S&P Global
Market Intelligence

S&P Global Market Intelligence for Salesforce

Installation Guide

Version 5.5 for Lightning

March 2025

S&P Global
Market Intelligence

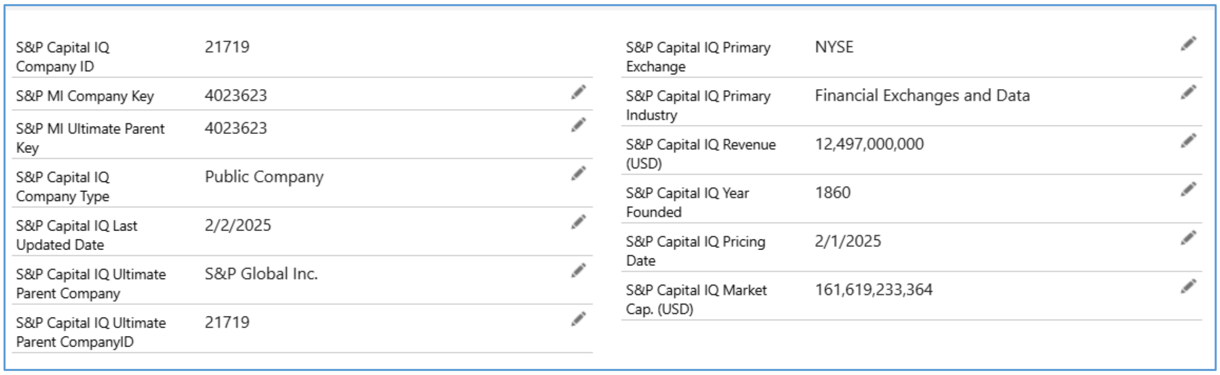
Contents

Key Features

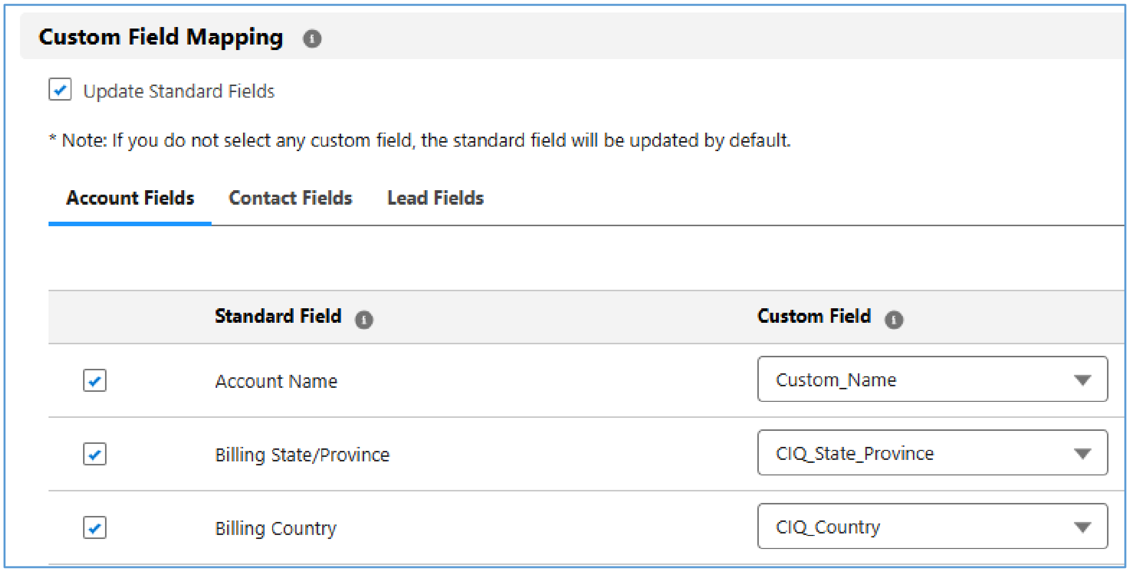
New in Version 5.5

1. Users can now screen companies using Market Capitalization.
2. Stock price & market data added under the new, 'Market Data' tab.

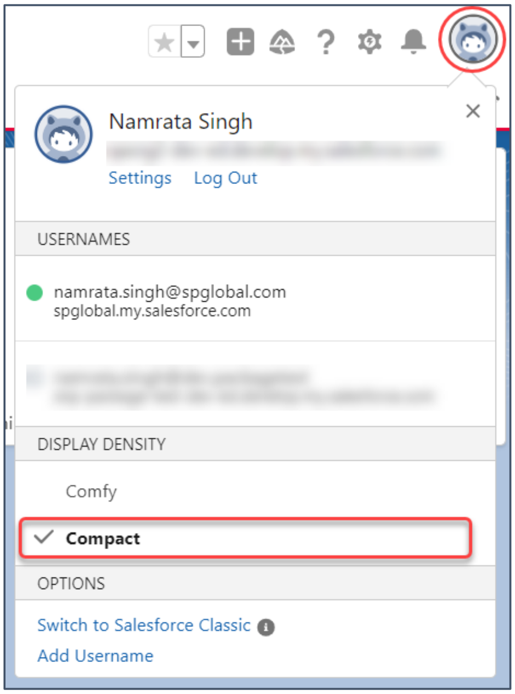
3. Market Capitalization is now available as a SPCIQ custom field.



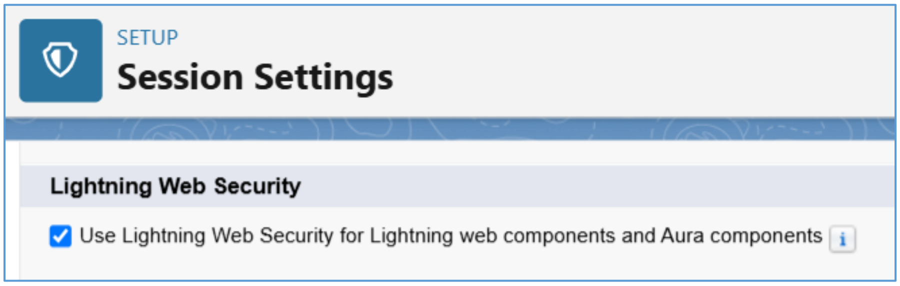
4. Custom field mapping is now supported as a part of Batch Configuration.



You can choose the display density from your profile settings. We recommend using the ‘Compact’ mode for optimum experience.



To get better performance and to ensure that all enhancements are working as expected, please go to Setup > Security > Session Settings > Select the checkbox under ‘Lightning Web Security’, as below -



For existing users only – Reset Batch Config Settings with V 5.5

Post the upgrade to version 5.5, existing users would be required to reset the ‘Batch Config’ & ‘Feature’ settings. To do that, go to Setup > Installed Packages > S&P Cap IQ > Configure.

Locate Prospects

S&P Global Market Intelligence for Salesforce has a robust search tool with dozens of criteria you can use to locate prospects. You can search for companies, people, and events that meet your requirements.

Companies - S&P Global Market Intelligence for Salesforce has expanded its private company coverage to allow users to have access to 20 million public and private companies globally, as well as 8.5 million private & public funds. Profiles can include company/fund profile information, key financials, news, and events. With company data, you can:

- research new industries and markets
- view a corporate family tree, determine the ultimate parent of a company, identify private equity sponsors, and find current investors in a company

People - S&P Global Market Intelligence for Salesforce profiles over 15.5 million company executives, board directors and private investment professionals. With people data, you can:

- identify executives and board members affiliated with a specific company
- pinpoint key decision makers who may be interested in your product or service

Key Developments – S&P Global Market Intelligence for Salesforce provides a news analysis, and filtering service delivering categorized news and corporate event data. With key developments data, you can:

- quickly catch up on recent news affecting your prospects
- identify new business opportunities based on events (e.g., business expansions and executive changes)

**Requires S&P Capital IQ Pro subscription.*

Stay Current on Prospects and Clients

With S&P Global Market Intelligence for Salesforce, you can stay current on your prospects and clients. Through a single interface, you can quickly and easily:

- view company/fund profile information and generate a tear sheet
- review all news and significant events impacting a company or a fund
- retrieve relevant financials
- identify company relationships including subsidiaries, direct investments and competitors
- perform customized in-depth searches on specific topics of interest

Add New Information to your Salesforce Contact Database

S&P Global Market Intelligence for Salesforce allows you to add new information to your contact database. You can:

- add new accounts, leads and contacts using S&P Global Market Intelligence for Salesforce data
- enrich an existing account or lead or contact with additional details from S&P Global Market Intelligence for Salesforce
- automatically create accounts by uploading a list of S&P Capital IQ platform Company IDs

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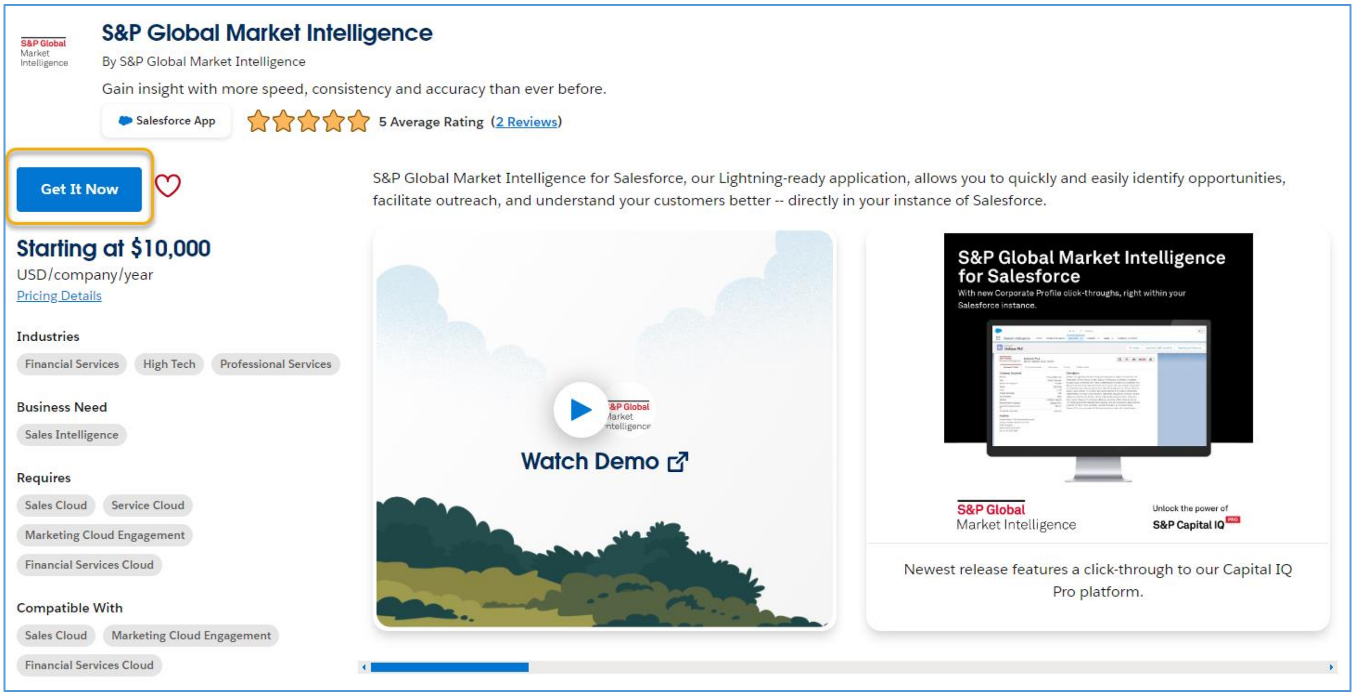
Install S&P Global Market Intelligence for Salesforce in your organization

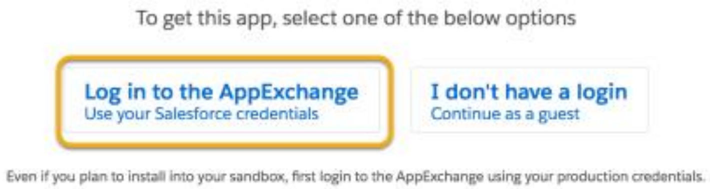
Our app can be accessed by a provided link – [S&P Global Market Intelligence for Salesforce.](#) Once you have located the S&P Global Market Intelligence for Salesforce application on the Salesforce AppExchange, please follow the steps below to properly install the application in your Salesforce environment.

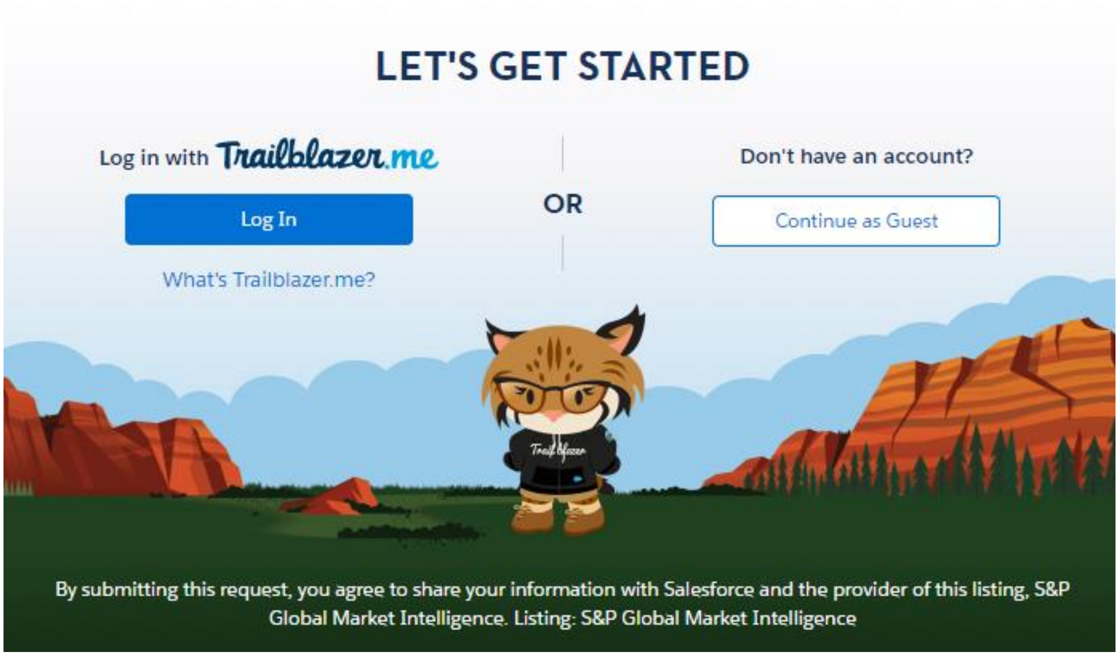
Important: If you are installing in a Sandbox environment, your Email Deliverability must be set to All Email.

Click the "GET IT NOW" button.

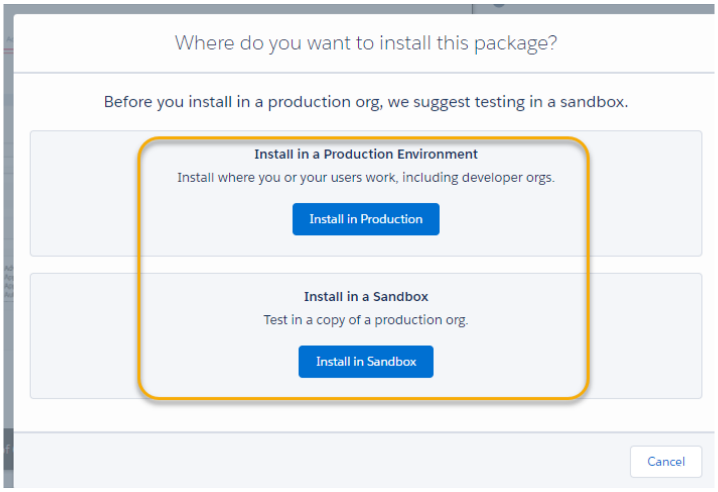


Click the Log into the AppExchange button.

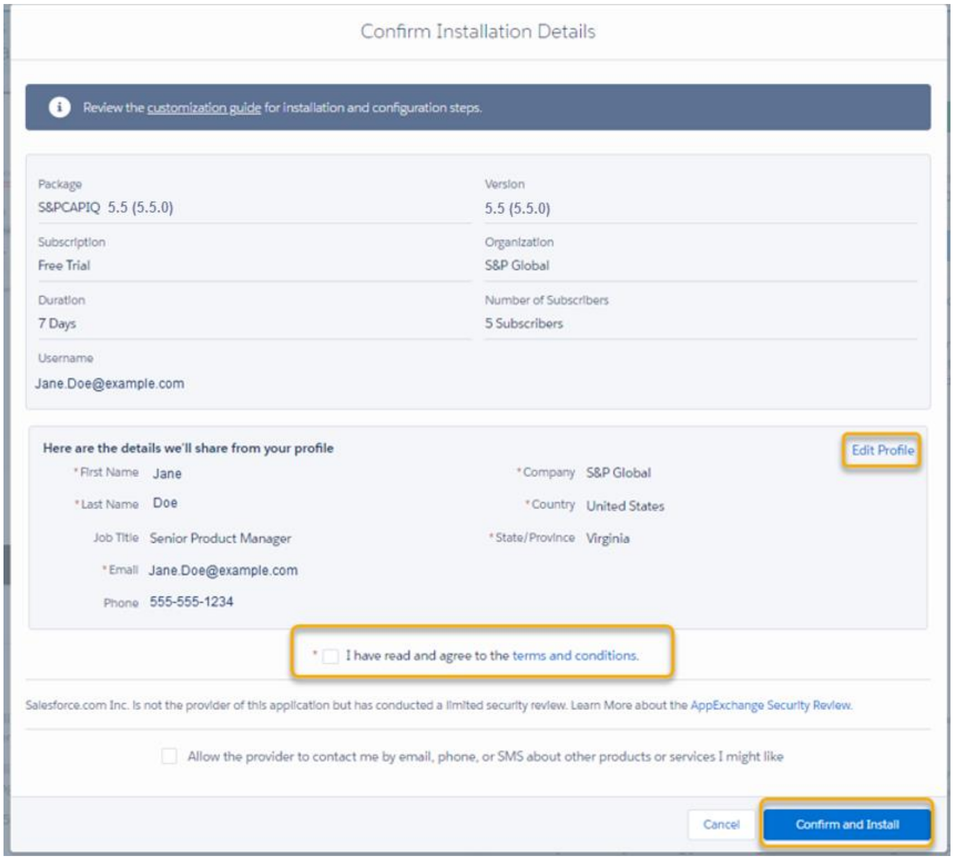



LET'S GET STARTED
Log in with Trailblazer.me
Log In
What's Trailblazer.me?
OR
Don't have an account?
Continue as Guest
By submitting this request, you agree to share your information with Salesforce and the provider of this listing, S&P Global Market Intelligence. Listing: S&P Global Market Intelligence

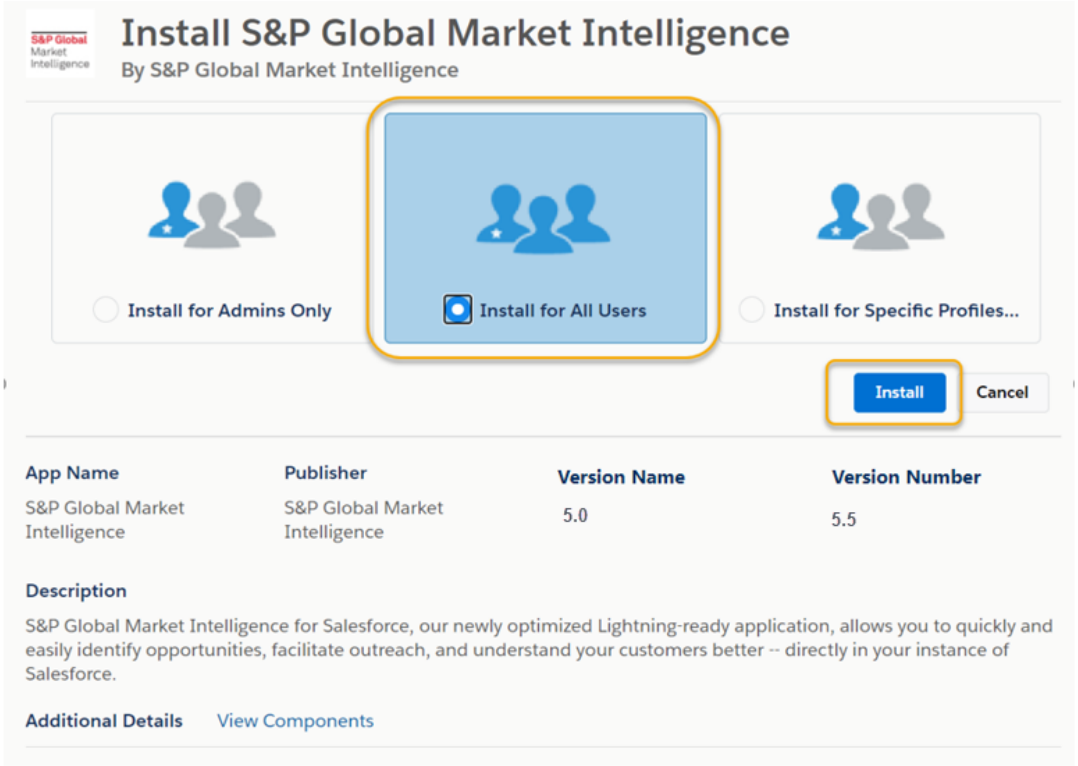
Click the Install in Production or the Install in Sandbox button to install the application in the desired environment.



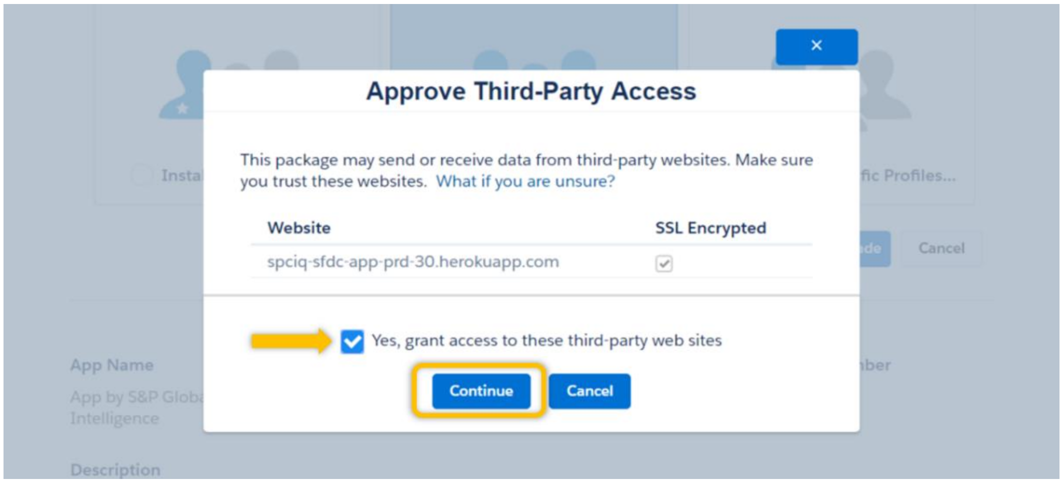
Review the details in the screen below and then click the Confirm and Install button.

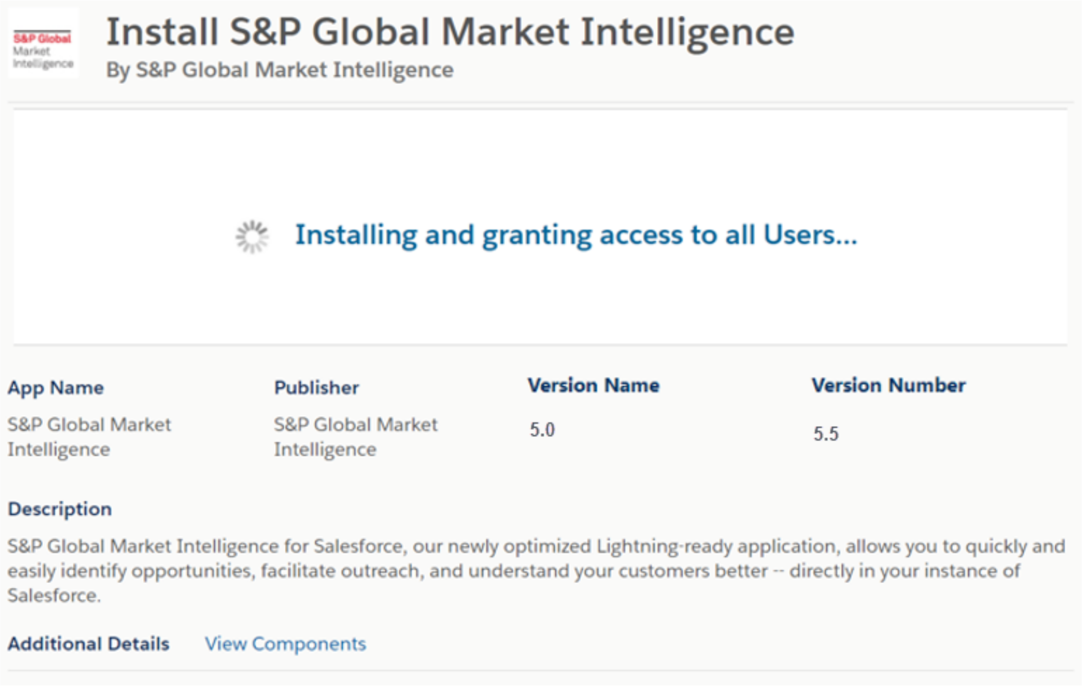


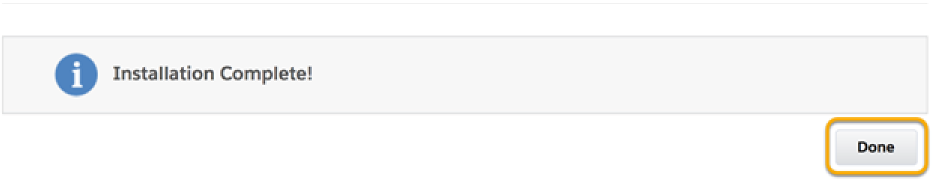
Select how you wish to deploy the application to your user base.



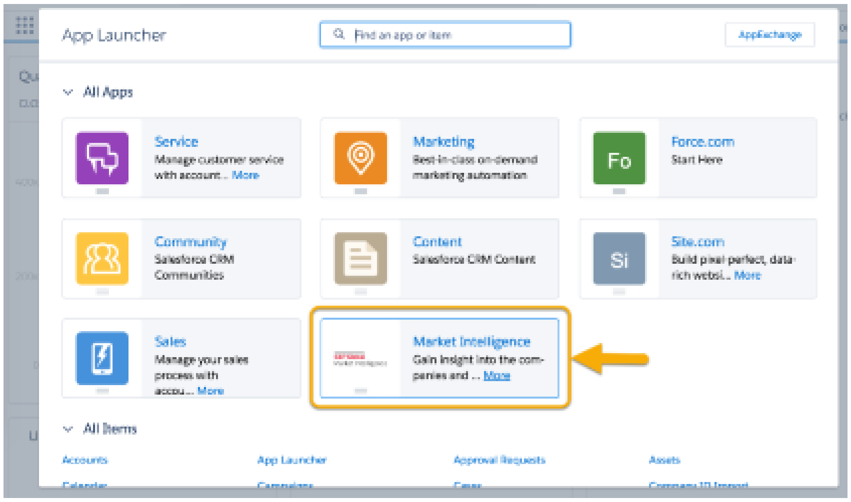
Check the YES checkbox to grant access and then click the Continue button.







When the installation has completed, you will see a new app called Market Intelligence in your app menu. You will receive an email notification confirming the installation.


App Launcher
Find an app or item
AppExchange
All Apps
Service
Manage customer service with account... More
Marketing
Best-in-class on-demand marketing automation
Fo
Force.com
Start Here
Community
Salesforce CRM Communities
Content
Salesforce CRM Content
Si
Site.com
Build pixel-perfect, data-rich websi... More
Sales
Manage your sales process with accou... More
Market Intelligence
Gain insight into the companies and ... More
All Items
Accounts
App Launcher
Approval Requests
Assets

Assigning Users

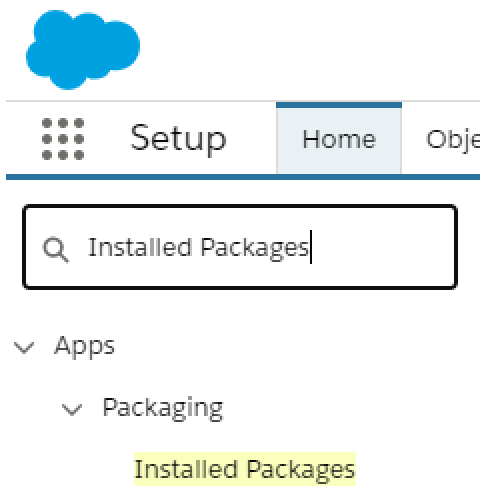
Users get access to the App by having the correct permissions associated with their profile. If your license is set up for seats, such as during a trial, you will need to grant users access to the App via Installed Packages.

License Users (Seats)

For your trial, you will have 5 seats available, which means you must assign users.

Search "Installed Packages" in the Quick Find Box, or navigate to

Setup → Platform Tools → Apps → Installed Packages



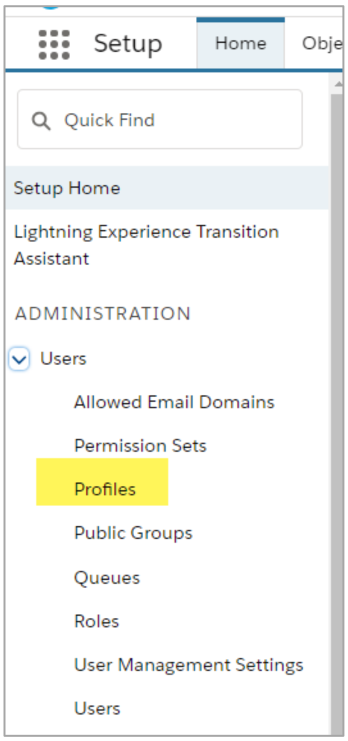
Click Manage Licenses next to the S&PCAPIQ package.

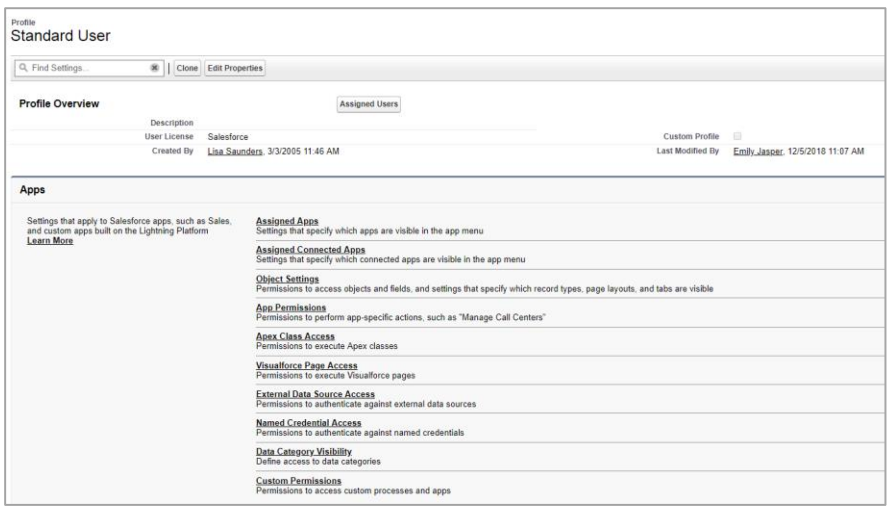
Click Add Users and select the users you would like to enable.

Using Profiles

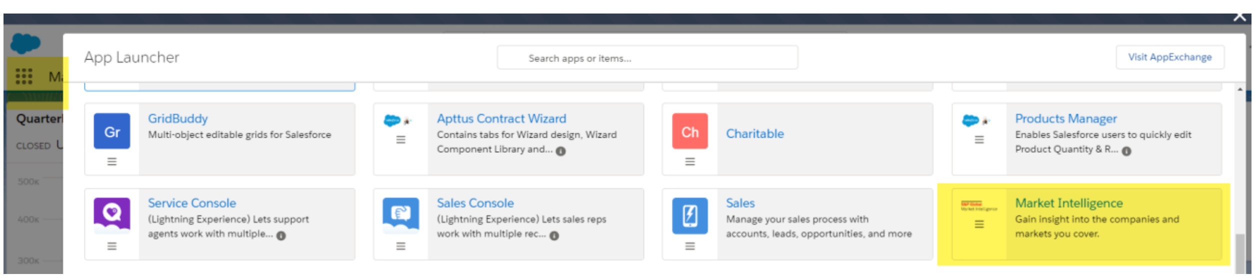
If you manage access in your Salesforce via Profiles, you can enable access there. Otherwise, skip to Permission sets.

Go to Setup > Administration > Users > Profiles. You can select existing profiles (such as Standard User or Marketing User), or create a new one by selecting “New Profile”. When you select the appropriate profile, you will see a menu to assign all associated items.



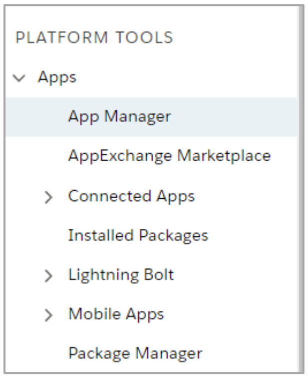


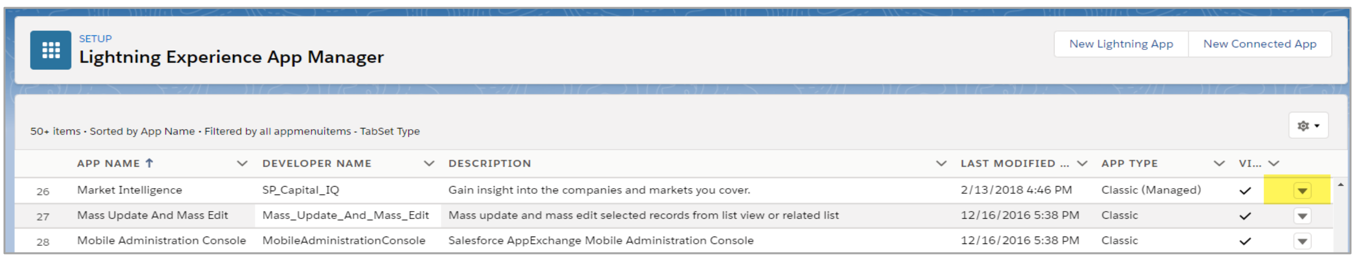
You will select “Assigned Apps” to associate the Market Intelligence App. This will generate the Market Intelligence option on the App Launcher on the left-hand menu. Select Edit, find Market Intelligence (SNPCAPIQ__SP_Capital_IQ), select Visible.

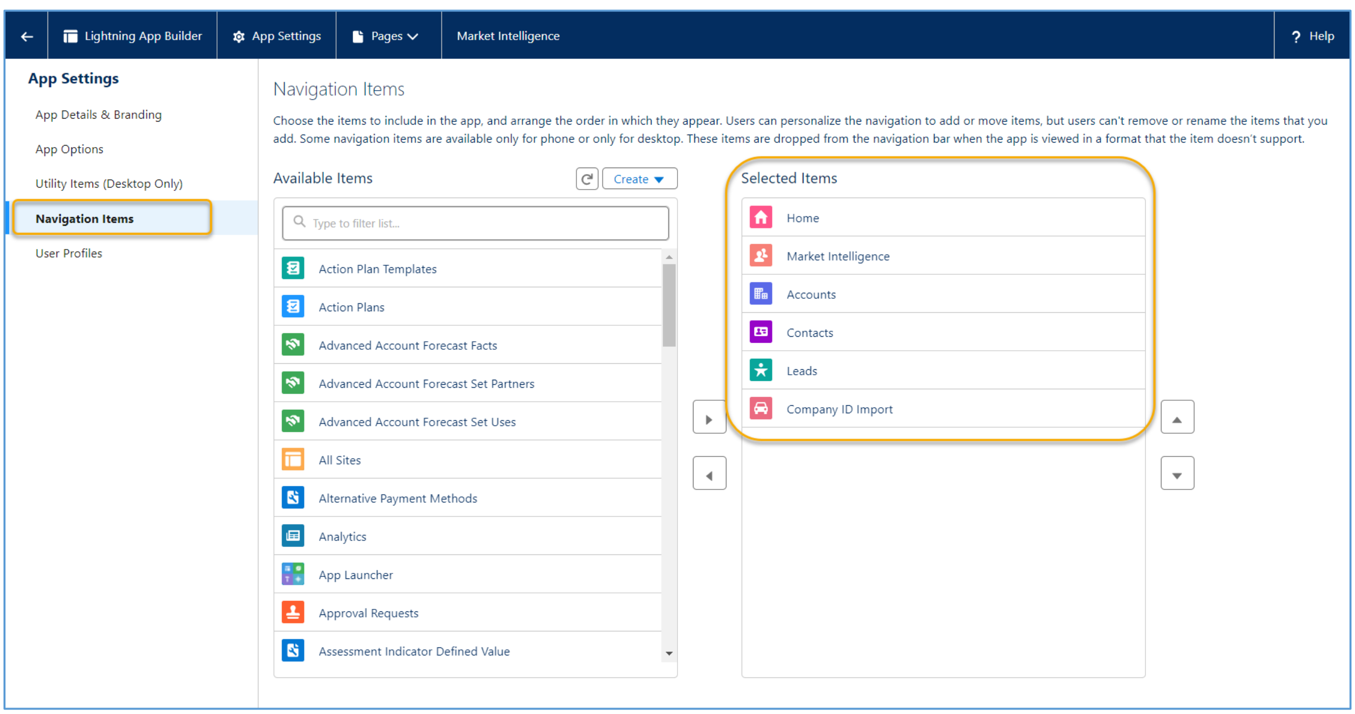


You will select Object Settings to ensure the Company ID Import and Market Intelligence tabs are set to Default On.

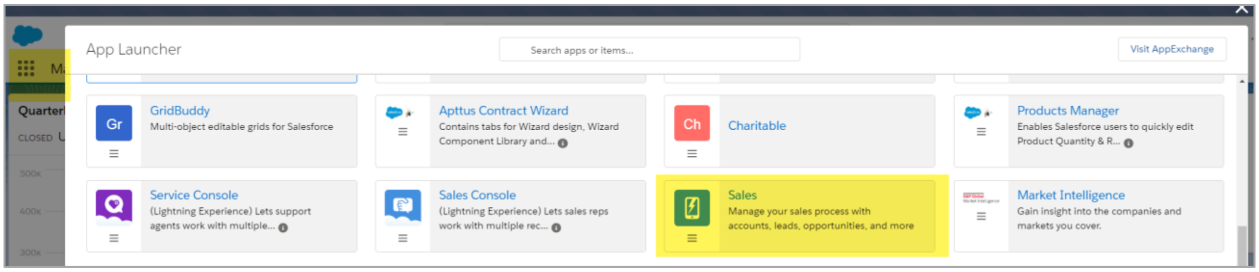
You will then go to Setup > Platform Tools > Apps > App Manager, find Market Intelligence, and select “Edit” from the drop-down menu. This will lead you to the ‘App Settings’ section. Under ‘App Settings’, go to ‘Navigation Items’. You can then rearrange the tabs here, or add more.







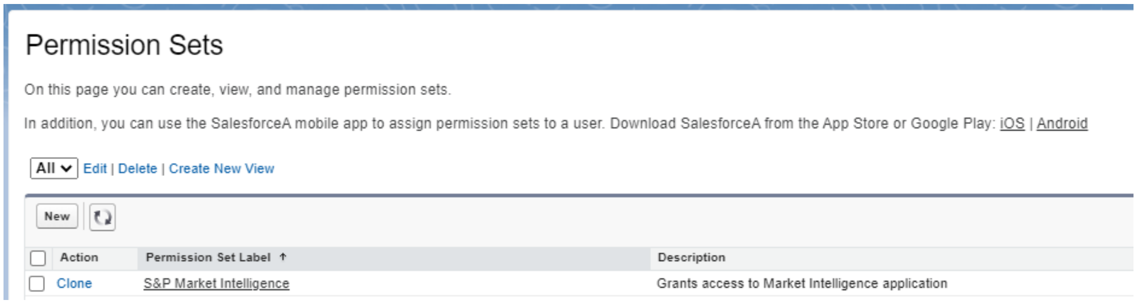
If there is a different view from the App Launcher you want to add the tabs to, for example Sales (below), you will also find this under Setup > Platform Tools > App Manager. You will then select the Available Tabs, move to Selected Tabs, reorder, and save.



Field level security allows for the correct permissions to be associated with the profile. For each profile you are granting access to, please review the permissions in the [Field Level Security] section to ensure the workflows from the App perform correctly.

Permission Sets and Field Level Security Permissions

The App is set with a permission set S&P Market Intelligence to assign access to all the custom fields.



Standard Field Level Security settings will still need the below fields marked with read and edit access for all users.

Accounts & Contacts

Accounts Standard Fields	
Field Label	**Field Name**
Name	Account Name
Website	Website
Description	Company Description
Employees	NumberOfEmployees
Billing Address	BillingAddress
Phone	Phone
Fax	Fax

Contacts Standard Fields	
Field Label	**Field Name**
First Name	FirstName
Last Name	LastName
Title	Title
Description	Description
Phone	Phone
Email	Email
Mailing Address	MailingAddress

Leads

Leads Standard Fields	
Field Label	**Field Name**
First Name	FirstName
Last Name	LastName
Title	Title
Email	Email
Website	Website
Description	Description
Employees	NumberOfEmployees
Billing Address	BillingAddress
Phone	Phone
Fax	Fax

Custom Fields enabled via Permission Set

Accounts Custom Fields	
Field Name	**API Name**
S&P Capital IQ Company Type	SNPCAPIQ__Company_Type__c
S&P Capital IQ Description	SNPCAPIQ__S_P_Capital_IQ_Description__c
S&P Capital IQ Last Updated Date	SNPCAPIQ__LastUpdatedDate__c
S&P Capital IQ Primary Exchange	SNPCAPIQ__Primary_Exchange__c
S&P Capital IQ Primary Industry	SNPCAPIQ__Industry__c
S&P Capital IQ Revenue (USD)	SNPCAPIQ__CapitalIQRevenueUSD__c
S&P Capital IQ Ultimate Parent Company	SNPCAPIQ__Ultimate_Parent_Company__c
S&P Capital IQ Ultimate Parent CompanyID	SNPCAPIQ__Ultimate_Parent_Company_ID__c
S&P Capital IQ Year Founded	SNPCAPIQ__Year_Founded__c
S&P Capital IQ Ticker Symbol	SNPCAPIQ__Ticker_Symbol__c
S&P MI Company Key	SNPCAPIQ__SNPMI_MICompanyID__c
S&P MI Ultimate Parent Key	SNPCAPIQ__SNPMI_MIUltimate_Parent_ Company_Key__c
S&P Capital IQ Market Cap. (USD) *New!*	CapitalIQMarketCapUSD__c
S&P Capital IQ Pricing Date *New!*	CapitalIQPricingDate__c
UNUSED_PE_S&P Capital IQ Company ID	SNPCAPIQ__CapitalIQCompanyID__c
UNUSED_S&P Capital IQ Annual Revenue	SNPCAPIQ__Annual_Revenue__c
	*Fields marked "Read Only" will be: • S&P Capital IQ Company ID (SNPCAPIQ__CapitalIQCompanyID__c) • PE_Capital IQ Company ID (SNPCAPIQ__PE_SP_Capital_IQ_Company_ID_txt__c)
PLEASE NOTE!	*New!* Custom fields will need to be added by system administrators to their existing page layouts to ensure that these new fields are displayed for all profiles.
Contacts Custom Fields	
Field Name	**API Name**
S&P Capital IQ Company Name	SNPCAPIQ__CapitalIQCompanyNameEnrich__c
Last Updated Date	SNPCAPIQ__LastUpdatedDate__c
UNUSED_PE_S&P Capital IQ Company ID	SNPCAPIQ__CapitalIQCompanyID__c
UNUSED_PE_S&P Capital IQ Person ID	SNPCAPIQ__CapitalIQPersonID__c
UNUSED_PE_S&P Capital IQ Professional ID	SNPCAPIQ__CapitalIQProfessionalID__c
	*Fields marked "Read Only" will be: • S&P Capital IQ Company ID (SNPCAPIQ__CapitalIQCompanyID__c) • PE_Capital IQ Company ID (SNPCAPIQ__PE_SP_Capital_IQ_Company_ID_txt__c) • S&P Capital IQ Person ID (SNPCAPIQ__CapitalIQPersonID_txt__c_ • PE_S&P Capital Person ID (SNPCAPIQ__PE_CapitalIQPersonID_txt__c) • S&P Capital IQ Professional ID (SNPCAPIQ__CapitalIQProfessionalID_txt__c) • PE_S&P Capital Professional ID (SNPCAPIQ__PE_CapitalIQProfessionalID_txt__c)
Lead Custom Fields	
Field Name	**API Name**
S&P Capital IQ Account Description	SNPCAPIQ__Account_Description__c
S&P Capital IQ Company Type	SNPCAPIQ__Company_Type__c
S&P Capital IQ Contact Description	SNPCAPIQ__Contact_Description__c
S&P Capital IQ Last Updated Date	SNPCAPIQ__LastUpdatedDate__c
S&P Capital IQ Primary Exchange	SNPCAPIQ__Primary_Exchange__c
S&P Capital IQ Primary Industry	SNPCAPIQ__Industry__c
S&P Capital IQ Revenue (USD)	SNPCAPIQ__CapitalIQRevenueUSD__c
S&P Capital IQ Ticker Symbol	SNPCAPIQ__Ticker_Symbol__c
S&P Capital IQ Ultimate Parent Company	SNPCAPIQ__Ultimate_Parent_Company__c
S&P Capital IQ Ultimate Parent CompanyID	SNPCAPIQ__Ultimate_Parent_Company_ID__c
S&P Capital IQ Year Founded	SNPCAPIQ__Year_Founded__c
S&P MI Company Key	SNPCAPIQ__SNPMI_MICompanyID__c
S&P MI Ultimate Parent Key	SNPCAPIQ__SNPMI_MIUltimate_Parent_ Company_Key__c
UNUSED_PE_S&P Capital IQ Company ID	SNPCAPIQ__CapitalIQCompanyID__c

UNUSED_PE_S&P Capital IQ Person ID	SNPCAPIQ__CapitalIQPersonID__c
UNUSED_PE_S&P Capital IQ Professional ID	SNPCAPIQ__CapitalIQProfessionalID__c
	*Fields marked "Read Only" will be: • S&P Capital IQ Company ID (SNPCAPIQ__CapitalIQCompanyID__c) • PE_Capital IQ Company ID (SNPCAPIQ__PE_SP_Capital_IQ_Company_ID_txt__c) • S&P Capital IQ Person ID (SNPCAPIQ__CapitalIQPersonID_txt__c_ • PE_S&P Capital Person ID (SNPCAPIQ__PE_CapitalIQPersonID_txt__c) • S&P Capital IQ Professional ID (SNPCAPIQ__CapitalIQProfessionalID_txt__c) • PE_S&P Capital Professional ID (SNPCAPIQ__PE_CapitalIQProfessionalID_txt__c)

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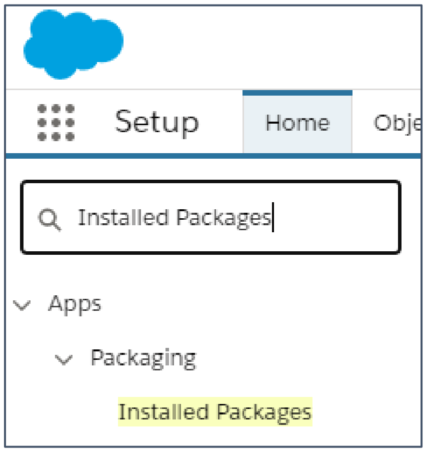
Batch Updates

Batch Updates allow the administrator to set how often the fields are updated with changes from the S&P database.

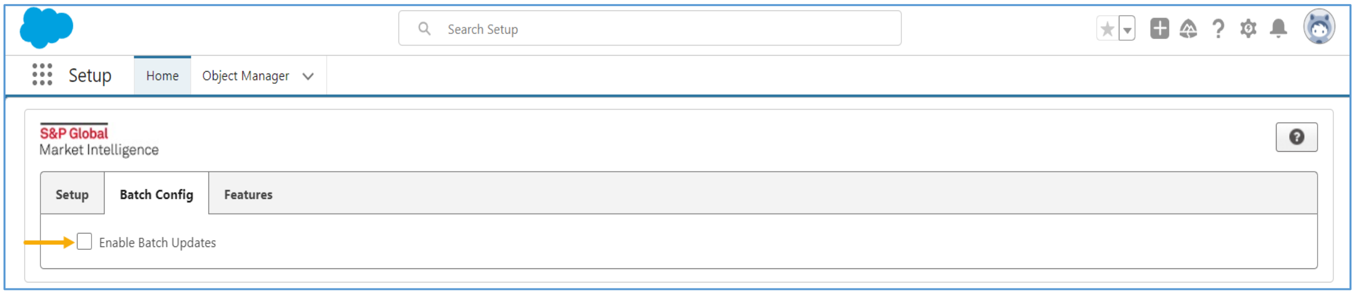
Note: With version 5.5 upgrade, existing users would be required to reset their 'Batch Config' and 'Feature' settings.

Search "Installed Packages" in the Quick Find Box, or navigate to Setup → Platform Tools → Apps → Installed Packages

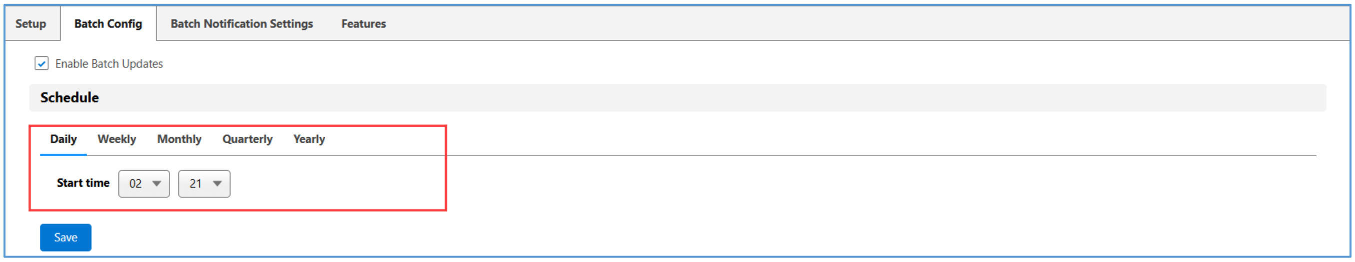


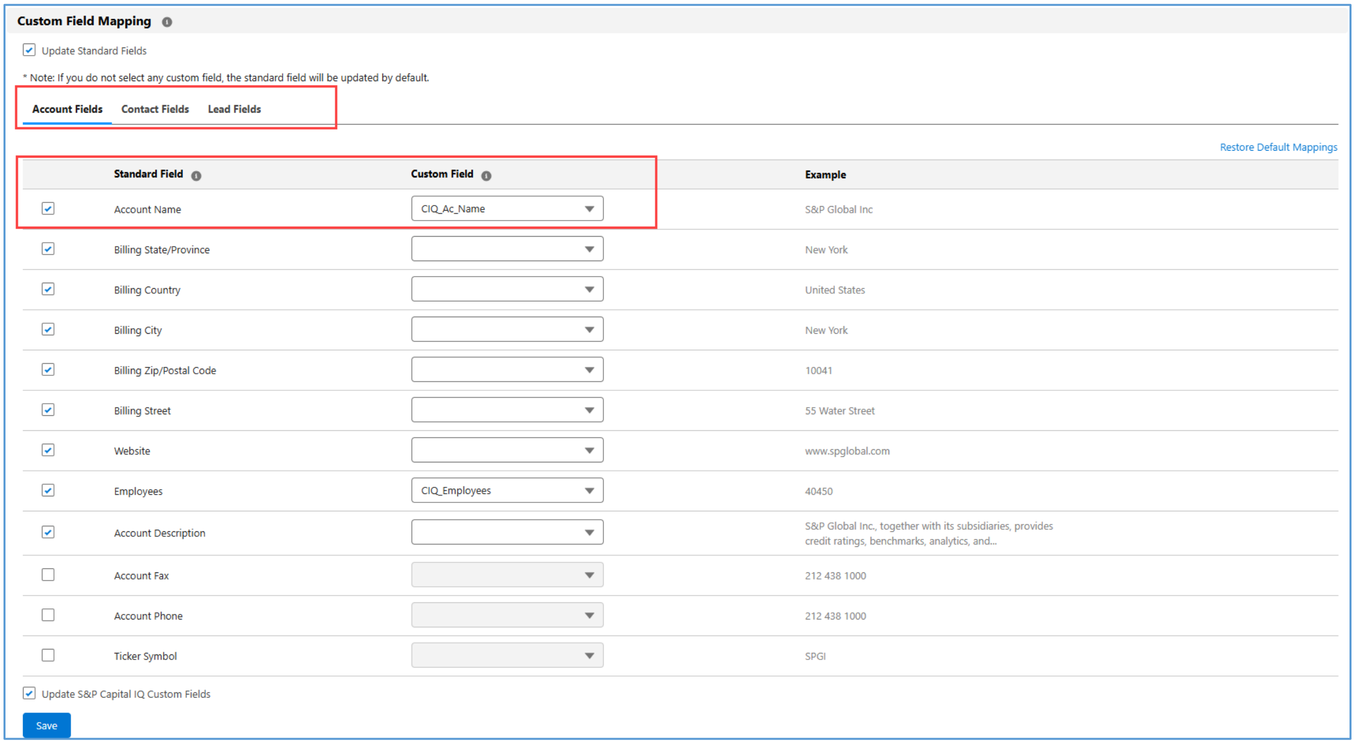
Click "Configure" next to the S&PCAPIQ package.

Click "Enable Batch Updates." Then, follow all prompts as shown below to designate the frequency of update and fields.



New filters are available for Standard Fields on Account, Contact, and Lead objects. The selection will default to all, but Administrators can select which fields receive updates during the batch process.





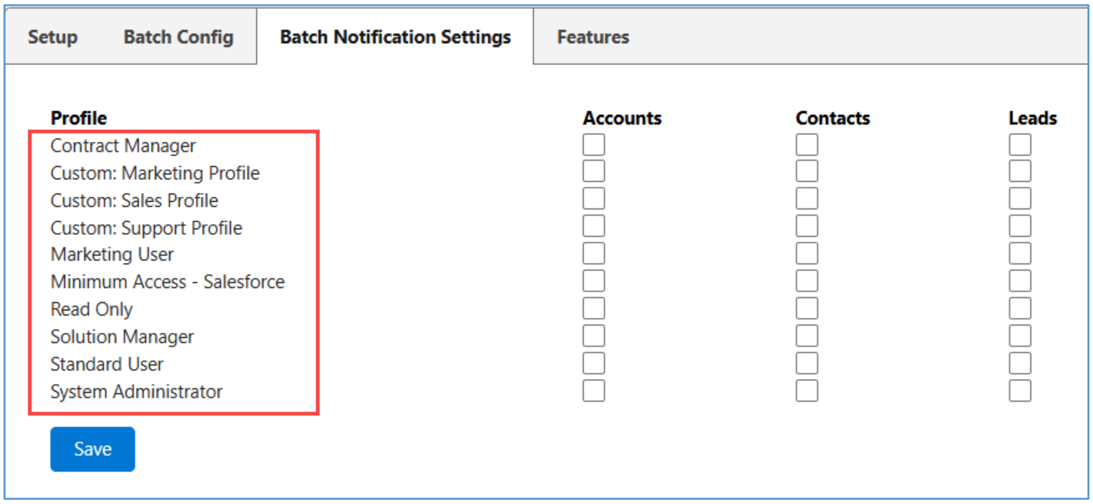
With version 5.5, administrators can now map standard fields to their desired fields for receiving updates. *More information on Custom Field Mapping is available on Page 25*.

Once finished, click Save, and the below confirmation message will display.

Batch Notification Settings for Profiles

Users can customize batch notifications as per their profiles.

Note: It is recommended to limit character length of profile names to less than 30. Any profile having character length > 30 will not be available for selection under Batch Notification settings.

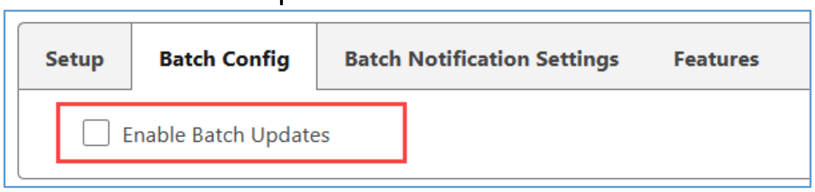


Custom Field Mapping

In versions 5.5 and beyond, custom field mapping has been made available, which enables users to map standard fields to custom fields (Note: Not SPCIQ custom fields). Once mapped, these custom fields will be populated with S&P Global Market Intelligence data upon batch runs, company ID imports, add as account/contact and update data functions.

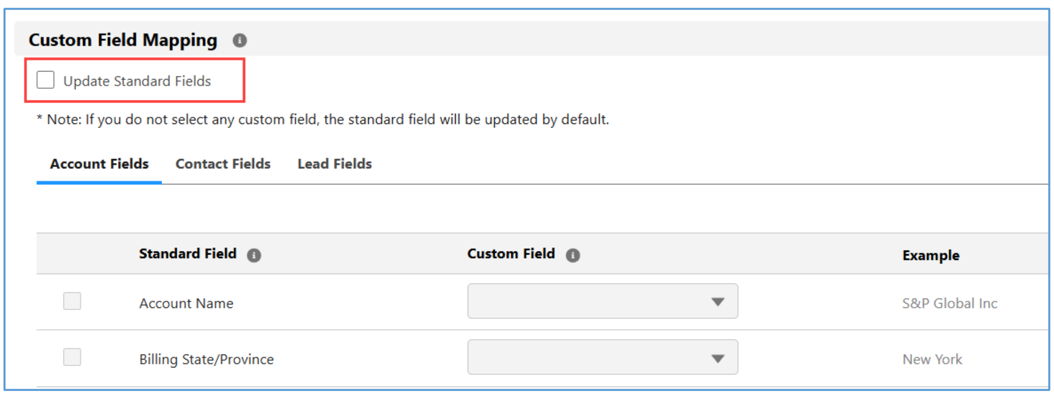
Custom field mapping is available for Accounts, Contacts and Leads.

1. To enable custom field mapping, go to Setup → Platform Tools → Apps → Installed Packages
2. Click “Configure” next to the S&PCAPIQ package.
3. Click “Enable Batch Updates.”

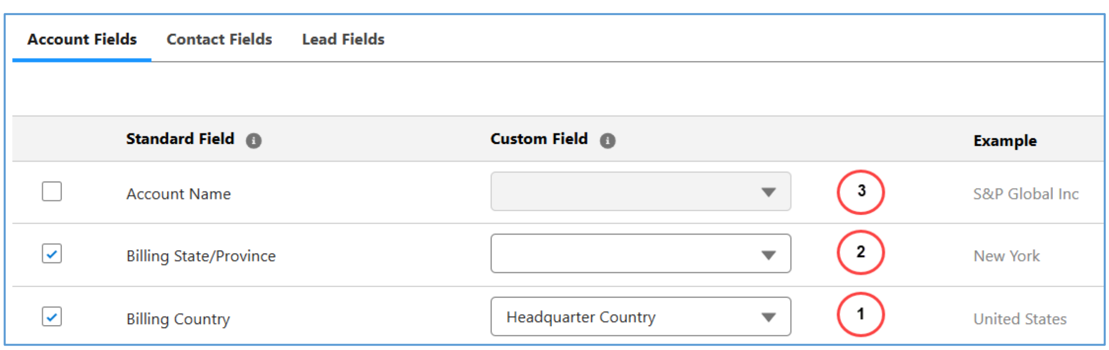


This populates the Custom Field Mapping section below the “Schedule” section.

4. Click “Update Standard Fields” to initiate the mapping process.



5. Select the field which needs to be mapped to a custom field.



    i. Select a custom field from the dropdown to populate it with S&P Data.
    ii. In case no custom field is selected, but checkbox is still enabled, the standard field will be updated by default.
    iii. In case the checkbox is not selected, the standard field will not be updated. This allows the user to completely bypass updating the standard field.
6. Click on 'Save' to save your settings. The 'Save' function saves the mappings individually for Accounts, Contacts and Leads, and not as a whole.
7. Select 'Restore Default Mappings' to erase all custom mappings.

Please Note!

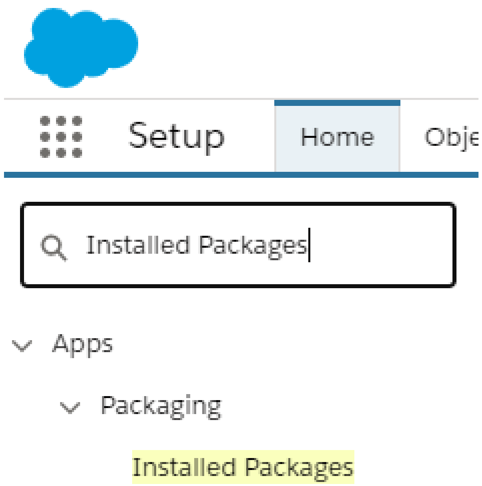
1. Custom field mapping is available only for standard fields and not for SPCIQ custom fields.
2. Data type of the standard field and the custom field should be compatible.
3. Once a custom field is selected for mapping, the same field will not be available in the dropdown for subsequent mappings.
4. To select a different custom field from the one already selected, first erase the selected custom field from the box.

State and Country/Territory Picklists

Picklists allow for consistent identification of countries, territories, and states. While Salesforce has several loaded by default, Administrators can choose to map many more to the picklist. When a picklist value does not exist, instead of presenting an error, the following setting will allow the creation of the Account, Contact, or Lead.

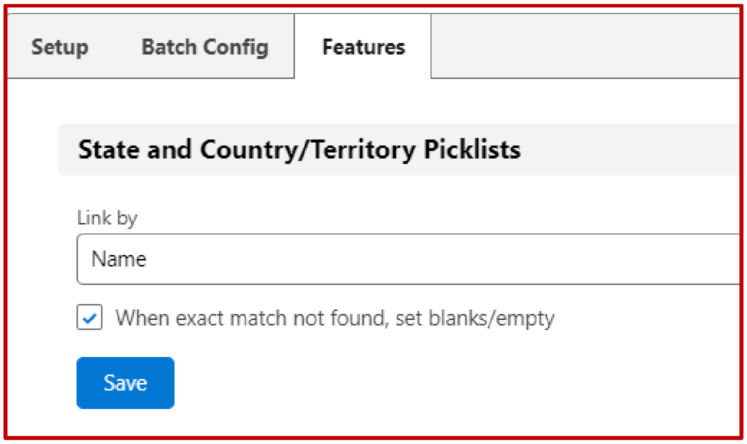
Search "Installed Packages" in the Quick Find Box, or navigate to

Setup → Platform Tools → Apps → Installed Packages



Click configure next to the S&PCAPIQ package.

Choose to match by Name or Integration or Integration Value. If you still want to create Accounts, Contacts, and Leads even if the values don't match, check the box below.



Upgrading to LWC (Lightning Web Components) Version 5.1 & above

Required Steps before Upgrading to Version 5.5+ (Applicable to existing users currently operating on versions below 5.1)

Before you upgrade your package to version 5.5, you need to ensure that all references to VisualForce pages & components (used in the S&P Global Market Intelligence app) in your custom page layouts have been removed.

Below is a list of VisualForce pages & components being used up till version 4.4.

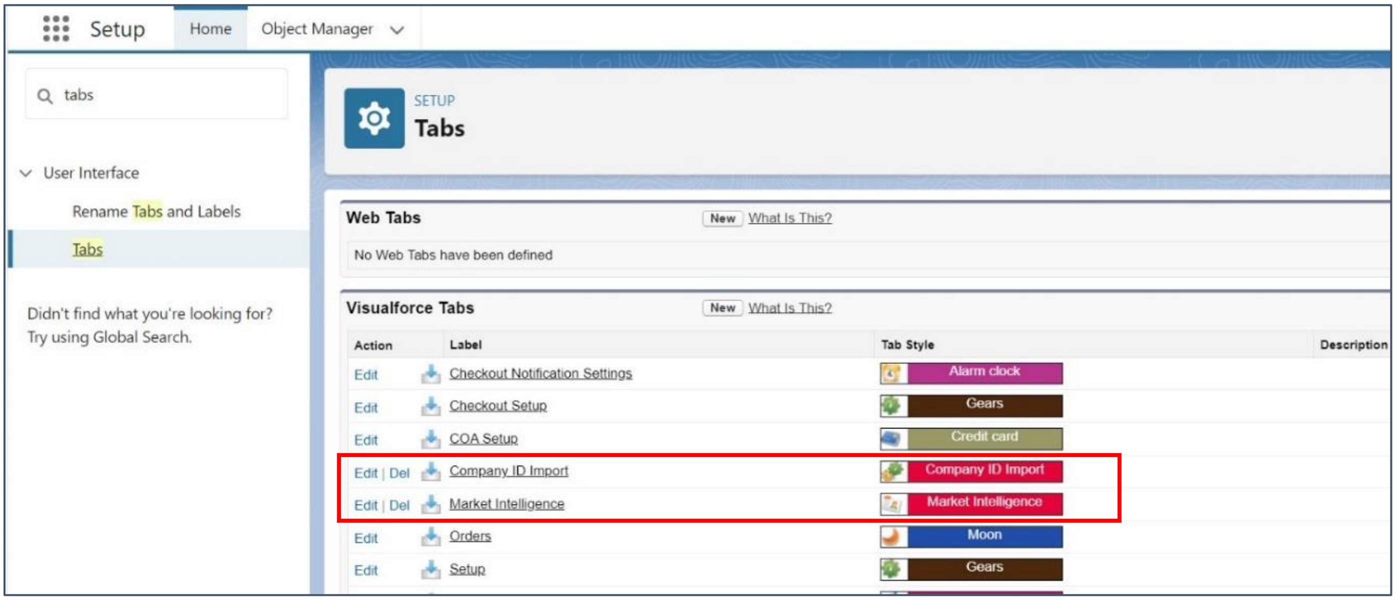
1. ConfigPage.page
2. Key_Development_Page.page
3. Welcome.page
4. AccountInfo.page
5. LeadInfo.page
6. SearchKeyDevelopments.page
7. SearchContacts.page
8. SearchAccounts.page
9. ContactUnlinkAction.page
10. AccountUnlinkAction.page
11. AccountUpdate.page

Required Steps After Upgrading the Package (For existing users only)

Once the package is upgraded, clients need to delete the tabs that were released in the previous version.

Steps:

1. Go to Setup.
2. Navigate to Tabs.
3. Select Visualforce Tabs.
4. Delete the "Company ID Import and Market Intelligence" tab.

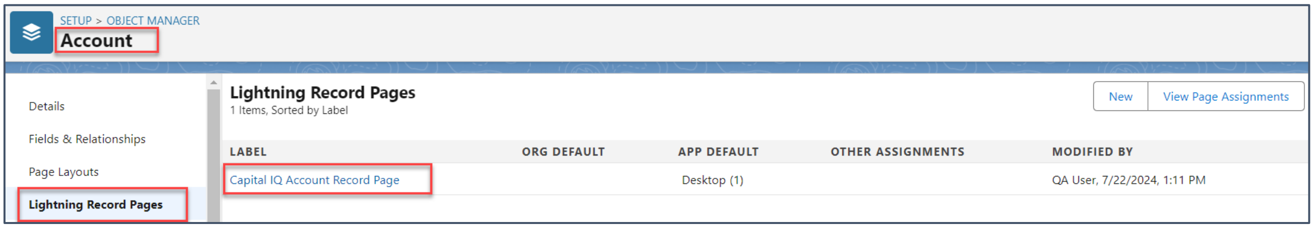


Configuring Account, Contact and Lead Lightning Record Pages (For both NEW & EXISTING USERS)

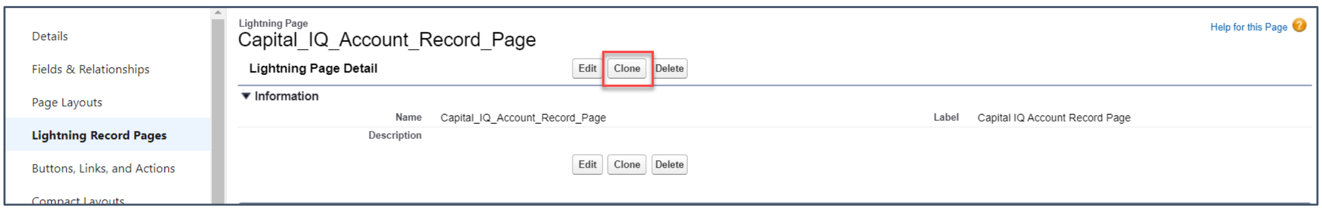
We've transitioned from page layouts to Lightning record pages. If clients want to add new custom fields to the Accounts, Contacts, or Leads tabs of the Market Intelligence app, they can follow these steps:

Configure the Account Lightning Record Page

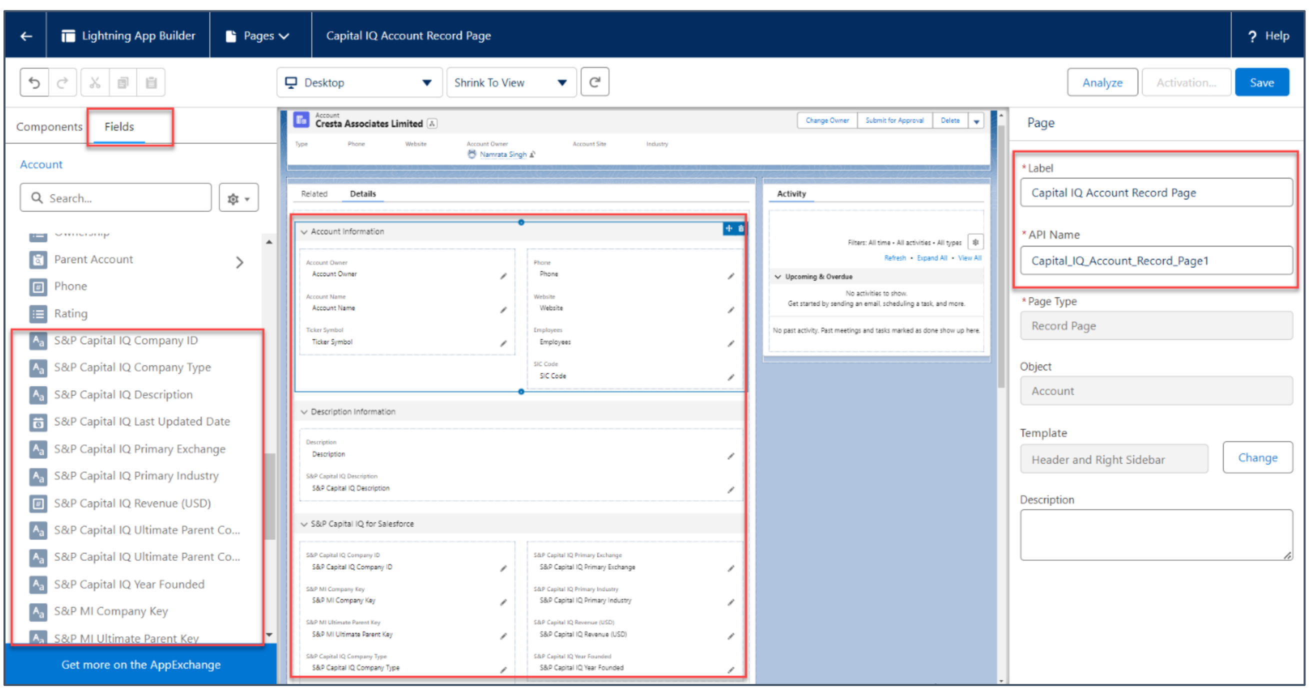
1. Go to Setup > Object Manager > Account > Lightning Record Pages.



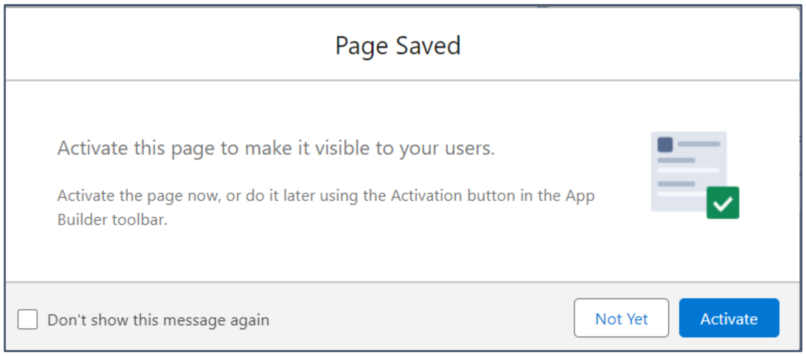
2. Click on Clone, as the managed Lightning record page does not allow field modifications.



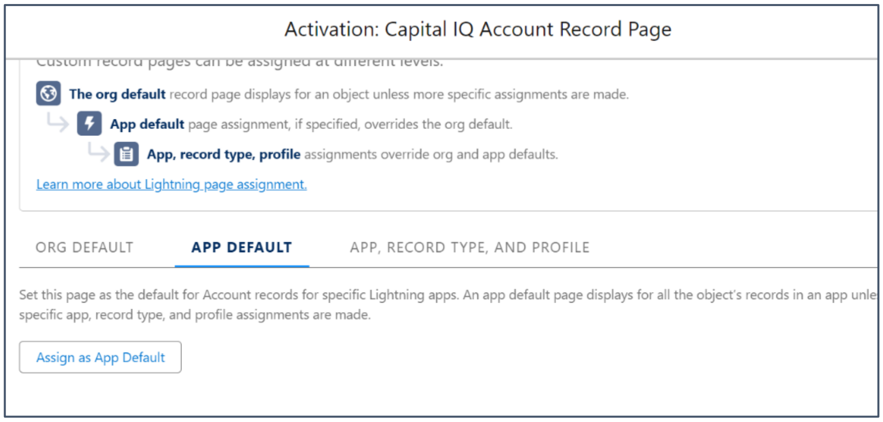
3. Under Fields, you can see the attributes available for addition. Add any desired fields to the Lightning record page.



4. Click Save. A dialog box will appear; click on Activate.



5. Select "App Default" and assign as App Default.



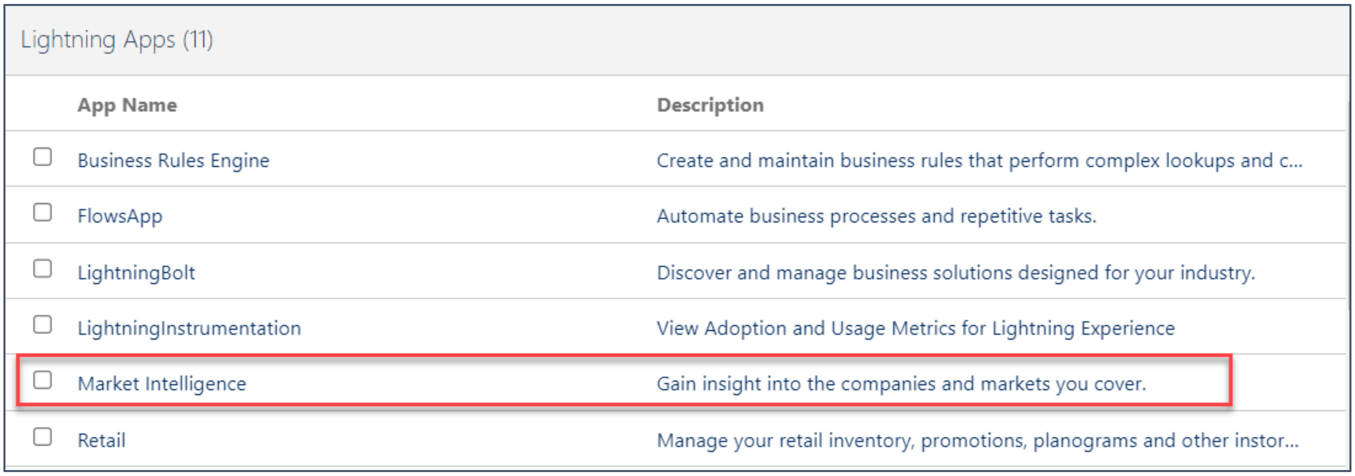
Note:

App Default: Setting as app default will display your LWC page as the default page for users of the S&P Global Market Intelligence App in your enterprise. If there is no App Default, then the Org default or the Profile default will be used.

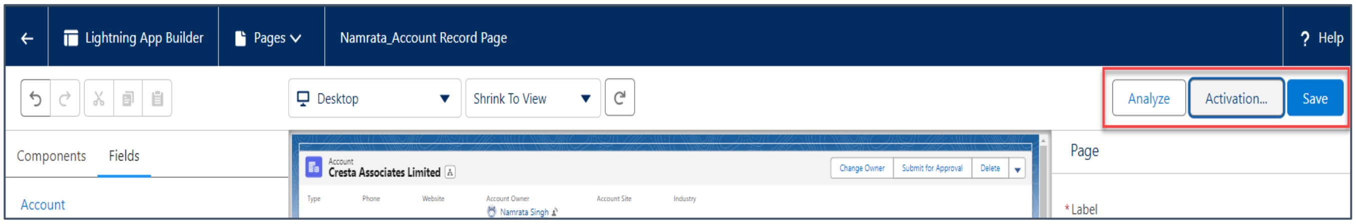
Org Default: Displays your LWC page for anyone who views that object's record in Salesforce, as long as they have access to that object. Org Default overrides the app default.

App, Record Type, and Profile: Lets you set a combination of apps, record type and profiles that will display your new LWC page.

6. Choose the Market Intelligence App and proceed with the next steps until you reach the final save.



7. Click Save again on the Lightning record page.



Note: This new Lightning record page will override the default one that comes with the Market Intelligence app. The changes will apply only to the Market Intelligence app. For other apps, different fields will be used. If you want to make it the org default, this page will apply to all apps for accounts.

Configure the Contact Lightning Record Page

1. Go to Setup > Object Manager > Contact > Lightning Record Pages.
2. Repeat steps 2 through 7 for ‘Accounts’.

Configure the Lead Lightning Record Page

1. Go to Setup > Object Manager > Lead > Lightning Record Pages.
2. Repeat steps 2 through 7 for ‘Accounts’.

Revision History

The changes made to this document include the following:

V1.0	March 2015	• Initial version
V1.1	November 2015	• Reflects functionality changes in Version 1.80
V3.0	May 2017	• Reflects changes in Version 3.0
V3.6	July 2018	• Reflects changes in Version 3.6
V3.8	July 2019	• Reflects changes in Version 3.8
V3.9	December 2020	• Reflects changes in Version 3.9
V4.1	November 2021	• Reflects changes in Version 4.1
V4.3	December 2022	• Reflects changes in Version 4.3
V4.4	January 2024	• Reflects changes in Version 4.4
V5.1	July 2024	• Reflects Lightning Web Components upgrade in Version 5.1
V5.5	March 2025	• Reflects data addition & introduction of Custom Field Mapping