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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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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
Text in Italics	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 <u>flow diagram</u>.



Figure 1: Salesgenie Overview Flowchart

Logging on to Salesforce

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:

 Log on to Salesgenie Enhance using the URL: <u>https://login.salesforce.com/packaging/installPackage.apexp?p0=04t58000000Md80</u> You are redirected to the Salesforce logon page, if you are not already logged on. For more information, see <u>Logging on to Salesforce</u>.

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.

Approve Th	ird-Party Access
This package may send or receive you trust these websites. What if y	data from third-party websites. Make sure you are unsure?
Website	SSL Encrypted
api.infoconnect.com	\checkmark
api.linkedin.com	
www.linkedin.com	\checkmark
Yes, grant access	to these third-party web sites

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.

Install SalesgenieEnhance By Infogroup							
i Installati	on Complete!		Done				
App Name	Publisher	Version Name	Version Number				
SalesgenieEnhance	Infogroup	Spring 2017	1.10				

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.

Koleyfor: Ar Campaigns Flore: Chatter Campaigns Create Here: Record Hore: Maloir: Bry: Recycle Bin	Search Leads Accounts Contacts Opportunities Forecasts Cont Contacts Manjirit Roy Monory Apil 3, 2018 Monory Apil 4, 2018 There are no updates.	stracts Orders Cases Solutions Products Reports Dashboards +	G. Santch to Lightning Experience Margin: Roy + Setter	Holp Sales Sales
	Calendar Today 49/2018 You have no events scheduled for the next 7 days. My Tasks	New Event		Cateriar Help (?) C April 2015 > Sun-Man Tue Wed The Fit at 01 02 03 04 65 06 07 00 11 10 11 10 13 14 22 03 44 05 08 07 20 20 30 01 01 01 10 13 14 22 03 44 05 08 07 20 20 30 01 01 01 01 10 > Low Help (%) Image: Comparison of the fit of the f
	My Tasks Items to Approve No records to display	You have no open tasks scheduled for this period.		Items to Approve Help (?)

Figure 5: Salesgenie Enhance Dashboard

The Salesgenie Enhance dashboard page is displayed.

8. Click the Salesgenie Admin tab.

salesforce	Search Search				${\cal G}$ Switch to Lightning Experience	Manjirir Roy 🔻	Setup	Help	Salesgenie Enhance 🔹
Home Accounts Contacts	Leads Salesgenie Admin Reports +								
Create Now	Manjirir Roy Monday Ayd 9, 2019 Monday Ayd 9, 2019 Monday Ayd 9, 2019 Monday Ayd 9, 2019 Mone area Share an update, @methon someone G Sort By Laket Prots ~ There are no updates.	Share	Recommendations too Counting StateStrate Any por Landers SafeStrate.						Sprag '15 for Divelopert
	Calendar	New Event	Follow						Calendar Help 🛞
	Today 49/2918 You have no events scheduled for the next 7 days.								April 2018 > Sun Mion Tue Wed Thu Fri Sat 01 02 03 04 05 06 07 08 10 11 12 13 14 15 16 17 16 19 02 12 22 23 24 25 26 27 28 93 16 15 1 1 7 31 1 7 31
	My Tasks	New							Overdue 🔻
			You have no op	n tasks scheduled for this period.					
	Items to Approve	Manage All							Items to Approve Help (?)
	No records to display								

- Figure 6: Clicking the Admin Tab
- Paste the API key generated from the Infoconnect application in the box provided. For more information, see <u>Creating an app on Infoconnect and generating an API Key for Salesgenie</u> <u>Enhance</u>.

salesforce	Search Search			${\cal G}$ Switch to Lightning Experience	Manjirir Roy 🔻 Setup Hel	p Salesgenie Enhance 🔹
Home Accounts Contacts	Leads Salesgenie Admin Reports +					
Create New_	Salesgenie Enhance Adminis	tration				salesgenie [.]
Recent Items	Salesgenie Enhance API Details					
Manjirir Roy.	Salesgenie Enhance API Key not registered!					
	Please enter the API key provided to you :					
W Recycle Bin						Register
	Mapping Values					
	Infogroup Field Name	Salesforce Field	IsActive	Visible in Stare and Compare	SFDC Object Type	Туре
	FirstName	SFFirstName	true	true	Account	AdditionalC
	Year In Business	SGE_IGYearInBusinessc	true	true	Account	CompanyType
	Corporate Sales Volume Range	SGE_IGCorporateSalesVolumeRange	false	true	Account	CompanyType
	Corporate Employee Size Range	SGE_IGCorporateEmployeeSizeRangec	faise	true	Account	CompanyType
	SIC Code Description	SicDesc	true	true	Account	CompanyType
	Sales Volume	AnnualRevenue	true	true	Account	CompanyType
	Business Type	Industry	true	true	Account	CompanyType
	SIC Code	Sic	true	true	Account	CompanyType
	Employee Size	NumberOfEmployees	true	true	Account	CompanyType
	Website	Website	true	true	Account	CompanyType
	Company Name	Name	true	true	Account	CompanyType
	Phone	Phone	true	true	Account	AccCompType
	Address	BillingStreet	true	true	Account	AccCompType
	Zio Code	BillingPostalCode	true	true	Account	AccCompType
	State	BillingState	true	true	Account	AccCompType
	City	BillingCity	true	true	Account	AccCompType

Figure 7: Specifying the API key

10. Click Register.

salesforce	earch Search			$\ensuremath{\overline{\mathcal{G}}}$ Switch to Lightning Experience	Manjirir Roy 🔻 Setup	Help Salesgenie Enhance •
Home Accounts Contacts	Leads Salesgenie Admin Reports +					
Create New	Salesgenie Enhance Adminis	stration				<mark>s</mark> alesgenie [.]
Recent Items	salesgene Enhance API Details					
Maniirir Roy	Salesgenie Enhance API Key not registered!					
	Please enter the API key provided to you : 4xL	nHcwfAMLRePqxYbXc3sPWTiK7pVYn				
Recycle Bin						Register
	Mapping Values	Salaaforna Elald	la Activa	Visible in Stars and Compare	SEDC Object Type	Turne
	FirstName	SFFirstName	true	true	Account	AdditionalC
	Year In Business	SGE IG YearInBusiness c	true	true	Account	CompanyType
	Corporate Sales Volume Range	SGE IG CorporateSalesVolumeRange	faise	true	Account	CompanyType
	Coroorate Employee Size Range	SGE_IGCorporateEmployeeSizeRangec	false	true	Account	CompanyType
	SIC Code Description	SicDesc	true	true	Account	CompanyType
	Sales Volume	AnnualRevenue	true	true	Account	CompanyType
	Business Type	Industry	true	true	Account	CompanyType
	SIC Code	Sic	true	true	Account	CompanyType
	Employee Size	NumberOfEmployees	true	true	Account	CompanyType
	Website	Website	true	true	Account	CompanyType
	Company Name	Name	true	true	Account	CompanyType
	Phone	Phone	true	true	Account	AccCompType
	Address	BillingStreet	true	true	Account	AccCompType
	Zip Code	BillingPostalCode	true	true	Account	AccCompType
	State	BillingState	true	true	Account	AccCompType
	<u>Citx</u>	BillingCity	true	true	Account	AccCompType
	Email	SFEmail	true	true	Account	AdditionalC

Figure 8: Registering the API key

A success message is displayed.

sales/orce	sarch Search		${\mathcal G}$ Switch to Lightning Experience	Manjirir Roy 🔻 Setup	Help Salesgenie Enhance 🔹
Home Accounts Contacts	Leads Salesgenie Admin Reports +				
Create New	Salesgenie Enhance Adminis	ration			salesgenie [.]
Recent Items	Salesgenie Enhance API Details				
Manjirir Roy.	Success: Salesgenie Enhance API Key registered				
	API Key				
Recycle Bin	Salesgenie Enhance API Key 4xLnH	wfAMLRePqxYbXc3sPWTiK7pVYn			
					Edit
	APIURLS				
	Company Url https://	pi.infoconnect.com/v1/companies	Match Url https://api.infoconnec	t.com/v3/match	
	People Url https://	pi.infoconnect.com/v1/people			

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

Log on to Infoconnect.

<< Please note that this sample does not include the complete content in all the Chapters/Sections/Headings of this document. >>

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

<< Please note that this sample does not include the complete content in all the Chapters/Sections/Headings of this document. >>

Save Salesgenie Enhance API Key in salesforce.

<< Please note that this sample does not include the complete content in all the Chapters/Sections/Headings of this document. >>

Salesgenie Enhance Dashboard

Salesgenie Prospecting 1.5

About Salesgenie Prospecting

<< Please note that this sample does not include the complete content in all the Chapters/Sections/Headings of this document. >>

Installing Salesgenie Prospecting

<< Please note that this sample does not include the complete content in all the Chapters/Sections/Headings of this document. >>

Use Salesgenie credentials on Admin tab

<< Please note that this sample does not include the complete content in all the Chapters/Sections/Headings of this document. >>

Salesgenie Prospecting Dashboard

<< Please note that this sample does not include the complete content in all the Chapters/Sections/Headings of this document. >>

Understanding Field Mapping

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