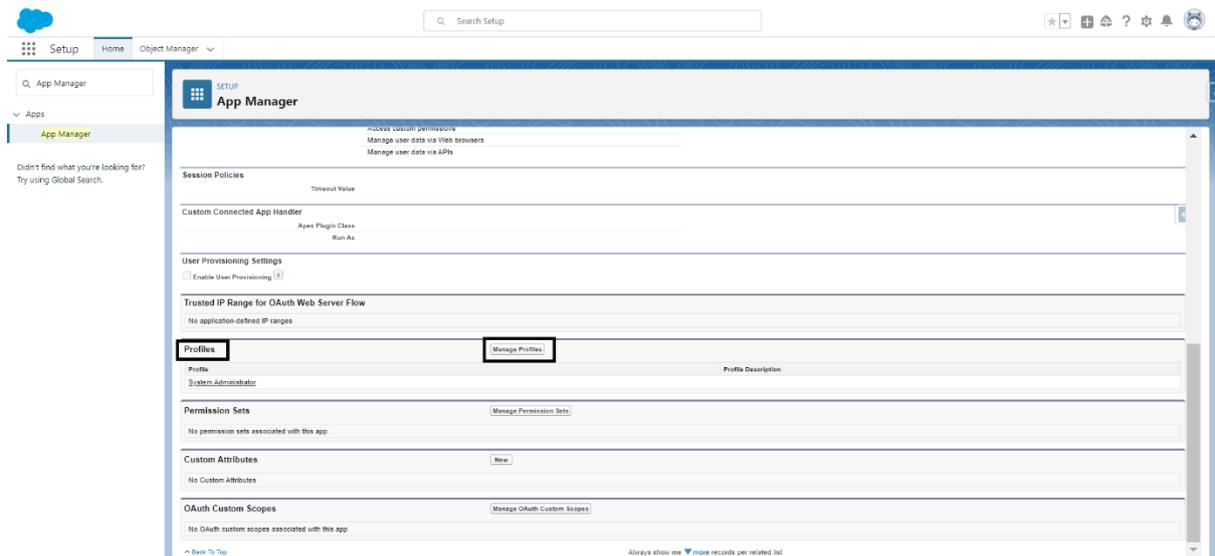
17. Add Salesforce Connector → Go to "**Account Engagement"** app → Click on "**Account Engagement Settings**" Tab → Click on "**Connectors**"
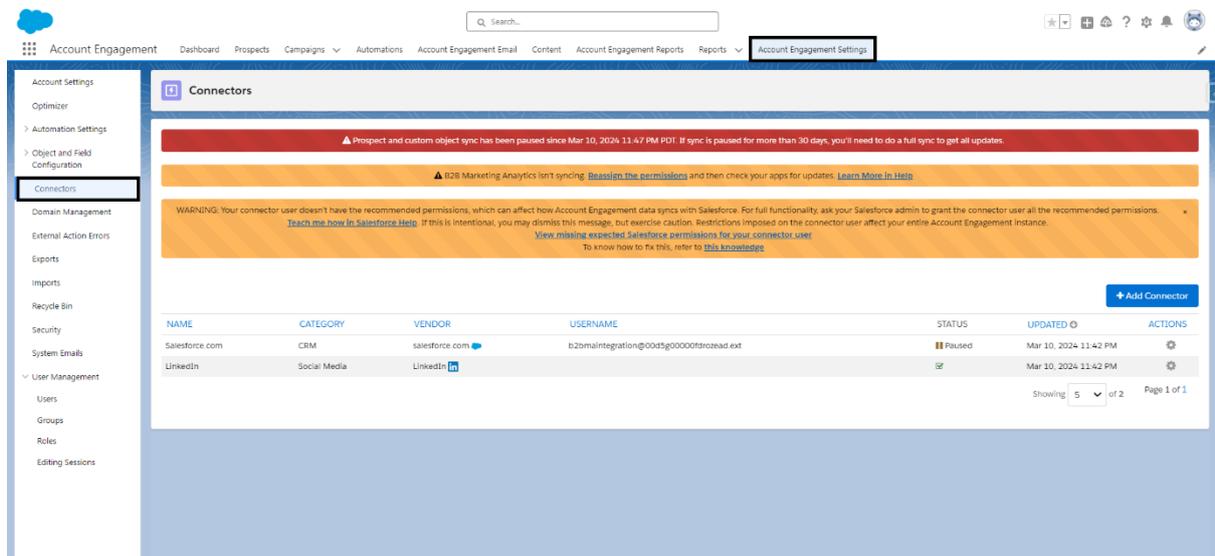
18. In Salesforce Connector Status in "**Paused**"

19. Go to Actions → Click on "**Resume Sync**"

20. In Salesforce Connector status is "**verified**".