

Installation Manual for Salesforce App (in Classic View)

Vyakar Lead to Account Matching

21 Aug, 2018

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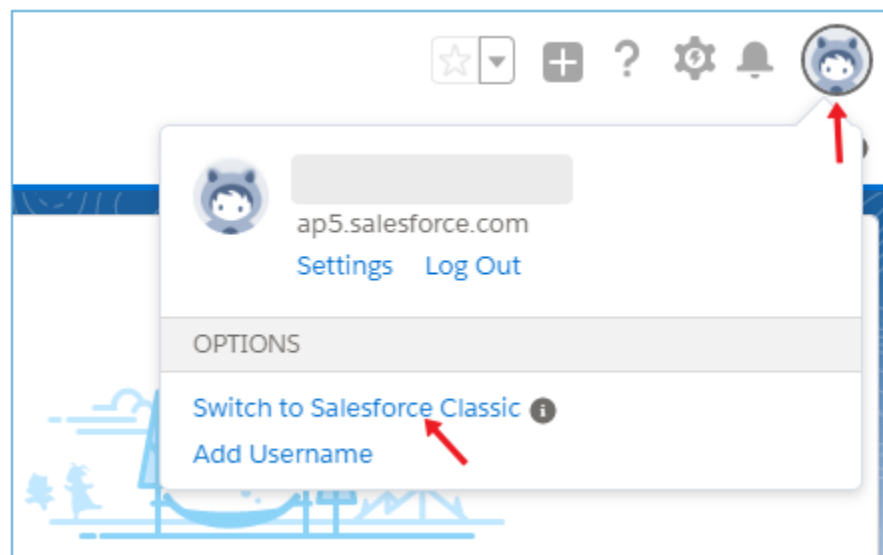
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Introduction

This step-by-step guide helps installing and configuring “**Vyakar Lead To Account Matching**” application in salesforce. Though this guide explains the setup in every possible detail, it is recommended installation to be done by salesforce admin with reasonable hands-on expertise. Installation process has been explained in step by step manner with screenshots to illustrate each step clearly. An authorized salesforce user with **Admin** privileges should install and configure this application.

To use this manual, please temporarily change to the “Classic view” in Salesforce if you are currently using “Lightning Experience”. The application itself is “Lighting Ready” once configured.

If you are using “Lightning Experience” view, click on your profile picture (or default image) on top-right corner. Then click on “Switch to Salesforce Classic”. Please note this is a temporary change and you can switch back to “Lightning Experience” view once the installation is complete.



Great. You are all set to follow the user guide step by step.

Prerequisite

Editions

The app “Vyakar Lead to Account Matching” works for these SF editions due to API availability. Ensure that your organization has subscribed one of these editions of salesforce license.

- Enterprise
- Performance
- Unlimited

However, if you are using editions other than those mentioned above, you may contact Salesforce to get **API access enabled** for your organization, before proceeding with the installation of this app.

Tip: To check your salesforce edition, login to salesforce (login.salesforce.com) and go to **Setup -> Company Information** and check “Organization Edition”

Used Data Space	712 KB (0%) [View]
Used File Space	13 KB (0%) [View]
API Requests, Last 24 Hours	3,205 (15,000 max)
Streaming API Events, Last 24 Hours	139 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00D7F000001vGv2
Organization Edition	Developer Edition
Instance	AP5
Modified By:	

My Domain

If your organization uses “My Domain” to customize the salesforce login domain, the “Login Policy” checkbox must be unchecked during “Vyakar Setup” process. Once the setup is complete, you may choose to turn it back on if needed.

My Domain Settings

[Save](#) [Cancel](#)

Login Policy Prevent login from <https://login.salesforce.com> [i](#) **Uncheck This**

Redirect Policy Decide whether to redirect anyone who uses bookmarks and links that contain your previous instance-specific domain:

Redirect to the same page within the domain

Redirect with a warning to the same page within the domain

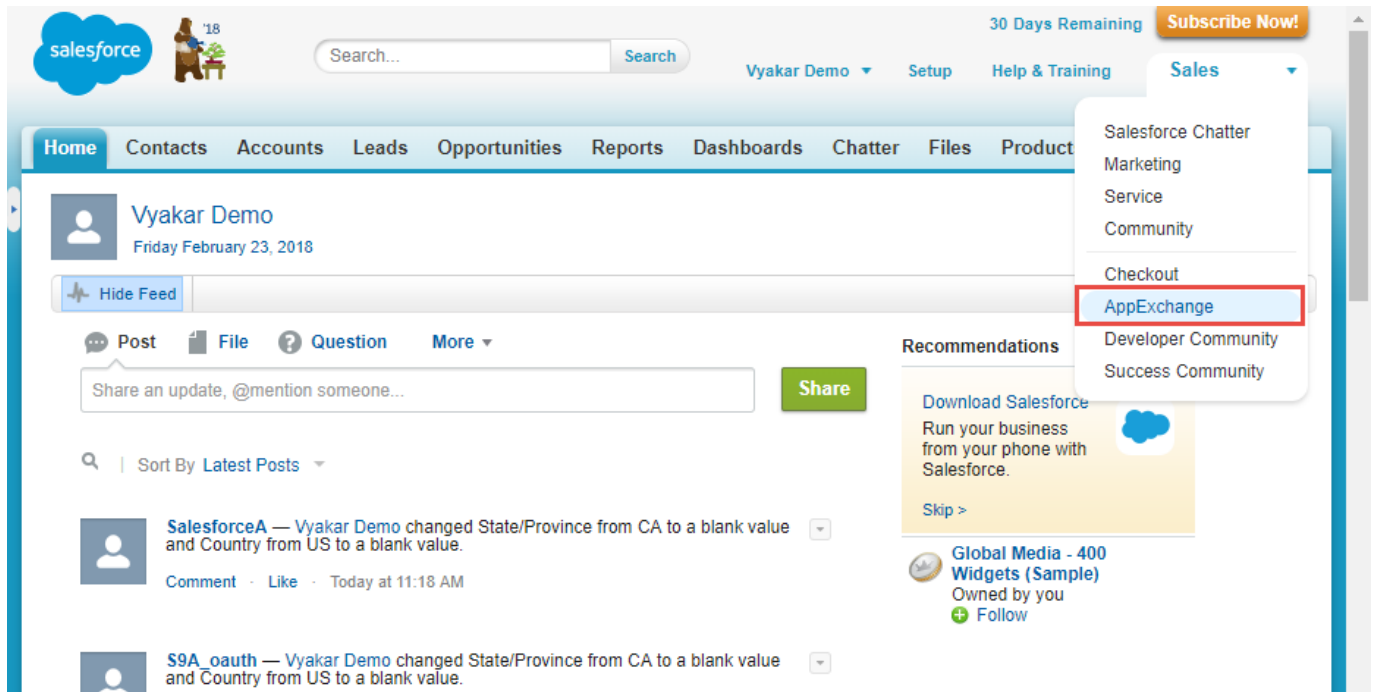
Don't redirect (recommended)

Rename your My Domain <https://vyakartest1234-dev-ed> -dev-ed.my.salesforce.com/

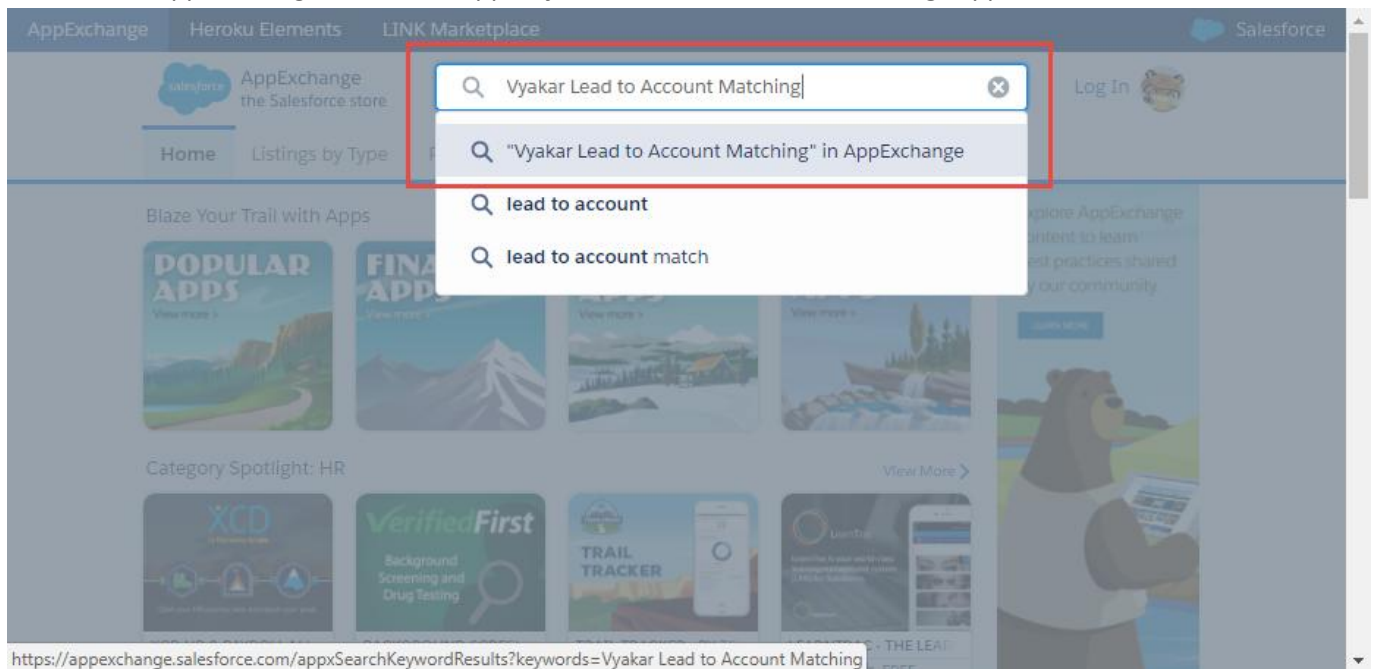
[Save](#) [Cancel](#)

App installation

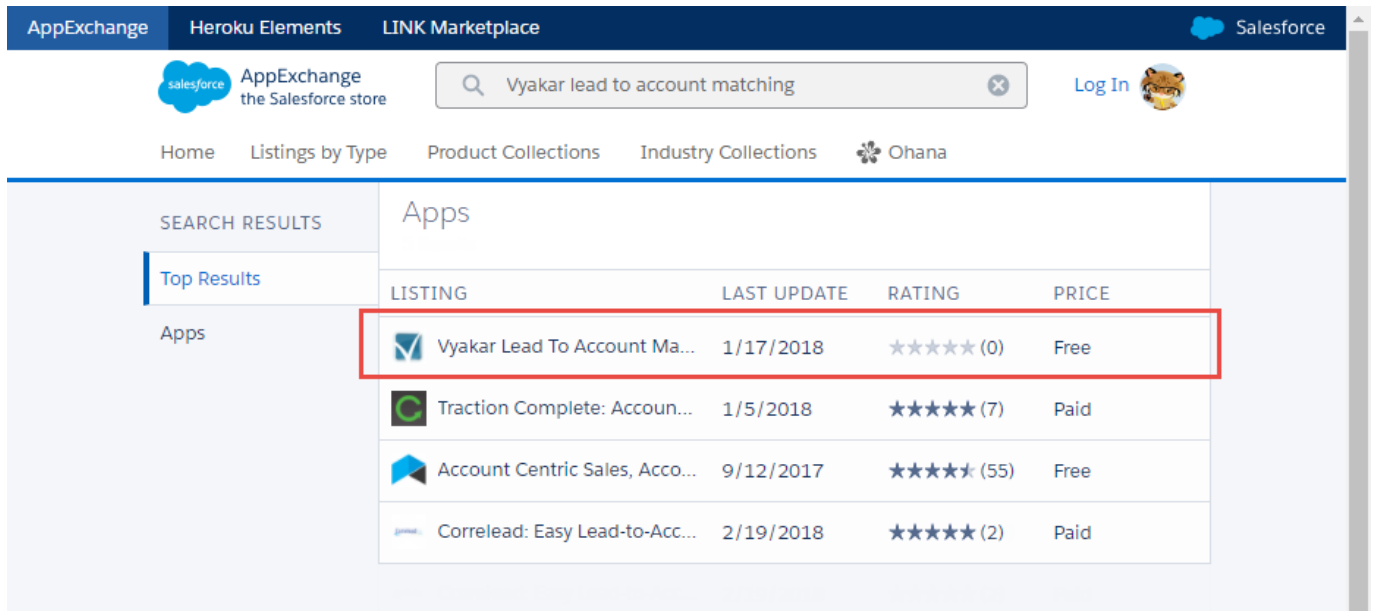
1. Login to your Salesforce account as administrator. Click on the right most tab (“Sales” in this example) and launch **AppExchange**.







2. With-in app exchange, search for app “**Vyakar Lead To Account Matching**” app.



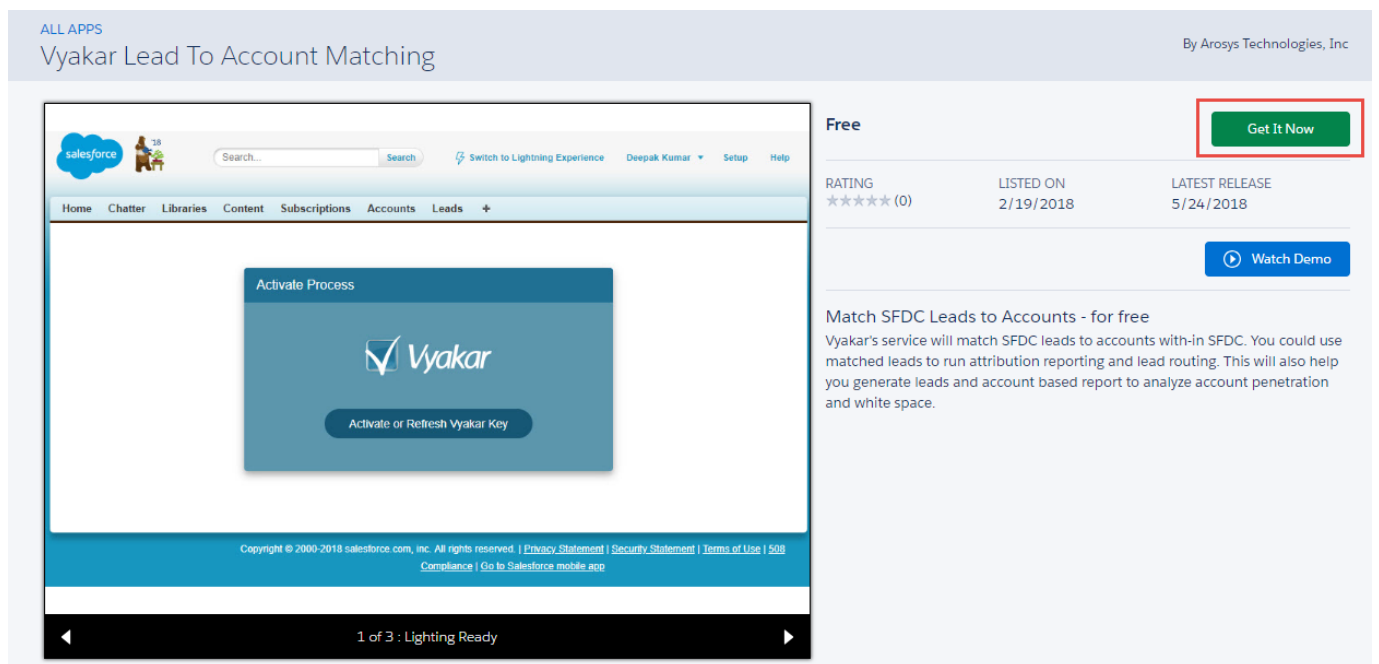
3. Click and open the app with name “Vyakar Lead To Account Matching”



The screenshot shows the Salesforce AppExchange interface. At the top, there are navigation tabs for 'AppExchange', 'Heroku Elements', and 'LINK Marketplace'. A search bar contains the text 'Vyakar lead to account matching'. Below the search bar, there are navigation links for 'Home', 'Listings by Type', 'Product Collections', 'Industry Collections', and 'Ohana'. The main content area displays search results for 'Apps'. A table lists several apps, with the first one, 'Vyakar Lead To Account Ma...', highlighted with a red box. The table has columns for 'LISTING', 'LAST UPDATE', 'RATING', and 'PRICE'.

LISTING	LAST UPDATE	RATING	PRICE
 Vyakar Lead To Account Ma...	1/17/2018	★★★★★ (0)	Free
 Traction Complete: Accoun...	1/5/2018	★★★★★ (7)	Paid
 Account Centric Sales, Acco...	9/12/2017	★★★★★ (55)	Free
 Correlead: Easy Lead-to-Acc...	2/19/2018	★★★★★ (2)	Paid

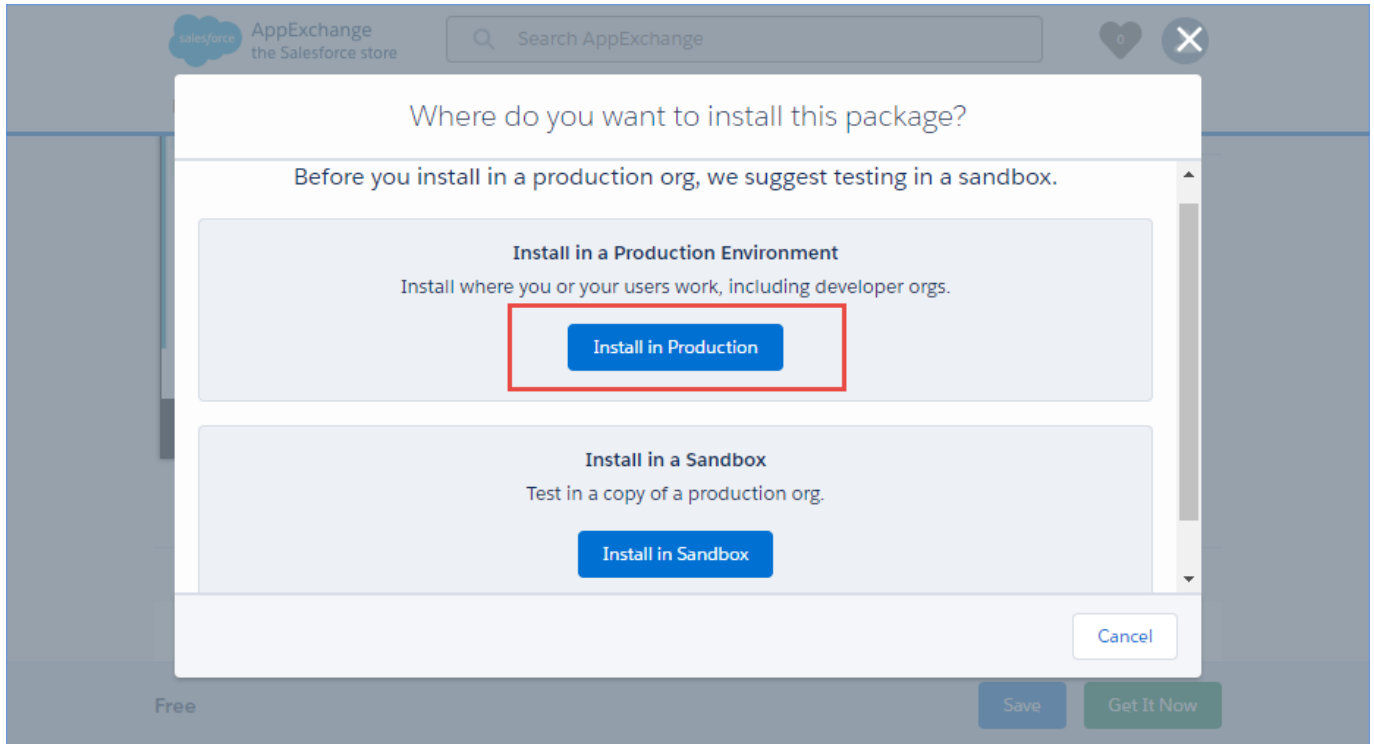
4. Click on button “Get It Now” button



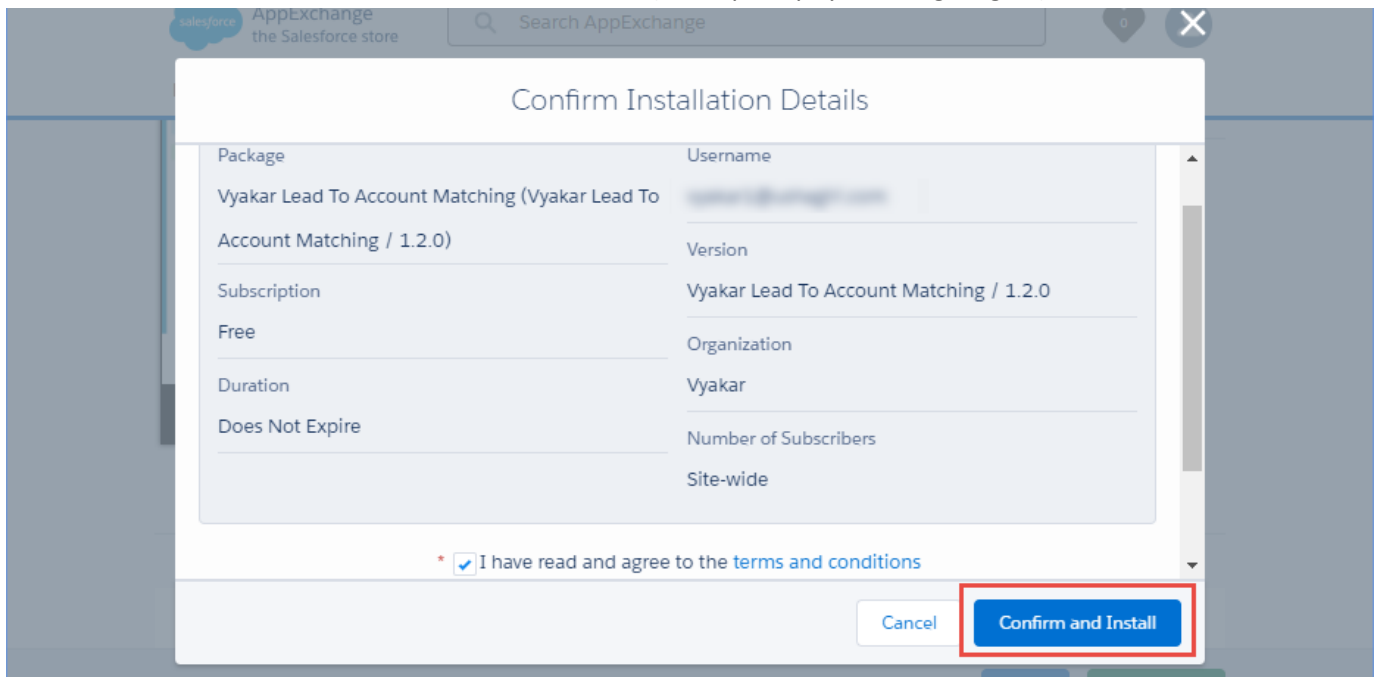
The screenshot shows the app page for 'Vyakar Lead To Account Matching' by Arosys Technologies, Inc. The page includes a header with 'ALL APPS' and the app name. Below the header, there is a preview window showing the app's interface, which includes a search bar, navigation tabs, and a central 'Activate Process' dialog box with the Vyakar logo and a button to 'Activate or Refresh Vyakar Key'. To the right of the preview, there is a 'Free' label, a 'Get It Now' button (highlighted with a red box), and a 'Watch Demo' button. Below these buttons, there is a table with columns for 'RATING', 'LISTED ON', and 'LATEST RELEASE'. The app description states: 'Match SFDC Leads to Accounts - for free. Vyakar's service will match SFDC leads to accounts with-in SFDC. You could use matched leads to run attribution reporting and lead routing. This will also help you generate leads and account based report to analyze account penetration and white space.'

RATING	LISTED ON	LATEST RELEASE
★★★★★ (0)	2/19/2018	5/24/2018


5. You may need to login to app exchange if not already logged in. Once logged in and clicked on **“Get It Now”**, click on **“Install in Production”**



6. Read the terms and conditions and if all okay, check the checkbox **“I have read and agree to the terms and conditions”** and click on button **“Confirm and Install”**. (It will prompt you to login again).

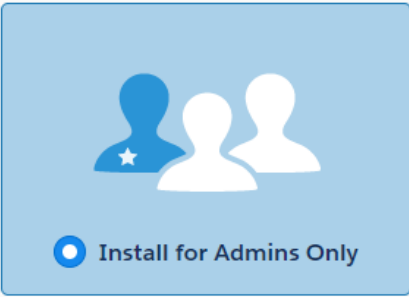


7. Once you are logged in again, 3 installation options are shown. Select the “**Install for Admins Only**”. Click “**Install**” button. To continue with the installation, you must approve 3rd party data access. It may take a while for salesforce to complete the installation. Wait for installation to finish before moving to next step. Click “**Done**” when the “**Installation Complete**” message is displayed.

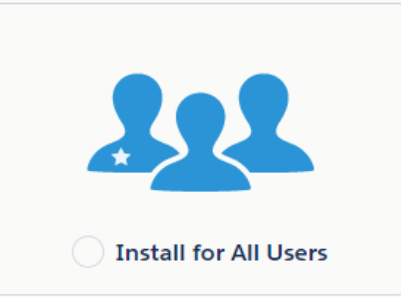


Install Vyakar Lead To Account Matching - FREE

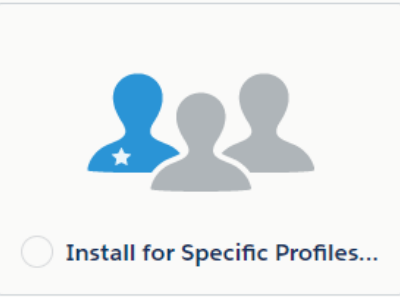
By Arosys Technologies, Inc



Install for Admins Only



Install for All Users



Install for Specific Profiles...

Approve Third-Party Access

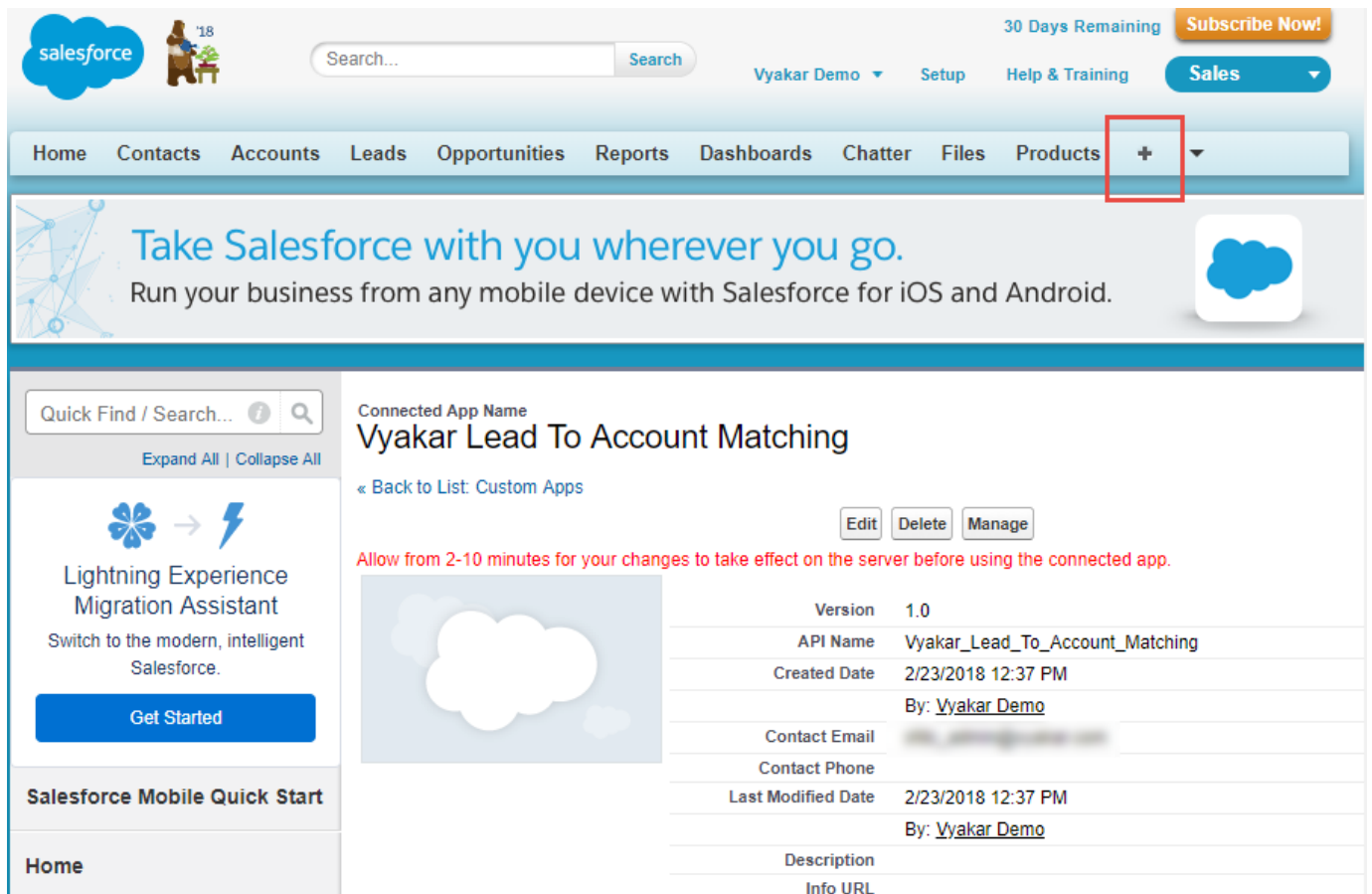
This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?

Website	SSL Encrypted
login.salesforce.com	<input checked="" type="checkbox"/>
one.vyakar.com	<input checked="" type="checkbox"/>
test.salesforce.com	<input checked="" type="checkbox"/>

Yes, grant access to these third-party web sites

Vyakar Application Configuration

8. Now it's time to configure the Vyakar application. On the top menu bar, click on + sign to open the Vyakar Admin configuration



The screenshot shows the Salesforce user interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and a menu with options like 'Vyakar Demo', 'Setup', 'Help & Training', and 'Sales'. A red box highlights a '+' sign in the navigation bar. Below the navigation bar is a banner for 'Take Salesforce with you wherever you go.' The main content area shows the configuration for a connected app named 'Vyakar Lead To Account Matching'. It includes a 'Quick Find / Search...' bar, a 'Lightning Experience Migration Assistant' section, and a table of metadata for the connected app.

Quick Find / Search... Expand All | Collapse All

Lightning Experience Migration Assistant
Switch to the modern, intelligent Salesforce.
[Get Started](#)

Salesforce Mobile Quick Start

Home

Connected App Name
Vyakar Lead To Account Matching

[« Back to List: Custom Apps](#)

[Edit](#) [Delete](#) [Manage](#)

Allow from 2-10 minutes for your changes to take effect on the server before using the connected app.

Version	1.0
API Name	Vyakar_Lead_To_Account_Matching
Created Date	2/23/2018 12:37 PM
	By: Vyakar Demo
Contact Email	
Contact Phone	
Last Modified Date	2/23/2018 12:37 PM
	By: Vyakar Demo
Description	
Info URL	



























9. Click on **Vyakar Setup** link as shown below

All Tabs

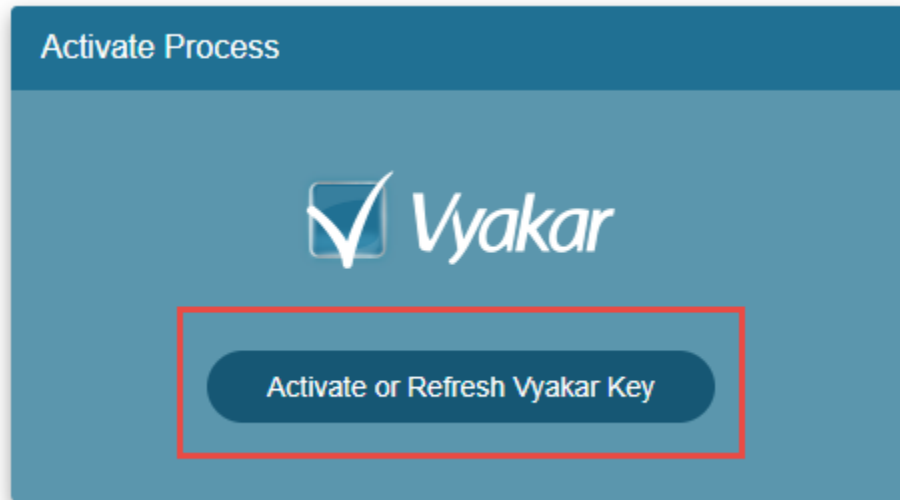
[Help for this Page](#) 

Use the links below to quickly navigate to a tab. Alternatively, you can [add a tab](#) to your display to better suit the way you work.

View: ▼ Add Tabs to Your Default Display **Customize My Tabs**

 Accounts	 Libraries
 Cases	 Opportunities
 Chatter	 People
 Contacts	 Profile
 Content	 Profile Feed
 Contribute	 Profile Overview
 Dashboards	 Reports
 Documents	 Scorecards
 Files	 Social Personas
 Getting Started	 Social Posts
 Groups	 Solutions
 Home	 Subscriptions
 Leads	 Vyakar Setup

10. Click on “Activate or Refresh Vyakar Key” button. This will generate oAuth credentials and share with Vyakar Servers. Allow the required access for Lead to Account matching.



If you encounter any error during the activation process, please send an email to support@vyakar.com or call toll free **1844-321-5323** Ext **02**.

Vyakar is now all set to match lead to existing SFDC accounts. Next few steps are to modify your account and lead layout to show appropriate matched information. Use discretion while making these changes. Guidelines provided here are for illustration, actual changes may vary per your business need.

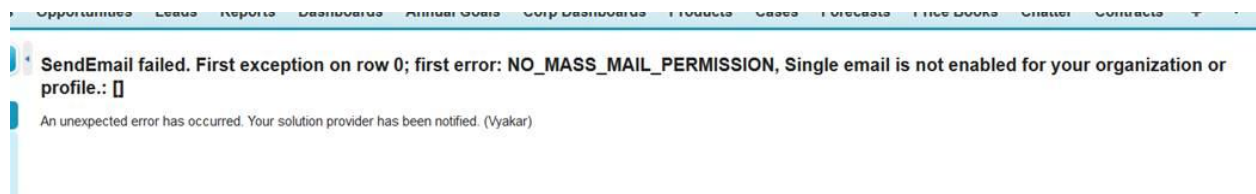
Lead and Account Layout Changes

11. Add **"Vyakar Matched Company Name"** to desired **Lead Page** layouts.
12. Add **"Leads" Related Lists** to desired **Account Page** layouts.

Congratulations. You have completed the set up.

Troubleshooting

If “No Mass Email Permission” error (as shown below) is displayed during setup,



Check you Deliverability settings under **Setup > Email > Deliverability**. “Access to Send Email (All Email Services)” must be set to **All Email**.

