

This Installation Guide was created for the users of the Salesgenie application.



MS Word was used as the authoring tool, to create the Installation Guide.



TechSmith Snagit was used to capture and illustrate the product images in this guide.



We adhered to the Microsoft Manual of Style for Technical Publications (MSTP) standard for creating and reviewing content.



The Installation Guide includes most of the standard sections, namely, cover page, table of contents, about this guide, chapters and appendix.



Salesgenie Installation and Configuration Guide



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Contact Infogroup

Customer services of Infogroup can be reached by email at support@infogroup.in or by phone at 1800-<Toll-Free-Number-Here>, Monday through Friday.

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Getting Started

About This Guide

This document provides instructions on how to install and configure Salesgenie Enhance and Salesgenie Prospecting packages within Salesforce.

Prerequisites

To install Salesgenie, you need the following:

- The package installation link provided by the Infogroup account executive
- The Salesgenie Enhance API key
- The unique API key for your Salesforce organization, provided by Infogroup

Target Audience

Salesgenie Enhance and Salesgenie Prospecting packages are intended for a Salesforce user.

Hardware Software Requirements

The Salesforce application is Cloud-based.

Conventions

Text conventions used throughout this guide are as follows.

This...	Indicates...
Bold	Name of menu items, dialog boxes, dialog box elements, and commands
Courier Text	Directory name, file name, file path, command names, and user credentials appear in courier text
Code Block	Code examples appear in courier text inside a box with gray background
URLs	URLs for reference sources
<i>Text in Italics</i>	Reference to other documents
 Note text	Additional useful information

Infogroup

Overview

Infogroup is a leading provider of innovative business data and marketing solutions. Infogroup helps to increase customer acquisition and retention. The company actively uses various intuitive models and analytics to drive customer acquisition and retention. This creates cross-sell opportunities and a positive impact on the customer's revenue.

To achieve a high quality of data, Infogroup helps customers refine, match, append, and filter data.

For business requirements, the user needs to install the following packages:

- Salesgenie Enhance
- Salesgenie Prospecting

To get a quick overview, refer to the following [flow diagram](#).

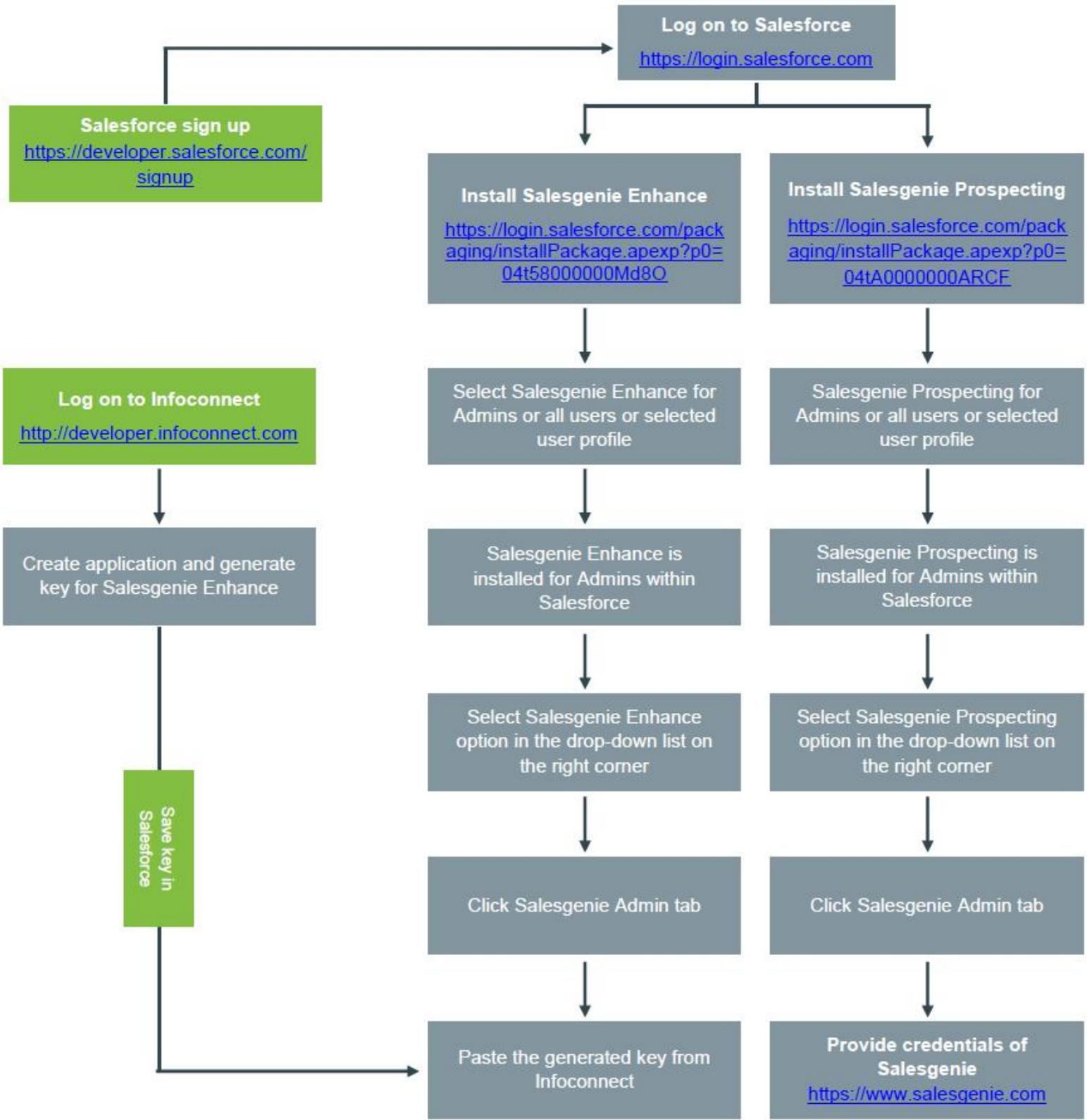


Figure 1: Salesgenie Overview Flowchart

Logging on to Salesforce

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Salesgenie Enhance 1.10

About Salesgenie Enhance

The Salesgenie Enhance application enables the users to get complete, up-to-date information for their accounts and contacts within Salesforce. The data of customers and prospects is synchronized in real time with Infogroup’s premier business and consumer databases.

Users must be assigned rights in Salesforce. Based on the rights assigned, the users can profile companies, households, contacts, find additional decision makers, and understand corporate hierarchy. Users can also get detailed firmographics such as lines of business, annual sales, number of employees, credit rating, and years in business, and so on. Users can also get demographics such as age, income, own/rent, home value, marital status, presence of children, mortgage details, and so on. A user gets accurate and clean data by using Salesgenie Enhance.

Installing Salesgenie Enhance

To install Salesgenie Enhance:

1. Log on to Salesgenie Enhance using the URL:
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t58000000Md80>
You are redirected to the Salesforce logon page, if you are not already logged on. For more information, see [Logging on to Salesforce](#).
The **Install Salesgenie Enhance** page is displayed.
2. Salesgenie Enhance has three types of users—Admin, All Users, and Specific Profiles. Select the corresponding option button for the user type.

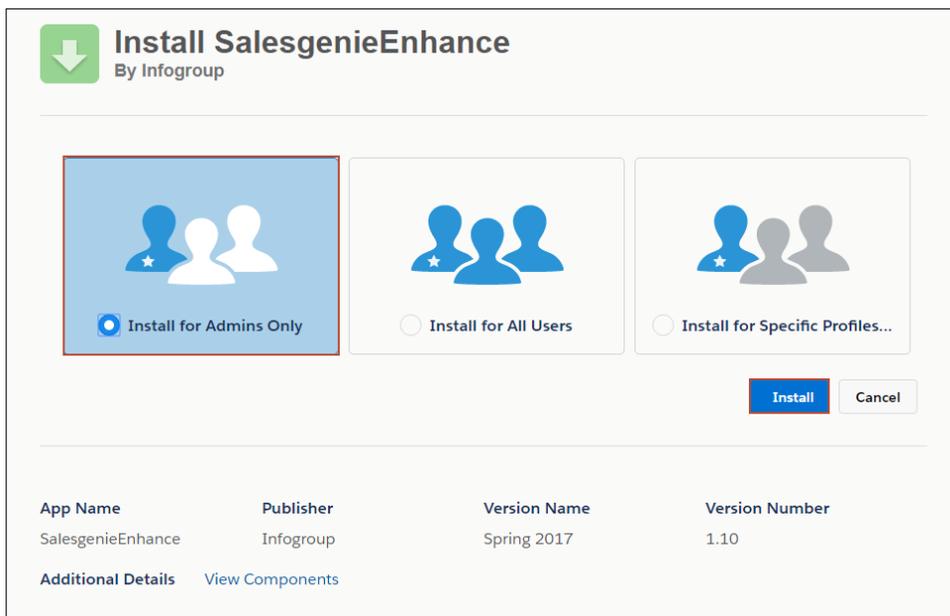


Figure 2: Salesgenie User Type

3. Click **Install**.
The **Approve Third-Party Access** dialog box is displayed.

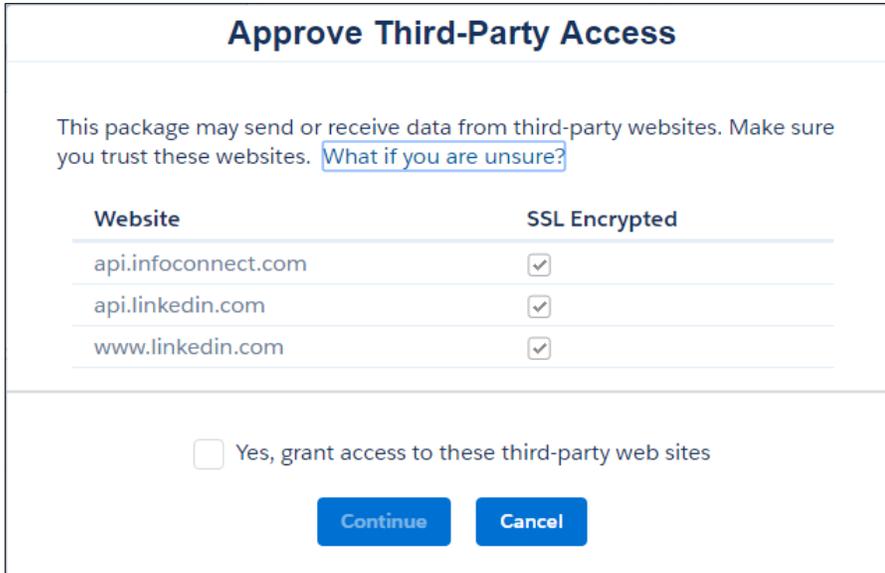


Figure 3: Approve Third-Party Access

4. Select the **Yes, grant access to these third-party web sites** check box.
5. Click **Continue**.

The **Installation Complete!** message is displayed.

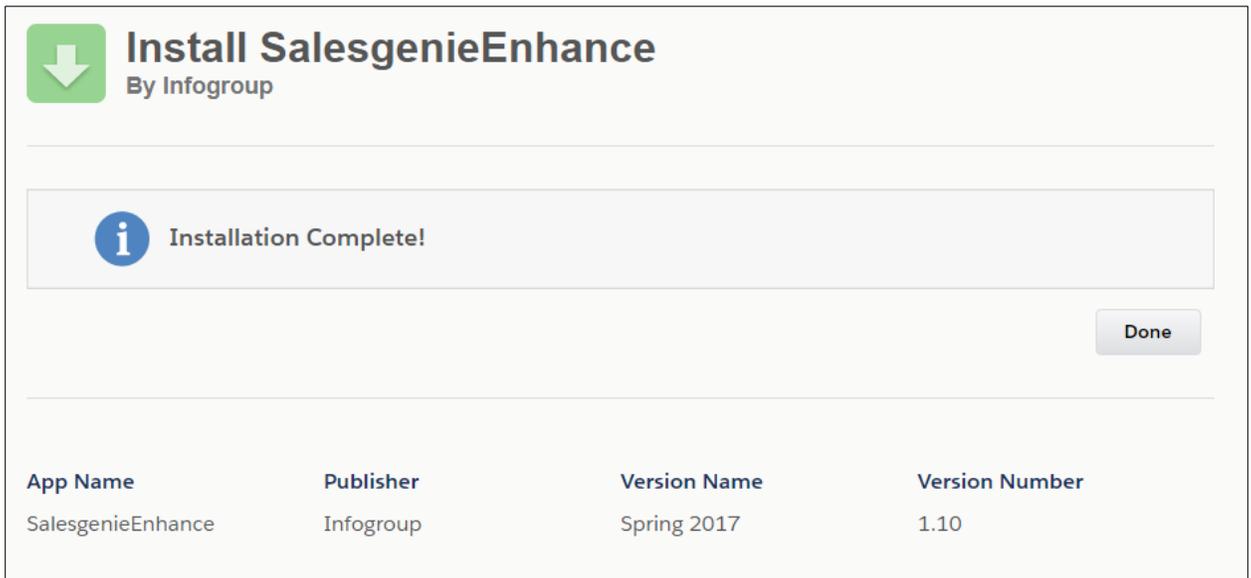


Figure 4: Salesgenie Installation completed

6. Click **Done**.
The Salesgenie Enhance package is installed within Salesforce, and you are redirected to the Salesforce **Home** page.
7. On the top-right corner, select **Salesgenie Enhance** from the list.

Salesgenie Installation Guide

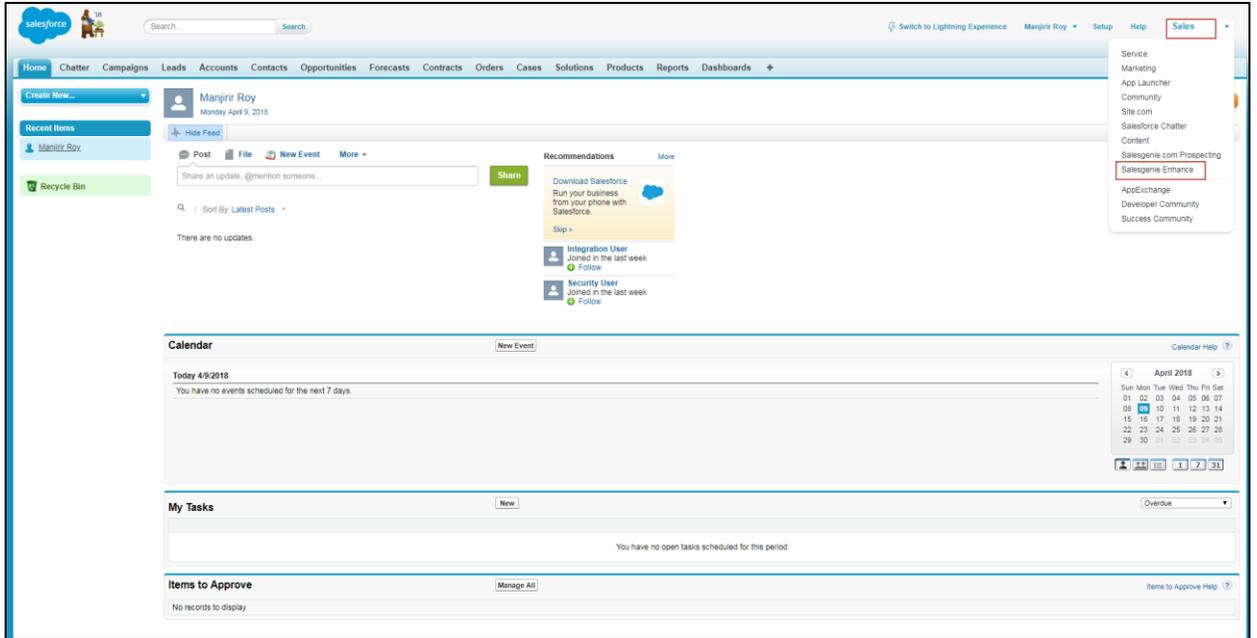


Figure 5: Salesgenie Enhance Dashboard

The Salesgenie Enhance dashboard page is displayed.

8. Click the **Salesgenie Admin** tab.

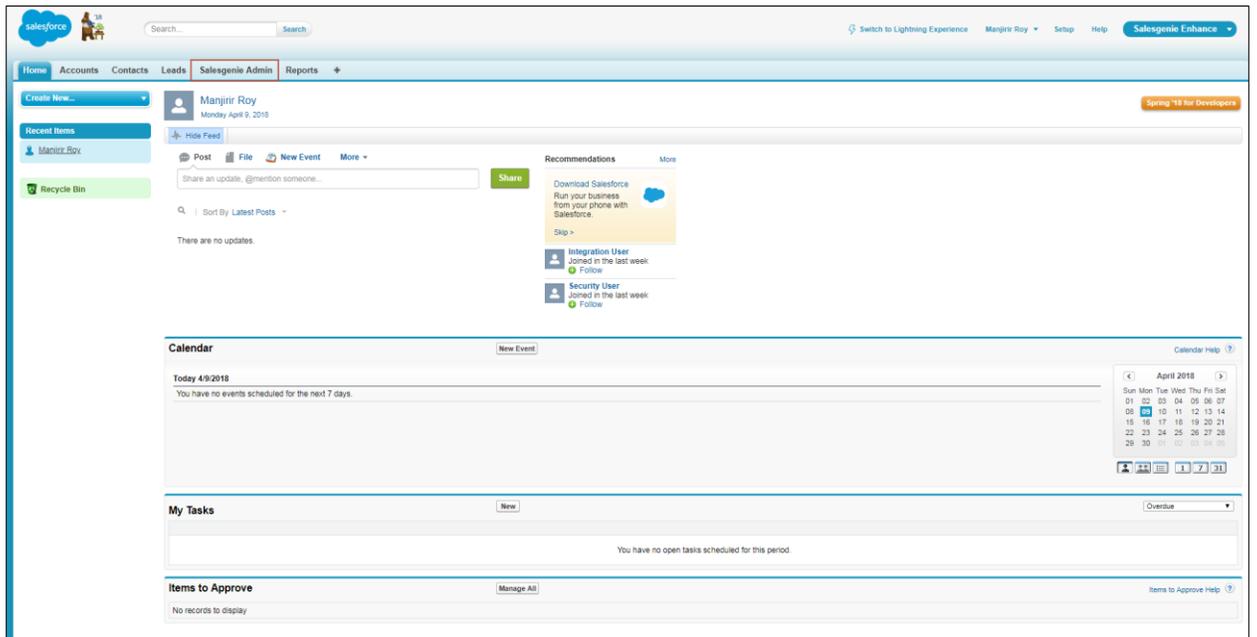


Figure 6: Clicking the Admin Tab

9. Paste the API key generated from the Infoconnect application in the box provided. For more information, see [Creating an app on Infoconnect and generating an API Key for Salesgenie Enhance](#).

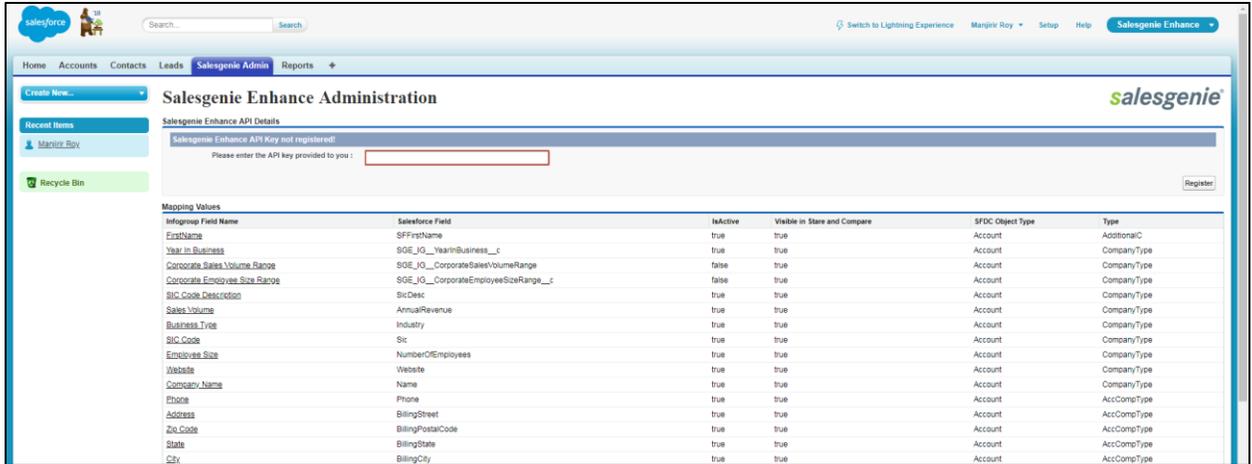


Figure 7: Specifying the API key

10. Click **Register**.

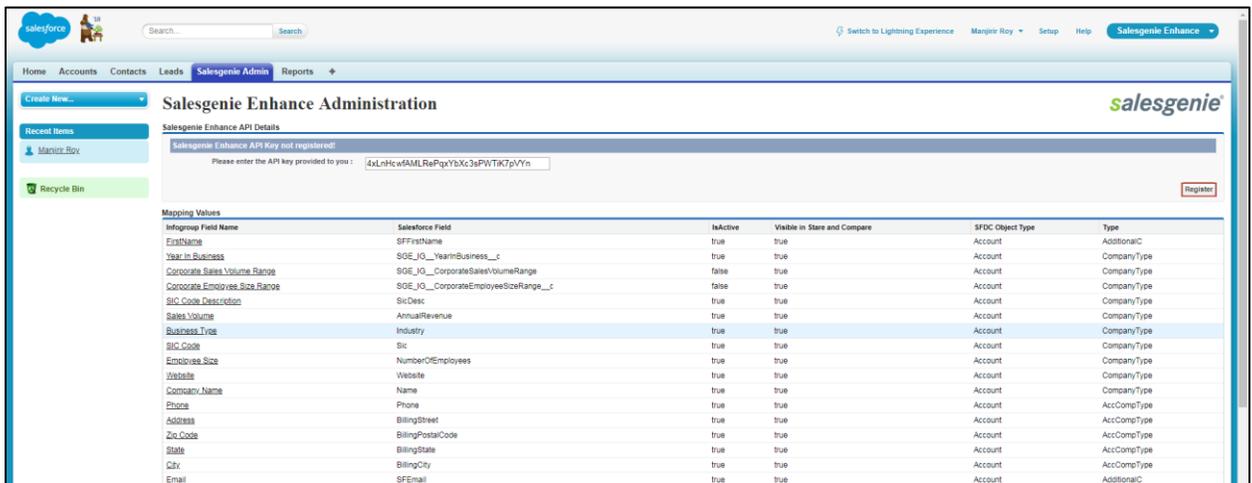


Figure 8: Registering the API key

A success message is displayed.

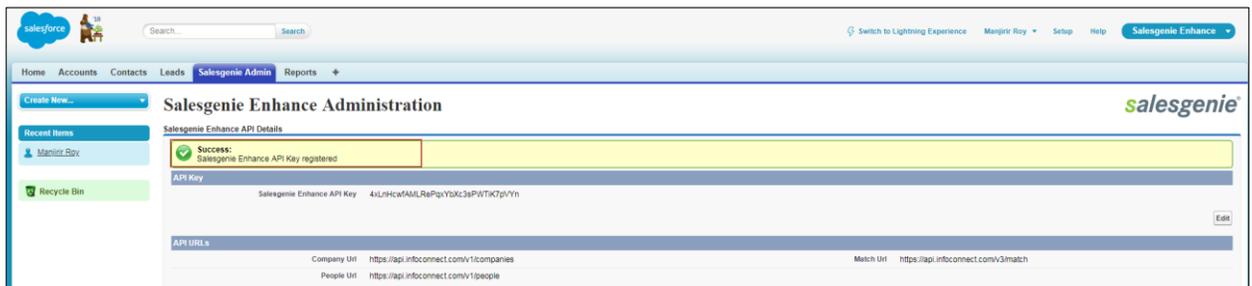


Figure 9: Salesgenie Enhance API key registered



You can also update the API key by clicking **Edit**. For more information, see [Editing API key](#).

Editing API key

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Log on to Infoconnect.

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Creating an app on Infoconnect and generating an API Key for Salesgenie Enhance.

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Save Salesgenie Enhance API Key in salesforce.

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Salesgenie Enhance Dashboard

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Salesgenie Prospecting 1.5

About Salesgenie Prospecting

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Installing Salesgenie Prospecting

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Use Salesgenie credentials on Admin tab

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Salesgenie Prospecting Dashboard

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Understanding Field Mapping

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Appendix

Troubleshooting

This section contains information about the various error messages that may occur during the installation process and the action that you need to take to resolve the errors.

Installation checklist

You can use the following checklist to ensure that you have all the requirements ready, prior to installing the application.

Hardware requirements
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Software requirements
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