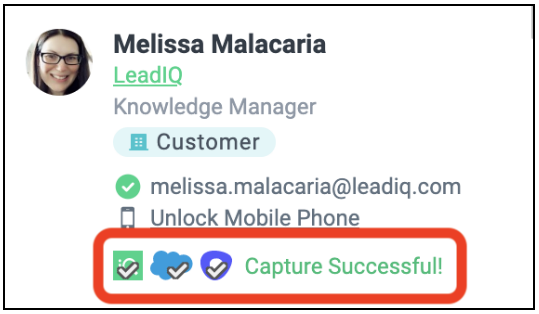
LeadIQ: Saving to Salesforce as a Contact

In addition to the document you can find additional information in our Help Center here: Saving as a Contact in Salesforce

When you save as Contact from the LeadIQ extension, LeadIQ uses the Company Domain to find the correct Account in Salesforce.

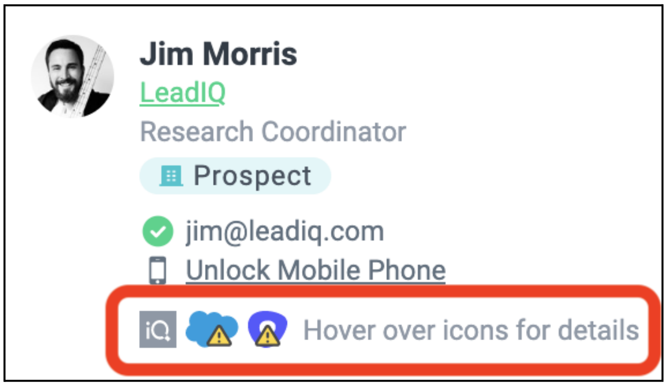
- Prior to capturing, you'll know whether we've found an existing Account or not if you see the blue Salesforce Cloud (and/or Outreach icon) shown under the prospect's data in the extension.



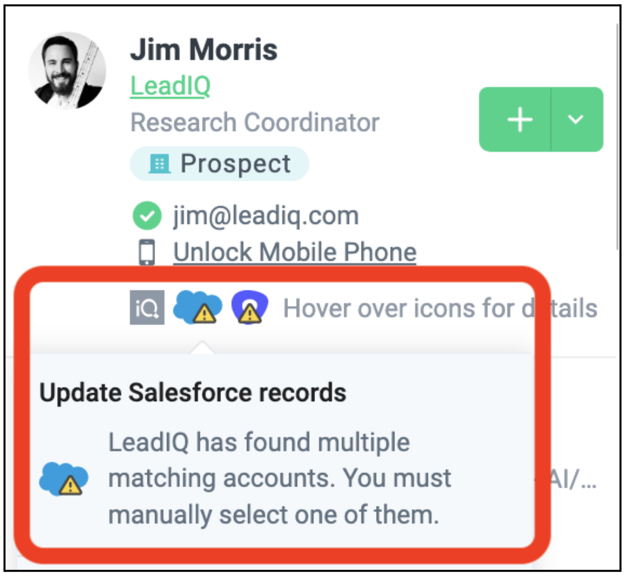
- To get more information about the matches that were found, you can hover your mouse over the Salesforce cloud (and Outreach icon). A dropdown will appear showing all of the matches that were found.
- You can select the account or choose from the options provided in the dropdown where you would like to save the information.

What does the yellow caution triangle on the Salesforce cloud mean?

- When you see a yellow caution triangle on the Salesforce cloud (or Outreach icon) this means that there is a manual action you need to take prior to saving your prospects to your CRM and/or sales engagement tool.



- Most often you will see this when there are multiple matching accounts in your systems (eg. multiple accounts with the same domain). However, you may see this in the event there are multiple matching prospects with the same name and company.
- You will need to select the correct record before you can sync to your integrations by hovering over the Salesforce icon and selecting it from there.



- This will show the same as described above on the Outreach icon in the event there are multiple matching accounts