



June 11, 2025

Version 1.5

Intellective Spark Installation and Administration Guide

OVERVIEW

Welcome to Spark! This guide describes how to install, configure, and upgrade Spark in your nCino environment.

Table of Contents

1	Introduction.....	3
2	Installation and Configuration of Spark	3
2.1	Prerequisites.....	3
2.2	Installing the Spark Managed Package	3
2.3	Adding the Spark Search Tab.....	4
2.4	Adding the Split & Merge Button to Document Manager Pages	6
2.4.1	Assigning Permissions	6
2.4.2	Adding the Spark Toolbar to Record Pages	7
2.5	Upgrading Spark	8
2.6	Uninstalling Spark.....	8
3	Administration.....	9
3.1	Security.....	9
3.2	Activate/Deactivate User Action Triggers	10

© Copyright Intellective 2025. Produced in the United States of America in June 2025. All Rights Reserved. Intellective, Spark, Intellective Unity, and Unity are trademarks of Intellective. All other products are trademarks or registered trademarks of their respective companies.

The information contained in this document is provided for informational purposes only. While efforts were made to verify the completeness and accuracy of the information contained in this documentation, it is provided “as is” without warranty of any kind. Intellective shall not be responsible for any damages arising out of the use of, or otherwise related to, this documentation or any other documentation.

1 Introduction

Intellective Spark makes working with documents in nCino easy.

Spark search gives users the ability to quickly find and work with documents and placeholders across nCino Objects, right from within nCino.

Spark's Split & Merge feature gives users tools to split documents into multiple pieces, merge multiple files into one document, and fix other issues with documents.

2 Installation and Configuration of Spark

Complete the following steps to install and configure Spark for use within your nCino Org.

2.1 Prerequisites

Spark for nCino is used together with nCino. As such, you must install it into an existing Org that is fully configured for nCino. Spark is designed to work together with nCino's Document Manager functionality for those customers that store documents in Document Manager.

Spark supports nCino Orgs running the Fall 2023 build of Document Manager (2.853) or later. It fully supports "Gold Standard" configurations but may support other as well configurations, depending on the specific changes made. For questions about using Spark with your environment, please contact Intellective Customer Support at sparksupport@intellective.com.

Spark accesses the following URLs, which must be accessible from users' browsers:

- <https://spark.intellectivecloud.com>
- <https://sparkhelp.intellectivecloud.com>

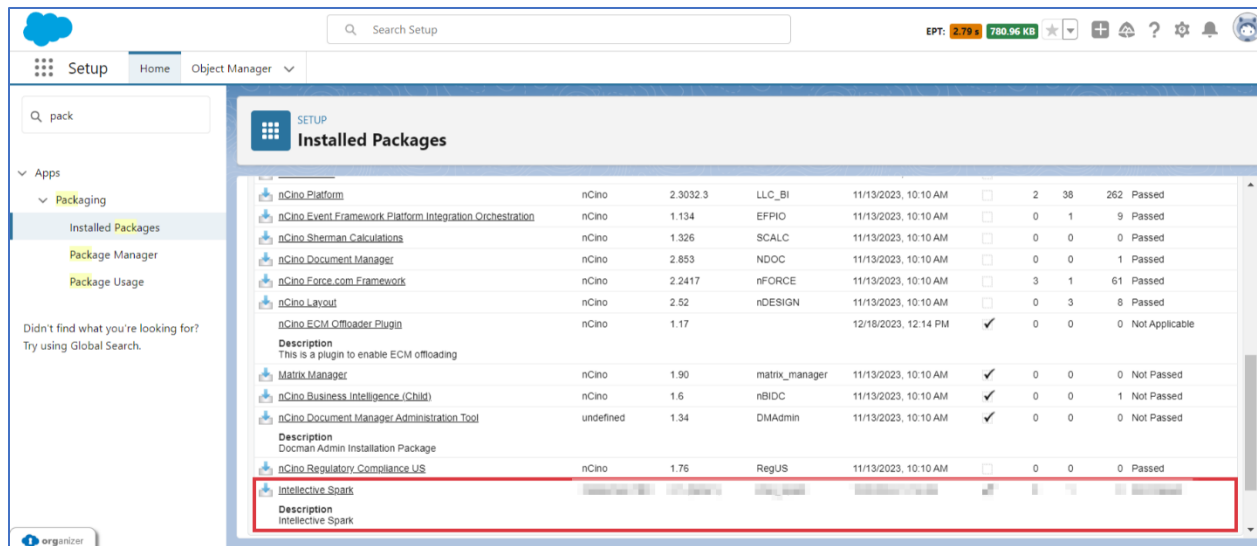
For some actions, Spark will open a new tab in the user's browser. The user's browser must be configured to allow launching of new windows for the above URLs.

2.2 Installing the Spark Managed Package

Spark is available to be installed directly from our Salesforce App Exchange listing.

If at any point you need assistance with installing the Spark package, please contact Intellective Customer Support at sparksupport@intellective.com.

- 1) Visit the Spark [Salesforce App Exchange listing](#), and select either "Try It" to install in a non-production sandbox, or "Get it Now" to install in a sandbox or production org instance.
- 2) Follow the instructions provided by the Salesforce App Exchange installation wizard to complete the installation of the managed package into the desired environment.
- 3) Once Salesforce indicates that the managed package is being installed, completion of the installation may take several minutes. Please wait 15 minutes, then check in your nCino Org. Open Setup > Installed Packages: if you see Intellective Spark in the list, the installation is completed. If you don't see it, please wait an additional 15 minutes and then refresh the page.



Package Name	Version	Size	Installation Date	Status	Progress	Details
nCino Platform	nCino	2.3032.3	11/13/2023, 10:10 AM	Passed	2 38 262	
nCino Event Framework Platform Integration Orchestration	nCino	1.134	11/13/2023, 10:10 AM	Passed	0 1 9	
nCino Sherman Calculations	nCino	1.326	11/13/2023, 10:10 AM	Passed	0 0 0	
nCino Document Manager	nCino	2.853	11/13/2023, 10:10 AM	Passed	0 0 1	
nCino Force.com Framework	nCino	2.2417	11/13/2023, 10:10 AM	Passed	3 1 61	
nCino Layout	nCino	2.52	11/13/2023, 10:10 AM	Passed	0 3 8	
nCino ECM Offloader Plugin	nCino	1.17	12/18/2023, 12:14 PM	Not Applicable	0 0 0	
Description: This is a plugin to enable ECM offloading						
Matrix Manager	nCino	1.90	11/13/2023, 10:10 AM	Not Passed	0 0 0	
nCino Business Intelligence (Child)	nCino	1.6	11/13/2023, 10:10 AM	Not Passed	0 0 1	
nCino Document Manager Administration Tool	undefined	1.34	11/13/2023, 10:10 AM	Not Passed	0 0 0	
Description: Docman Admin Installation Package						
nCino Regulatory Compliance US	nCino	1.76	11/13/2023, 10:10 AM	Passed	0 0 0	
Intellective Spark						
Description: Intellective Spark						

Figure 1 Intellective Spark in Installed Packages

- 4) After installation is completed proceed with configuration steps listed in the following sections:
 - a) [2.3 Adding the Spark Search Tab](#) to enable Spark search
 - b) [2.4 Adding the Split & Merge Button to Document Manager Pages](#) to enable Split & Merge

2.3 Adding the Spark Search Tab

Complete the following steps to make the Spark search tab visible to users:

- 1) Assign the nCino Cross-DocMan Search permission set to your user. To do so open Setup > Users > Users > Click link in Full Name column > Click Permission Set Assignments link > Edit Assignments > Move nCino Cross-DocMan Search permission set to right list and click Save.

Please note: if you don't see the permission set, please confirm first that the managed package has completed installation in your environment. It may take up to 30 minutes to complete.

- 2) Add Spark Search tab.
 - a) To add tab for current user: Open nCino application > Click on pencil icon in Navigation bar > Add More Items > Select All > In "Search All Items" input type in Enterprise > Click + before Spark Search > Click Add 1 Nav Item > Save.

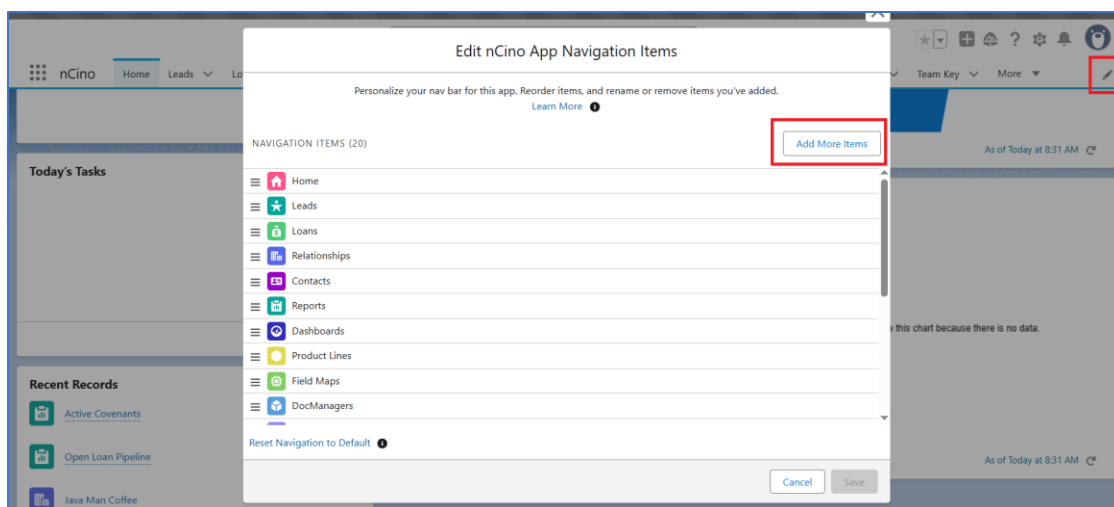


Figure 2 Edit nCino App Navigation Items

- b) If you need to add Spark Search tab for all profiles nCino application is configured for, it's better to use App Manager:
 - i) Open Setup > App Manager.
 - ii) Open the context-menu for nCino application and click Edit.
 - iii) Open Navigation Items.
 - iv) Select Spark Search from Available Items list and move it to Selected Items list.
 - v) Click Save.

- 3) In the nCino application, click More in the navigation panel and select Spark Search tab.

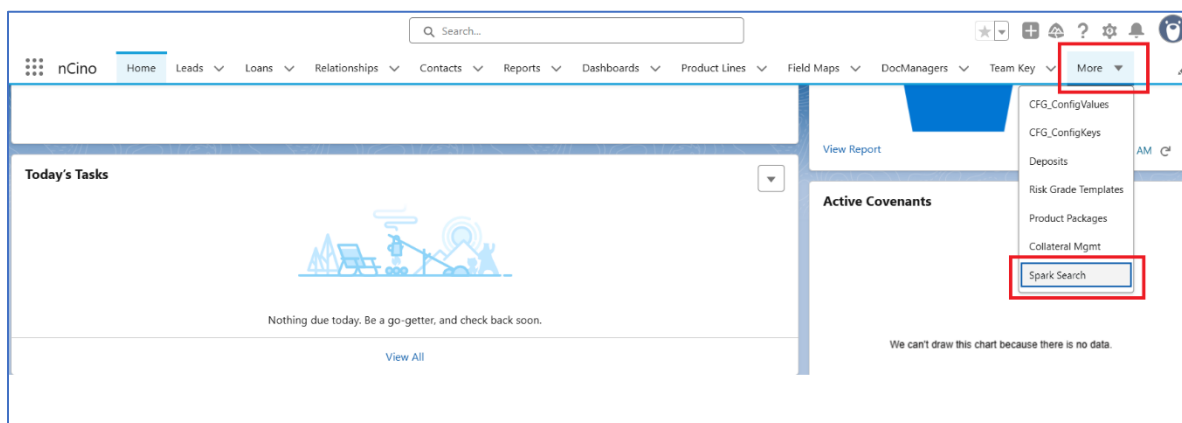


Figure 3 "Spark Search" tab in the More menu

- 4) You can now search for documents and placeholders.

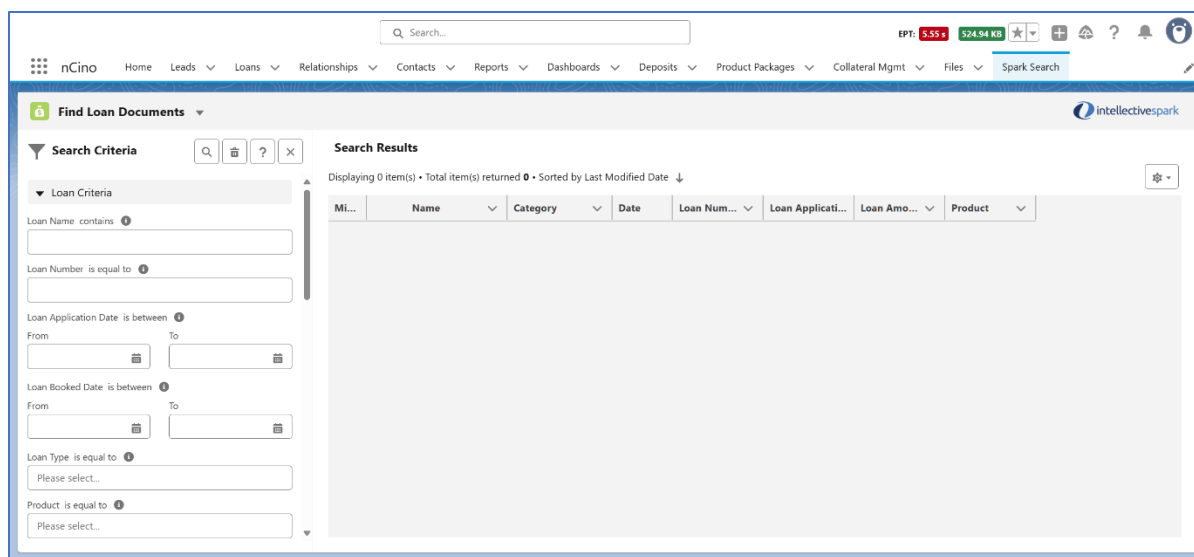


Figure 4 "Spark Search" tab

2.4 Adding the Split & Merge Button to Document Manager Pages

The Split & Merge button is part of the Spark Document Manager Toolbar. To add the toolbar to the nCino Document Manager, assign permissions and add the related Visualforce page to each record page as described below.

2.4.1 Assigning Permissions

The Spark Split & Merge permission set should be assigned to users who need access to this feature. To assign the permission set to a particular user:

- 1) Navigate to Setup > Users > Users.
- 2) Select the link in the Full Name column > Click on the Permission Set Assignments link > Edit Assignments > Transfer the Spark Split & Merge permission set to the right list and click Save.

Please note: if you don't see the permission set, please confirm first that the managed package has completed installation in your environment. It may take up to 30 minutes to complete.

- 3) Repeat the steps for other users who need access to this feature.

To assign the permission set to a list of users:

- 1) Navigate to Setup > Users > Permission Sets.
- 2) Find the Spark Split & Merge permission set and select the link in the Permission Set Name column.
- 3) Click on the Manage Assignments link.
- 4) Click Add Assignment.
- 5) Select the users you would like to assign it to.

- 6) Click Next.
- 7) Click Assign.
- 8) Click Done.

2.4.2 Adding the Spark Toolbar to Record Pages

Edit the Account, Loan, Collateral, Product Package record pages, and any custom Document Manager pages to include the Spark toolbar with the Split & Merge button.

- 1) In the Setup Quick Search, look for Lightning App Builder and open it.
- 2) Find the record page you would like to modify. Typical pages to add this toolbar to are:
 - a) Loan_Layout
 - b) Product_Package_Layout
 - c) Relationship_Layout
 - d) Collateral_Management_Layout
- 3) Click Edit to open the Lightning App Builder page.
- 4) Click on the Document Manager tab.
- 5) Drag and drop the Visualforce component from the Components panel to the Document Manager.

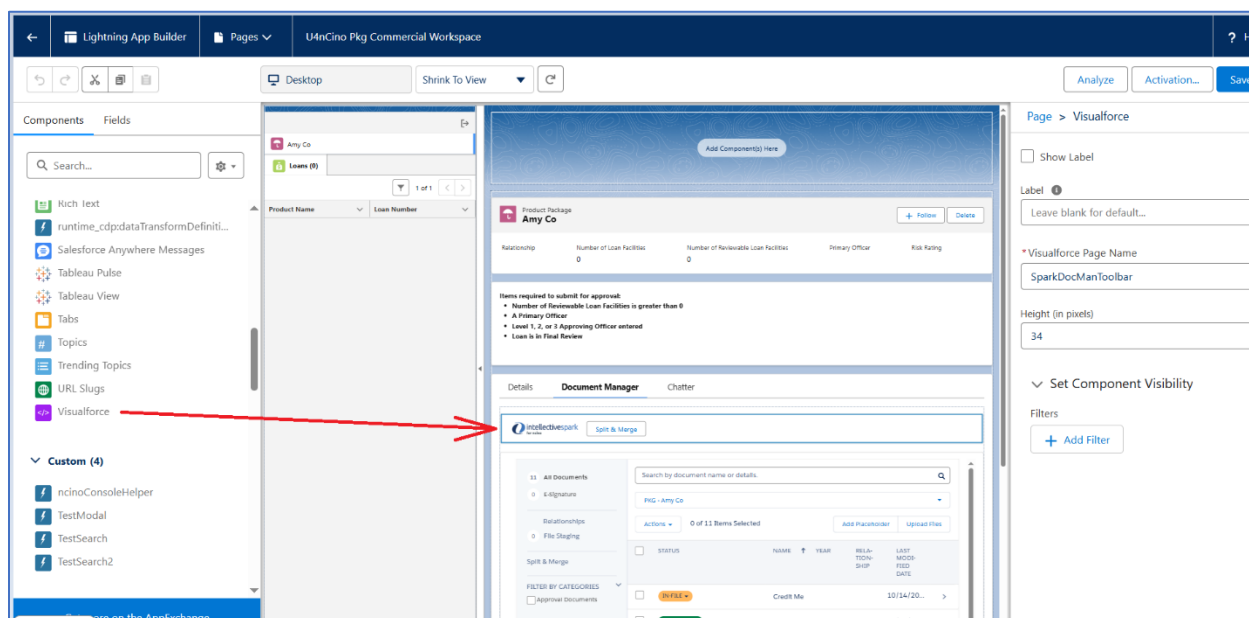


Figure 5 The Split & Merge toolbar in the Document Manager

- 6) Configure the Visualforce component in the right pane with these values:

Parameter	Value
Show Label	Deselected

Parameter	Value
Label	Empty
Visualforce Page Name	SparkDocManToolbar
Height	34

- 7) Click Save.
- 8) Repeat the steps for the desired Document Manager pages, such as Loan, Collateral, Product Package record pages, and custom pages.

Please note: this feature works together with nCino's Document Manager pages and cannot be added to other pages.

2.5 Upgrading Spark

To upgrade Spark to a later version, visit the Spark [Salesforce App Exchange listing](#), select "Get it Now", and follow the Salesforce package upgrade wizard instructions to complete the upgrade.

You do not need to repeat additional configuration steps beyond updating the package.

2.6 Uninstalling Spark

To uninstall Spark, complete the following steps:

- 1) Remove the Spark Search tab.
 - a) Select the nCino application from App Launcher and click on pencil icon in Navigation bar > Find Spark Search tab.
 - b) Remove it by clicking X > Save.
 - i) Alternatively, if the tab was added via App Manager: Open Setup > App Manager > Open context-menu for nCino application and click Edit > Open Navigation Items > Select Spark Search from Selected Items list and move it to Available Items list > Click Save.
- 2) Remove the Spark Toolbar from the Account, Loan, Collateral, Product Package and other pages it is located.
 - a) Open a record page.
 - b) Click Setup > Edit Page.
 - c) Select the Document Manager tab.
 - d) Select the Spark Toolbar.
 - e) Click Delete Visualforce Component (a basket icon in the top right corner of the component).
 - f) Click Save.
 - g) Repeat steps a)-f) for all record pages where the Spark Toolbar is located.
- 3) Remove users from the Permission Sets.

- a) Open Setup > Permission Sets.
 - b) Find the nCino Cross-DocMan Search and click on the permission link.
 - c) Click the Manage Assignments button.
 - d) Select all users and click the Remove Assignments button.
 - e) Confirm by clicking Remove.
 - f) Repeat steps b)-e) for Spark Split & Merge permission set.
- 4) Finally, uninstall the Intellective Spark package.
- a) Open Setup > Installed Packages.
 - b) Find the Intellective Spark package and click Uninstall link > confirm removal.

3 Administration

3.1 Security

Spark adheres to the standard Salesforce security models that form the underlying basis of nCino object and document security. Generally, no additional security configuration is needed for Spark to adhere to the current security used in your org, but we strongly encourage reviewing the material in this section, and testing in a sandbox to verify that Spark Search meets your security needs. For details about how Salesforce handles security around objects, please refer to the baseline Salesforce security documentation: [Salesforce Security Guide](#)

Salesforce has three security levels that the Spark UI utilizes to show or hide information for users based on their permissions:

- **Object Level Security** - users may be restricted from accessing the entire table (object).
 - If a crucial table, such as the Loan Documents table for Loan Documents Search, is not visible to the user, the entire search will not open.
 - If a linked table is used in additional criteria, only that section will be excluded from the search.
- **Field Level Security** - users may be able to view a table but have restricted access to certain columns (fields). Specifically, Spark requires READ access to access fields.
 - If a user does not have READ access to the field, the search results grid will either display an empty value or omit the column.
 - If a user does not have READ access to the field used in criteria, the criteria involving this field will not be visible to the user.
- **Record Level Security (Sharing)** - users can view or interact with records they own or those shared with them.

Ensure that user access is appropriately restricted in accordance with Salesforce security protocols. For instance, if users lack permission to view a specific tab but have permission to access the records within it, they will still be able to view those records without opening the tab.

Spark uses the security elements described above when determining whether a user is allowed or not allowed to access placeholders and documents. nCino may provide additional layers of security or tools that customers may use or may customize to apply specific security behavior to their system. If you have customized nCino to create certain security behavior or have a complex security model and would like to verify if Spark Search natively supports it, please contact Intellective Customer Support at sparksupport@intellective.com.

3.2 Activate/Deactivate User Action Triggers

The Standard Salesforce Preview player is used for View action on Spark's Spark Search tab. Except for preview capability the player supports extra actions that should not be actively used for nCino documents:

- Upload New Version
- Delete

Administrators may optionally choose to apply an additional layer of security to prevent users from selecting these actions by applying the triggers described in this section. While this is not mandatory, it may optionally be used to ensure users do not apply the above actions to nCino-related documents.

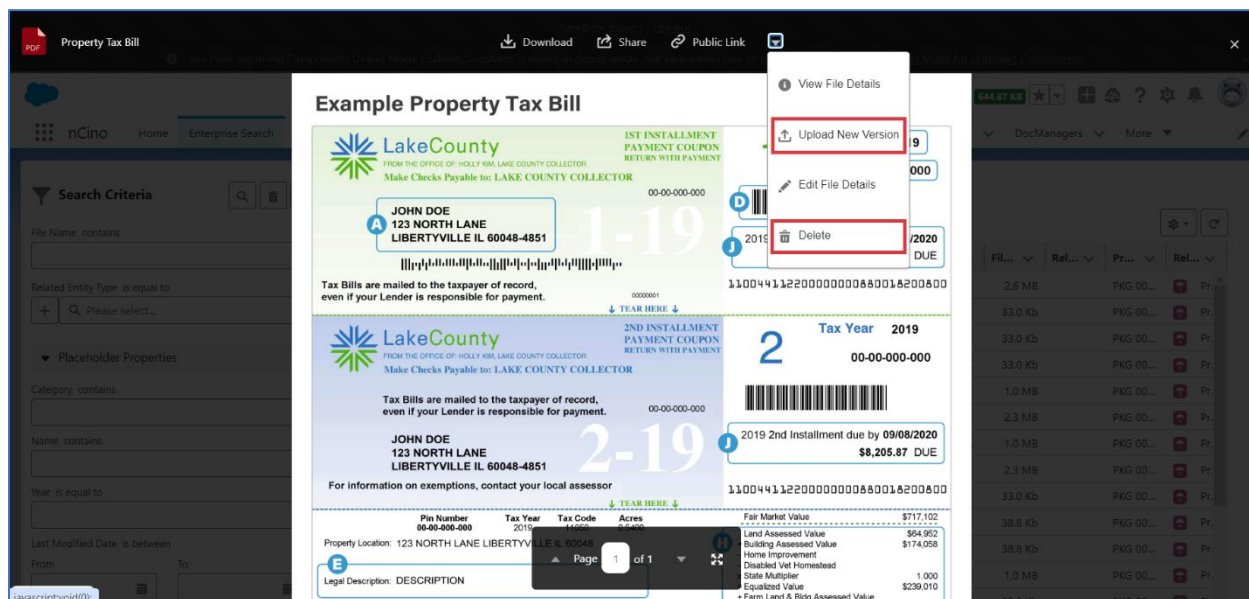


Figure 6 Actions menu

The Spark package provides several triggers that prevent users from interacting with these actions. The triggers are activated by default. If you would like to deactivate them (for example, if you do not want to apply this layer of security or encounter issues with using it), please complete the following steps:

- 1) Open Setup > Translation Language Settings. Enable Translation Workbench if it's disabled.
- 2) Open Setup > Custom Labels.
- 3) If Intellective Spark view is already created select it from View dropdown. Otherwise, use instruction below to create the View.
 - a) Click Create New View link and fill in the form:

Property	Value
View Name	Intellective Spark
View Unique Name	Intellective_Spark
Filter By Additional Fields	Field: Namespace Prefix, Operator: equals, Value: Intel_Spark

- b) In "Step 4. Restrict Visibility", choose the preferred option, e.g. Visible to all users, and click Save.
- 4) Click Spark_Triggers_Activated link.
- 5) Click New Local Translations / Overrides.
- 6) Select Language and set Translation Text to false:

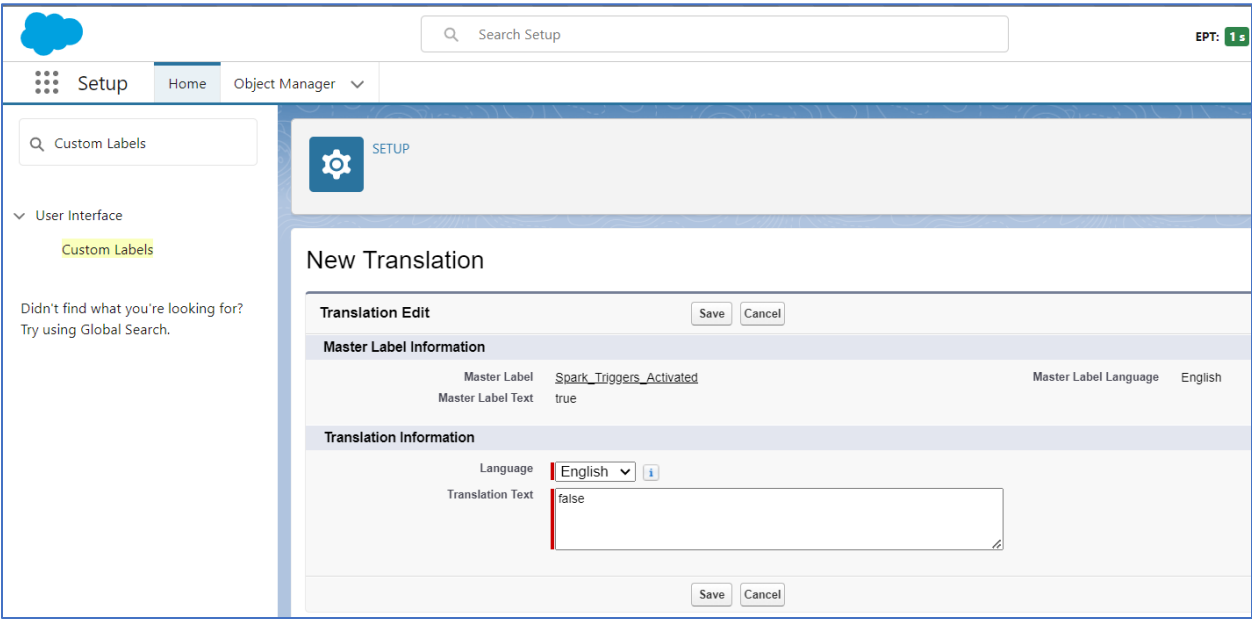


Figure 7 Deactivating triggers

- 7) Click Save.