

# Implementing your Conversica Salesforce App



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## Implementation Overview

There are five key stages required to get the Conversica App fully implemented. These stages can be completed in less than a day if you already know which employees will be using Conversica and the leads you will be messaging.

Implementation Stage	Completed By	Time Estimate	Prior to Completion
<b>Install the Conversica App and Configure Conversica Settings</b>	Salesforce Admin	<15 minutes	Notify your Conversica Technical Account Manager (TAM)
<b>Configure Page Layout for Lead, Contact, and Campaign Pages</b>	Salesforce Admin	<1 hour	NA
<b>Set up Reps and Managers in Salesforce</b>	Salesforce Admin	<1 hour	Last Step: Notify Conversica TAM to complete the synchronization
<b>Add Reps and Managers to Conversica</b>	Salesforce Admin Conversica Admin	<15 minutes	First Step: API User must access the Conversica tab in Salesforce
<b>Create Salesforce Campaign and Sync to Conversica Dialogue</b>	Salesforce Admin	<1 hour	NA

Your Conversica Technical Account Manager (TAM) is available to walk you through this install and configuration process. Please reach out to them before beginning this guide for their efficient Conversica setup service.

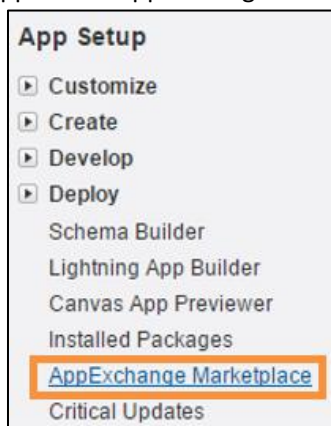
To complete implementation, the following information will need to be provided to Conversica:

- **Salesforce Org ID**
- **Salesforce API User ID:**
  - The API User's access will be used to update information. This user needs to have access to edit all fields required for Conversica
  - This will also be the first user to access the Conversica Dashboard through Salesforce and will be responsible for adding at least the first manager to Conversica's Team Settings tab.
- **Campaign ID** of an empty campaign that will be used for testing and the initial conversation type.

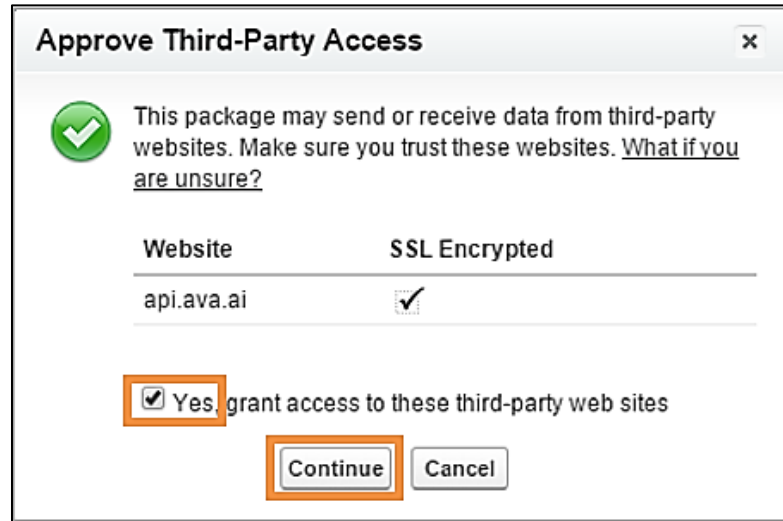
## Install the Conversica App and Configure Conversica Settings

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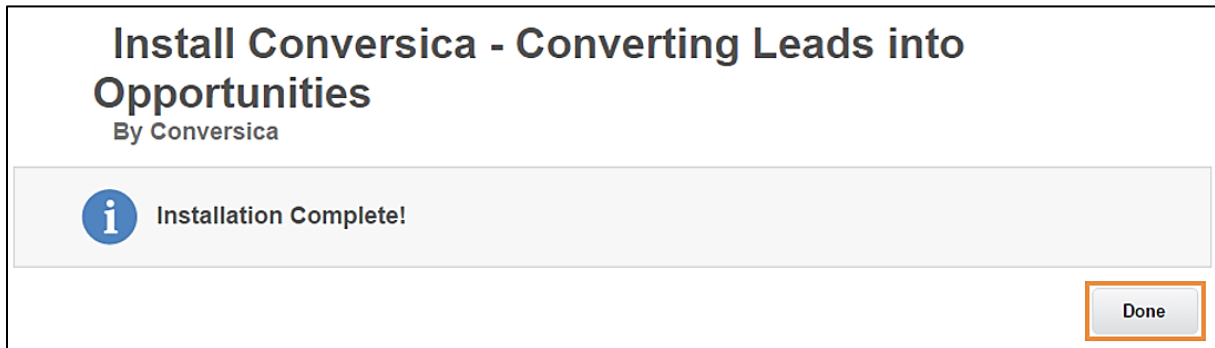
1. Access and download the Conversica App on the AppExchange Marketplace.



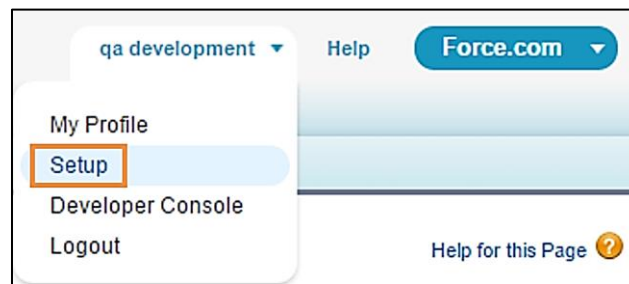
2. There are three options you have for downloading the Conversica App. In all three options you will still need to grant connected app permission to the profile of the user if you would like them to see the Conversica Tab or Visualforce Sections.
  - **Install for Admins Only:** If you are not sure which users will need access to Conversica, or you do not use Profiles to manage settings (use Permission Sets or other custom settings instead) then you can install for Admins only and grant access to your users later.
  - **Install for All Users:** If all users in your organization will be using Conversica, you may install for all users. Conversica will be visible to all users on the pages you configure, but content will only be visible once a user is added to the Conversica Dashboard (steps outlined below).
  - **Install for Specific Profiles:** If you already know who will be needing to interact with Conversica (including managers that will oversee the program and the reps who will follow up with leads Conversica identifies as hot) and you use Profiles to manage settings, you can speed the implementation time by selecting these profiles now. Conversica will be visible to selected profiles on the pages you configure, but content will only be visible once a user is added to the Conversica Dashboard (steps outlined below).
3. Once you select your installation preference and click on **Install**, you will receive a confirmation to grant 3<sup>rd</sup> Party Access to Conversica (api.ava.ai). Select **Yes** and **Continue**.



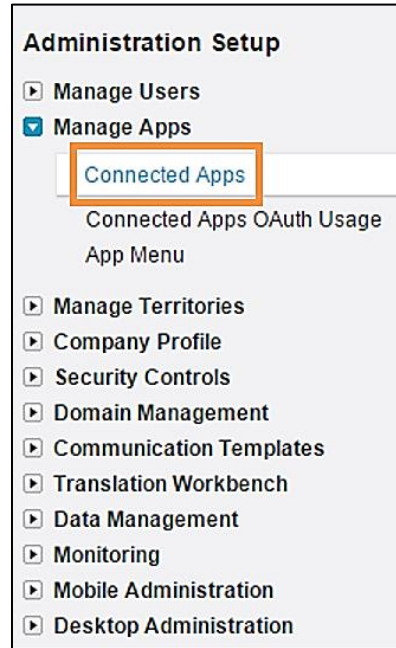
4. Your App will begin to install. When completed, click **Done**:



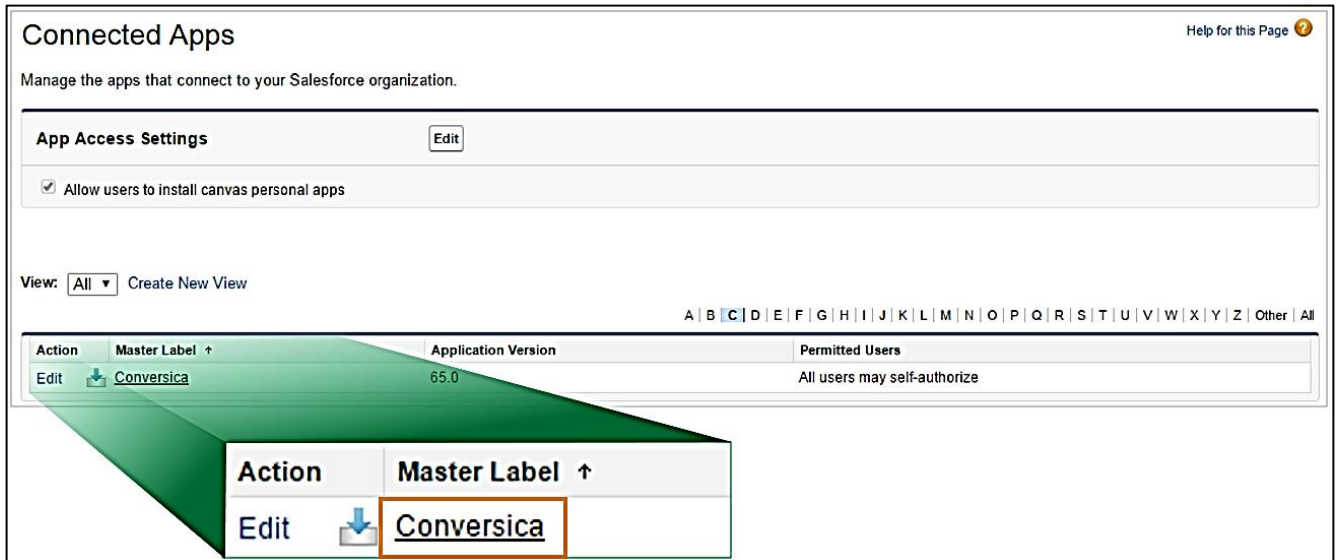
5. You will now be taken to your list of Installed Packages. To complete the configuration process, you need to access the Conversica App under **Manage Apps**.
- If you are completing configuration after installation, you can find **Manage Apps** in your left navigation panel under **Administration Setup** (go to Step 6).
  - If you are completing the configuration later, you can continue by going to the **Setup** page. To access this page, go to the top of the page and click on your user drop-down menu.



6. Under **Administration Setup**, expand **Manage Apps** and click **Connected Apps**:

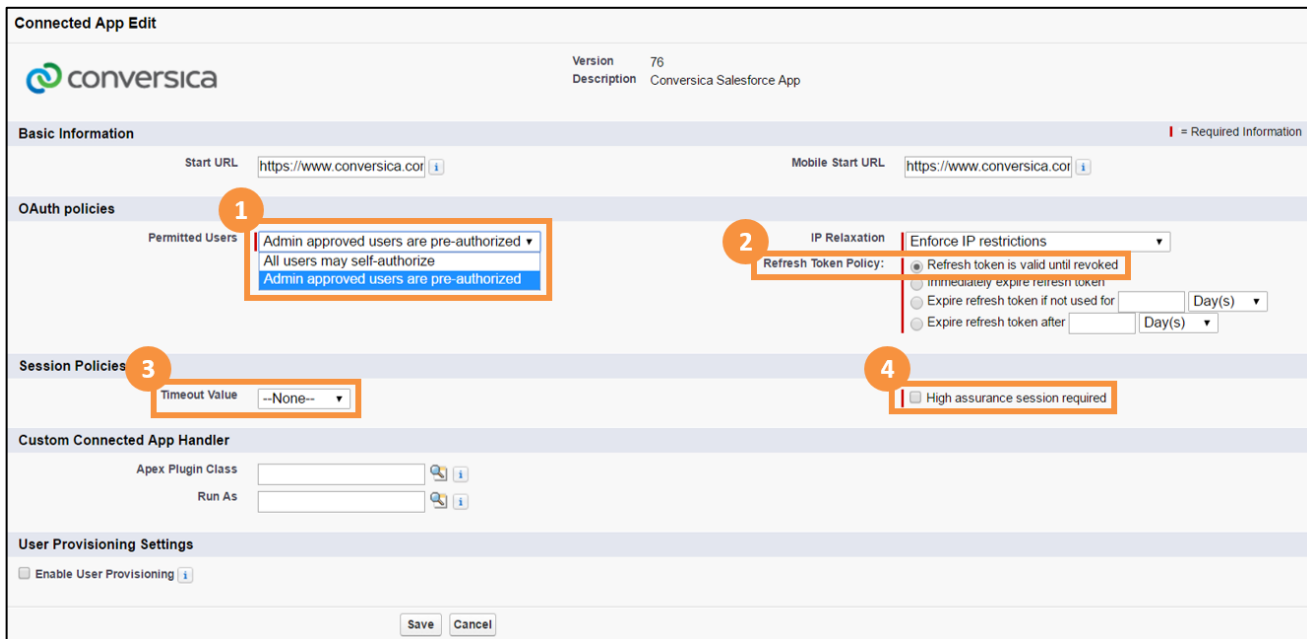


7. Find **Conversica** in your list of Connected Apps. Click on **Edit**.



8. There are a few settings to edit/confirm in your Conversica App settings.
- Refresh Token Policy
    - Select **Refresh token is valid until revoked**.
    - Expiring your token will prevent Conversica from accessing new leads and updating Conversica's fields.
  - Pre-Authorize Admin Users

- Under OAuth policies, ensure **Admin approved users are pre-authorized** and click **OK** on pop-up.
  - If you are using Professional or General Editions, your only option is to select **All users may self-authorize**. This setting works as well for all editions and will allow all users in the organization to Authorize the Conversica App. They will still not be able to see the dashboard unless they have been added as a manager or rep (covered later in this document).
- c. Timeout Value: The shorter the timeout, the more API Calls Conversica may need to make. If you hit your API limits, Conversica will not be able to receive or update leads. We recommend the Timeout Value is set to **None**.
- d. **High assurance session required**: OFF (unchecked).



Connected App Edit

Version 76  
Description Conversica Salesforce App

Basic Information ! = Required Information

Start URL  Mobile Start URL

OAuth policies

Permitted Users Admin approved users are pre-authorized  
All users may self-authorize  
Admin approved users are pre-authorized

IP Relaxation Enforce IP restrictions

Refresh Token Policy: Refresh token is valid until revoked  
Immediately expire refresh token  
Expire refresh token if not used for  Day(s)  
Expire refresh token after  Day(s)

Session Policies

Timeout Value --None--

High assurance session required

Custom Connected App Handler

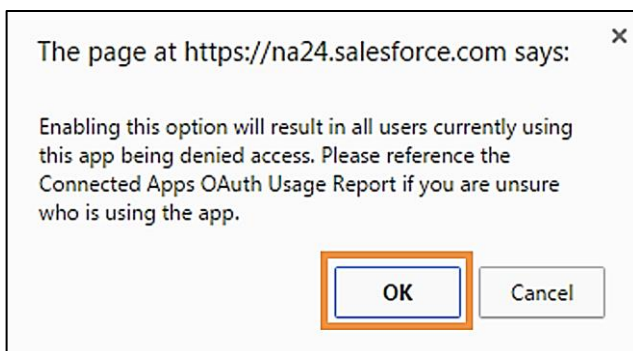
Apex Plugin Class

Run As

User Provisioning Settings

Enable User Provisioning

9. Click **Save**.
10. Confirm pop-up (only displayed if permitted users setting is *Admin approved users are pre-authorized*) and then click **OK**:



## Configure Layout on Lead, Contact, and Campaign Pages

These steps will walk you through adding Conversica fields to your page layouts.

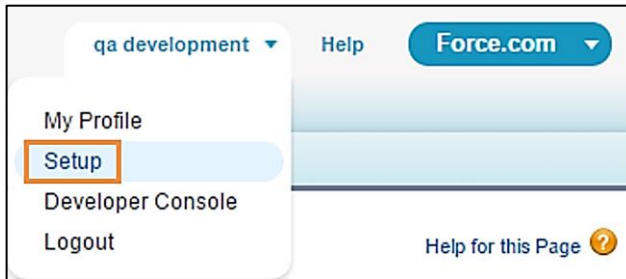
### Lead, Contact, and Person Account Page Setup

*For setting up the Person Account page layout, please disregard the Visualforce Field Configuration section.*

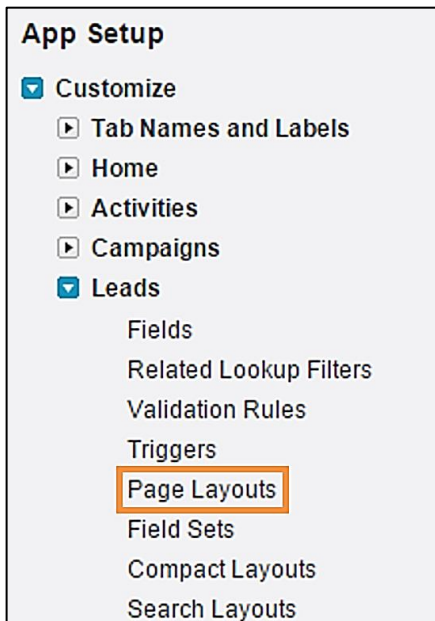
#### Page Layout Configuration

In order to display the Conversica Visualforce and custom field sections on your Lead and Contact pages, you need to create and configure a new Conversica section. Please follow the instructions below for both your Lead Page Layout, and your Contact Page Layout.

1. Go to **Setup**.



2. Under **App Setup**, expand **Customize**, then expand **Leads** to get to **Page Layouts**.





- Identify which Lead layouts need to have Conversica information on them. Complete the steps below for each layout by clicking **Edit**:

### Lead Page Layout

This page allows you to create different page layouts to display Lead data.  
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

**Lead Page Layouts** New Page Layout Assignment

Action	Page Layout Name	Installed Package	Created By	Modified By
<span>Edit</span>   <span>Del</span>	Lead (Marketing) Layout		ga development, 5/15/2015 11:38 AM	ga development, 5/15/2015 11:38 AM
<span>Edit</span>   <span>Del</span>	Lead (Sales) Layout		ga development, 5/15/2015 11:38 AM	ga development, 5/15/2015 11:38 AM
<span>Edit</span>   <span>Del</span>	Lead (Support) Layout		ga development, 5/15/2015 11:38 AM	ga development, 5/15/2015 11:38 AM
<span>Edit</span>   <span>Del</span>	Lead Layout	Conversica	ga development, 6/20/2015 9:33 AM	ga development, 6/20/2015 9:33 AM
<span>Edit</span>   <span>Del</span>	Lead Layout		ga development, 5/15/2015 11:38 AM	ga development, 6/20/2015 1:39 PM

## Visualforce Field Configuration

*These instructions do not apply to Person Accounts. If you are configuring Person Accounts, please skip to the next section.*

- Scroll down to the **Visualforce Pages** category. You may need to open the panel by pressing the arrow.

### Lead Layout

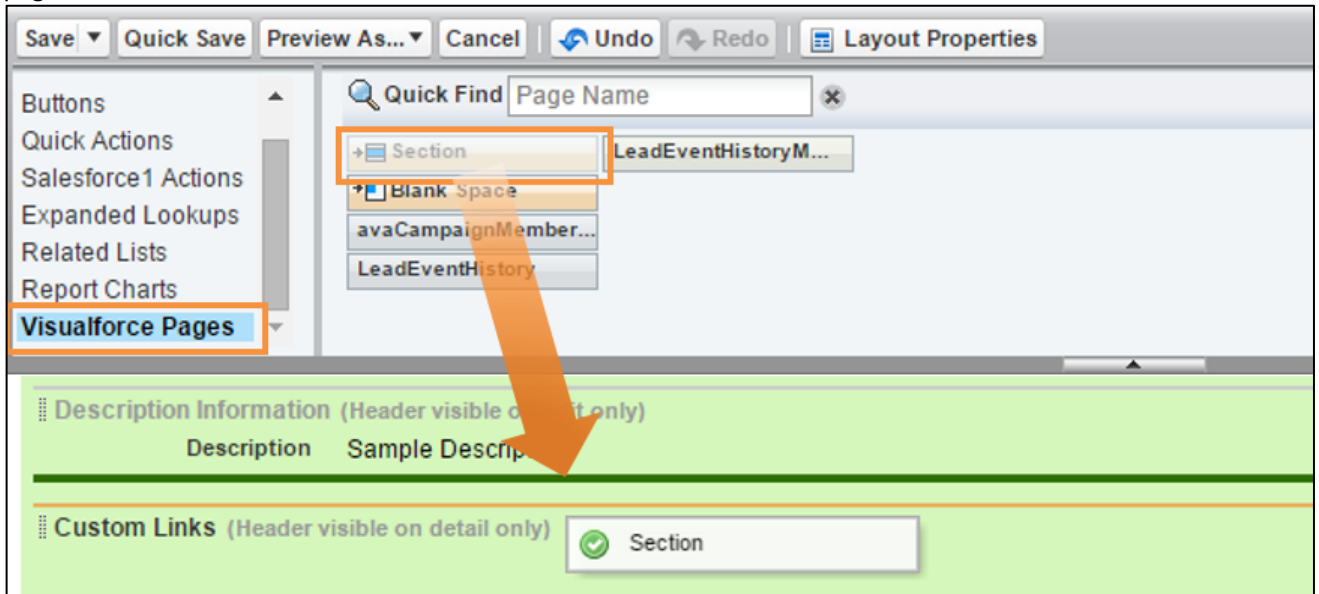
Save Quick Save Preview As... Cancel Undo Redo Layout Properties

- Buttons
- Quick Actions
- Salesforce1 Actions
- Expanded Lookups
- Related Lists
- Report Charts
- Visualforce Pages

Quick Find

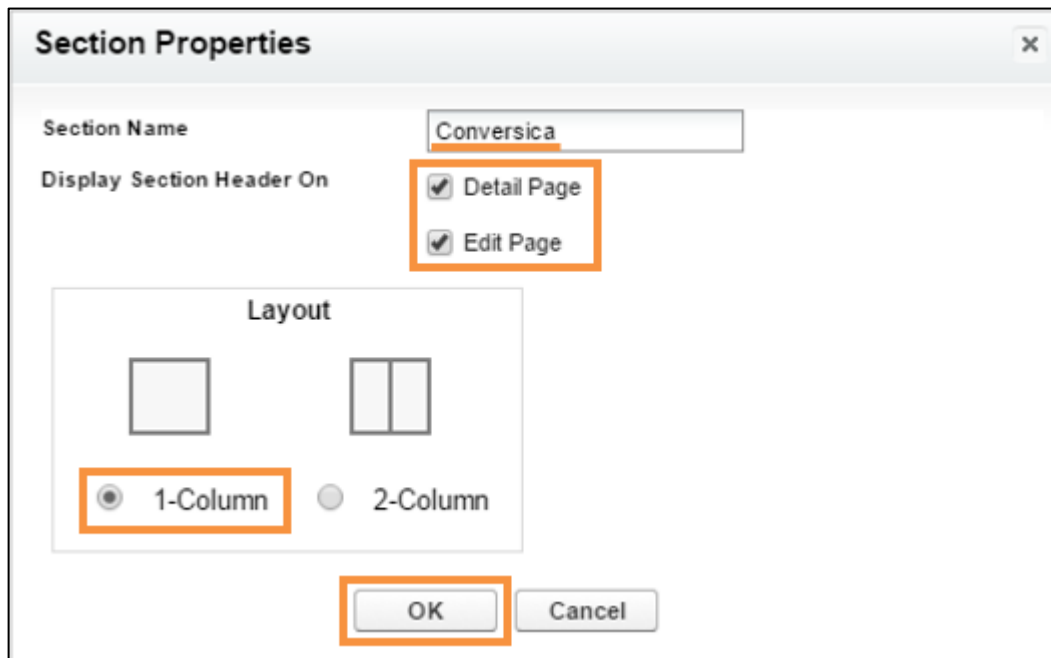
+ Section	Campaign	Conversica Date A...	Conversica
+ Blank Space	Campaign	Conversica First ...	Conversica
Address	Company	Conversica Hot Lead	Conversica
Annual Revenue	Company D-U-N-S N...	Conversica Hot Le...	Conversica

2. Drag and drop the Visualforce **Section** where you would like to display Conversica’s lead history on the page.

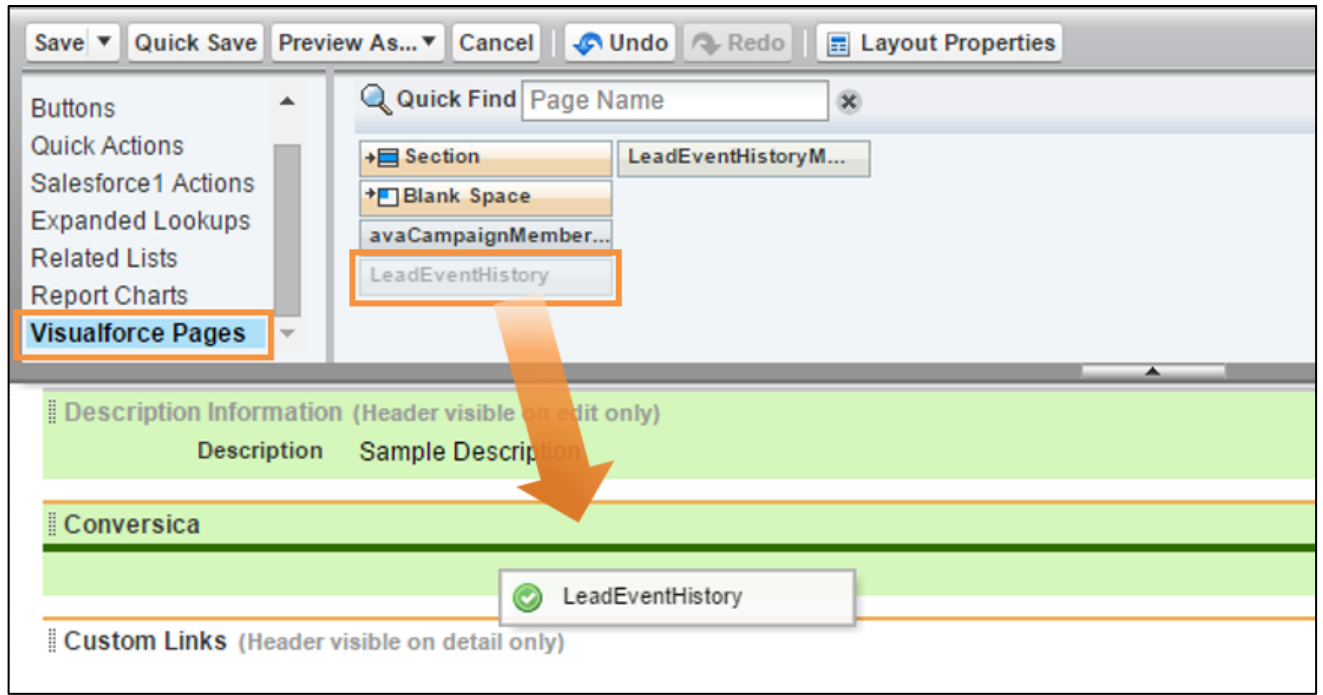


3. Name the section “Conversica” and ensure the section is set up with:

- In the **Display Section Header On** section, check the **Detail Page** and **Edit Page** boxes
- **1-Column layout**



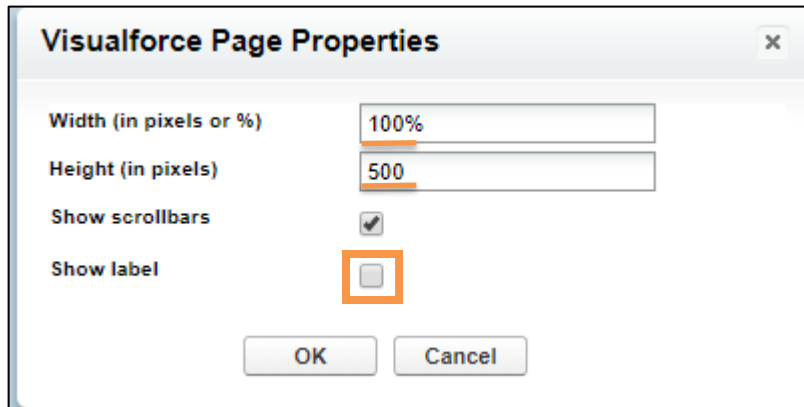
- Next, drag the **LeadEventHistory** Visualforce page and drop it in your newly created Conversica section.



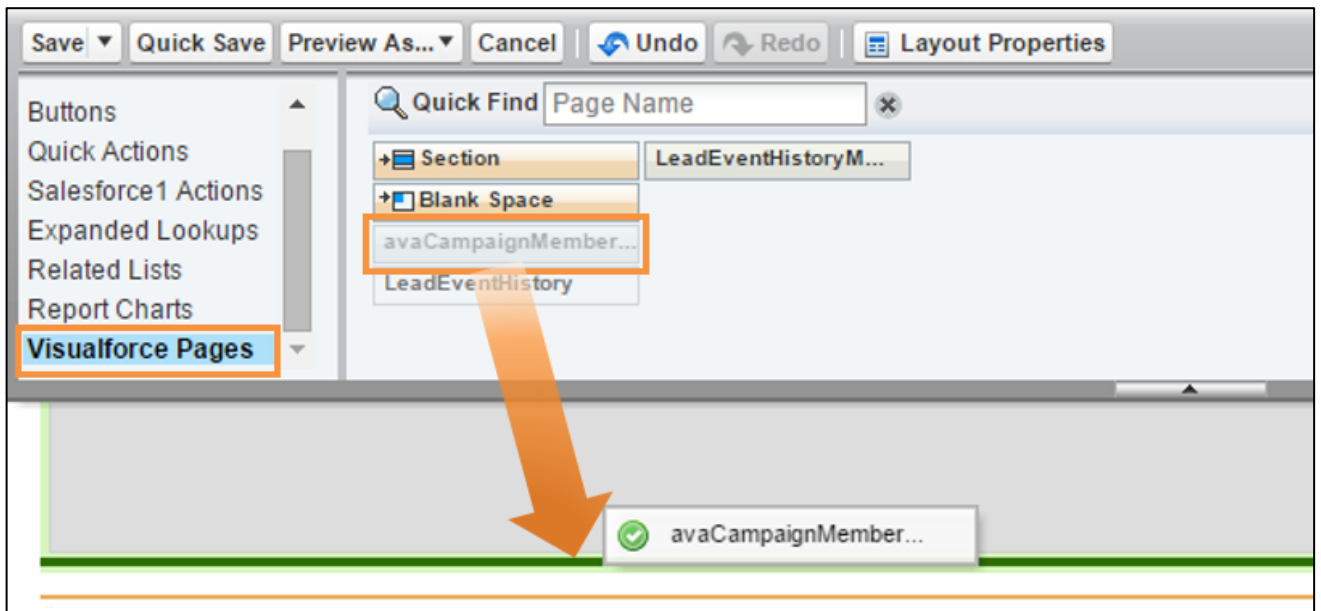
- Upon completion, you will see that the **LeadEventHistory** Visualforce page has been added. While hovering over the page, click on the **Properties** button (wrench).



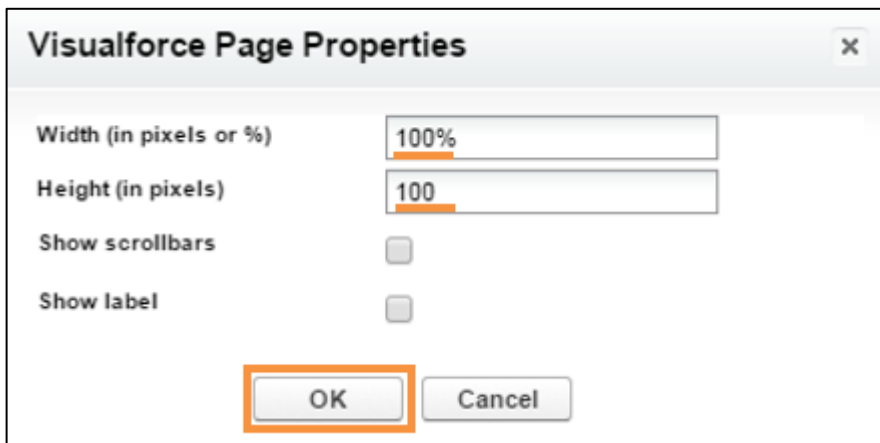
- Set your preferred settings. In most set ups, our recommended settings are optimal, however depending on your organization's preference, these may differ. Recommended Settings:
  - 100% Width
  - 500 pixel Height
  - Show scrollbars: Regardless of the Width and Height you select, we do recommend **Show scrollbars** as this is where your Conversica messaging will display which may include multiple emails to and from your lead/contact.



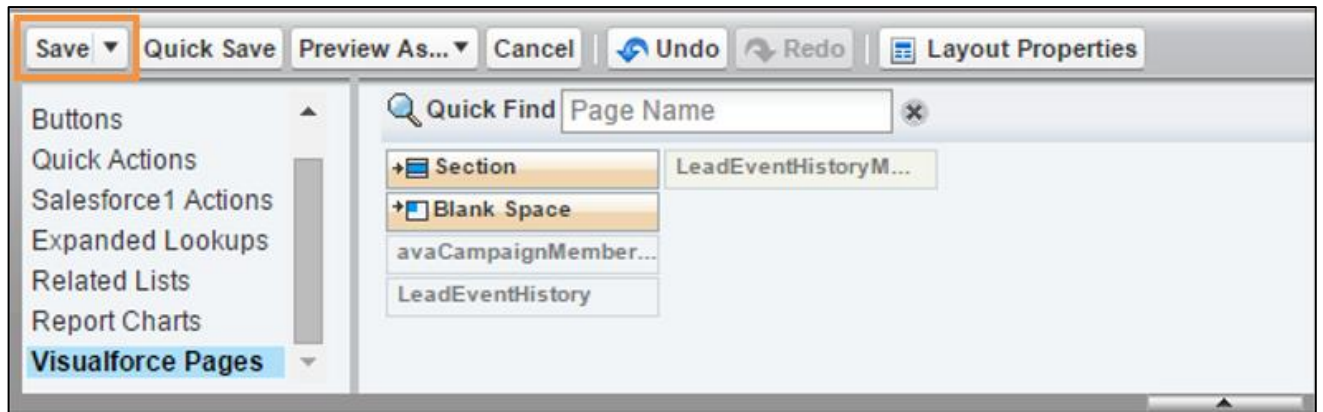
- Drag the **avaCampaignMember** Visualforce page, and drop it directly under the **LeadEventHistory** Visualforce page, still within the Conversica section.



8. Adjust your settings by clicking the properties button (wrench). These are our recommended Settings:
- 100% Width
  - 100 pixels Height



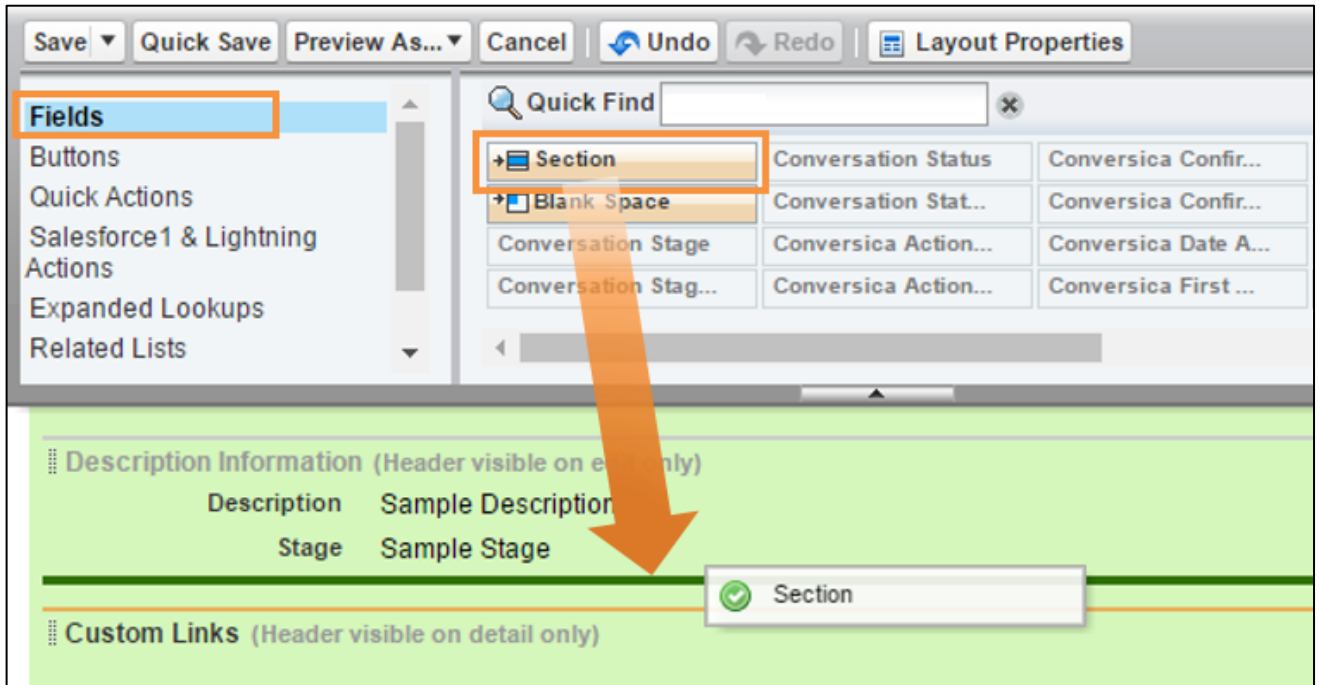
9. Click **Save**.



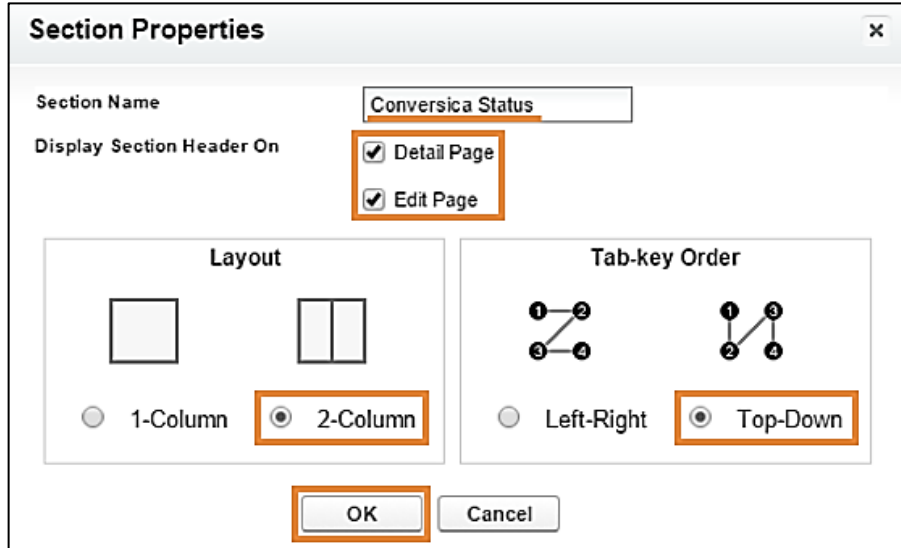
## Custom Fields Configuration

Next, you need to add the Conversica Status fields to the Lead (and Contact) page layout. These fields can be added to a current section, or to a new section. Below are instructions for creating a new section for your Conversica Status fields.

1. Drag and drop the Fields **Section** where you would like to display Conversica's lead data on the page.



2. Name your new section "Conversica Status."
  - In the **Display Section Header On** section, check the **Detail Page** and **Edit Page** boxes
  - Select the **2-Column** layout
  - Select the **Top-Down** Tab-Key Order



**Section Properties**

Section Name:

Display Section Header On:

- Detail Page
- Edit Page

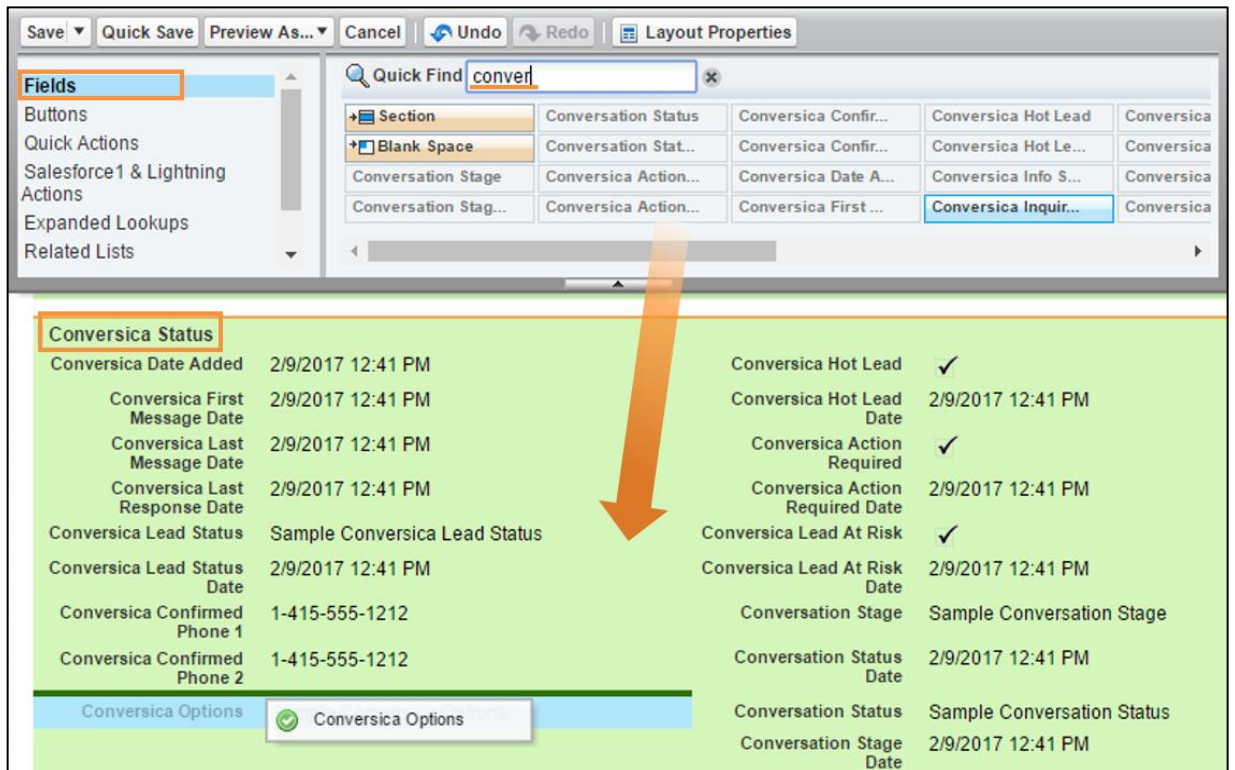
Layout:

- 1-Column
- 2-Column

Tab-key Order:

- Left-Right
- Top-Down

3. Enter "conver" into the Quick Find textbox and select each Conversica field (except the fields with the word "deprecated" in the title) and drag and drop it into your new section.

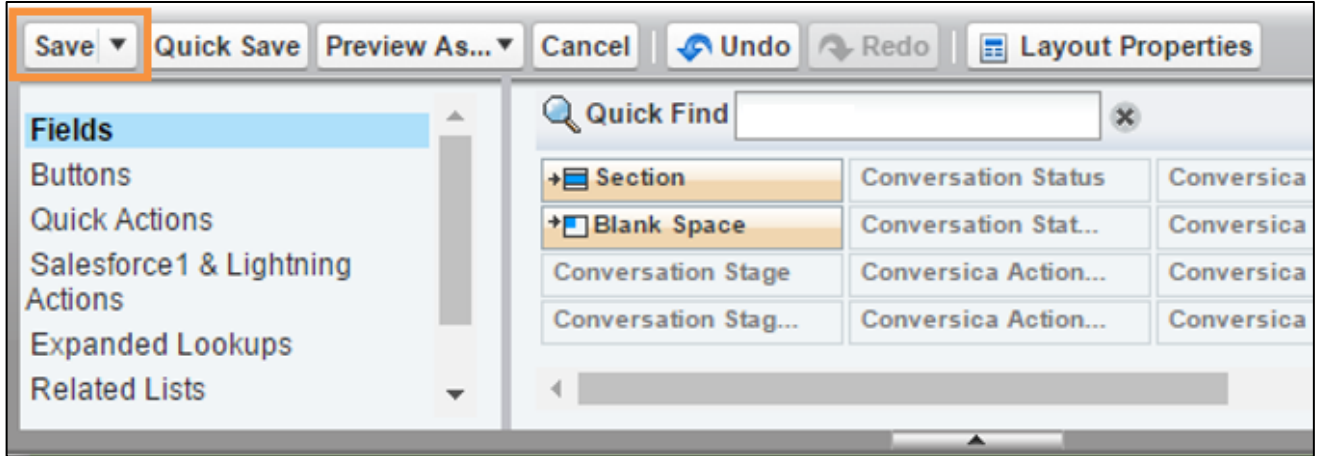


After you select all these fields, you should have the following fields:

- Conversation Stage
- Conversation Stage Date
- Conversation Status
- Conversation Status Date
- Conversica Action Required
- Conversica Action Required Date
- Conversica Confirmed Phone 1
- Conversica Confirmed Phone 2
- Conversica Date Added
- Conversica First Message Date
- Conversica Hot Lead
- Conversica Hot Lead Date
- Conversica Info Statement
- Conversica Inquiry Verb
- Conversica Last Message Date
- Conversica Last Response Date
- Conversica Lead at Risk
- Conversica Lead at Risk Date
- Conversica Lead Status
- Conversica Lead Status Date
- Conversica Options
- Conversica Further Action
- Conversica Further Action Date
- Conversica Discovered Email 1
- Conversica Discovered Email 2
- Conversica Discovered Name
- Conversica SMS Opt Out
- Conversica Lead Profile



4. Press **Save**.



When you are finished, this should be the result:

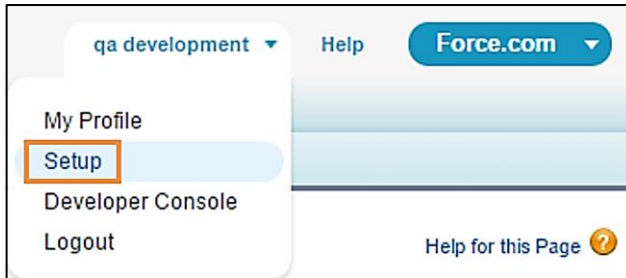
▼ Conversica Status		
Conversica Date Added	3/15/2017 10:46 AM	Conversica Hot Lead <input checked="" type="checkbox"/>
Conversica First Message Date	3/15/2017 10:48 AM	Conversica Hot Lead Date
Conversica Last Message Date	3/17/2017 11:04 AM	Conversica Hot Lead Date
Conversica Last Response Date	3/17/2017 11:06 AM	Conversica Lead At Risk <input type="checkbox"/>
Conversation Stage	Conversica Stopped	Conversica Lead At Risk Date
Conversation Stage Date	3/17/2017 11:09 AM	Conversica Action Required <input type="checkbox"/>
Conversation Status	Conversation Complete	Conversica Action Required Date
Conversation Status Date	3/17/2017 11:09 AM	Conversica Further Action <input type="checkbox"/>
Conversica Lead Status	Satisfied	Conversica Further Action Date
Conversica Lead Status Date	3/17/2017 11:09 AM	Conversica Discovered Email 1
Conversica Lead Profile		Conversica Discovered Email 2
Conversica Options		Conversica Confirmed Phone 1
		Conversica Confirmed Phone 2
		Conversica SMS Opt Out <input type="checkbox"/>

REPEAT on CONTACT PAGE LAYOUT

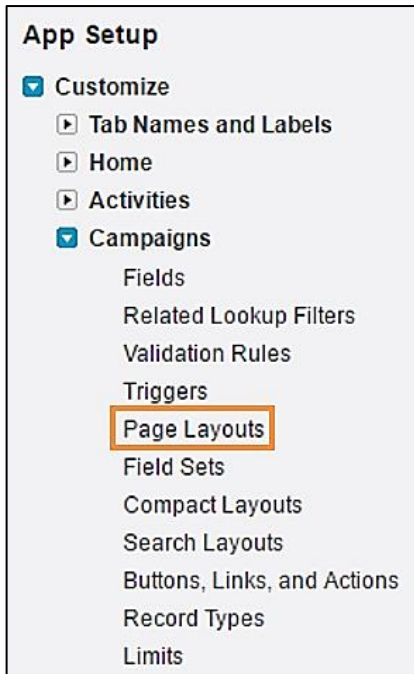
Complete steps 1-16 on your Contact Page Layouts

## Campaign Page Setup

1. Go to **Setup**.



2. Under **App Setup**, expand **Customize**, then expand **Campaigns** to get to **Page Layouts**.



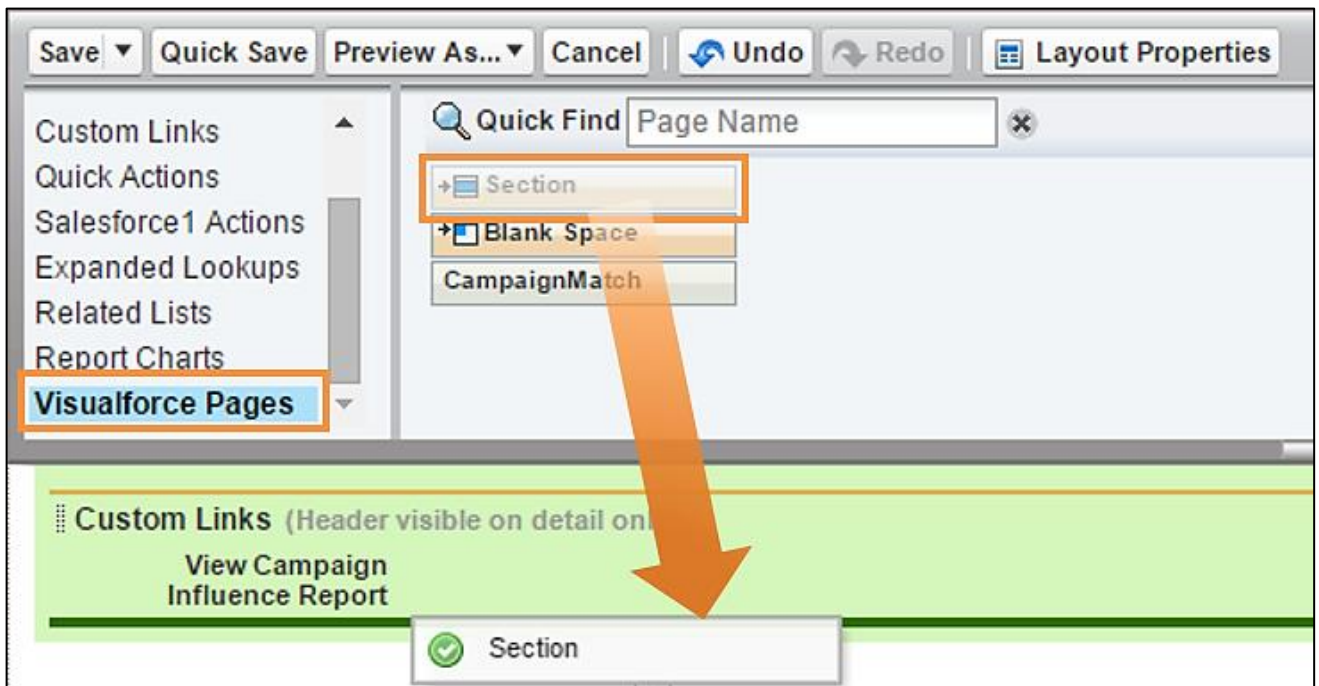
3. Identify which Campaign Layouts need to have Conversica. Complete the steps below for each layout by clicking **Edit**.

### Campaign Page Layout

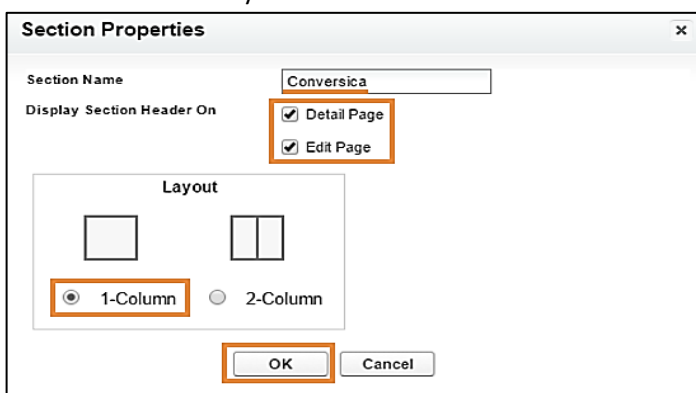
This page allows you to create different page layouts to display Campaign data.  
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Action		Page Layout Name	Installed Package	Created By	Modified By
Edit	Del	Campaign Layout		qa development, 5/15/2015 11:38 AM	qa development, 6/25/2015 12:38 PM
Edit	Del	Campaign Layout	Conversica	qa development, 6/25/2015 12:22 PM	qa development, 6/25/2015 12:22 PM

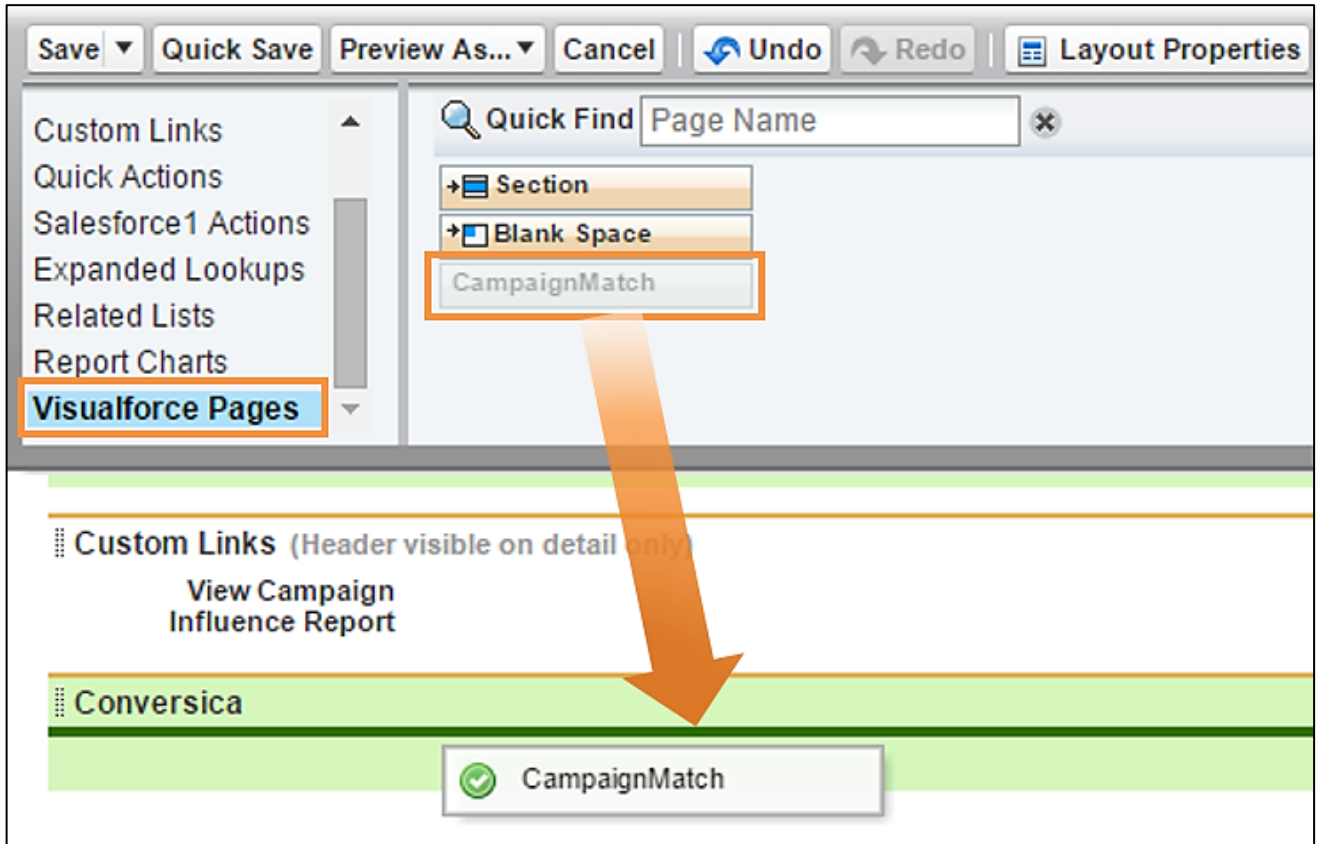
4. Scroll down to the Visualforce Pages category. Drag and drop a **Section** where you would like the Conversica Visualforce page to be.



5. For the **Section Properties**, name the section "Conversica" and have the following selected:
  - In the **Display Section Header On** section, check the **Detail Page** and **Edit Page** boxes
  - **1-Column** Layout

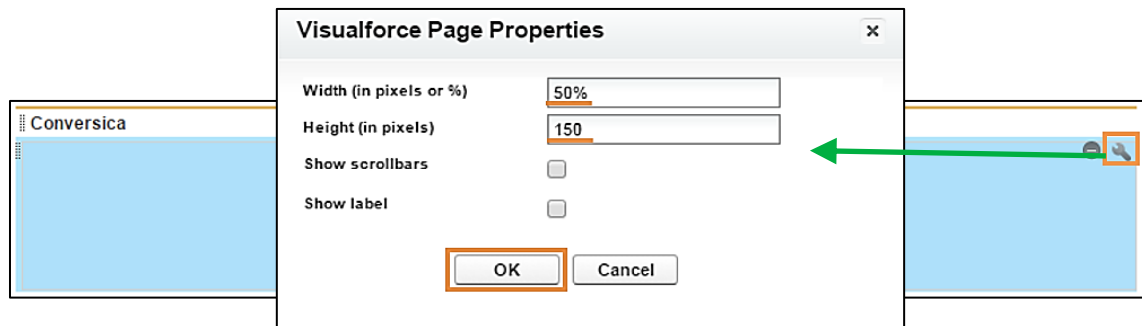


- Go back up in the Visualforce section, and drag and drop **CampaignMatch** to the Conversica section you just created.

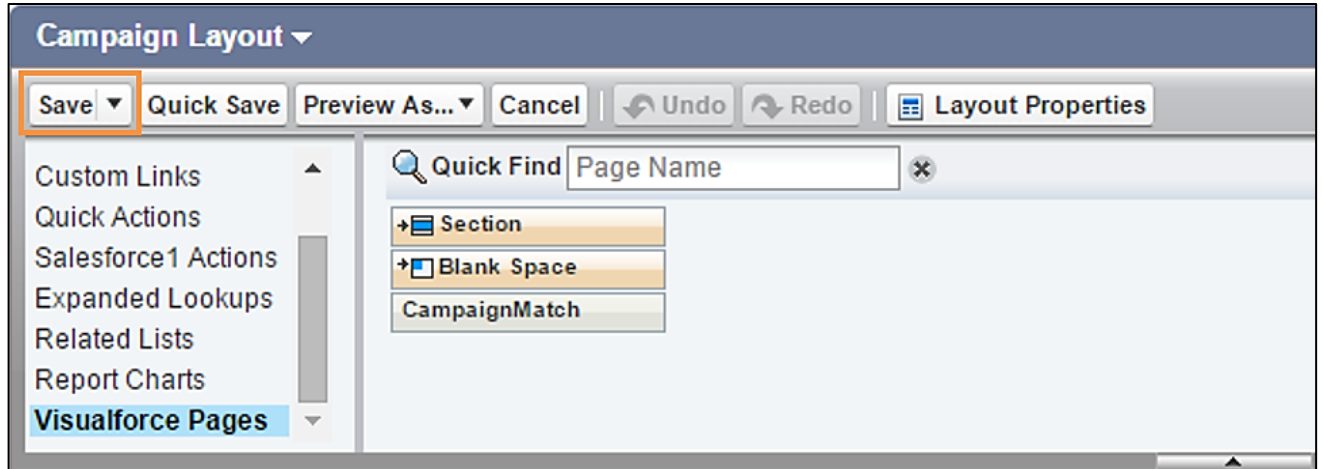


- Adjust your settings (click the **property wrench**).

- Width: 50%
- Height: 150 pixels



8. Press **Save**.

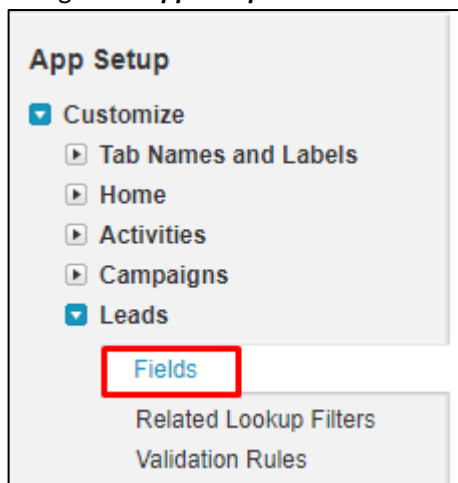


You have completed adding Conversica to your layouts. Your next step is to map the Conversica custom lead fields to the custom Contact fields. This allows your Conversica data to be transferred from the lead to the contact created during the conversion process.

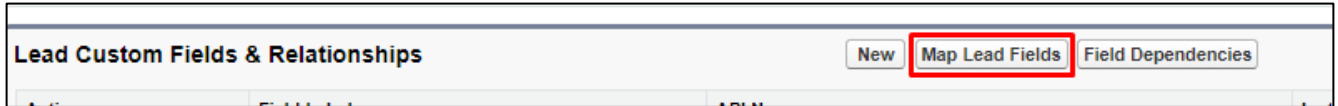
## Map Conversica Custom Lead Fields to Contact Fields

By default, when a Lead is converted to a Contact, none of the data in the Lead's custom fields is transferred to the Contact's custom fields because there is no mapping between the fields in these two objects. The steps below explain how to map the custom fields on the Lead to the custom fields on the Contact, so this data is transferred during the Lead conversion process.

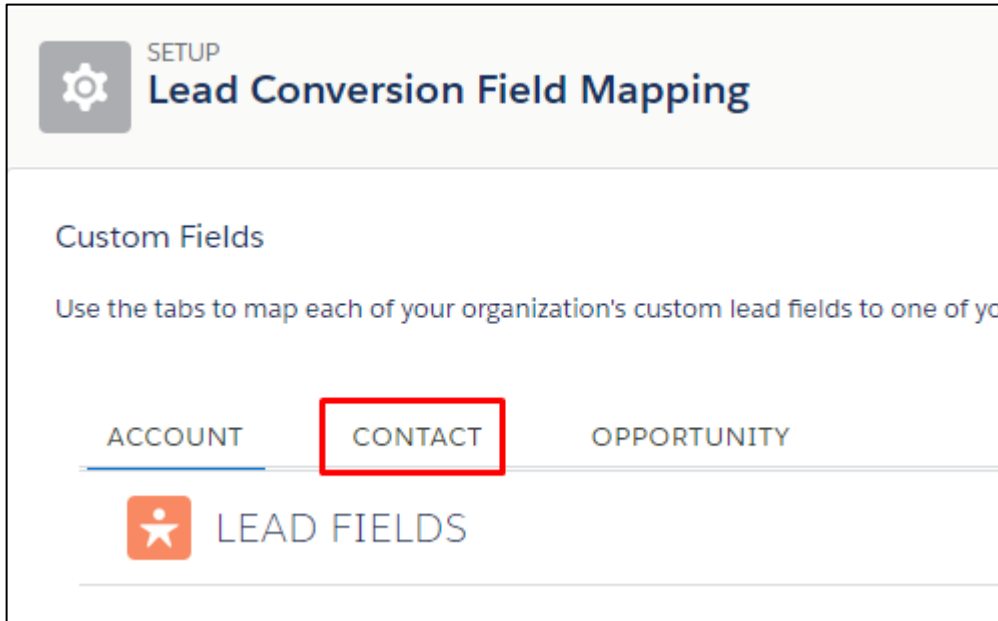
1. Navigate to **App Setup > Customize > Leads > Fields**.



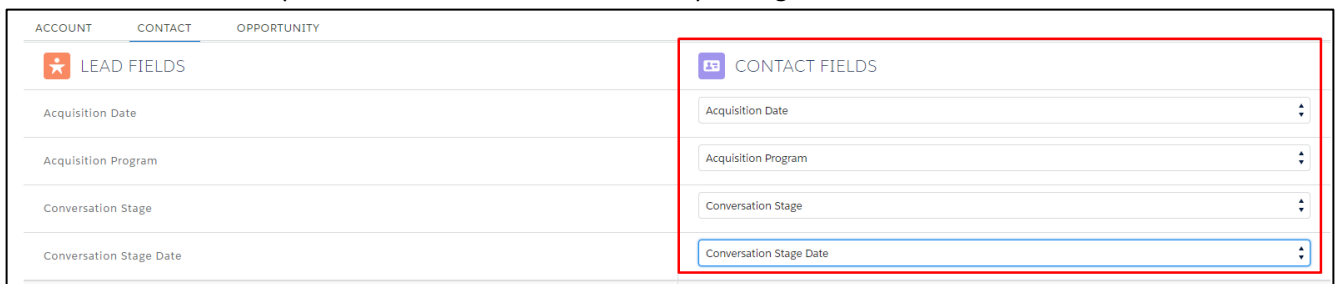
2. Scroll down to the **Lead Custom Fields and Relationships** section and click the **Map Lead Fields** button.



3. Click on the **Contact** tab.



4. Go down the list and map the custom lead field to the corresponding contact field.



Once these steps are complete, all leads that are converted in the future will carry over their Conversica field data when they're converted from a lead to a contact.

## Set up Reps and Managers in Salesforce

### Manage User Permissions in Salesforce

Prior to setting up your user permissions, you need to determine who will need access to Conversica. Generally, this will include anyone who is going to be following up with leads, and any user that needs access to Conversica lead information.

Next, determine how your organization would like to manage access to Conversica. Salesforce offers two different ways to manage user settings:

- Profiles
- Permission Sets

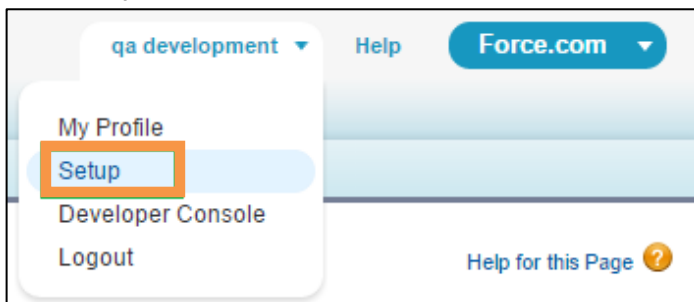
Once permissions have been granted and you have configured your page layouts, your users will be able to see the Conversica Visualforce pages and the Conversica Tab in Salesforce. Content will only be visible after the user is also added into the Conversica Dashboard.

## Profiles

Profiles are set up by your organization to easily manage settings for groups of users. Identify which users need to have access to Conversica. If your organization has not used profiles in the past, and you are not using Permission Sets for the app, you can activate Conversica on two of the most commonly used profile types and confirm access has been granted. Please explore your organization's profiles to ensure the correct users receive Conversica access.

- Standard User
- System Administrator

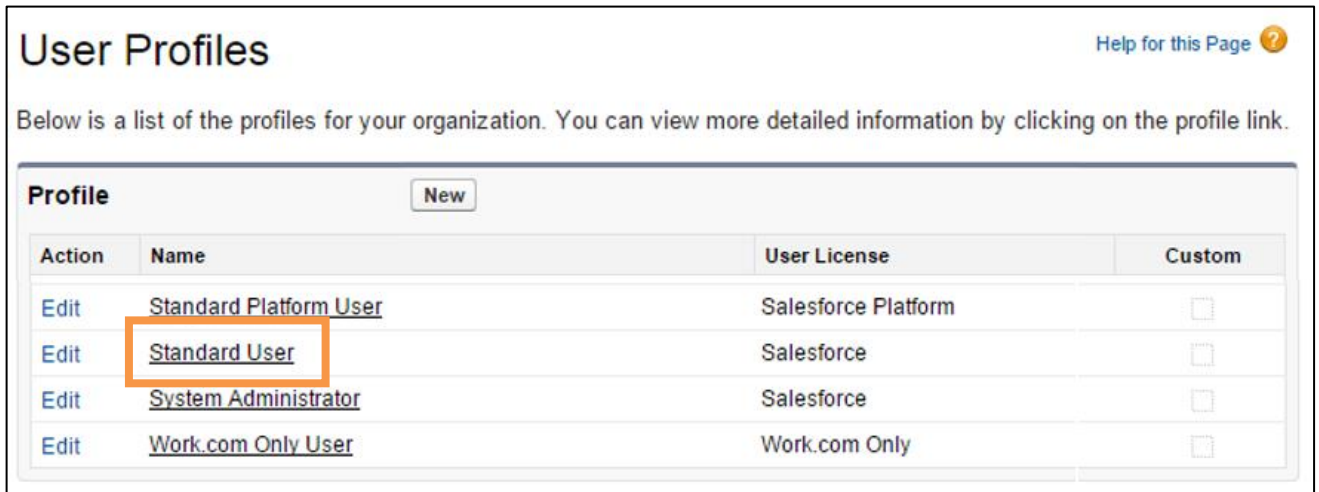
1. Go to **Setup**.



2. Under **Administration Setup**, expand **Manage Users**, and click on **Profiles**.



3. Select the profile that you are intending to grant permissions for. In the image below, the standard User will be selected. Click on the Name of the profile (not edit).

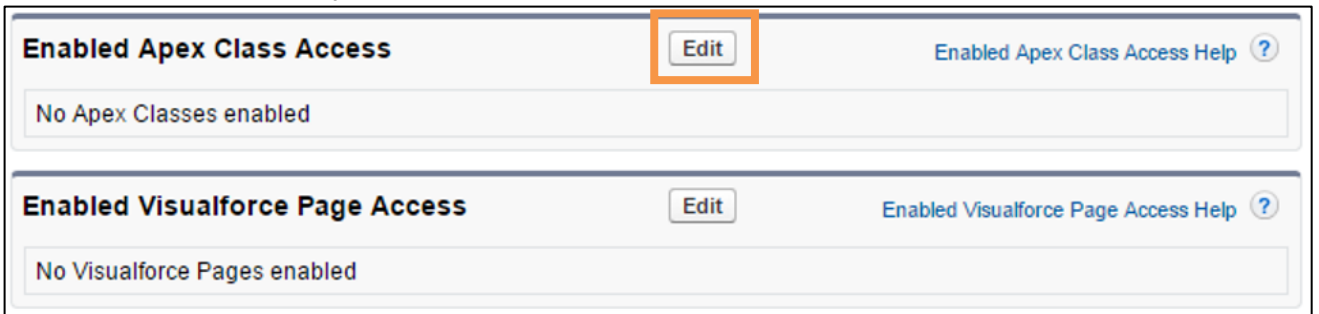


**User Profiles** Help for this Page ?

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

Action	Name	User License	Custom
<a href="#">Edit</a>	<a href="#">Standard Platform User</a>	Salesforce Platform	<input type="checkbox"/>
<a href="#">Edit</a>	<b>Standard User</b>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">System Administrator</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Work.com Only User</a>	Work.com Only	<input type="checkbox"/>

4. Scroll down to the **Enabled Apex Class Access** section and click **Edit**.



**Enabled Apex Class Access** Enabled Apex Class Access Help ?

No Apex Classes enabled

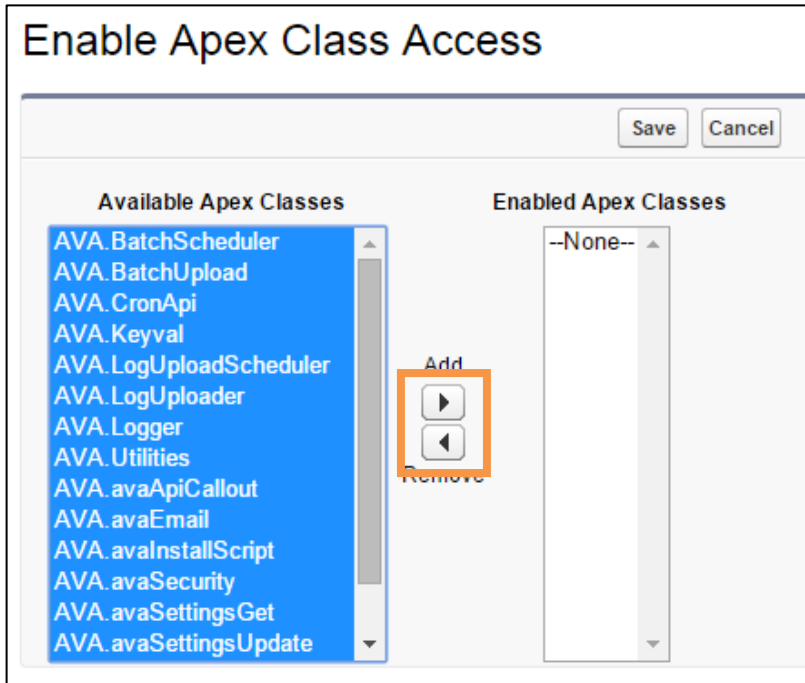
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**Enabled Visualforce Page Access** Enabled Visualforce Page Access Help ?

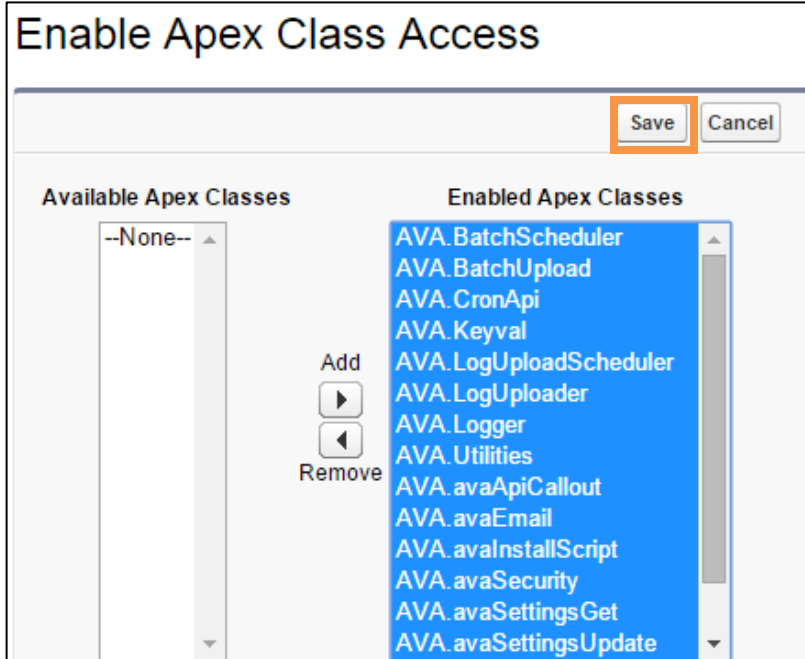
No Visualforce Pages enabled

5. Find and select all Apex Classes that begin with AVA. These should include:
  - AVA.BatchScheduler
  - AVA.BatchUpload
  - AVA.CronApi
  - AVA.Keyval
  - AVA.LogUploadScheduler
  - AVA.LogUploader
  - AVA.Logger
  - AVA.Utilities
  - AVA.avaApiCallout
  - AVA.avaEmail
  - AVA.avaInstallScript
  - AVA.avaSecurity
  - AVA.avaSettingsGet
  - AVA.avaSettingsUpdate
  - AVA.avaUninstallScript
  - AVA.avaUninstallScriptTest

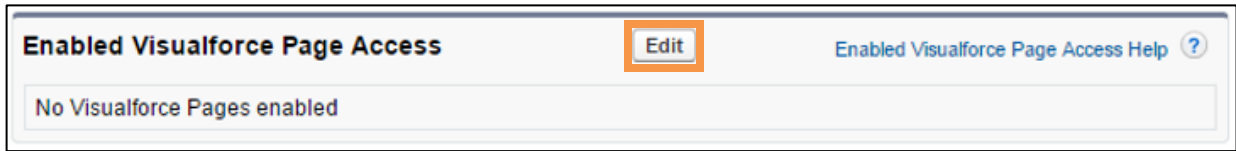




6. Press **Save**.

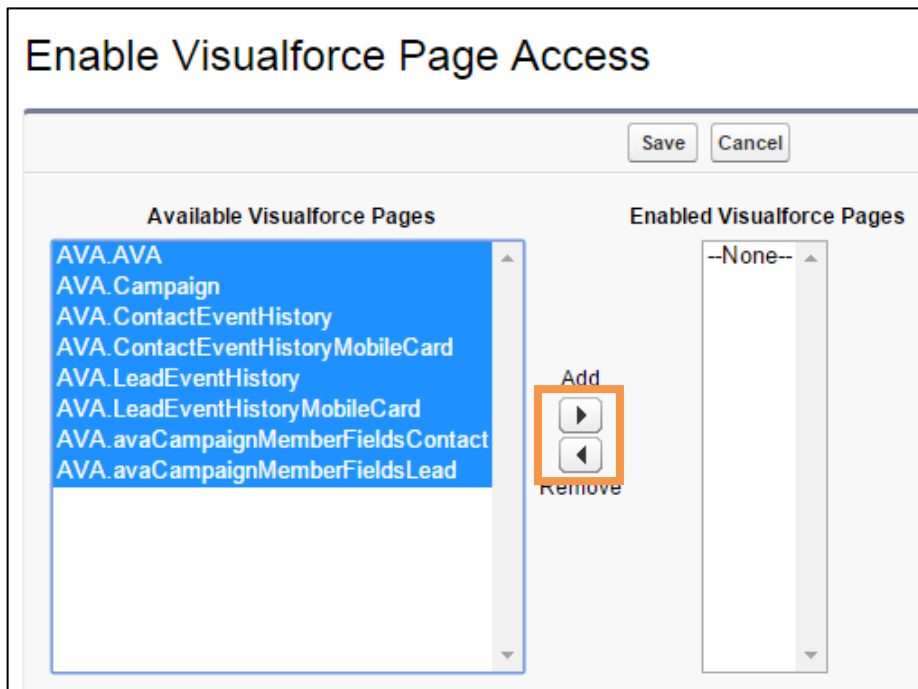


7. You will be taken back to the profile page. Scroll back down to the **Enabled Visualforce Page Access** and click **Edit**.

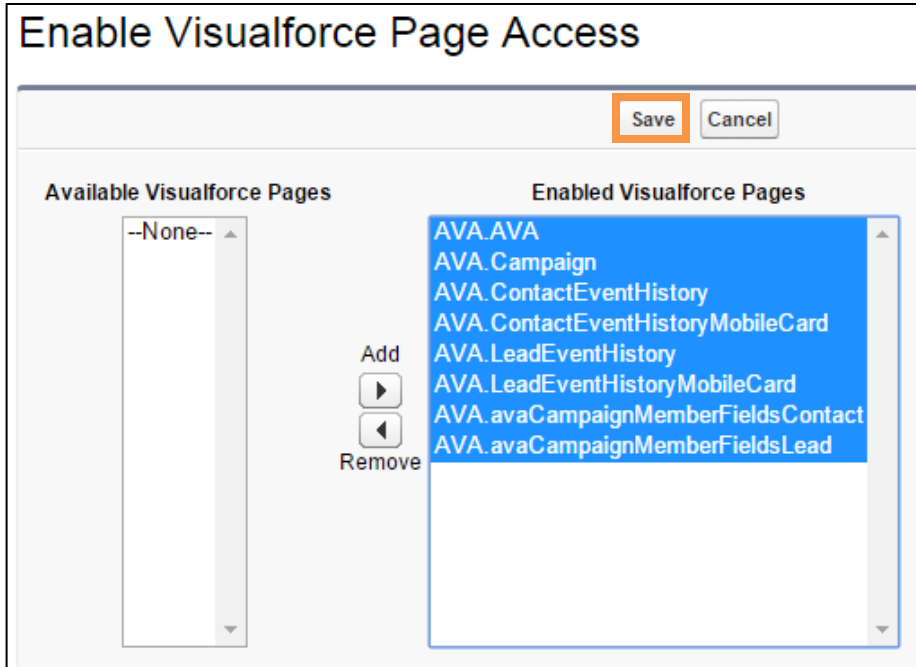


8. Select all the Visualforce Pages that begin with “AVA.” These are:

- AVA.AVA
- AVA.Campaign
- AVA.ContactEventHistory
- AVA.ContactEventHistoryMobileCard
- AVA.LeadEventHistory
- AVA.LeadEventHistoryMobileCard
- AVA.avaCampaignMemberFieldsContact
- AVA.avaCampaignMemberFieldsLead



9. Press **Save**.



**Enable Visualforce Page Access**

Save Cancel

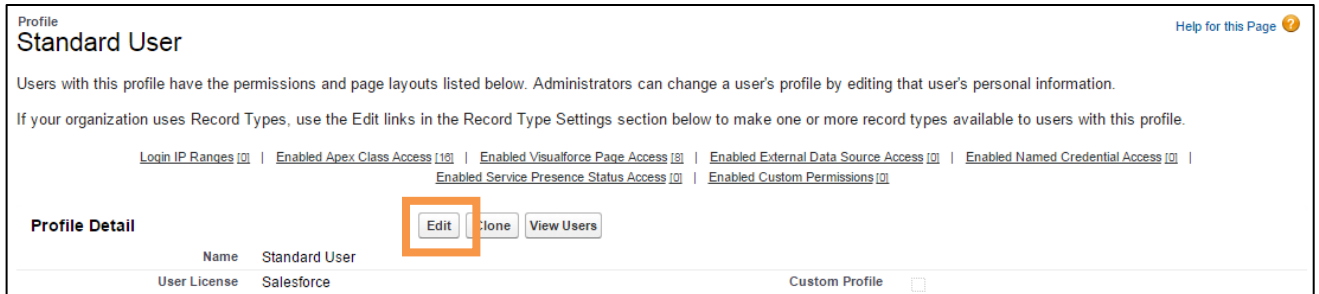
Available Visualforce Pages: --None--

Enabled Visualforce Pages:

- AVA.AVA
- AVA.Campaign
- AVA.ContactEventHistory
- AVA.ContactEventHistoryMobileCard
- AVA.LeadEventHistory
- AVA.LeadEventHistoryMobileCard
- AVA.avaCampaignMemberFieldsContact
- AVA.avaCampaignMemberFieldsLead

Add Remove

10. You will once again return to the profile's page. At the top of the page, click **Edit**.



Profile Standard User [Help for this Page](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

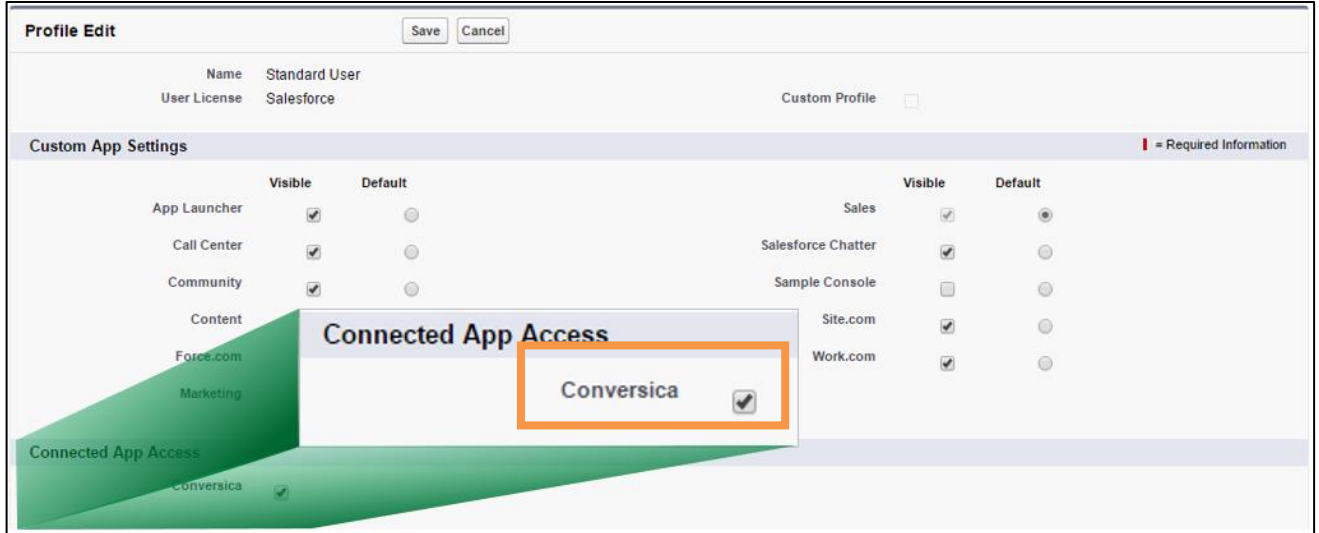
[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

**Profile Detail**

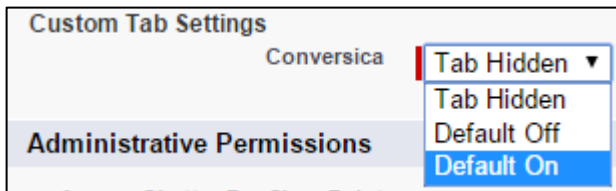
[Edit](#) [Clone](#) [View Users](#)

Name	Standard User
User License	Salesforce
Custom Profile	<input type="checkbox"/>

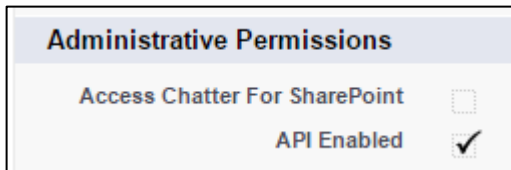
11. Scroll down to **Connected App Access** and select the **Conversica** check box.



12. Scroll down to **Custom Tab Settings** and select **Default On** from the drop down. This makes the Conversica Tab available for users to access.



13. Scroll down to **Administrative Permissions** and ensure **API Enabled** is selected.



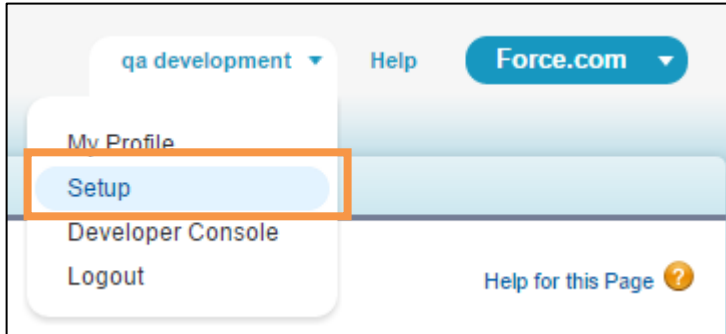
14. Ensure all Custom Object Permissions are selected.

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
App Logs	✓	✓	✓	✓	✓	✓	JobTracker	✓	✓	✓	✓	✓	✓
Ava Services	✓	✓	✓	✓	✓	✓	Queue	✓	✓	✓	✓	✓	✓

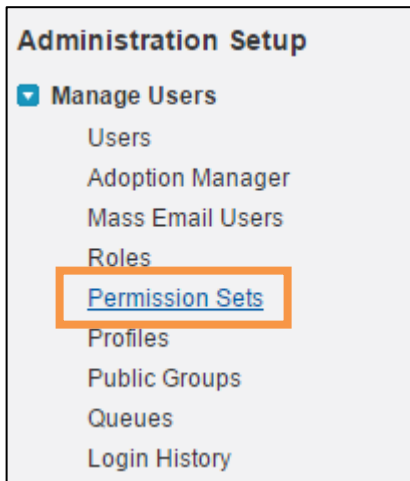
## Permission Sets

Permission Sets are useful if you are looking to grant permissions to group of users separate from Profiles. For example, you have a single profile for your Sales Reps, but a subset of those users need access to Conversica. To configure a permission set, follow the instructions below.

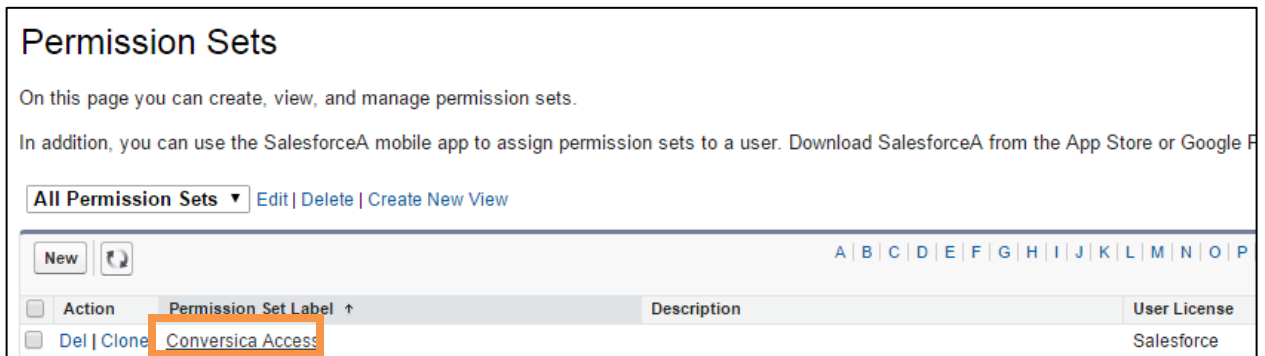
1. Go to **Setup**.



2. Under **Administration Setup**, expand **Manage Users** and select **Permission Sets**.



3. Here you will have the choice of selecting a current Permission Set or creating a new Permission Set. If you are already using Permission Sets and have one that meets your needs, you may follow the steps below. If you would like to create a new Permission Set, you can follow the tutorial [here](#). In this example, we will be using the Permission Set we created called Conversica Access. Click on the name of your desired Permission Set.



4. You will be taken to the page of your Permission Set. Click on **Assigned Connected Apps**.

Permission Set  
**Conversica Access** Video Tutorial | Help for this Page

Find Settings... | Clone Delete Edit Properties Manage Assignments

**Permission Set Overview**

Description		API Name	conversica_permissions
User License	Salesforce	Namespace Prefix	
Created By	qa_development 5/21/2015 9:09 AM	Last Modified By	qa_development 6/26/2015 6:58 AM

**Apps**

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com  
[Learn More](#)

**Assigned Apps**  
Settings that specify which apps are visible in the app menu

**Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu

**Object Settings**  
Permissions to access objects and fields, and settings such as tab availability

**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"

**Apex Class Access**  
Permissions to execute Apex classes

**Visualforce Page Access**  
Permissions to execute Visualforce pages

**External Data Source Access**

5. Click **Edit**.

Permission Set  
**Conversica Access**

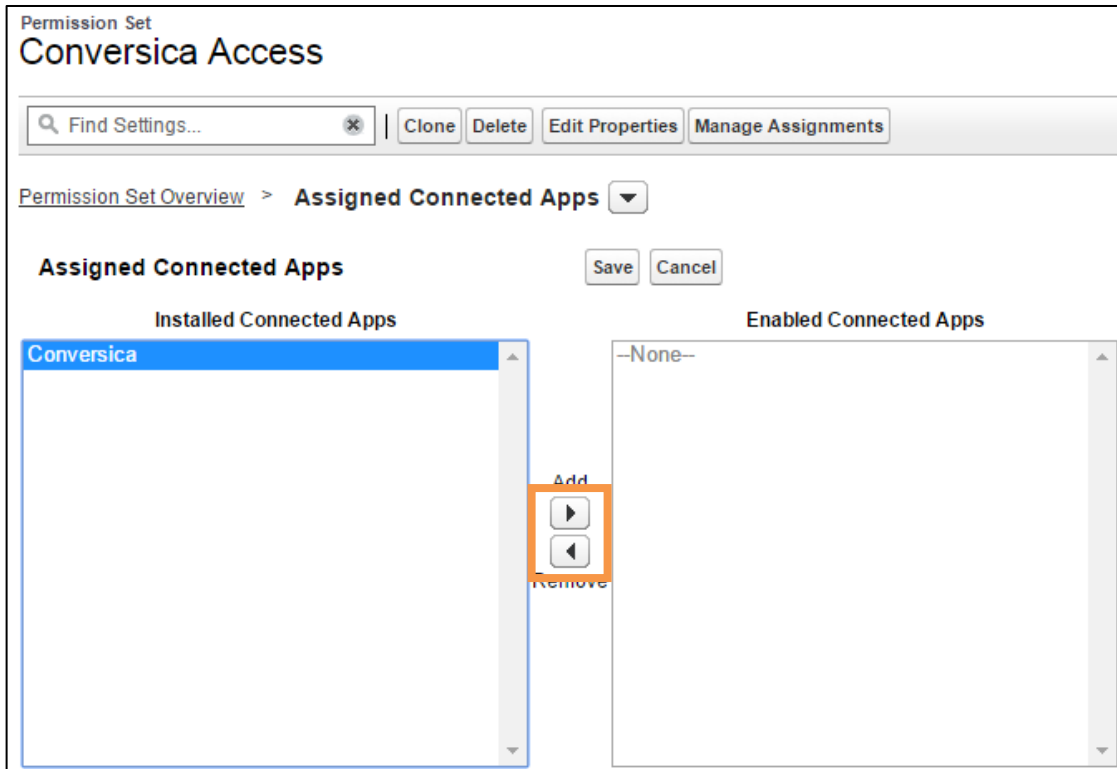
Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > **Assigned Connected Apps** ▼

**Assigned Connected Apps** Edit

Connected App Name

- Under **Installed Connected Apps**, find **Conversica** and add it to **Enabled Connected Apps**.



Permission Set  
**Conversica Access**

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Assigned Connected Apps

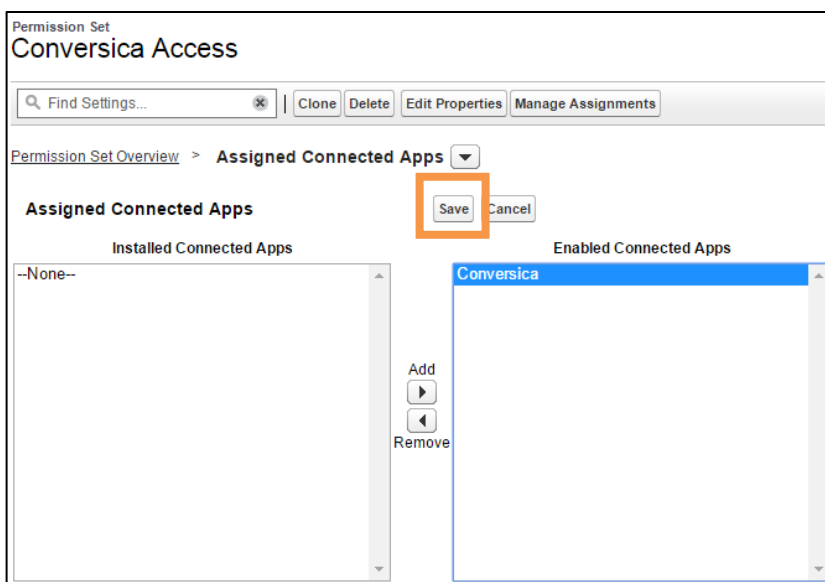
Assigned Connected Apps Save Cancel

Installed Connected Apps Enabled Connected Apps

Conversica --None--

Add  
Remove

- Click **Save**.



Permission Set  
**Conversica Access**

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Assigned Connected Apps

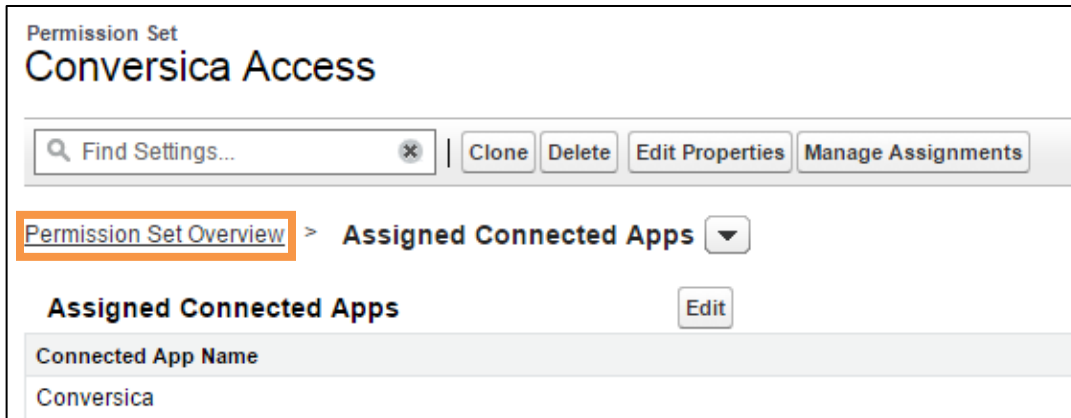
Assigned Connected Apps Save Cancel

Installed Connected Apps Enabled Connected Apps

--None-- Conversica

Add  
Remove

- To return to your Permission Set page, click on **Permission Set Overview**.



Permission Set  
**Conversica Access**

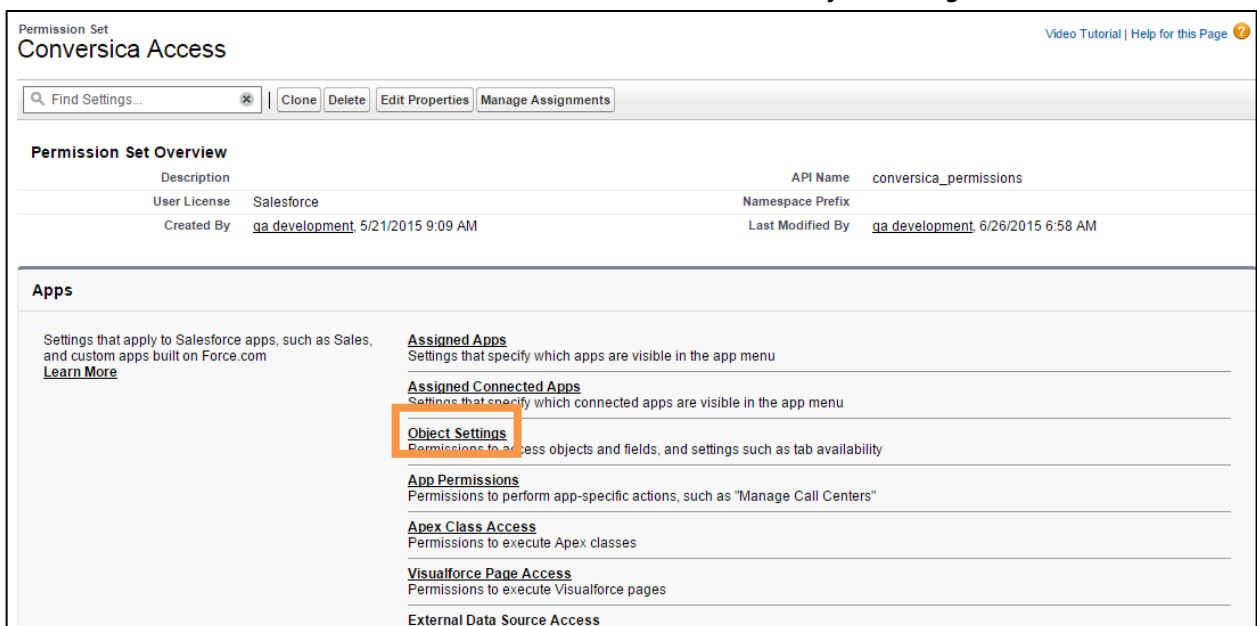
Find Settings... | Clone Delete Edit Properties Manage Assignments

**Permission Set Overview** > Assigned Connected Apps

**Assigned Connected Apps** Edit

Connected App Name
Conversica

- Now it is time to make the Conversica tab available to users. Click on **Object Settings**.



Permission Set  
**Conversica Access** Video Tutorial | Help for this Page

Find Settings... | Clone Delete Edit Properties Manage Assignments

**Permission Set Overview**

Description		API Name	conversica_permissions
User License	Salesforce	Namespace Prefix	
Created By	<a href="#">qa development</a> 5/21/2015 9:09 AM	Last Modified By	<a href="#">qa development</a> 6/26/2015 6:58 AM

**Apps**

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com  
[Learn More](#)

- Assigned Apps**  
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu
- Object Settings**  
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**  
Permissions to execute Apex classes
- Visualforce Page Access**  
Permissions to execute Visualforce pages
- External Data Source Access**



10. Find and click on **Conversica** under the **Object Settings** header.

Permission Set  
Conversica Access Video Tutorial | Help

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings ▾

**Object Settings**

Object Name	Object Permissions	Total Fields	Tab Settings
<a href="#">Accounts</a>	No Access	37	--
<a href="#">App Launcher</a>	--	--	--
<a href="#">App Logs</a>	No Access	12	--
<a href="#">Assets</a>	No Access	18	--
<a href="#">Ava Services</a>	No Access	5	--
<a href="#">Campaign Members</a>	--	40	--
<a href="#">Campaigns</a>	No Access	38	--
<a href="#">Cases</a>	No Access	35	--
<a href="#">Chatter</a>	--	--	--
<a href="#">Coaching</a>	No Access	5	--
<a href="#">Contacts</a>	No Access	40	--
<a href="#">Content</a>	--	--	--
<a href="#">Conversica</a>	No Access	23	--
<a href="#">D&amp;B Companies</a>	No Access	--	--
<a href="#">Dashboards</a>	--	--	--

11. Click **Edit**.

Permission Set  
Conversica Access

Find Settings... | Clone Delete Edit Properties Manage Assignments

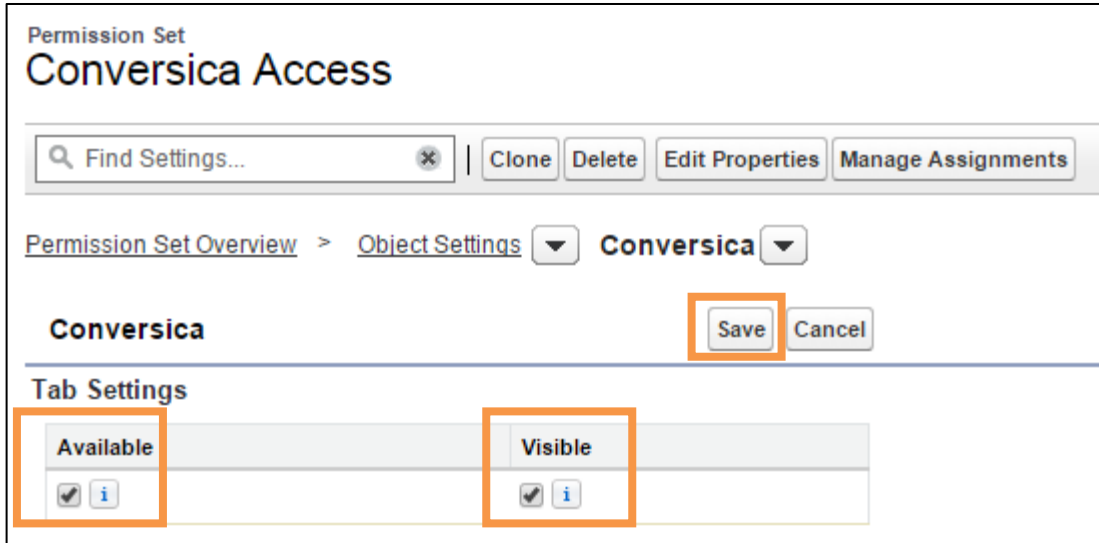
Permission Set Overview > Object Settings ▾ **Conversica** ▾

**Conversica** Edit

**Tab Settings**

Available	Visible
<input type="checkbox"/> <i>i</i>	<input type="checkbox"/> <i>i</i>

12. Select both **Available** and **Visible**. Then, click **Save**.



Permission Set  
**Conversica Access**

Find Settings... | Clone Delete Edit Properties Manage Assignments

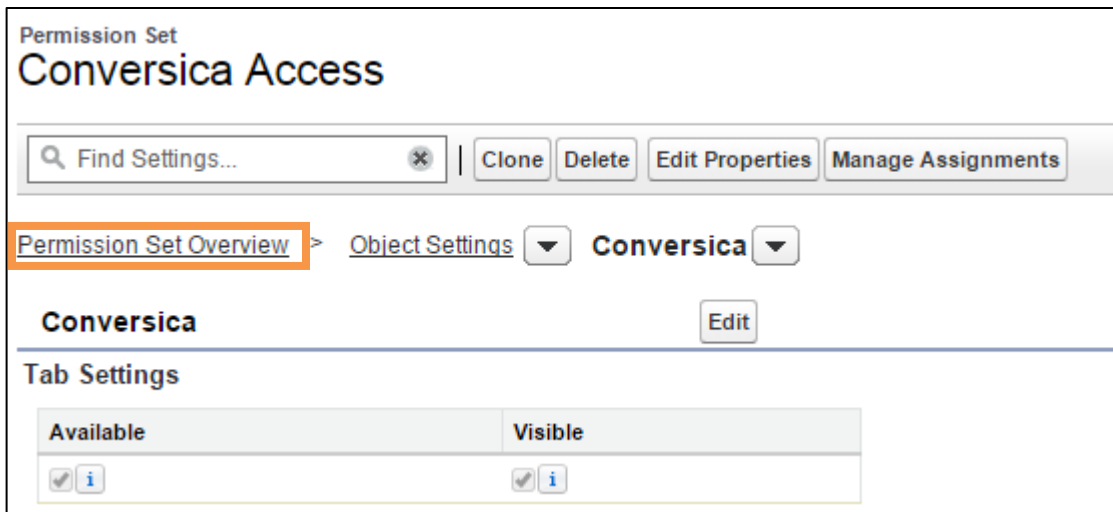
Permission Set Overview > Object Settings ▾ **Conversica** ▾

**Conversica** Save Cancel

Tab Settings

Available	Visible
<input checked="" type="checkbox"/> i	<input checked="" type="checkbox"/> i

13. Click the link to return to the **Permission Set Overview**.



Permission Set  
**Conversica Access**

Find Settings... | Clone Delete Edit Properties Manage Assignments

**Permission Set Overview** > Object Settings ▾ **Conversica** ▾

**Conversica** Edit

Tab Settings

Available	Visible
<input checked="" type="checkbox"/> i	<input checked="" type="checkbox"/> i

14. Once returned to the overview page, select **Apex Class Access**.

Permission Set  
**Conversica Access** Video Tutorial | Help for this Page

Find Settings... | Clone Delete Edit Properties Manage Assignments

**Permission Set Overview**

Description		API Name	conversica_permissions
User License	Salesforce	Namespace Prefix	
Created By	qa_development 5/21/2015 9:09 AM	Last Modified By	qa_development 6/26/2015 6:58 AM

**Apps**

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com  
[Learn More](#)

- Assigned Apps**  
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu
- Object Settings**  
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**  
Permissions to execute Apex classes
- Visualforce Page Access**  
Permissions to execute Visualforce pages
- External Data Source Access**

15. Click on **Edit**.

Permission Set  
**Conversica Access**

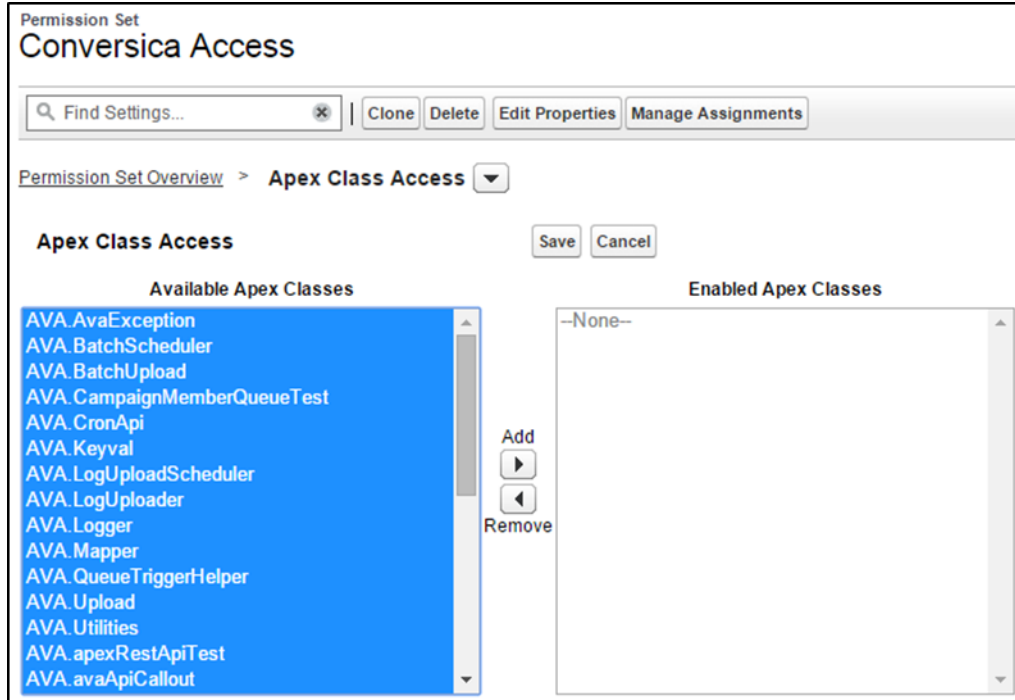
Find Settings... | Clone Delete Edit Properties Manage Assignments

[Permission Set Overview](#) > **Apex Class Access** ▼

**Apex Class Access** **Edit**

Apex Class Name

16. Select all Available Apex Classes that begin with “AVA” and click **Add**.



These should include:

- AVA.apexRestApiTest
- AVA.avaApiCallout
- AVA.avaCampaignMemberFieldsController
- AVA.avaEmail
- AVA.avaEmailTest
- AVA.AvaException
- AVA.avaInstallScript
- AVA.avaInstallScriptTest
- AVA.avaLeadTriggerTest
- AVA.avaMainPage
- AVA.avaSecurity
- AVA.avaSettingsGet
- AVA.avaSettingsUpdate
- AVA.avaUninstallScript
- AVA.avaUninstallScriptTest
- AVA.avaUploadHelper
- AVA.BatchScheduler
- AVA.BatchUpload
- AVA.CampaignMemberQueueTest
- AVA.CronApi
- AVA.Keyval
- AVA.Logger
- AVA.logTest
- AVA.LogUploader
- AVA.LogUploadScheduler
- AVA.Mapper
- AVA.QueueTriggerHelper
- AVA.testUploader
- AVA.Upload
- AVA.Utilities
- AVA.webserviceTest

17. Click **Save**.

Permission Set  
**Conversica Access**

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Apex Class Access

**Apex Class Access** Save Cancel

Available Apex Classes Enabled Apex Classes

--None--

AVA.AvaException  
AVA.BatchScheduler  
AVA.BatchUpload  
AVA.CampaignMemberQueueTest  
AVA.CronApi  
AVA.Keyval  
AVA.LogUploadScheduler  
AVA.LogUploader  
AVA.Logger  
AVA.Mapper  
AVA.QueueTriggerHelper  
AVA.Upload  
AVA.Utilities  
AVA.apexRestApiTest  
AVA.avaApiCallout

Add  
Remove

18. Return to the **Permission Set Overview** page.

Permission Set  
**Conversica Access**

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Apex Class Access

**Apex Class Access** Edit

Apex Class Name	Installed Package
AVA.apexRestApiTest	Conversica
AVA.avaApiCallout	Conversica
AVA.avaCampaignMemberFieldsController	Conversica
AVA.avaEmail	Conversica
AVA.avaEmailTest	Conversica

19. Once returned to the overview page, select **Visualforce Page Access**.

Permission Set  
**Conversica Access** Video Tutorial | Help for this Page

Find Settings... | Clone Delete Edit Properties Manage Assignments

**Permission Set Overview**

Description		API Name	conversica_permissions
User License	Salesforce	Namespace Prefix	
Created By	qa_development 5/21/2015 9:09 AM	Last Modified By	qa_development 6/26/2015 6:58 AM

**Apps**

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com [Learn More](#)

- Assigned Apps**  
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu
- Object Settings**  
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**  
Permissions to execute Apex classes
- Visualforce Page Access**  
Permissions to execute Visualforce pages
- External Data Source Access**

20. Click **Edit**.

Permission Set  
**Conversica Access**

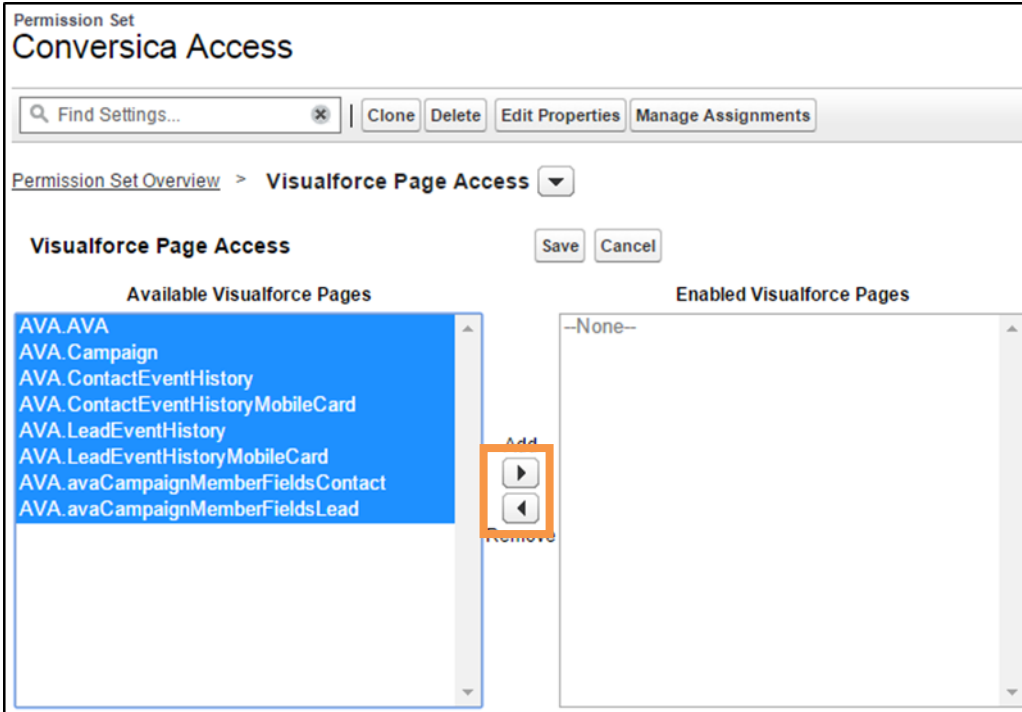
Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > **Visualforce Page Access** ▼

**Visualforce Page Access** Edit

Visualforce Page Name

21. Under **Available Visualforce Pages** select all pages that begin with “AVA” and click **Add**.



Permission Set  
Conversica Access

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Visualforce Page Access

Visualforce Page Access Save Cancel

Available Visualforce Pages Enabled Visualforce Pages

AVA.AVA  
AVA.Campaign  
AVA.ContactEventHistory  
AVA.ContactEventHistoryMobileCard  
AVA.LeadEventHistory  
AVA.LeadEventHistoryMobileCard  
AVA.avaCampaignMemberFieldsContact  
AVA.avaCampaignMemberFieldsLead

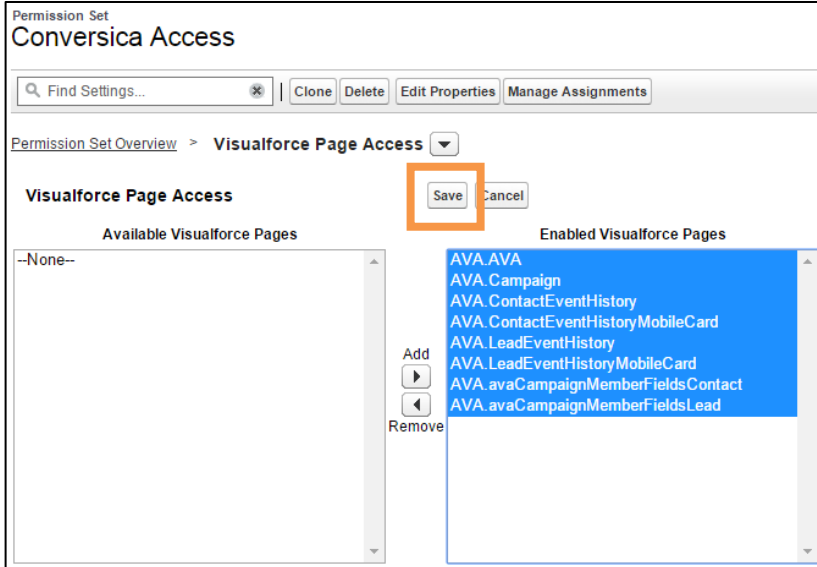
Add

--None--

These should include:

- AVA.AVA
- AVA.avaCampaignMemberFieldsContact
- AVA.avaCampaignMemberFieldsLead
- AVA.Campaign
- AVA.ContactEventHistory
- AVA.ContactEventHistoryMobileCard
- AVA.LeadEventHistory
- AVA.LeadEventHistoryMobileCard

22. Click **Save**.



Permission Set  
Conversica Access

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > Visualforce Page Access

Visualforce Page Access

Save | Cancel

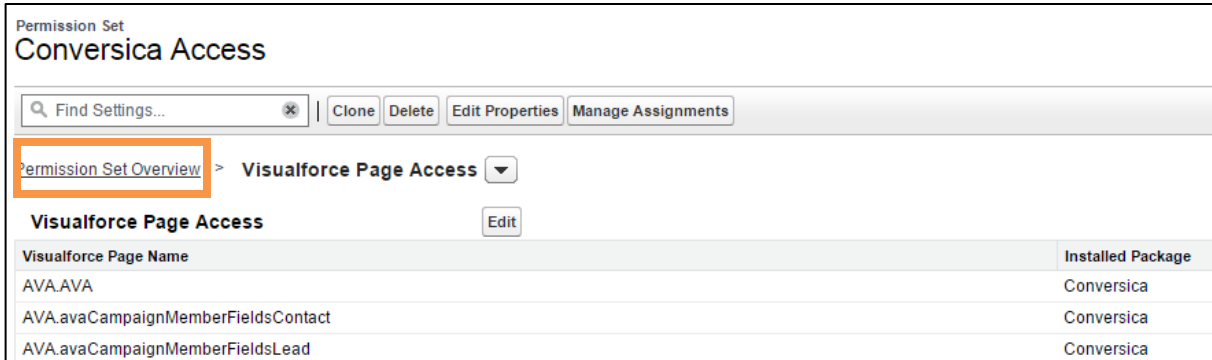
Available Visualforce Pages: --None--

Enabled Visualforce Pages:

- AVA.AVA
- AVA.Campaign
- AVA.ContactEventHistory
- AVA.ContactEventHistoryMobileCard
- AVA.LeadEventHistory
- AVA.LeadEventHistoryMobileCard
- AVA.avaCampaignMemberFieldsContact
- AVA.avaCampaignMemberFieldsLead

Add | Remove

23. Return to the permission set page by clicking on **Permission Set Overview**.



Permission Set  
Conversica Access

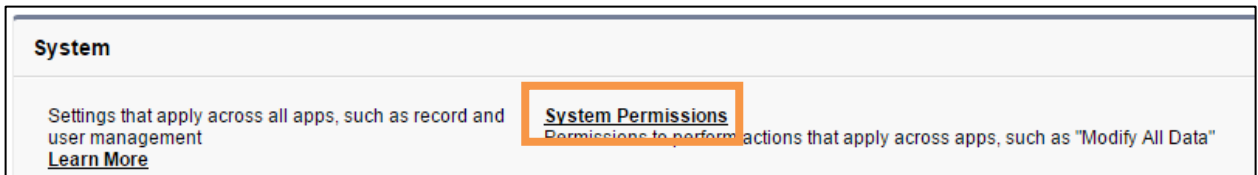
Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > Visualforce Page Access

Visualforce Page Access | Edit

Visualforce Page Name	Installed Package
AVA.AVA	Conversica
AVA.avaCampaignMemberFieldsContact	Conversica
AVA.avaCampaignMemberFieldsLead	Conversica

24. Now we will ensure the correct system settings are in place. Scroll down to the **System** section and select **System Permissions**.



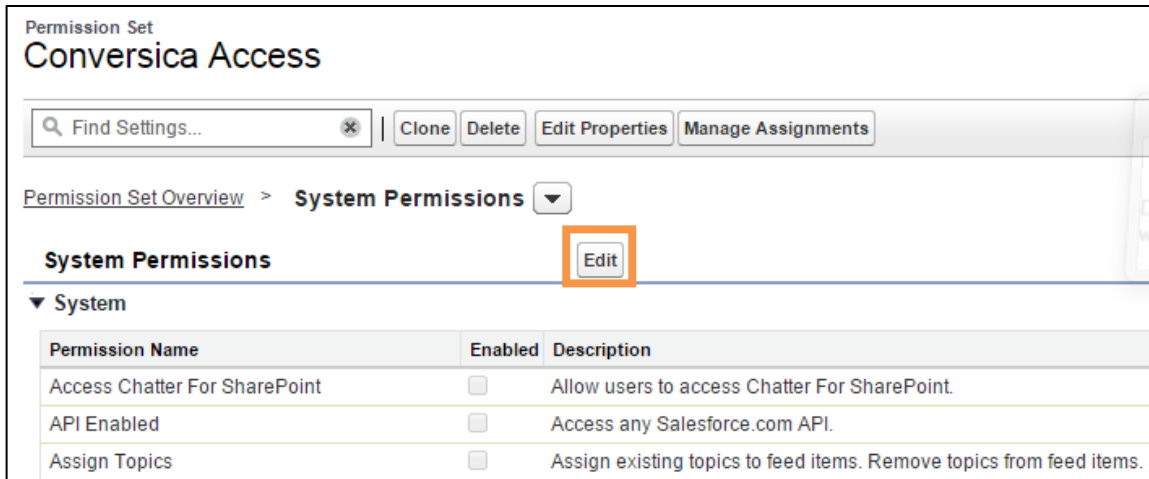
**System**

Settings that apply across all apps, such as record and user management  
[Learn More](#)

**System Permissions**  
Permissions to perform actions that apply across apps, such as "Modify All Data"



25. Click **Edit**.



Permission Set  
**Conversica Access**

Find Settings... | Clone Delete Edit Properties Manage Assignments

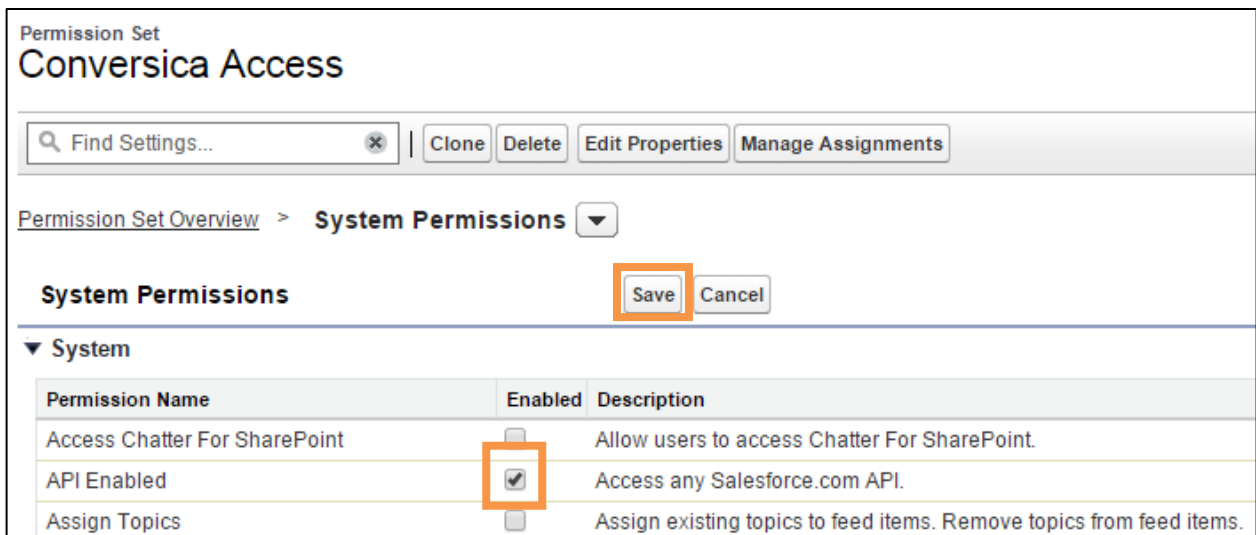
Permission Set Overview > **System Permissions** ▼

**System Permissions** Edit

▼ System

Permission Name	Enabled	Description
Access Chatter For SharePoint	<input type="checkbox"/>	Allow users to access Chatter For SharePoint.
API Enabled	<input type="checkbox"/>	Access any Salesforce.com API.
Assign Topics	<input type="checkbox"/>	Assign existing topics to feed items. Remove topics from feed items.

26. Turn on **API Enabled** and click **Save**.



Permission Set  
**Conversica Access**

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > **System Permissions** ▼

**System Permissions** Save Cancel

▼ System

Permission Name	Enabled	Description
Access Chatter For SharePoint	<input type="checkbox"/>	Allow users to access Chatter For SharePoint.
API Enabled	<input checked="" type="checkbox"/>	Access any Salesforce.com API.
Assign Topics	<input type="checkbox"/>	Assign existing topics to feed items. Remove topics from feed items.

27. Your last step to completing your Permission Set settings is to ensure you have the correct users added. You may follow this [Salesforce tutorial](#) to learn how to add users to Permission Sets.

## [Add Users to Permission Sets](#)

[Glossary](#)  
[Downloadable User Guides](#)

Assign a Permission Set to Multiple Users | Salesforce

### Assign a Permission Set to Multiple Users

From any permission set page, you can assign the permission set to one or more users.

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com Editions

User Permissions Needed	
To assign a permission set to users:	"Assign Permission Sets"

[Walk Through It: assign a permission set](#)

See Also:  
[Remove User Assignments from a Permission Set](#)  
[Assign Permission Sets to a Single User](#)

👍
💬

## Troubleshooting

Below are some of the common errors that can occur if there are issues with either Salesforce permissions or users in the Conversica dashboard.

Oops there was an error rendering Force.com Canvas application [AVA]

- If you receive the error below, you have not been granted access to view the Conversica App. Please confirm your Profile or Permission Set settings.

i Force.com Canvas - AVA

i

**Oops, there was an error rendering Force.com Canvas application [AVA].**

You don't have permissions to view application with namespace [AVA] and API name [AVA].

[Click to configure](#)

A problem has occurred while logging you in

- If you receive the error below, you are neither the Conversica Admin, nor have you been added as a rep or a manager in Conversica. Please ensure your Conversica Admin's user ID (15-18 alphanumeric character) has been sent to Conversica. To find this user ID, please [follow the instructions in this link](#).

A problem occurred while logging you in.

This user is not authorized. You must be added as a Manager or Sales Rep in the Conversica App to view this page.

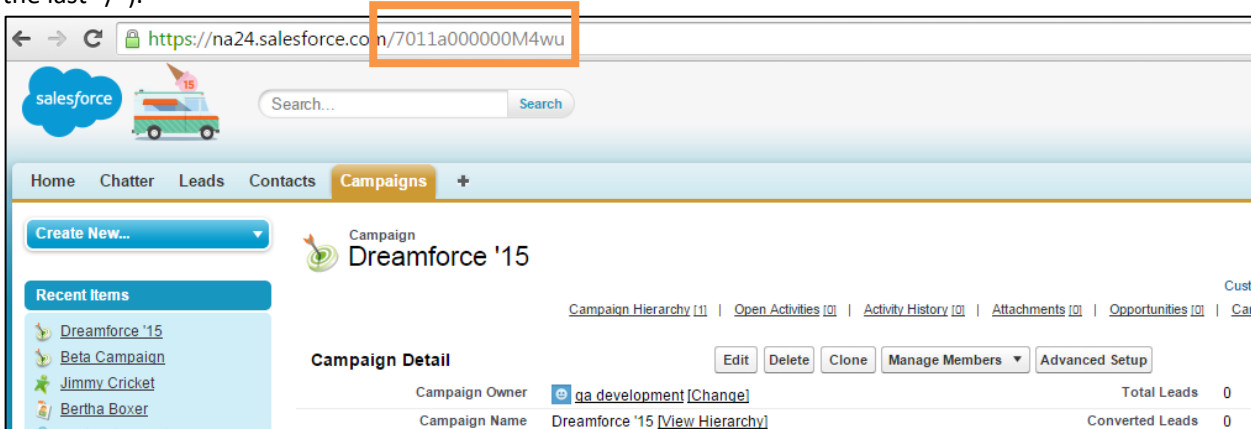
## Create Salesforce Campaign and Sync to Conversica Dialogue

In order to create a campaign in Salesforce, you will need to be a Marketing User and have the correct user or profile settings in place. Then you can follow the steps for creating a campaign provided by Salesforce, which [can be found here](#).

Once you've created a new campaign, you will either need to send the name of the campaign or the campaign ID to your CSM and TAM or sync the campaign to a conversation via the Visualforce section on the campaign page.

### Provide your Campaign ID's to Conversica

To find your *Campaign ID*, open the campaign and look at the URL (the ID is the alphanumeric number at the after the last "/").

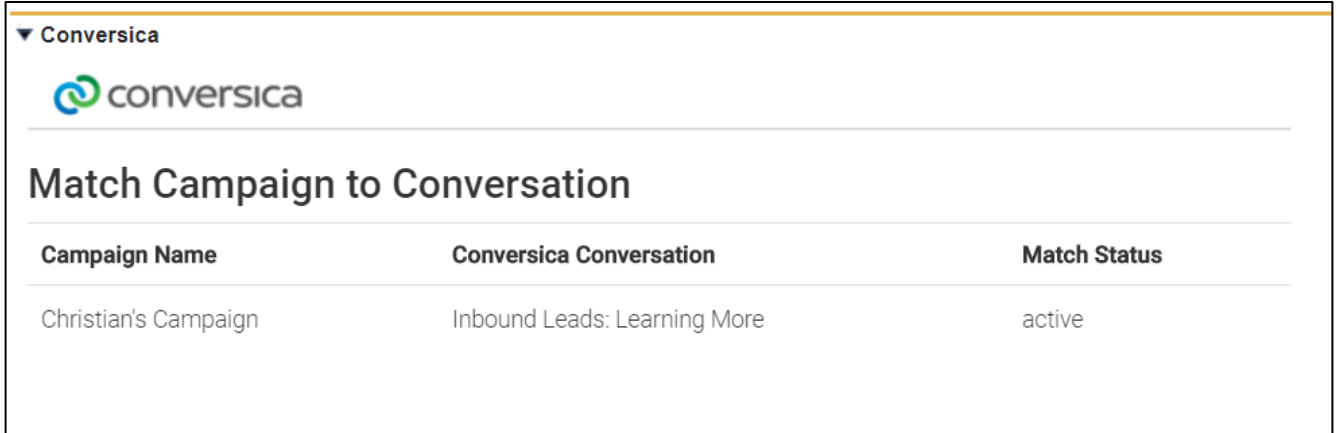


### Sync your Salesforce Campaign to your Conversica Dialogue

In the Campaign's Conversica Visualforce page, you have the ability to sync the campaign to a Conversica conversation type.

1. Open the Salesforce Campaign you would like to have synced with your conversation type.
2. Scroll down to the **Conversica** Visualforce page section.
3. Under **Conversica Service**, click the drop down.
4. Select the conversation type you would like this campaign to be synced with.

- Once selected, the drop down will disappear and the synchronization is complete.



The screenshot shows a user interface for the Conversica integration. At the top, there is a dropdown menu labeled 'Conversica' with a downward arrow. Below this is the Conversica logo. The main heading is 'Match Campaign to Conversation'. Underneath is a table with three columns: 'Campaign Name', 'Conversica Conversation', and 'Match Status'. The table contains one row of data.

Campaign Name	Conversica Conversation	Match Status
Christian's Campaign	Inbound Leads: Learning More	active

## Adding Leads to your Campaign

Only add leads (or contacts) to your synced Salesforce Campaign after your account has gone live. In the instance that leads have already been added to the campaign, Conversica will look back to the past 24 hours and engage with the leads added.

Additionally, once a lead (or contact) has been added to a campaign that is synced with Conversica, Conversica will begin to engage with the lead. Removing a lead from a campaign will not remove the lead from Conversica, so please talk with your Customer Success Manager regarding best practices on working with your leads.

Salesforce supports a number of ways to add leads to your campaign. You can [view your options here](#).