IBISWorld Call Prep Insights for Salesforce

Installation and configuration guide

Version: 4.3
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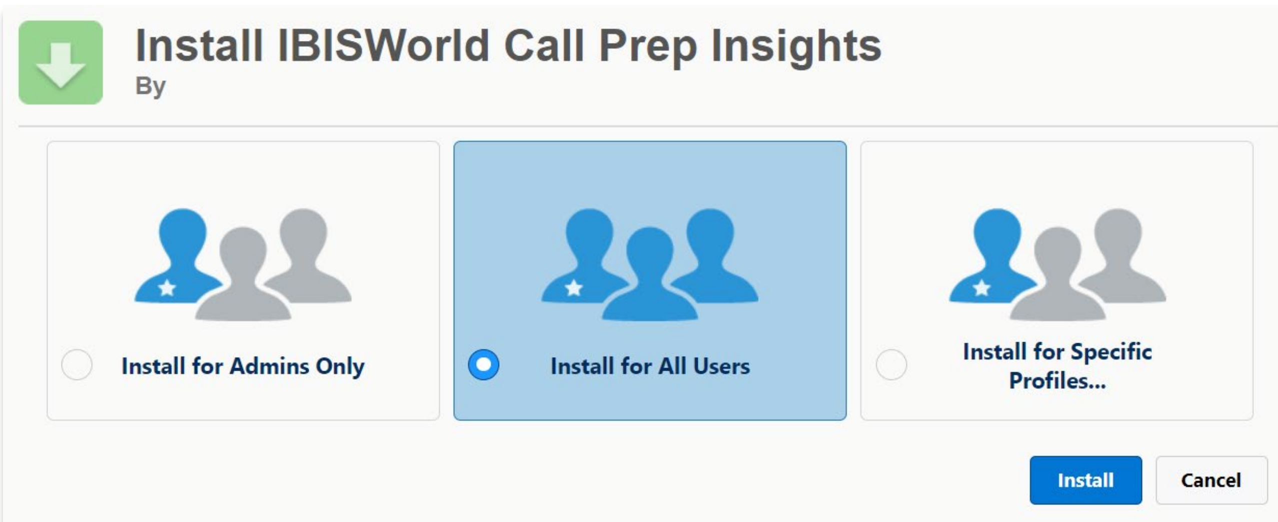
Contents

Installation

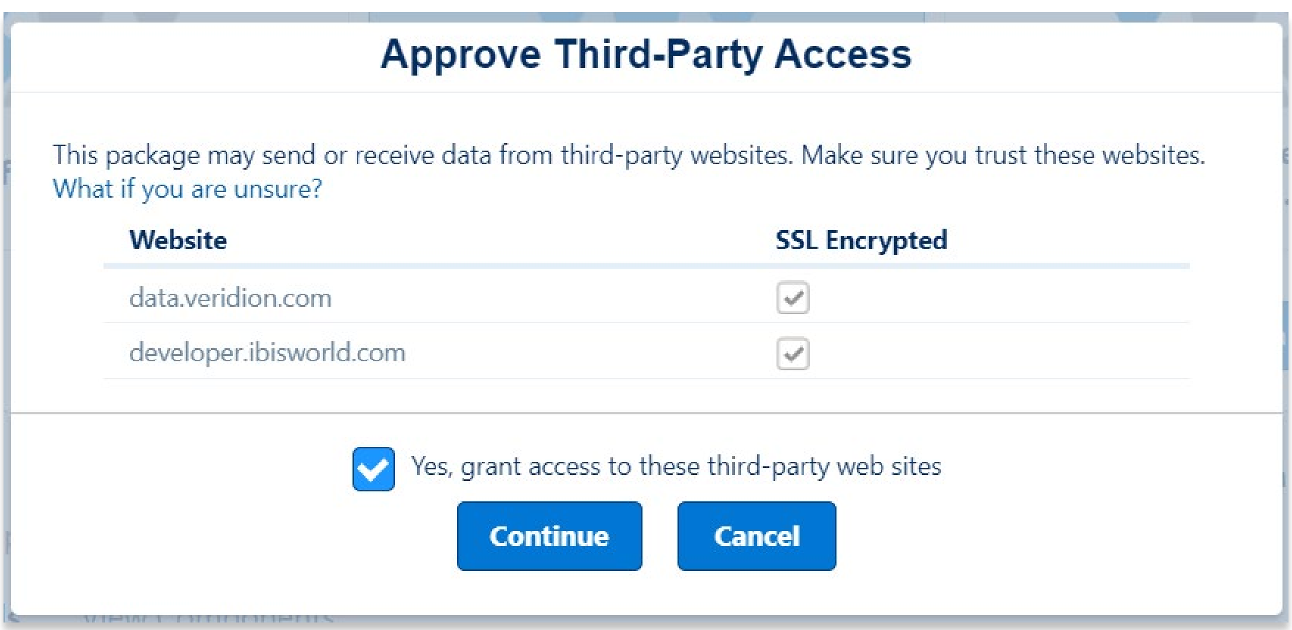
A. Download the package from the Salesforce AppExchange

1. Speak with your IBISWorld Representative to obtain links to download the app to your Production and Sandbox environments.

2. Select users to receive the download and click ‘Install.’

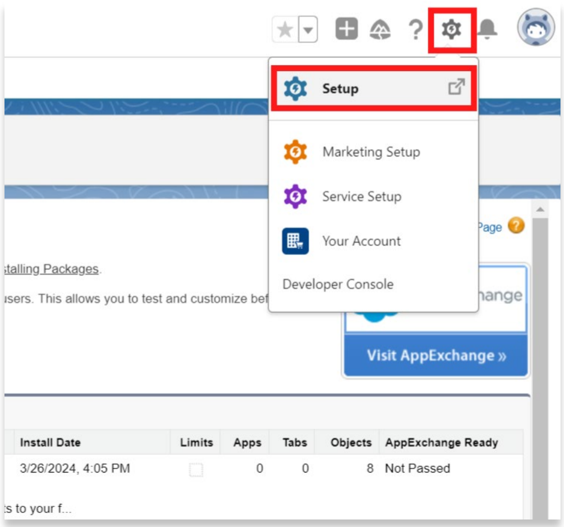


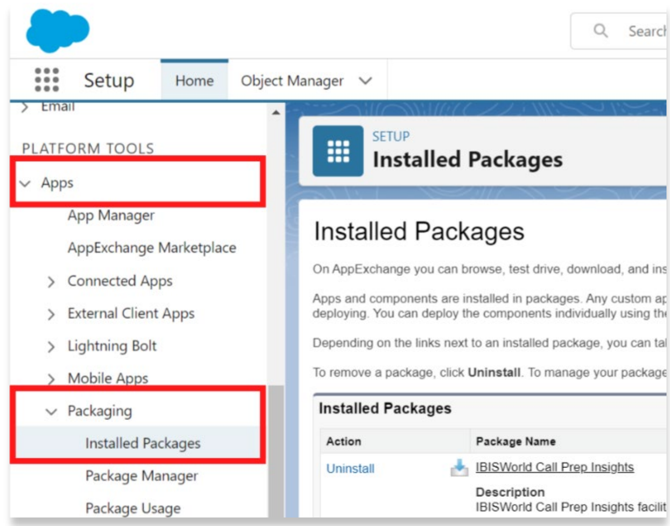
3. Grant access to third-party sites.



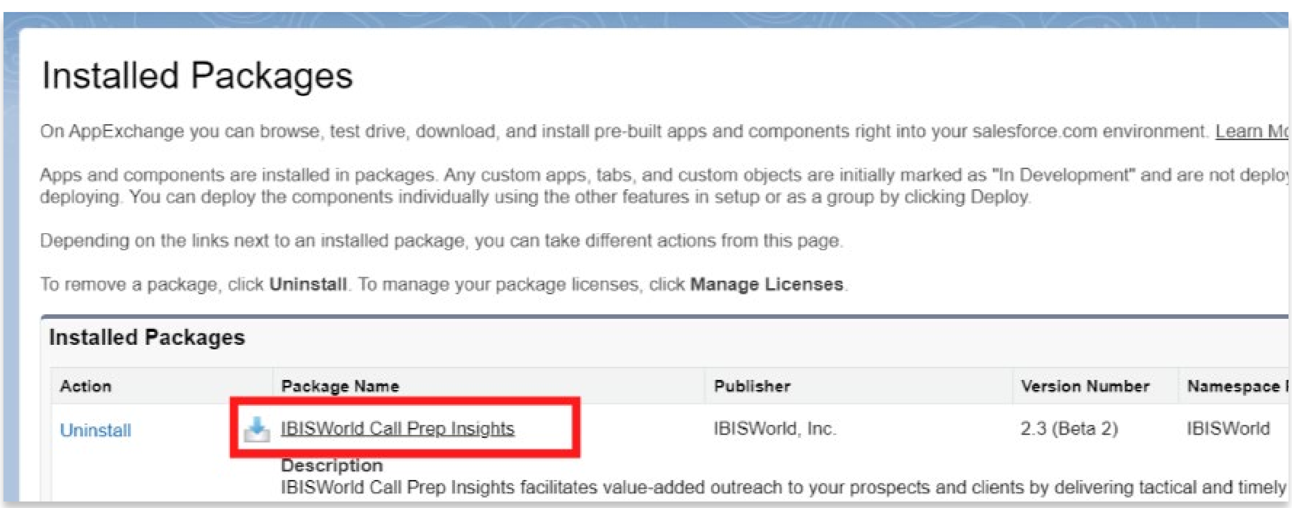
B. Enter IBISWorld credentials

1. In the Salesforce Org you downloaded Call Prep Insights into, navigate to ‘Setup,’ then to ‘Installed Packages.’

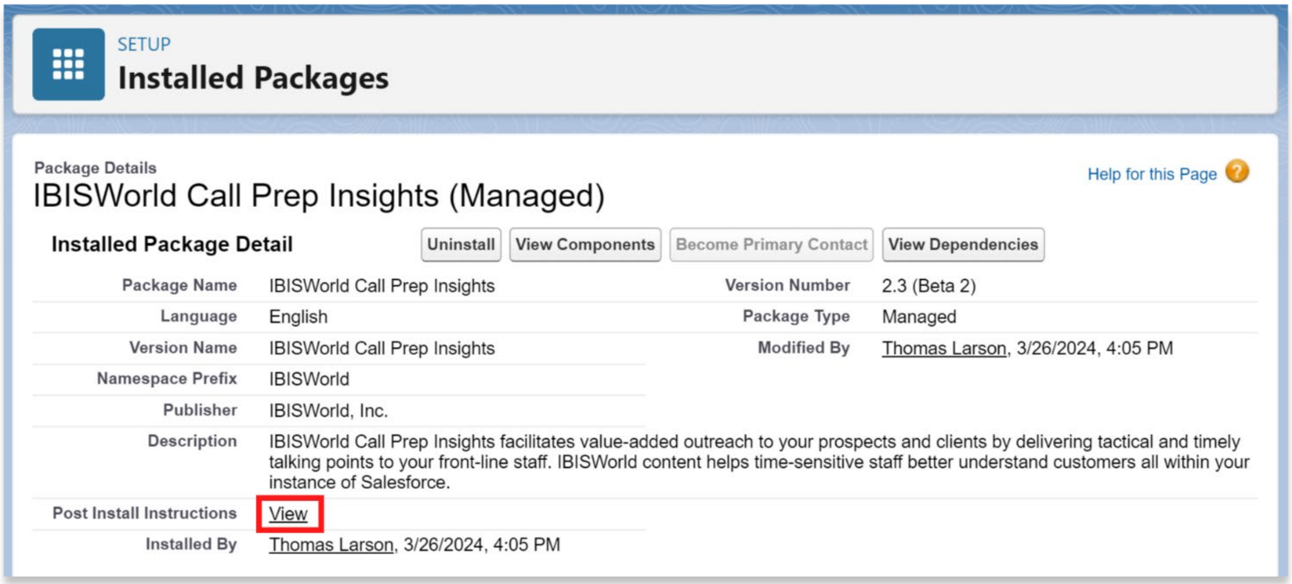




2. Select IBISWorld Call Prep Insights from the list of installed packages.



3. From the Package Details, click 'View' under Post Install Instructions.

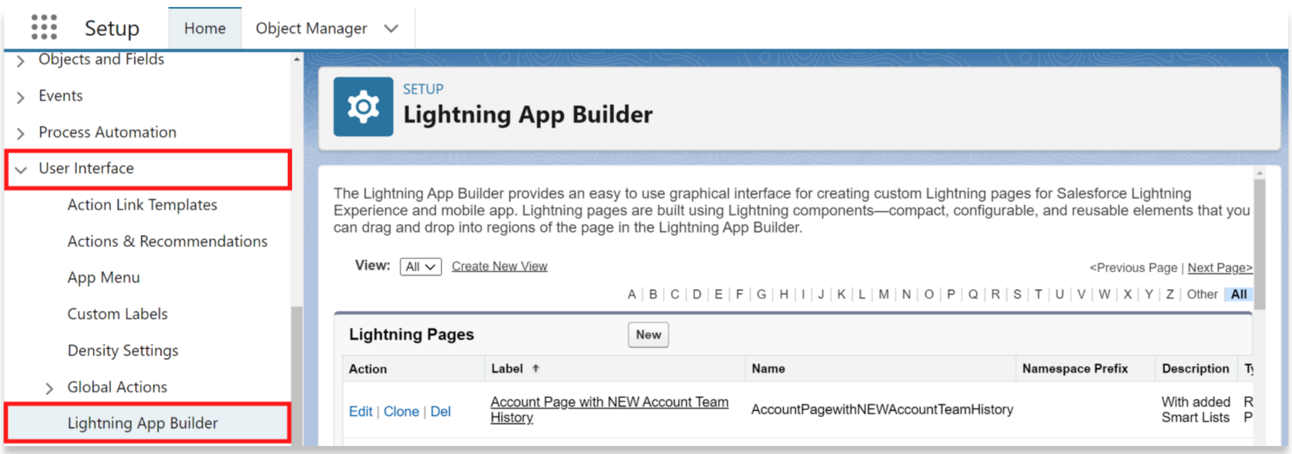


4. Enter IBISWorld credentials provided by your Client Relationship Manager and click 'Save.'

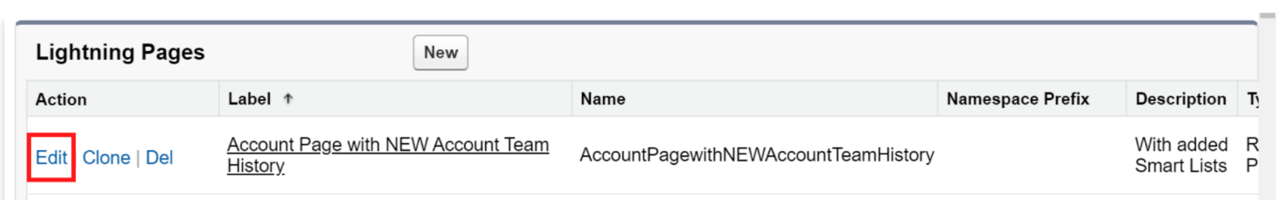
C. Add IBISWorld Lightning Component to Account Page Layout

These instructions will first be used to set up Call Prep Insights on the Account. Call Prep Insights is also compatible with the Lead and Opportunity objects. The same steps can be taken to configure Leads and Opportunities if required.

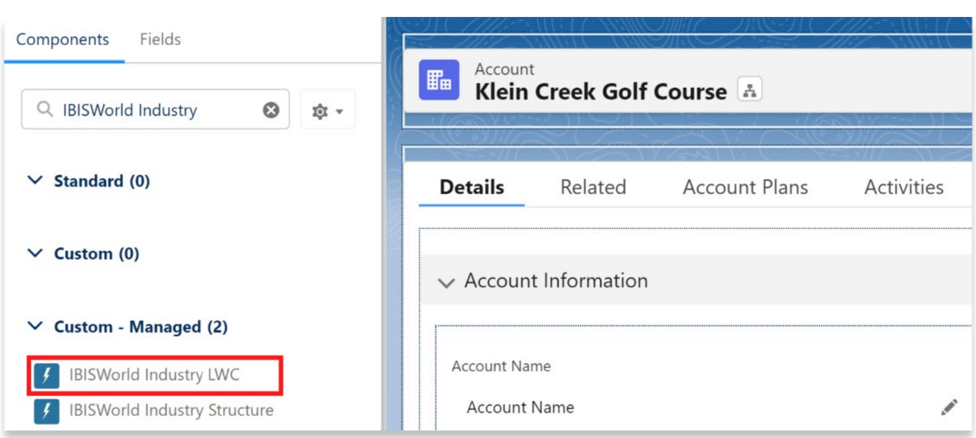
1. From Setup, navigate to 'User Interface,' then 'Lightning App Builder.'



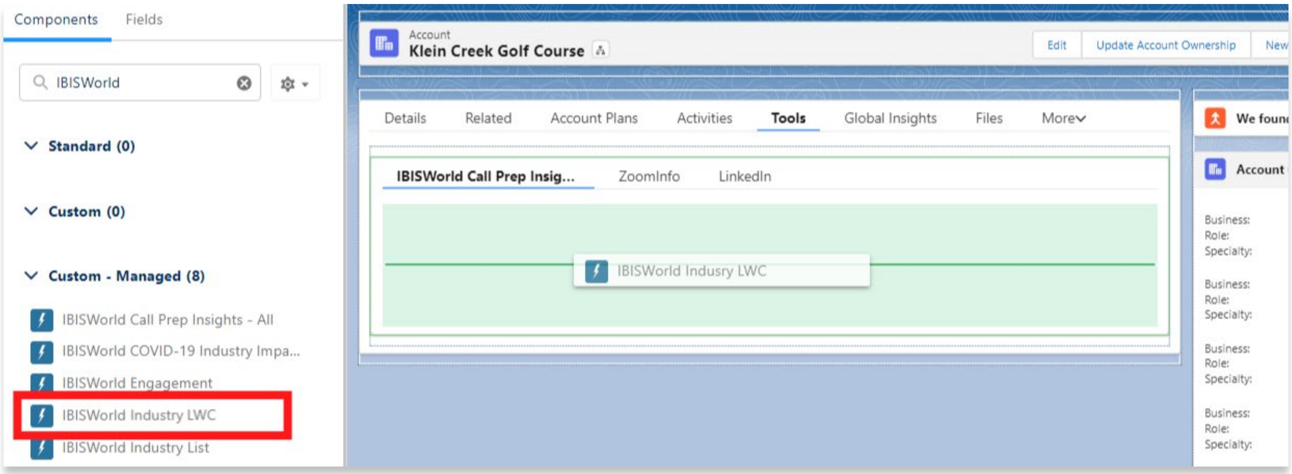
2. Locate the Account Lightning Page that you want to add Call Prep Insights to and click 'Edit.'



3. On the Lightning Page, search for and "IBISWorld Industry LWC" (under Custom - Managed).



4. Drag and drop the IBISWorld Lightning Component wherever desired within the page.



5. Add any necessary component visibility to ensure the app appears for the right Users or User Groups.

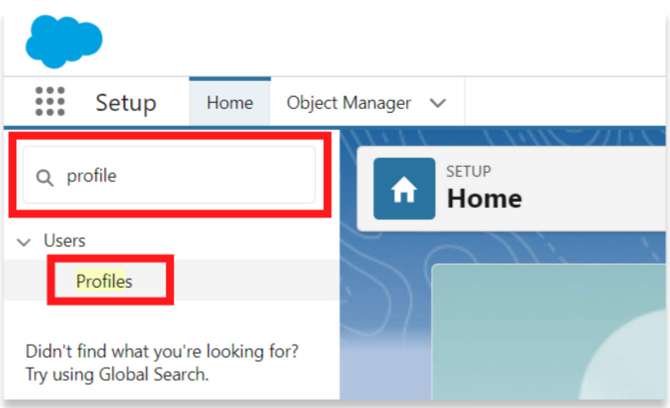
6. Click ‘Save.’

D. Give users access to IBISWorld App

Option 1

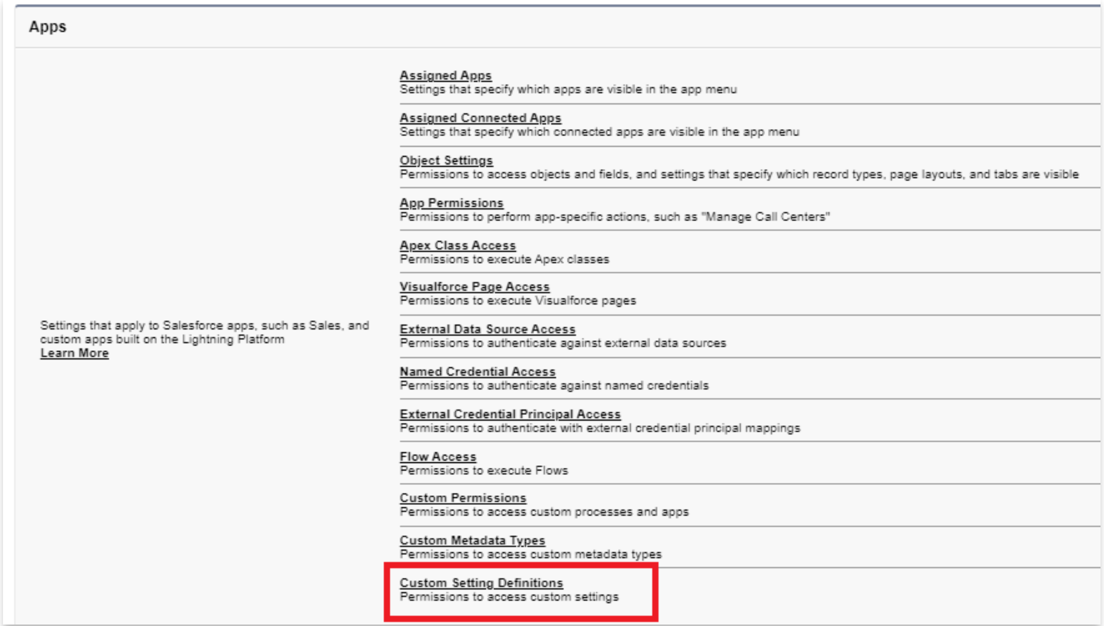
If you want to give all users with a specific profile access, enable the Apps Custom Settings on the Profile.

1. From Setup, type and select ‘Profiles’ in Quick Find.



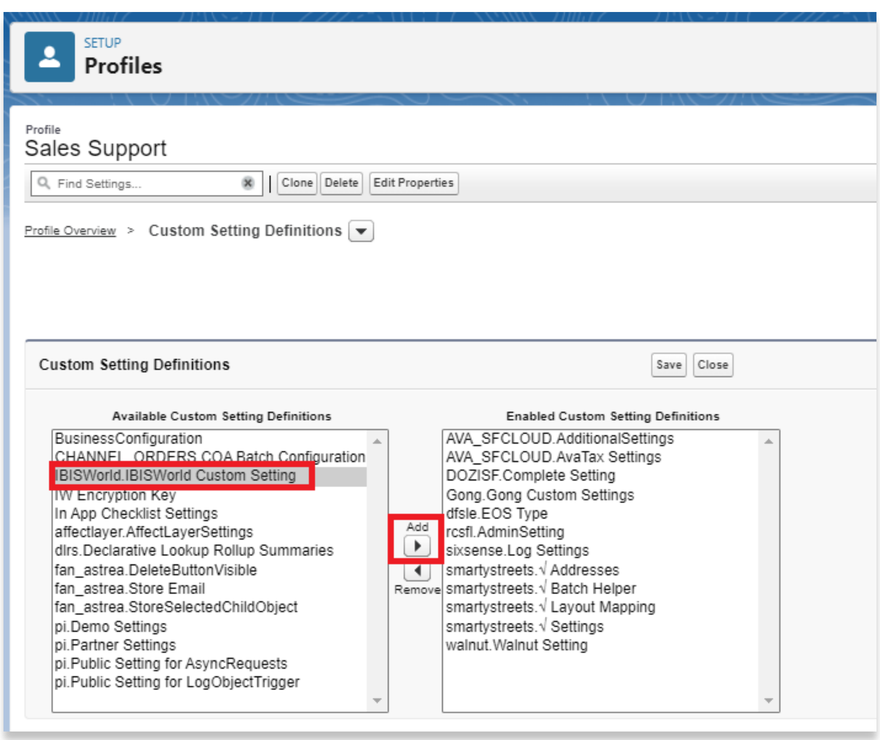
2. Select the Profile you want to give the App access to.

3. Click 'Custom Setting Definitions.'



4. Click 'Edit.'

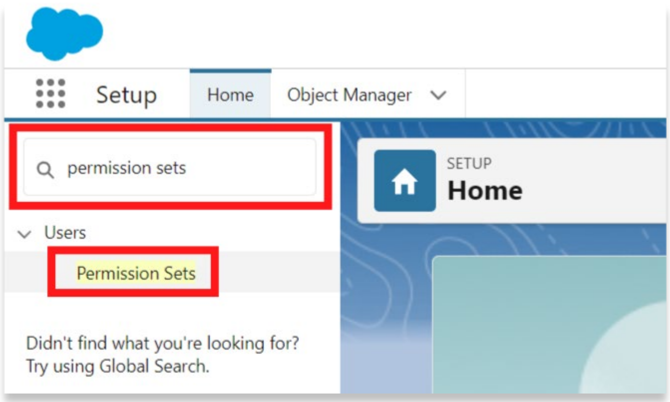
5. Select 'IBISWorld.IBISWorld Custom Settings' in the Available Custom Settings Definition column and click 'Add' to move it to the Enabled Custom Settings Definitions column.



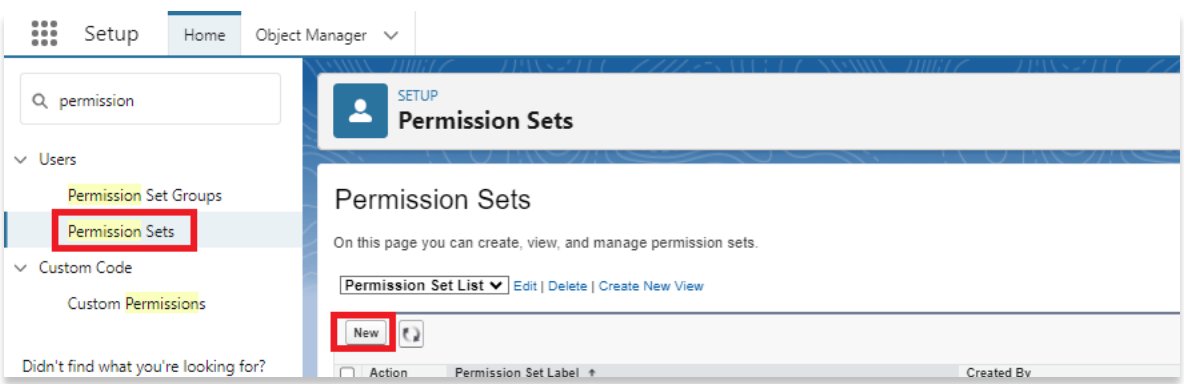
6. Click 'Save.'

Option 2

If you want to give only select users access to the App, create a permission set and assign the users' access.

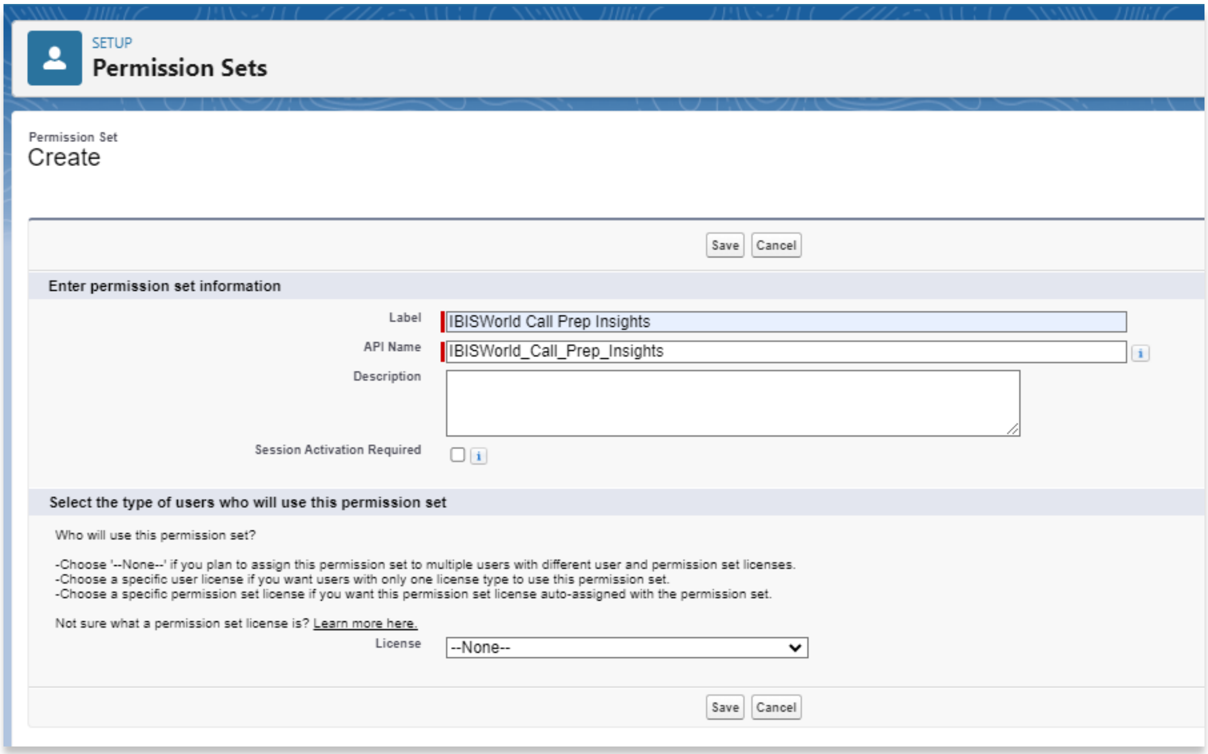


1. From Setup, type and select 'Permission Sets' in Quick Find.



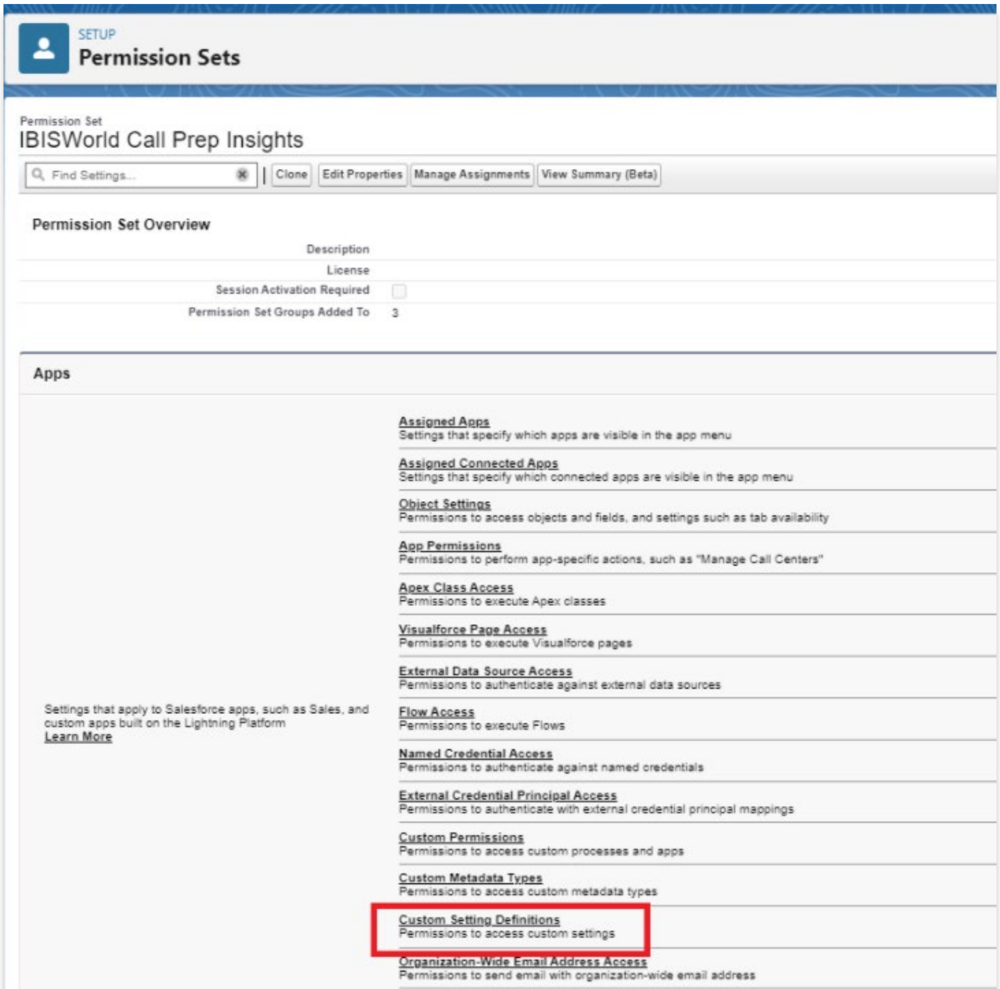
2. Click 'New.'

3. Complete the required fields.



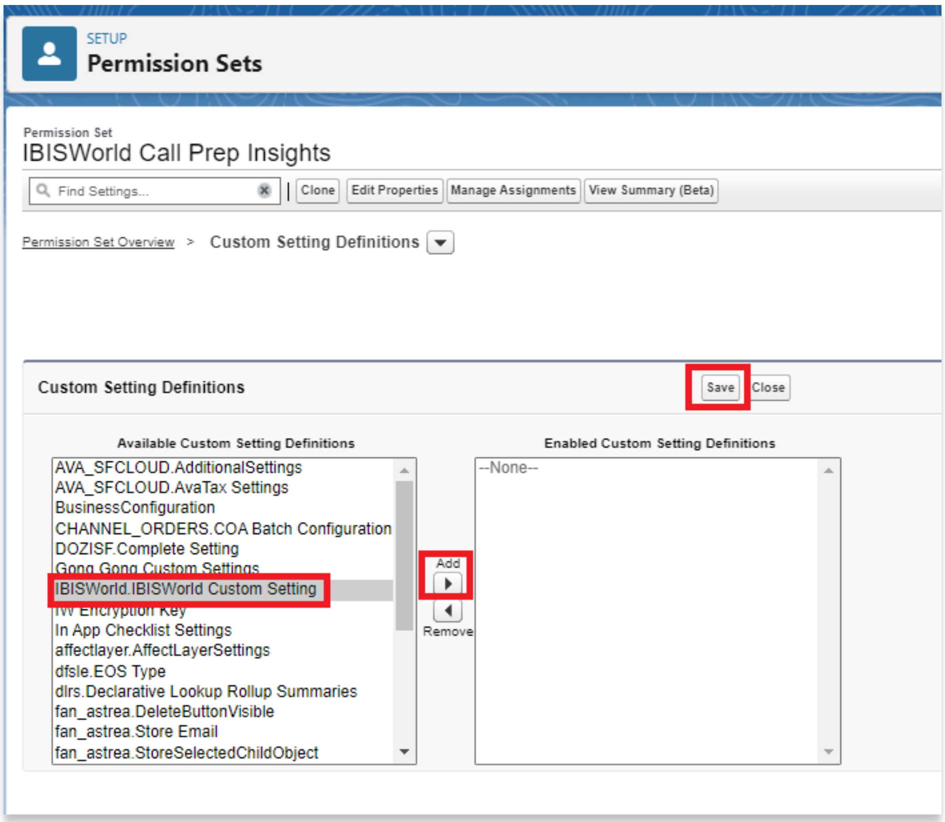
4. Save the permission set.

5. To update the App settings, click on 'Custom Setting Definitions.'



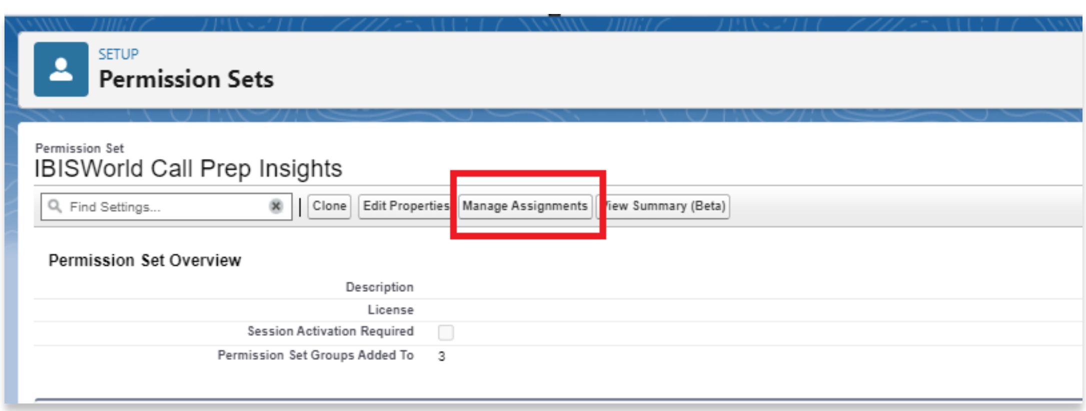
6. Click 'Edit.'

7. Select 'IBISWorld.IBISWorld Custom Settings' in the Available Custom Settings Definition column and click 'Add' to move it to the Enabled Custom Settings Definitions column.

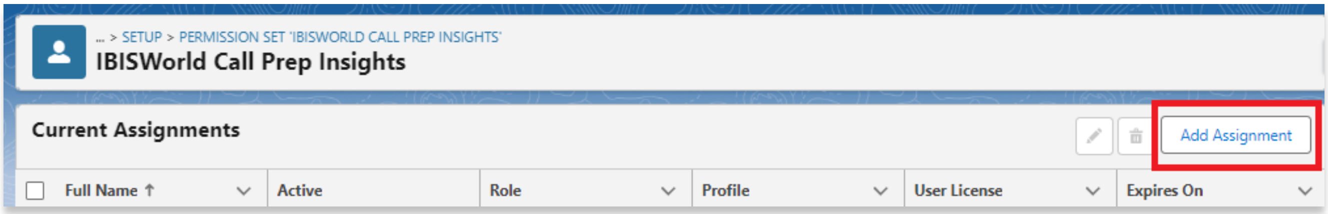


8. Click 'Save.'

9. To add users to the Permission Set, click 'Manage Assignments.'



10. Select 'Add Assignment.'



11. Select the Users you want to give App access to, then click 'Next.'
12. Click 'Assign.'
13. Click 'Done.'

Mapping

E. Automatically Map Industries to an Account within Call Prep Insights

These instructions will first be used to set up Call Prep Insights on the Account. Call Prep Insights is also compatible with the Lead and Opportunity objects. The same steps can be taken to configure Leads and Opportunities if required.

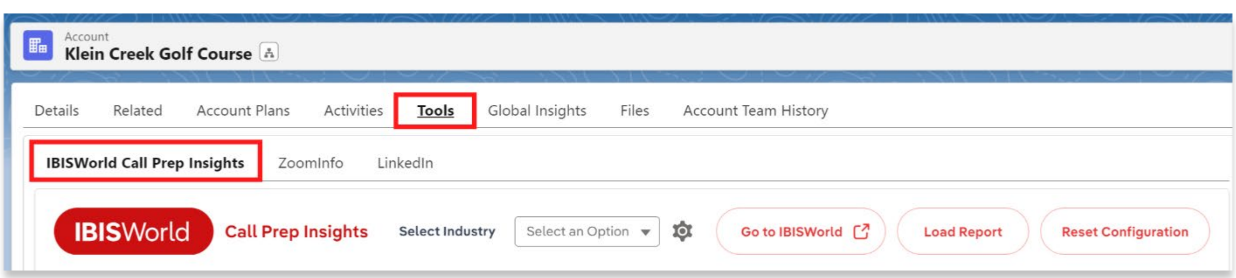
Confirm whether your Org has an existing field that corresponds to any of the below industry classification codes:

- NAICS 2022 - USA
- NAICS 2022 - CAN
- NACE 2008
- ANZSIC 2006
- ISIC Rev. 4
- UK-SIC 2007
- WZ 2008

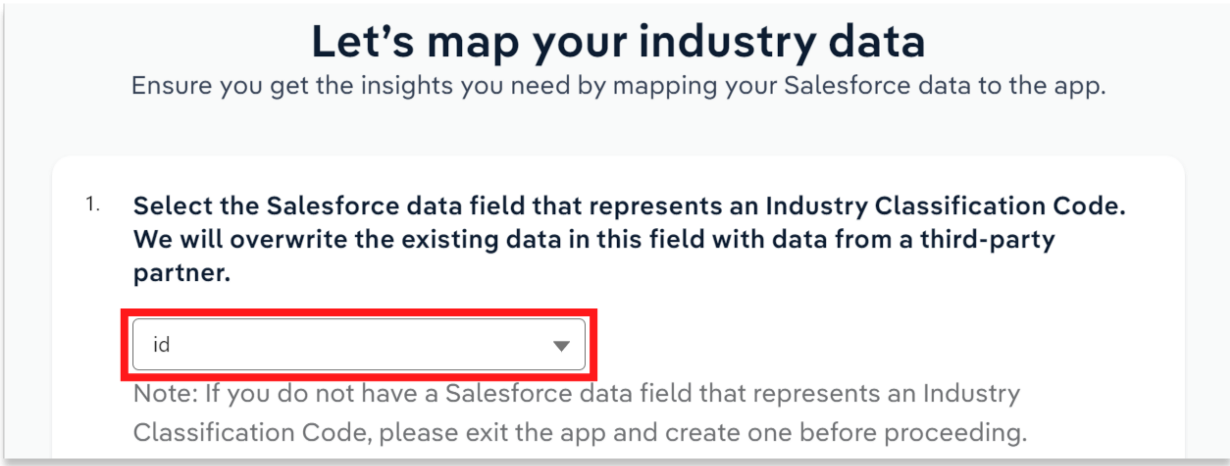
Important note: If you have an existing Industry Classification Code field, Call Prep Insights will **overwrite any existing data** with the industry code we identify for the company. **If you do not wish to overwrite this data, please create a new field**.

F. Map Industry Code Account Field to Call Prep Insights to pre-populate industries.

1. Navigate to any Account that has the Call Prep Insights Lightning Component visible.

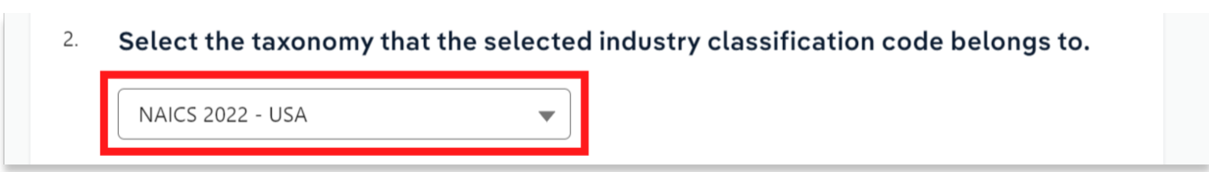


2. Using the dropdown, select the field that will populate with the Industry Classification Code.

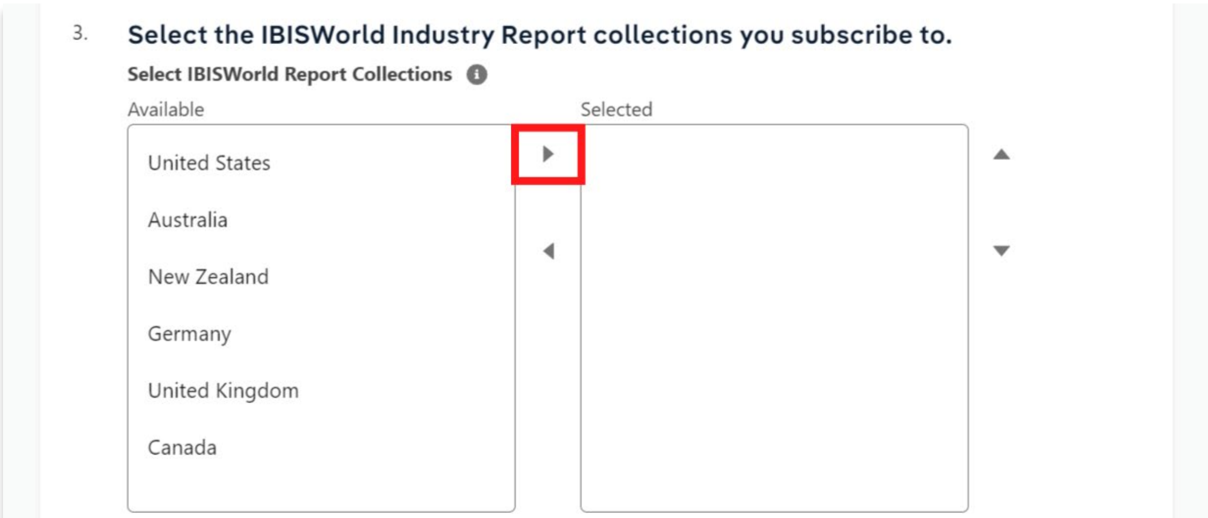


3. Select the industry classification system that this field will populate with from the following options:

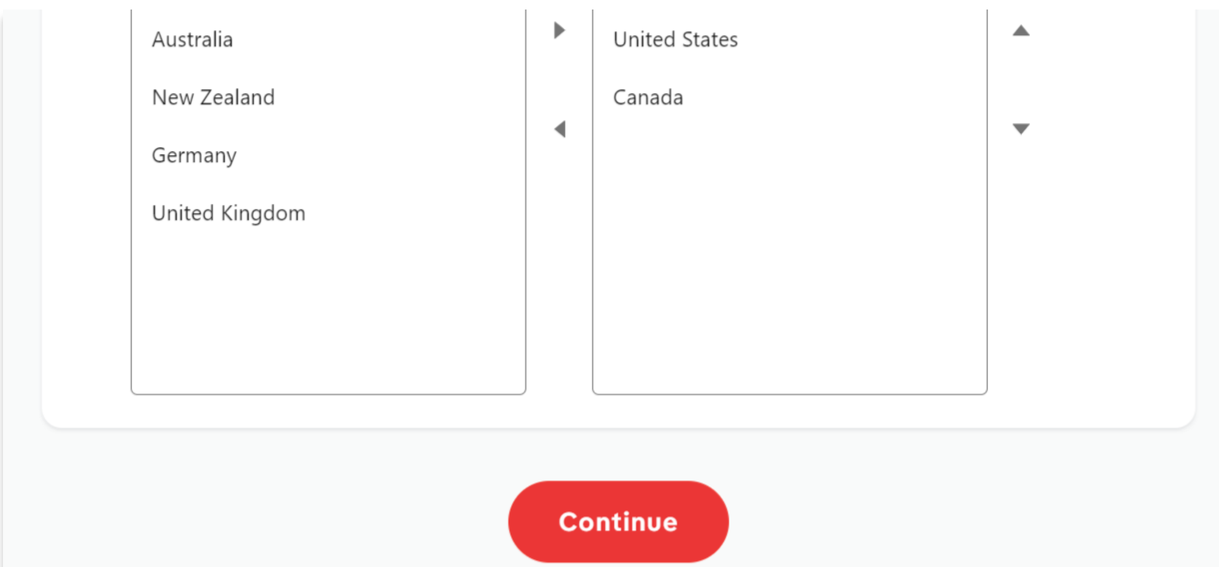
   - NAICS 2022 - USA
   - NAICS 2022 - CAN
   - NACE 2008
   - ANZSIC 2006
   - ISIC Rev. 4
   - UK-SIC 2007
   - WZ 2008



4. Select the IBISWorld report collections you subscribe to and add them using the arrow. Your Client Relationship Manager can provide the subscription details of your license.

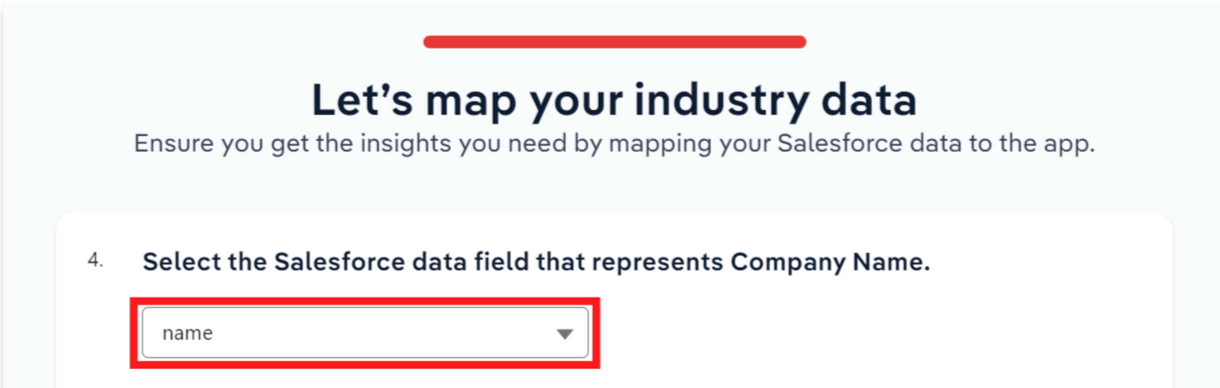


5. Click 'Continue.'



G. Map existing Account fields to Call Prep Insights

1. From the dropdown, select the field Account Name, or any custom field you populate with Company Name.



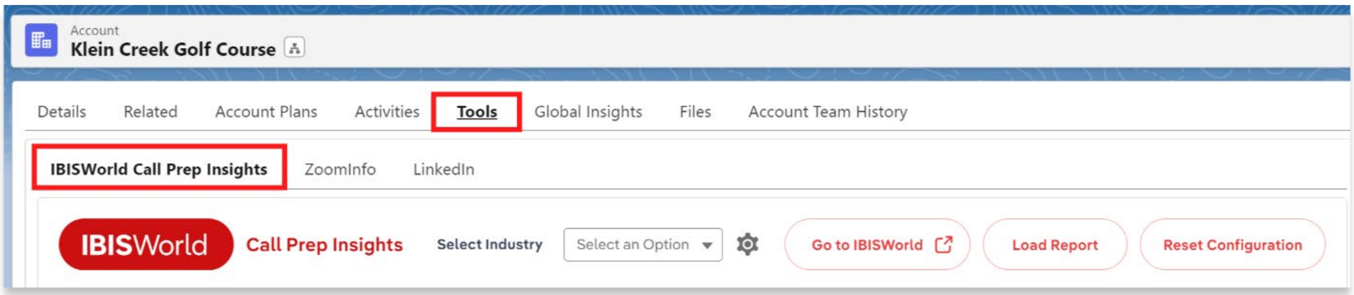
2. Optional: For more accurate results, also map the Website field, or any custom field you populate with the company's URL.

3. Optional: For more accurate results, also map the field where you store the company's headquarters country.

4. Click 'Continue.'

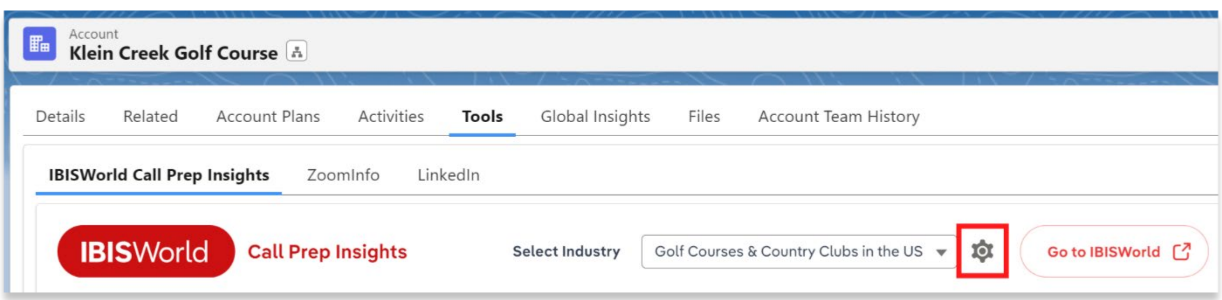
H. Navigate to an Account

Navigate to Call Prep Insights on any of the Lightning Record Pages you added the app to. When navigating to the app, Call Prep Insights reads the values in the data fields an administrator has configured. These values are passed to a third-party API, which returns the relevant industry classification codes to Call Prep Insights. These industry codes dictate the IBISWorld industry data the user views.



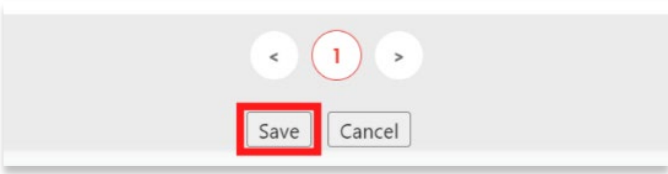
I. Edit or reset mapping configuration in Account

1. Click on the gear icon to enter Report Management settings.

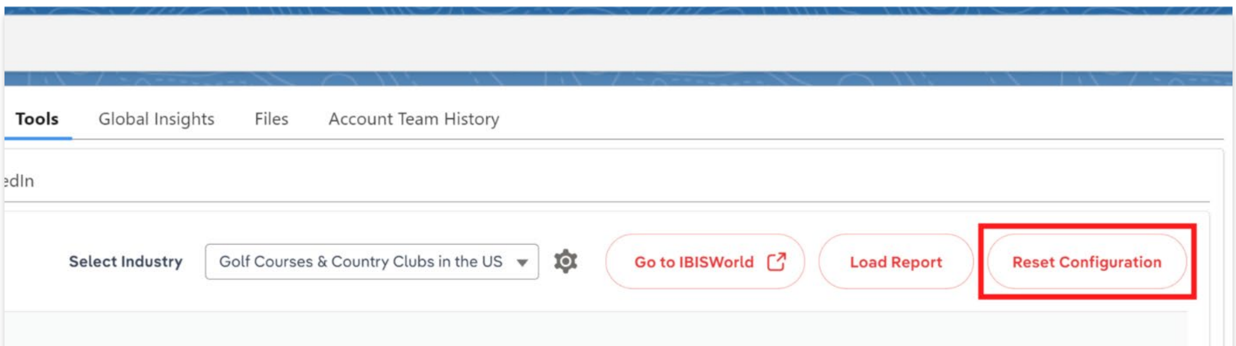


2. In the Operating Industries section, use the top garbage can icon to remove all mapped industries, or use the icons in the table to remove industries individually.

3. Click ‘Save.’



4. Click ‘Reset Configuration’ at the top of the app window.



5. Refresh the browser window.

6. Repeat steps in the Mapping chapter to reconfigure the mapping functionality.

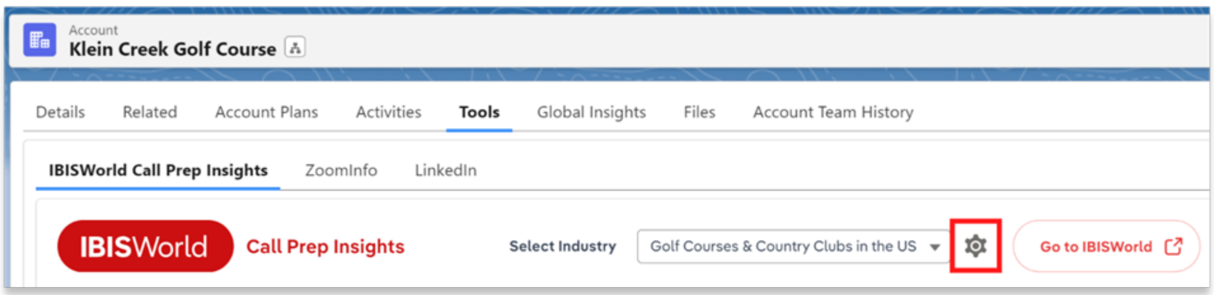
Personalization

J. Personalize what sections appear within an Account

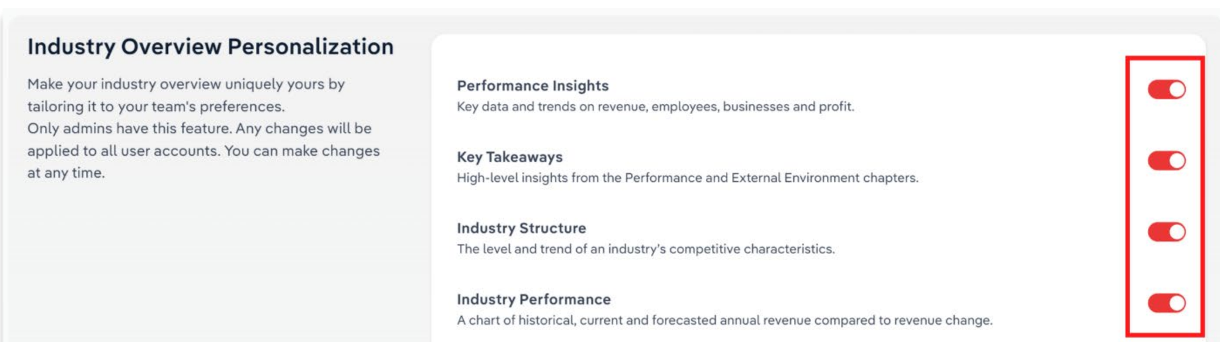
These instructions will first be used to set up Call Prep Insights on the Account. Call Prep Insights is also compatible with the Lead and Opportunity objects. The same steps can be taken to configure Leads and Opportunities if required.

To build your company's personalized Overview tab:

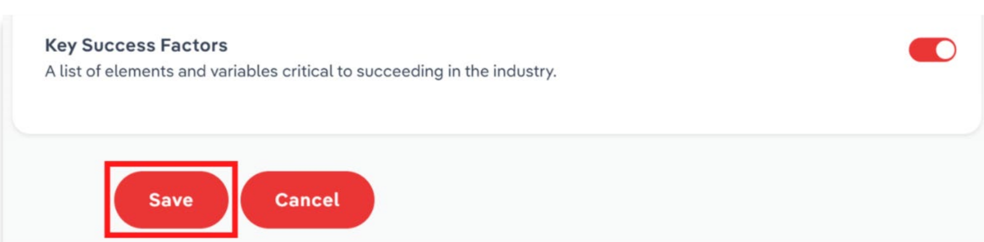
1. Navigate to Call Prep Insights.
2. Select the gear icon at the top of the app to navigate to Report Management.



3. Toggle on or off the sections you would like to appear within Call Prep Insights.



4. Click 'Save.'

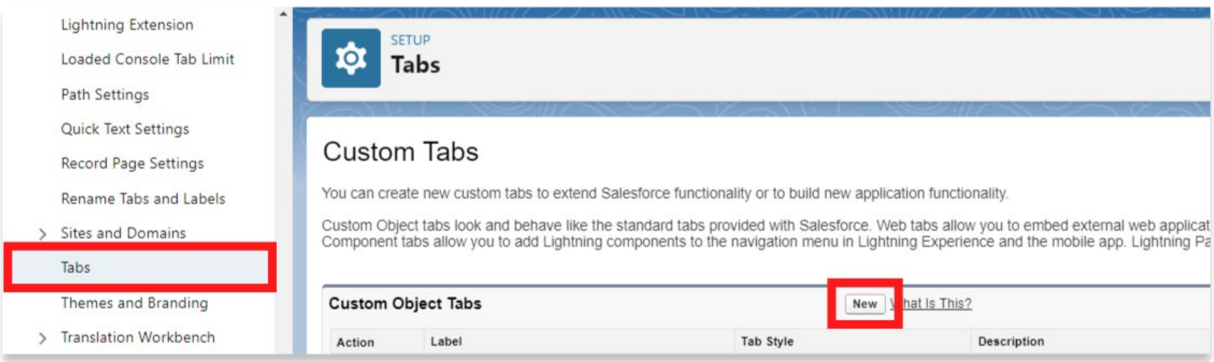


Save to Salesforce Configuration

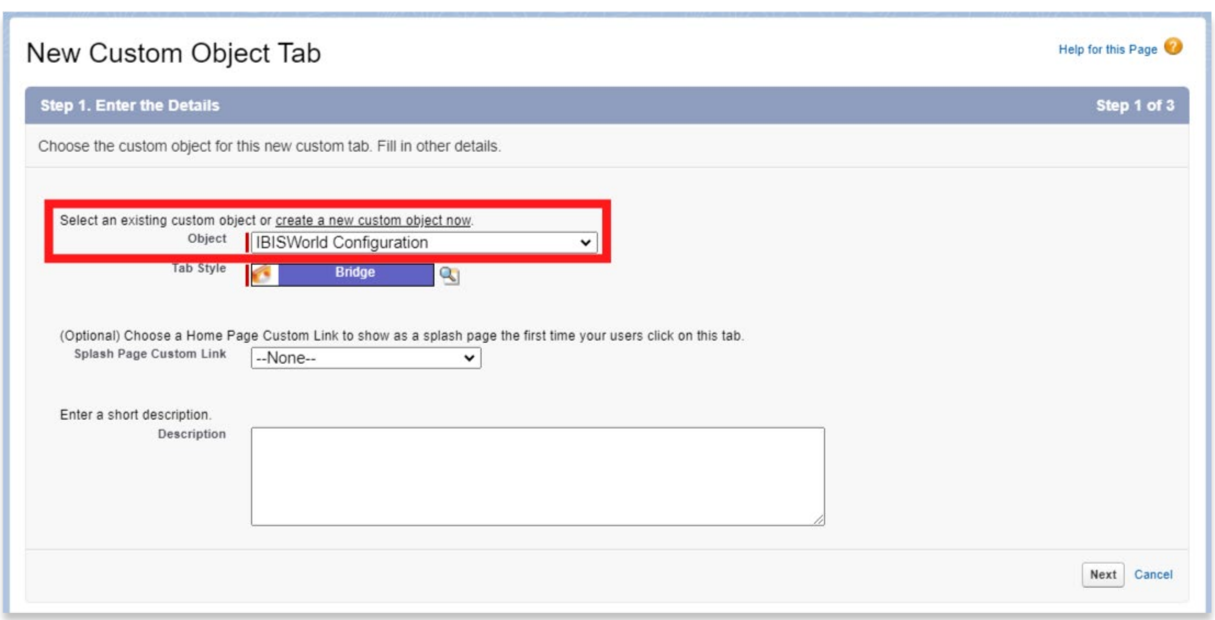
These instructions will first be used to set up this feature on the Account object. Call Prep Insights is also compatible with the Lead and Opportunity objects. The same steps can be taken to configure Leads and Opportunities if required.

K. Add IBISWorld Configuration to Tabs

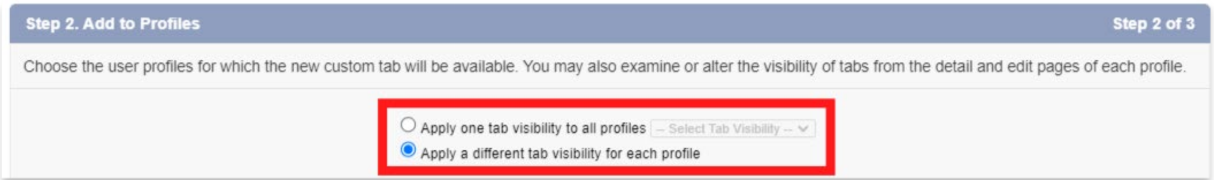
1. In 'Setup,' click 'Tabs' (under Platform Tools > User Interface)
2. Click 'New' to create a new Custom Object Tab.



3. Select IBISWorld Configuration from the dropdown list in the Object field, complete other fields as required and click 'Next.'



4. Choose the profiles that should have access to the Configuration tab. We recommend only giving administrators access.

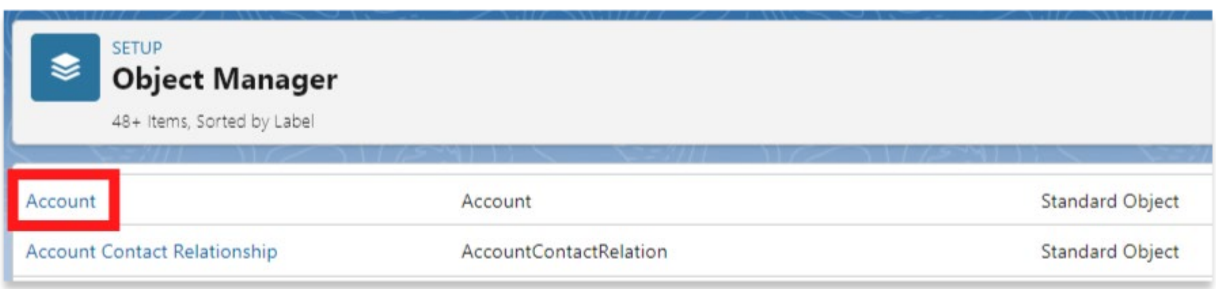


5. Choose which application to add the Custom object tab to, then click 'Save.'

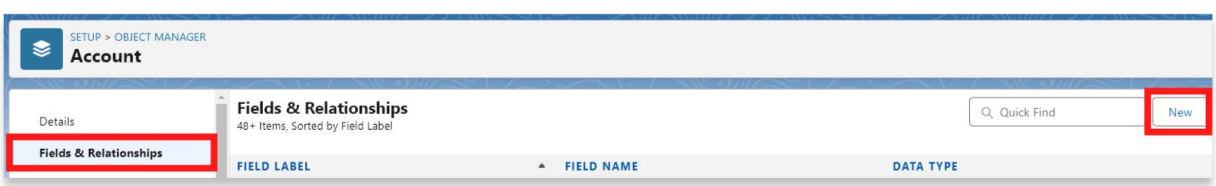
L. Create ReportFetchDate custom field

Two IBISWorld Configuration records need to be added for every Salesforce object you plan to store data within. The two configurations are the ReportFetchDate and the ReportTitle. Without these configurations, the information note beside the Load Report button will not be populated with the report metadata and would show None otherwise.

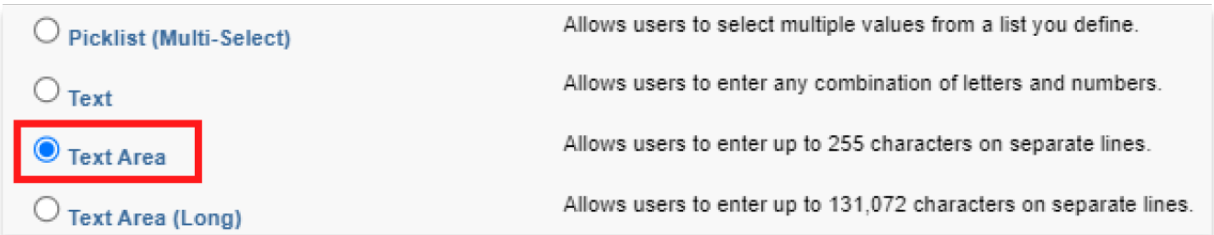
1. In 'Setup,' click 'Object Manager' (under Platform Tools > Objects and Fields). Choose the Salesforce object to save IBISWorld data to.



2. Go to 'Fields & Relationships' and click 'New' to create a new field.



3. Set the Data Type as Text Area, then click 'Next.'



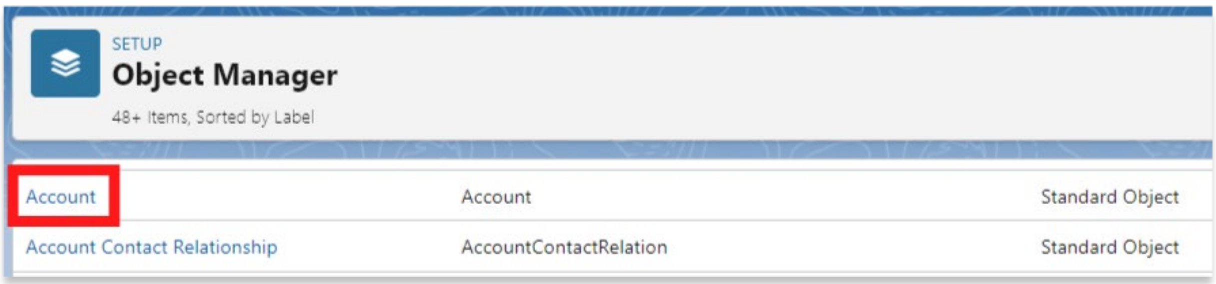
4. Set the Field Label and Field Name to ReportFetchDate

5. Establish the Field Level Security as Visible, then click 'Next.'
6. Leave checked any page layouts you want this field to appear in.
7. Click 'Save & New' to add the IBISWorld Custom Report Title field, or 'Save' when you're finished.

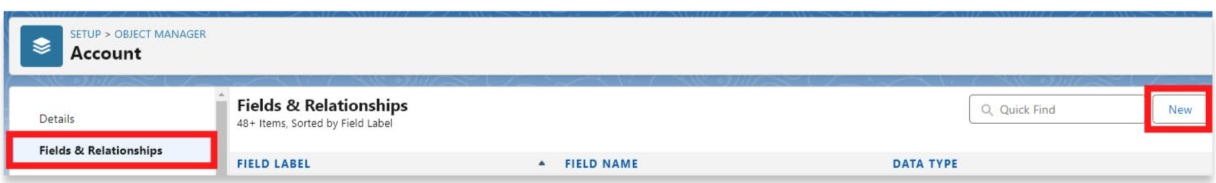
M. Create ReportTitle custom field

Two IBISWorld Configuration records need to be added for every Salesforce object you plan to store data within. The two configurations are the ReportFetchDate and the ReportTitle. Without these configurations, the information note beside the Load Report button will not be populated with the report metadata and would show None otherwise.

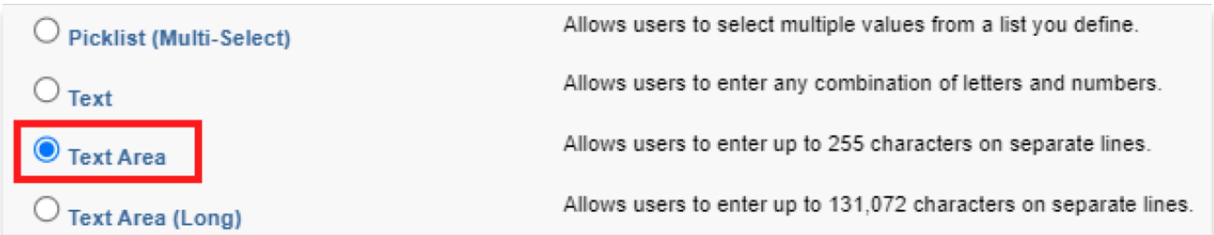
1. In ‘Setup,’ click ‘Object Manager’ (under Platform Tools > Objects and Fields). Choose the Salesforce object to save IBISWorld data to.



2. Go to ‘Fields & Relationships’ and click ‘New’ to create a new field.



3. Set the Data Type as Text Area, then click ‘Next.’

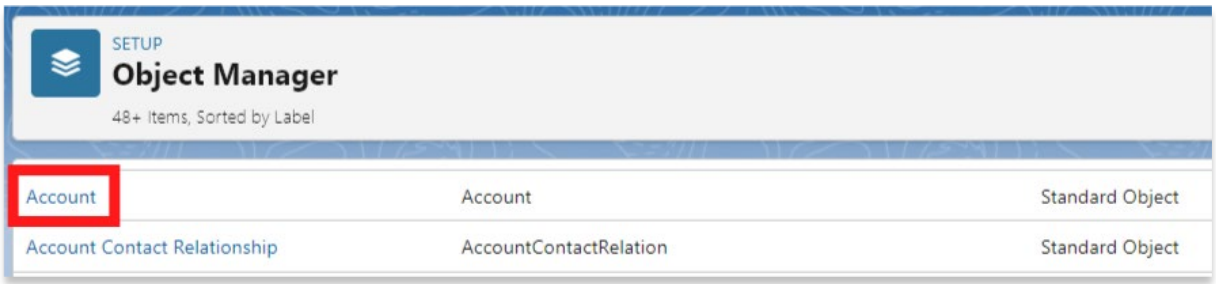


4. Set the Field Label and Field Name to ReportTitle

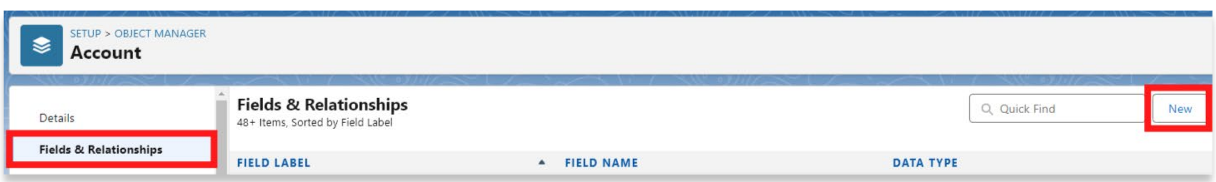
5. Establish the Field Level Security as Visible, then click ‘Next.’
6. Leave checked any page layouts you want this field to appear in.
7. Click ‘Save & New’ to add the IBISWorld Custom Report Title field, or ‘Save’ when you’re finished.

N. Add additional fields to the object to save IBISWorld data

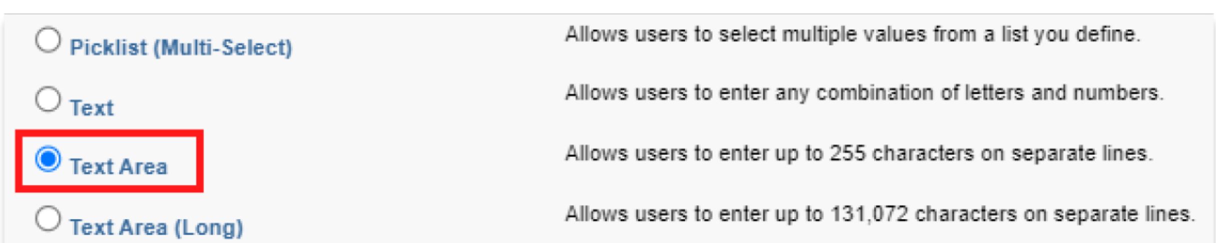
1. Use the table at the end of this document to identify the data points you're interested in saving to Salesforce.
2. In 'Setup,' click 'Object Manager' (under Platform Tools > Objects and Fields). Choose the Salesforce object to save IBISWorld data to.



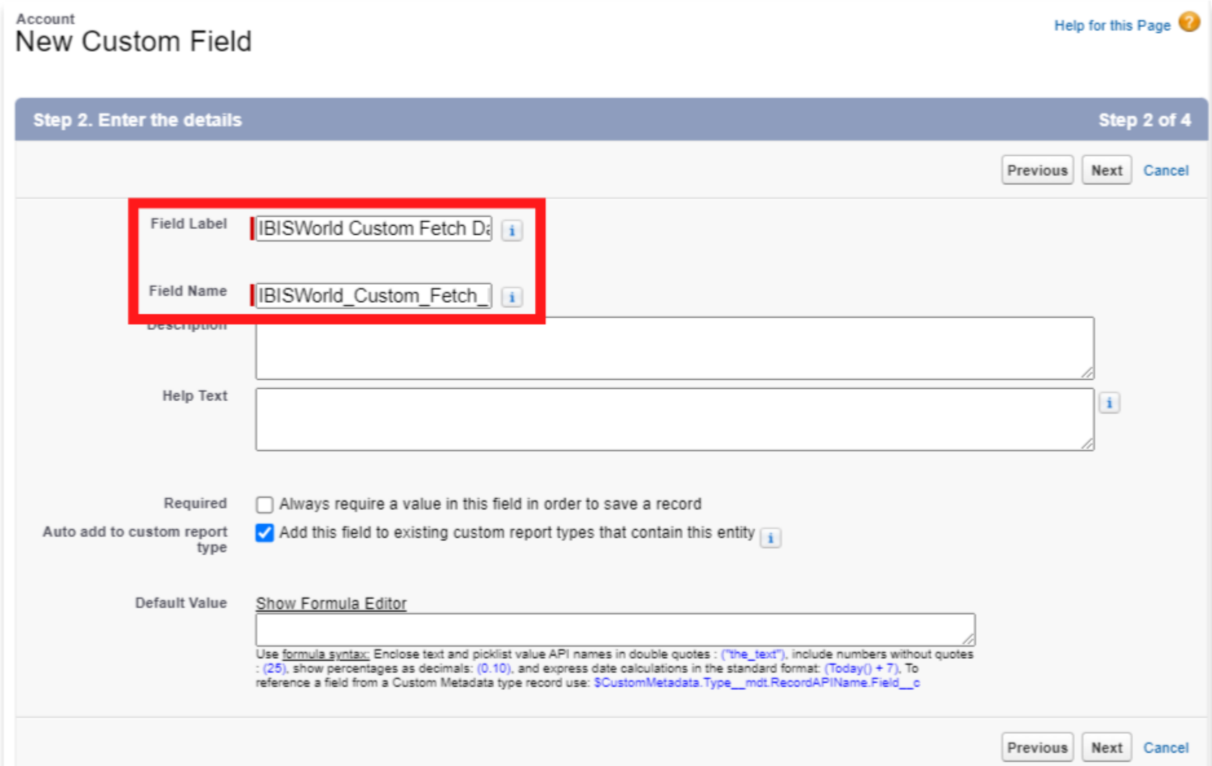
3. Go to 'Fields & Relationships' and click 'New' to create a new field.



4. Use the table below to identify the data points you're interested in saving to Salesforce. The second column contains the configuration key necessary to link the field to the IBISWorld configuration.
5. Set the Data Type according to the corresponding value in Data Type in the table below, then click 'Next.'



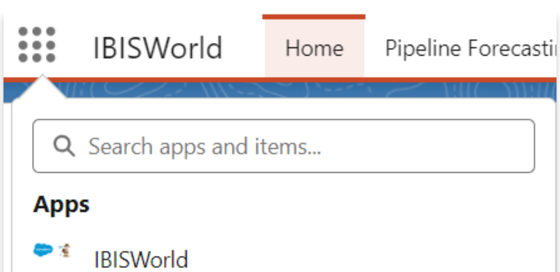
6. Set the Field Label and Field Name (we recommend using IBISWorld + [Data Point]).



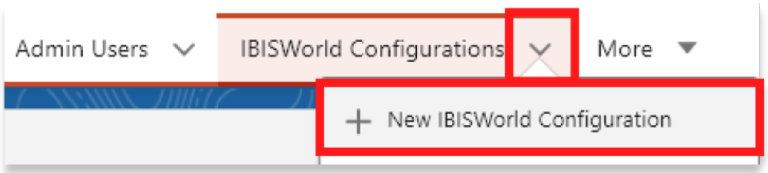
7. Establish the Field Level Security as Visible, then click 'Next.'
8. Leave checked any page layouts you want this field to appear in.
9. Click 'Save & New' to add more fields, or 'Save' when you're finished.

O. Add required fields and additional fields to IBISWorld Configuration

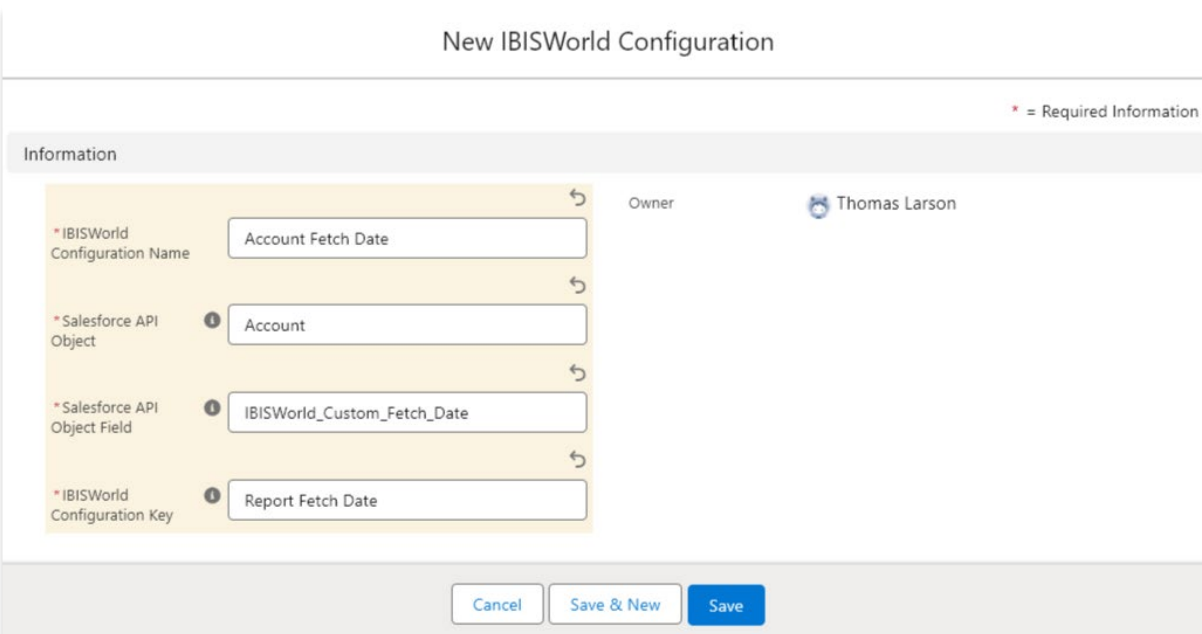
1. Using the 9-dot icon in the upper left, navigate to your Salesforce service.



2. Click the down arrow on the ‘IBISWorld Configurations’ tab that you just created (it may be under ‘More’) and select ‘New IBISWorld Configuration.’



3. Fill in all fields of the IBISWorld Configuration object (example on page 18). Details about the fields are below, or hover over the information icon in Salesforce for more context.



- **IBISWorld Configuration Name**: The name of the new record. We recommend the format [SalesforceObjectName] [Salesforce target field]. In this example, the Object name we want to store data against is Account, and the target field is Fetch Date.
- **Salesforce API Object**: The targeted Salesforce Object. In this case it’s the Account object. This needs to be the API Name of the object
- **Salesforce API Object Field**: The API Name of the custom field for this data.
- **IBISWorld Configuration Key**: The key of the IBISWorld data to be stored in this field.
    - When mapping the report date, use the IBISWorld Configuration Key: ReportFetchDate

- When mapping the report title, use IBISWorld Configuration Key: ReportTitle
- For all other fields, consult the column 2 in the below table for the IBISWorld Configuration Key.

4. Save the Configuration.

Data Point	IBISWorld Configuration Key	Data Type
Debt Service Coverage Ratio	DebtServiceCoverageRatio	Number (length=17, decimals= 1)
Net Cash After Operations	NetCashAfterOperations	Number (length=17, decimals= 1)
Current Ratio	CurrentRatio	Number (length=17, decimals= 1)
Days Payable	DaysPayable	Number (length=17, decimals= 1)
Days Receivable	DaysReceivables	Number (length=17, decimals= 1)
Industry Revenue	IndustryRevenue	Number (length=17, decimals= 1)
Annualized Historical Industry Revenue Growth Rate	IndustryRevenueHistoricalCAGR	Number (length=17, decimals= 1)
Annualized Forecasted Industry Revenue Growth Rate	IndustryRevenueForecastCAGR	Number (length=17, decimals= 1)
Number of Employees	Employees	Number (length=17, decimals= 1)
Annualized Historical Number of Employees Growth Rate	EmployeesHistoricalCAGR	Number (length=17, decimals= 1)
Annualized Forecasted Number of Employees Growth Rate	EmployeesForecastCAGR	Number (length=17, decimals= 1)
Number of Businesses	Businesses	Number (length=17, decimals= 1)

Annualized Historical Number of Businesses Growth Rate	BusinessHistoricalCAGR	Number (length=17, decimals= 1)
Annualized Forecasted Number of Businesses Growth Rate	BusinessForecastCAGR	Number (length=17, decimals= 1)
Industry Profit Margin	Profit	Number (length=17, decimals= 1)
Annualized Historical Profit Margin Growth Rate	ProfitHistoricalCAGR	Number (length=17, decimals= 1)
Concentration Level	ConcentrationLevel	Text Area
Barriers To Entry Level	BarriersToEntryLevel	Text Area
Barriers To Entry Trend	BarriersToEntryTrend	Text Area
Regulation And Policy Level	RegulationAndPolicyLevel	Text Area
Regulation And Policy Trend	RegulationAndPolicyTrend	Text Area
Life Cycle Level	LifeCycleLevel	Text Area
Revenue Volatility Level	RevenueVolatilityLevel	Text Area
Assistance Level	AssistanceLevel	Text Area
Assistance Trend	AssistanceTrend	Text Area
Competition Level	CompetitionLevel	Text Area
Competition Trend	CompetitionTrend	Text Area
Innovation Level	InnovationLevel	Text Area