Forcivity

Release Notes

v2.1 – Released February 19, 2018
- Bug fixes and stability fixes
- Added functionality to use Salesforce Duplicate and Matching rules to associate leads to accounts

v2.0 – Released January 30, 2018
- Fixed null object error when contact email domain is a null value
- Added lead-level field and custom setting to control whether matched leads are assigned to the matched account's owner.

v1.7.1 – Released July 2, 2017
- Fixed bug when auto converting leads with no account association previously

v1.7 – Released April 4, 2017
- Fixed bug in contact domain matching when editing contacts

v1.6.2 – Released March 7, 2017
- Adjusted how contact edits are handled to remove errors for duplicate

v1.6.0 – Released January 17, 2017
- Adjusted custom settings to public visibility

v1.5.0 – Released December 19, 2016
- Correlead will now auto convert Leads when Leads are updated. Previously, Leads were only auto converted during Lead creation.
- Correlead behavior can now be controlled through hierarchical custom settings for auto-association to Accounts, auto-creation of Accounts and auto-conversion of Leads for both inserts and updates of Leads.

v1.4.1 – Released June 22, 2016
- Correlead will now associate Accounts when Leads are created as well as when they are updated. Previous releases would only associated Leads to Accounts during Lead creation.
- Contacts to Multiple Accounts impact – because Correlead only associates email domains to Accounts through the primary Account assignment on the Contact object, Salesforce's new Contacts to Multiple Accounts feature does not impact Correlead's functionality.

Introduction

Correlead is the easiest, quickest method to get incoming Leads belonging to your existing Accounts in front of the right person - instantly. Through the use of a simple matching mechanism, Leads can be automatically associated to the correct Account in Salesforce with just a few steps.

What it does

- Reduce Account conflict
- Increase data and reporting quality
- Better customer experience

Getting Started

Salesforce Editions Supported

- Performance
- Developer
- Unlimited
- Enterprise
- Professional

How Correlead Works

Correlead uses a simple email domain-to-Account (and all associated Contacts) matching algorithm to assign incoming Leads to a pre-existing Account.

1. As new Leads enter your system, Correlead instantly determines if the Lead is related to one of your existing Accounts.
2. Correlead then automatically creates the association to that Account.
3. Once the link is made, the Lead is immediately assigned to the Account owner and removed from your normal BDR call queue. You can alternatively prevent lead assignment to the account owner and instead allow normal Lead Assignment Rules to execute.

You can control how incoming Leads are routed through a series of checkbox fields that exist on the Lead object. By giving your organization record-by-record control, you can create customized, use-case specific business rules to ensure every Lead is routed to the correct person, every time.

Correlead gives you the ability to automatically create Accounts on the fly, allowing for the implementation of true Account-based marketing and selling with little effort. Leads can even be automatically assigned to an existing Account without creating duplicate Contact records.
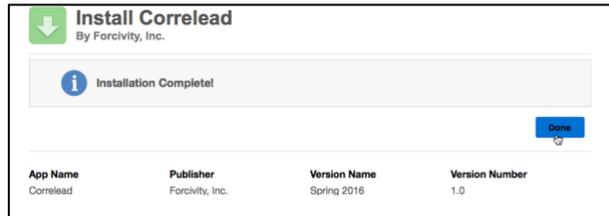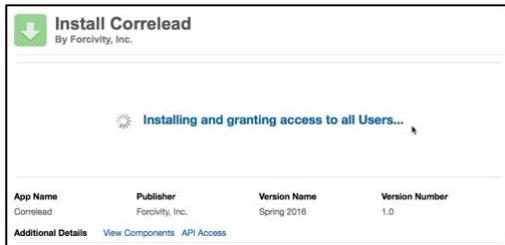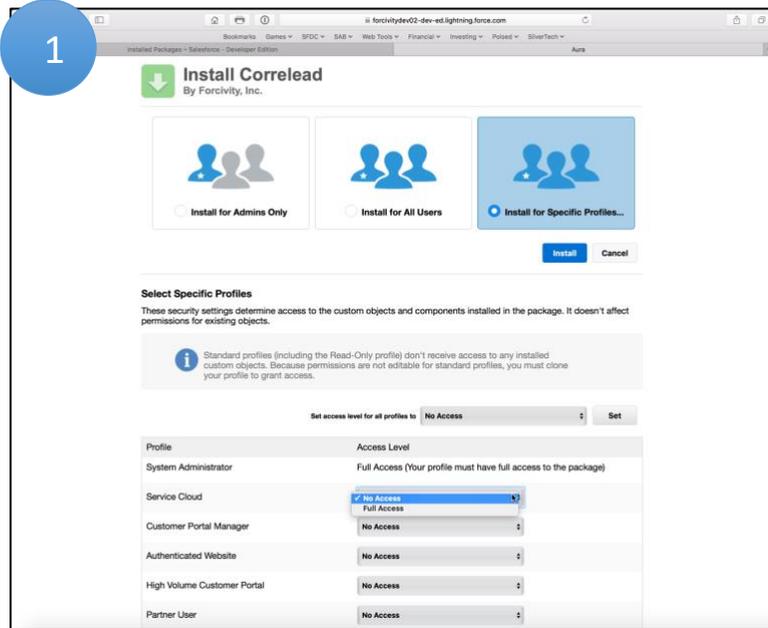
Installation

Correlead can be installed through the App Exchange in a matter of minutes with very little added configuration needed.

Like any other native Force.com application, Correlead uses the Force.com standard installation process.

1. During installation, determine who should have access to Correlead by simply selecting either Full Access or No Access for each profile in the list.
   -OR-
   You can also elect to install Correlead for Admins Only or All Users.

2. Correlead will automatically install into your Salesforce.com organization in a matter of minutes.

3. Once the installation is complete, simply click 'Done' to return to Salesforce.com.

Post Installation Steps

After Correlead completes installation, a post-installation batch script will run to initially populate the matching table of email domains to Accounts. The time needed to complete this batch job will vary based on the number of Account and Contact records in your Salesforce instance.

You can check the status of this batch job by Navigating to Setup -> Administration Setup -> Monitoring -> Apex Jobs in Classic Experience or Environments -> Jobs -> Apex Jobs in Lightning Experience. (See below.)
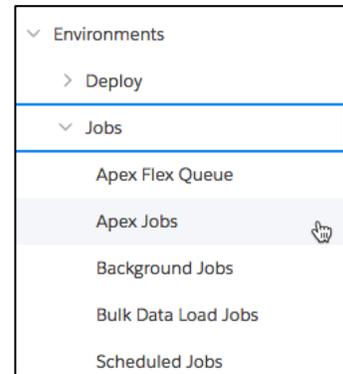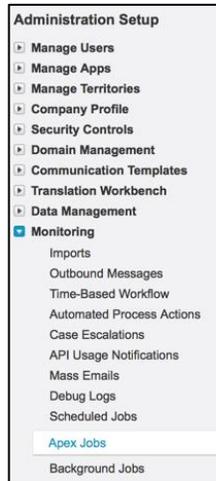
Correlead will not work effectively with email domain matching until this batch job is 100% completed. Be sure to verify the job is marked as completed. (See below.)

Using Correlead

Correlead is designed to give users record-level control over how Leads should be attached to existing Accounts in Salesforce. Please refer to the below sections for details on each of these checkboxes and how they are designed to function.

Through the use of Lead checkbox fields or Custom Settings, Leads can be:
- Automatically linked to a pre-existing Account in Salesforce.
- Automatically linked to a newly created Account in Salesforce if no pre-existing Account is found.

- Automatically associate the Lead to an existing Account then either merge into or create a new Contact linked on the Account.

Account Assignment Automation

The checkboxes and Custom Settings give your business the ability to control the automation of Account assignment for any scenario. The following checkbox fields are automatically added to your Lead object as part of the Correlead installation process.

Associate to Account	Modify your workflow to cause this flag to be checked as part of your Lead import/creation process to invoke Correlead's automatic association to pre-existing Accounts in Salesforce. Alternatively, set the Custom Setting for inserts and/or updates as defined below. The Lead's email domain will be matched against the records in the Email Domain custom object. If a match is found, the corresponding Account Id from the Email Domain record will be associated to the Lead record, hence linking the new Lead to your pre-existing Account. As part of this association, Correlead will set the Account Assignment Date field on the Lead to the current. This date field will allow you to build metrics around how impactful Correlead's Account assignment engine is to your business, showing you all Leads automatically associated to an Account over any given period of time. Additionally, if an existing Account is associate to the Lead, the Account owner will be assigned to the new Lead. This ownership assignment happens outside of the normal Lead assignment process, allowing you to invoke your own assignment notification using Salesforce's workflow engine and email notifications. We have provided an example workflow rule to achieve this notification, using the setting of the Account Assignment Date field as the trigger to invoke the email notification. Navigate to Setup -> App Setup -> Create -> Workflows & Approvals -> Workflow Rules and view the 'Lead Assigned to Account' workflow rule as an example of how to manage your notifications.
Auto Create Account	Modify your workflow to check this flag as part of your Lead import/creation process to invoke Correlead's automatic creation of new Accounts and association to the newly created Account. Alternatively, set the custom setting for inserts and/or updates as defined below. The Lead's email domain will be matched against the records in the Email Domain custom object. If no match is found, a new Account will

	be created and linked to the new Lead. Correlead will also add an entry into the Email Domain object to preserve the new email domain-to-Account Id association. The intent of this flag is to create Account-level visibility across all Leads but not prematurely convert Leads into Contacts, allowing you to prosecute the new Lead according to your existing Lead management process. Correlead will set the Account Assignment Date field on the Lead to the current date. This date field will allow you to build metrics around how impactful Correlead's Account assignment engine is to your business, showing you all Leads automatically associated to an Account over any given period of time.
Auto Convert Lead	Modify your workflow to cause this flag to be checked as part of your Lead import/creation process to invoke Correlead's automatic conversion to existing Accounts in Salesforce. Alternatively, set the custom setting for inserts and/or updates as defined below. To auto convert a Lead, an Account record must be pre-established in Salesforce. As part of the auto-conversion process, Correlead will attempt to find an existing Contact with the same email address as the new Lead. If a Contact is found, the Lead is merged into the existing Contact as part of the conversion process. If no Contact is found, a new Contact is created as part of the conversion process and linked to the existing Salesforce Account. Correlead will set the Account Assignment Date field on the Lead to the current date. This date field will allow you to build metrics around how impactful Correlead's Account assignment engine is to your business, showing you all Leads automatically associated to an Account over any given period.
Assign to Account Owner	When the lead field is checked or the custom setting is set, the lead will be assigned to the account owner when Correlead is able to match the lead to an existing account.

Controlling When Correlead is Invoked

Correlead will attempt to match a lead to an account whenever a lead is created or updated. Correlead has several custom settings which can be used to have complete control over when Correlead executes:

- Use Account Matching Rule: If enabled, Correlead will use Salesforce standard duplicate and matching rules to determine the best account match for a lead. Correlead will use the default account matching logic defined in the [Salesforce Help Documentation](#) to determine if there's a pre-existing account to which the lead should be matched. This setting must be used in conjunction with the Account Match Confidence Threshold setting defined below.
- Account Match Confidence Threshold: When used in conjunction with the Use Account Matching Rule setting, Correlead will use standard matching rules to determine which account to associate to any given lead. By defining a threshold, you have more complete control over how accurate or loose you want the match to be. Defining a value here will only consider a match if the match confidence returned by Salesforce matching rule meets or exceeds the value you input in this setting.
- Assign Leads to Account Owner: Enable this setting to ensure all leads at a global level are assigned to the account owner when a lead is associated to an existing account. Leave this setting disabled and use the Lead-level Assign to Account Owner field if you want record-by-record control.

Mapping Lead Fields

As part of the installation process, Correlead creates the 'Account Assignment Date' field on both the Lead and Contact object. To enable end-to-end tracking and metrics, it is critical to map the Lead field to the Contact field as part of the Lead conversion process.

1. Navigate to Setup -> App Setup -> Customize -> Leads ->Fields in Classic Experience or Setup -> Object Manager -> Lead -> Fields & Relationships. Click the Map Lead Fields button to configure your custom Lead field mapping. (See below.)

2. Find the Account Assignment Date field in the left-hand list and select Contact.Account Assignment Date from the list of available values in the pick list. Once selected, click Save. (See below.)

Custom Fields

Use the tabs to map each of your organization's custom lead fields to one of your custom account, contact, or opportunity fields. These mappings are used when you convert leads to accounts, contacts, or opportunities.

ACCOUNT   CONTACT   OPPORTUNITY

LEAD FIELDS	CONTACT FIELDS
ACCOUNT	None
ACCOUNT ASSIGNMENT DATE	Account Assignment Date

Lead Custom Field Mapping

Help for this Page

Map each of your organization's lead custom fields to one of your custom account, contact, or opportunity fields. These mappings will be used when you convert leads.

Lead Custom Field Mapping

Take this lead custom field...	...and map it to this field
Account	None Available
Account Assignment Date	✓ --None-- Contact.Account Assignment Date
Associate to Account	
Auto Convert Lead	None Available
Auto Create Account	None Available
Current Generator(s)	--None--
Email Domain	--None--
Number of Locations	--None--
Primary	--None--
Product Interest	--None--
SIC Code	--None--

Save   Cancel

Blacklist

Also, as part of the post installation process, Correlead creates and populates a custom setting that holds a list of the email domains that Correlead should ignore when processing a Lead. This email blacklist is completely customizable by you but comes pre-populated with the most common free email domains in use today – for example, gmail.com, msn.com, comcast.net.
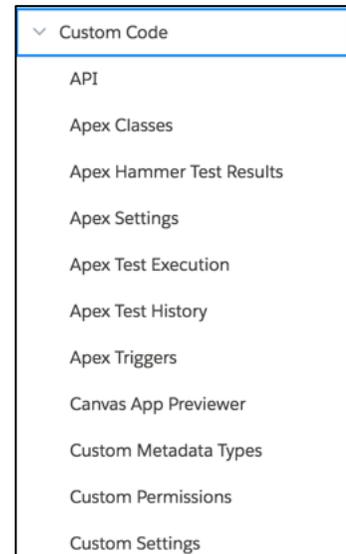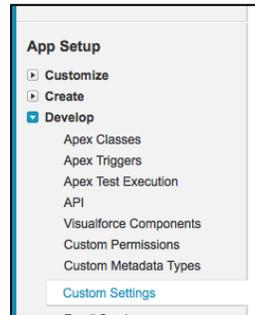
You can make any changes you wish by navigating to Setup -> App Setup -> Develop -> Custom Settings in Classic Experience or to Setup -> Platform Tools -> Custom Code -> Custom Setting in Lightning Experience. (See below.)

Once in Custom Settings, click Manage next to Email Domain Blacklist to view or modify the email domain blacklist. (See below.)

Editing Contacts

In addition to the initial population of the Email Domain records, Correlead maintains this mapping table as Contact records are added to your system via other business processes. When a Contact is inserted or updated, Correlead will ensure that Contact's email domain is added to the Email Domain object to map that email domain to the correct Account.

Custom Settings

During installation, custom settings are created to control the behavior of Correlead. Custom settings are defined as hierarchical settings to allow an organization to customize behavior of Correlead by Profile or for a specific user. Please refer to the Salesforce.com documentation for a more thorough description of the use of hierarchical custom settings.

The following custom settings are available:
- Auto Associate to Accounts on Insert/Update: set to 'checked' to auto associate Leads to Accounts during Lead creation/editing. This setting will override any behavior determined by the Auto Associate to Account field on the Lead object. This setting is available for both Lead inserts and updates.
- Auto Create Accounts on Insert/Update: Set to 'checked' to auto create a new Account if the Lead is being associated to an Account but no corresponding, existing Account is found in Salesforce. This setting will override any behavior determined by the Auto Create Account field on the Lead object. This setting is available for both Lead inserts and updates.
- Auto Convert Leads on Insert/Update: Set to 'checked' to auto convert Leads to a corresponding Account and Contact. This setting will override behavior determined by the Auto Convert Lead field on the Lead object. This setting is available for both Lead inserts and updates.
- Assign Leads to Account Owner: When set to 'checked', leads auto-associated to existing account records will be assigned to the corresponding account owner, otherwise, standard lead assignment rules and settings will determine lead ownership.
- Use Account Matching Rule: Used in conjunction with Account Match Confidence Threshold setting to use standard Salesforce duplicate and matching rules to associate leads to accounts. Only accounts with a confidence measure greater or equal to the threshold setting will be considered a match. If account matching rule setting is set to 'unchecked' Correlead's standard email domain match will be used.

Modifying Page Layouts
Once Correlead has been installed, you can expose Account associations to your users modifying your Lead and Account Page Layouts.
- Lead Page Layouts – add the Account field (automatically added when Correlead is installed) to any Lead Page Layout on which you want to show to which Account the Lead is assigned.
- Account Page Layouts – add the Leads related List (automatically added when Correlead is installed) to any Account Page Layout on which you want to show associated Leads.

Sandbox refreshes
All Correlead settings will persist across a Sandbox refresh. There are no added steps needed to configure Correlead to work in your Sandbox.

Release notes
Forcivity is committed to responding to our customers' needs and requests as quickly. We continuously refine and update our applications as well as add new features to enable our

customers to run the most effective, efficient Salesforce instance as possible. You can view our Release Notes for all our products at http://forcivity.com

Help & Support

Forcivity takes pride in delivering world-class support and service to all our customers at no additional charge. You can reach out to us in via:

Email
help@forcivity.com