S&P Global
Market Intelligence

S&P Capital IQ Pro Document Intelligence for Salesforce's Agentforce

Install Guide

Version 3.1

October 2025

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Assigning Permissions and Permission Sets

Before we configure the Agent, System Administrators need to ensure that the appropriate permissions and permission sets are assigned.

Assigning Permission Sets

System Administrators need to ensure that 'S&P Document Intelligence' permission set is assigned to all users for which the Agent needs to be enabled. Follow the below steps:

1. Click on the gear icon on the top right corner and select 'Setup'.
2. Go to Administration > Users > Permission Sets.
3. Click on 'S&P Document Intelligence'.

4. Click 'Manage Assignments'.
5. Click **Add Assignments**, select the users, and then click **Assign.**

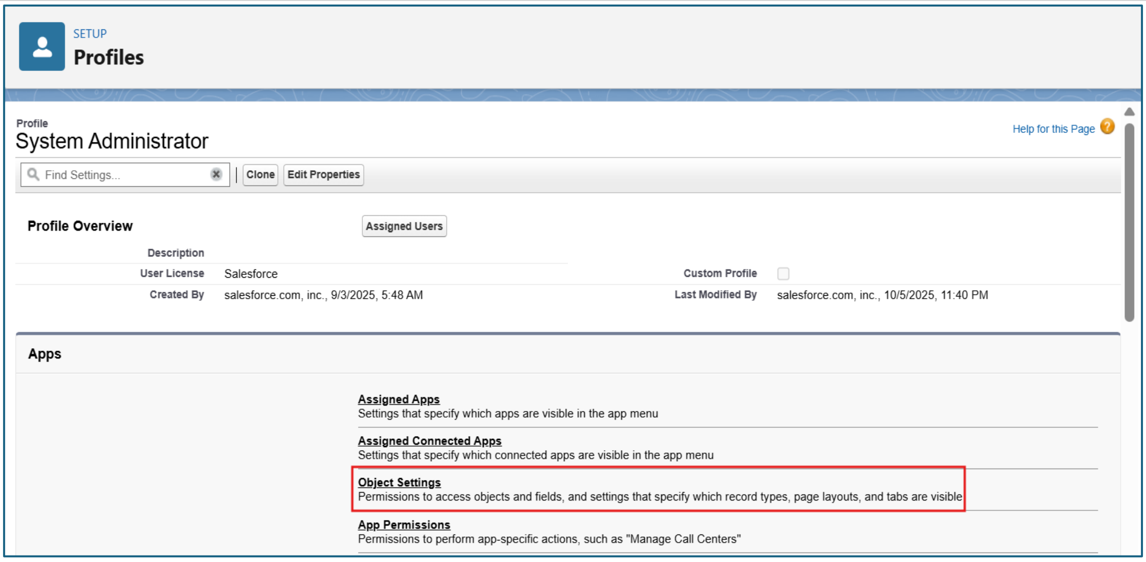
Field Level Security (FLS) Permissions

Along with the standard fields, it is required that the below two custom fields are visible with read and edit access enabled for all users.

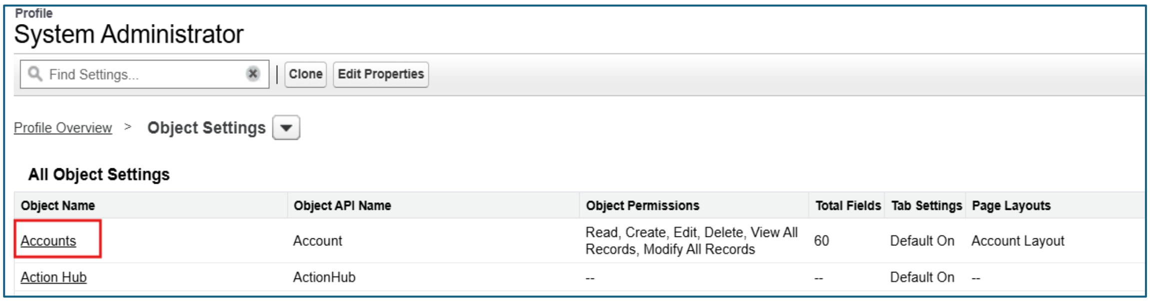
Field Name	Field API Name
S&P Capital IQ Company ID	spgmidocintel__S_P_Capital_IQ_Company_ID__c
S&P MI Company Key	spgmidocintel__S_P_MI_Company_Key__c

Steps to enable FLS Settings in your instance of Salesforce

1. Click on the gear icon on the top right corner and select 'Setup'.
2. On the left-hand navigation, go to Administration > Users > Profiles.
3. Upon clicking, the right pane shows the list of profiles.
4. Scroll down until you see "System Administrator" profile in the list.
5. Click System Administrator Profile name to access the profile.
6. Click Object Settings within the Apps section of the page.



7. Click on ‘Accounts’ from the list of objects.

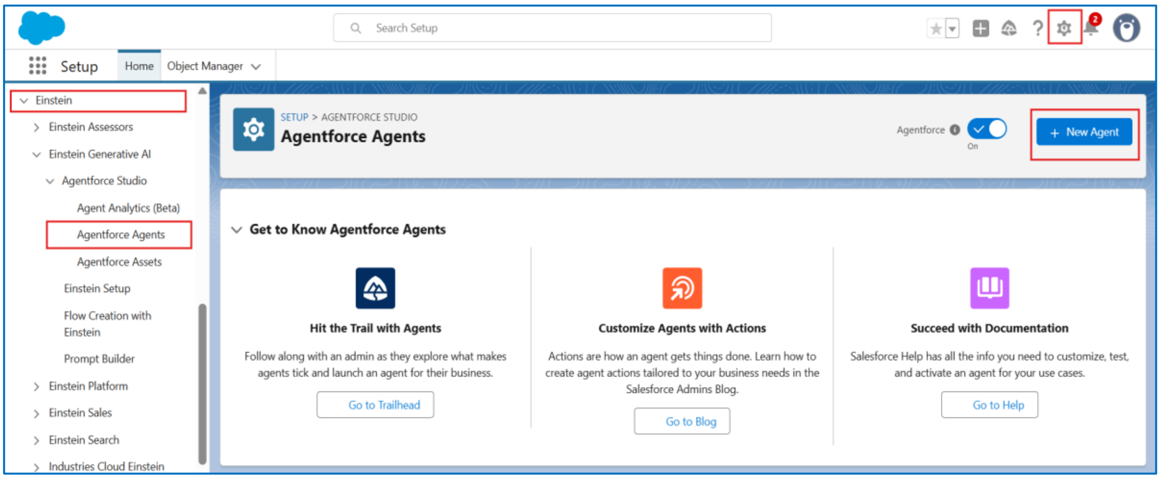


8. Account field-level security for the profile will be displayed within the Field Permissions section of the page.
9. Make sure that all fields mentioned at the start are checked.

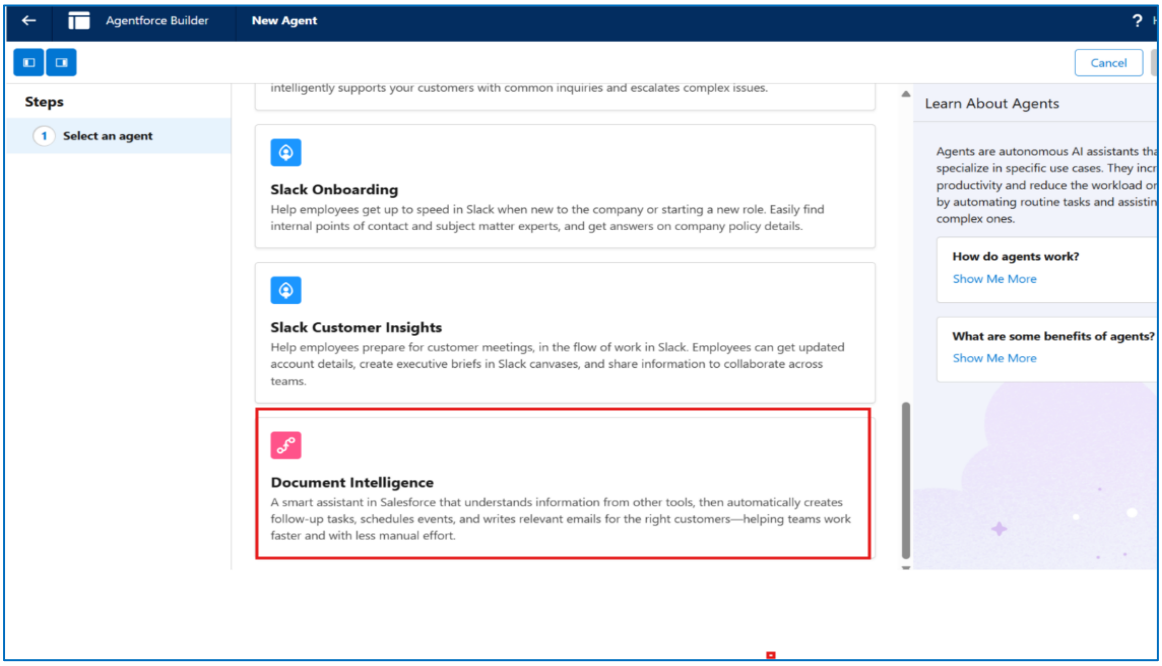
Setting up the Agent

To enable S&P Capital IQ Pro Document Intelligence, follow the below steps:

1. Click on the gear icon on the top right corner and select 'Setup'.
2. Either search for 'Agentforce Studio' directly in the search box or go to Einstein > Einstein Generative AI > Agentforce Studio > Agentforce Agents. Click on new agent.

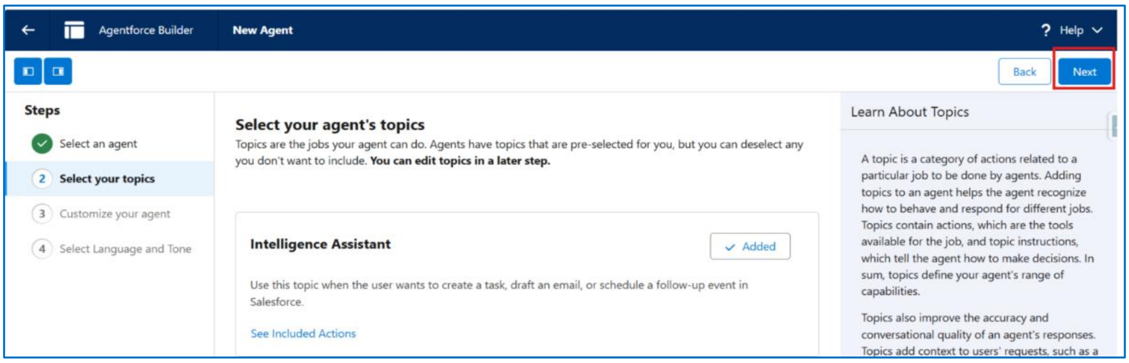


3. Select 'Document Intelligence' and click 'Next'.

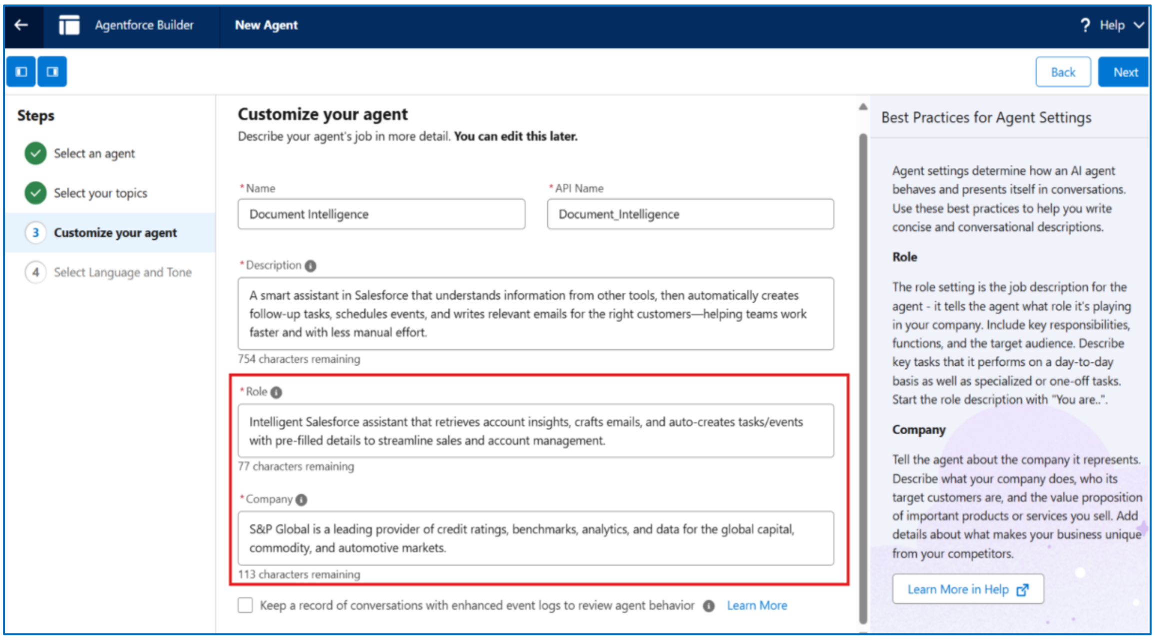


4. You will now land on the Topics page. Click on 'Next' as 'Topics' have already been assigned to Document Intelligence.

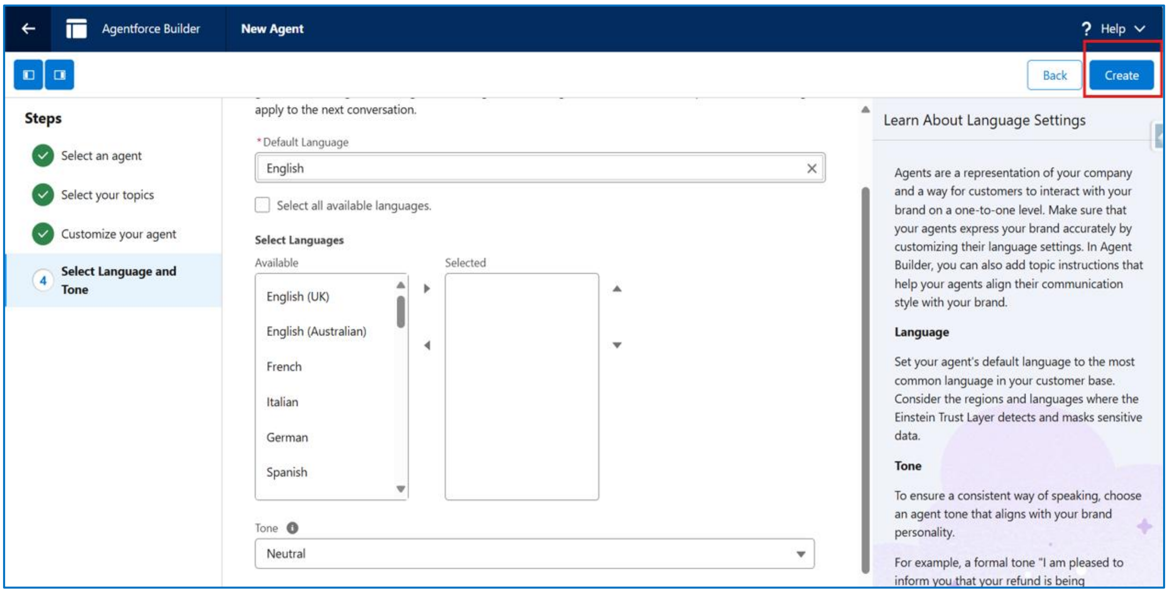
Quick read:
An agent topic is a category of actions related to a particular job to be done by agents. Topics contain actions, which are the tools available for the job, and instructions, which tell the agent how to make decisions. Collectively, topics define the range of capabilities your agent can handle. Topics improve the accuracy & conversational quality of an agent's responses, by adding context to user's requests.
There are preset topics available in Salesforce, but a user can also create custom topics in Agentforce Builder. You can read more about Topics here.



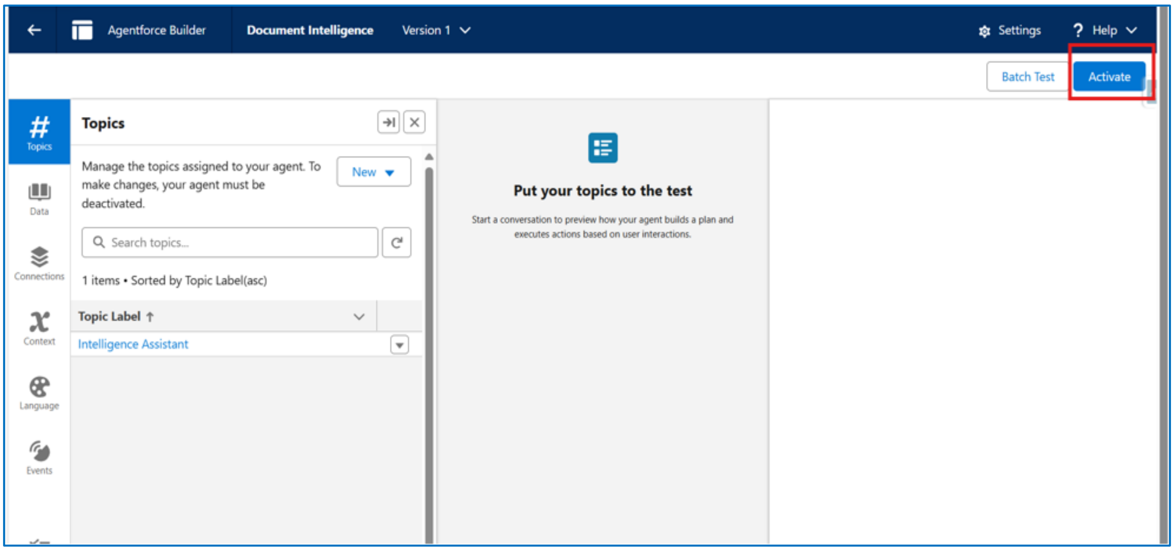
5. On “Customize your agent” page, enter role and scope.
   - **Role**: Intelligent Salesforce assistant that retrieves account insights, crafts emails, and auto-creates tasks/events with pre-filled details to streamline sales and account management.
   - **Scope**: S&P Global is a leading provider of credit ratings, benchmarks, analytics, and data for the global capital, commodity, and automotive markets.



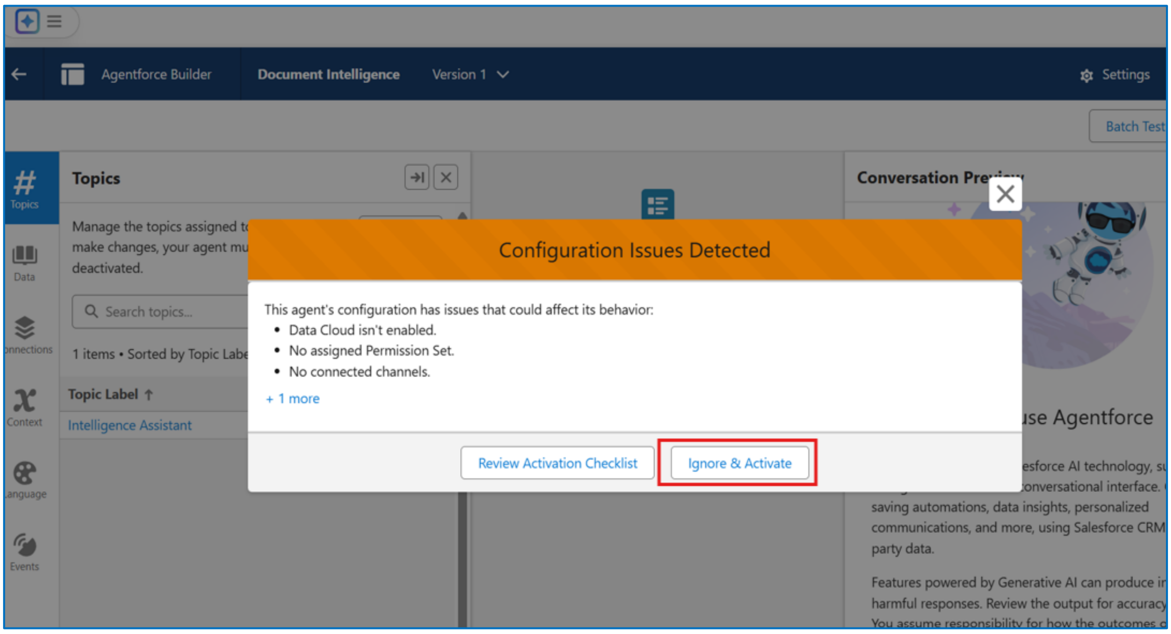
6. Click Next.
7. On the 'Select Language and Tone' page, let default settings persist. Click 'Create'.



8. On the 'Topics' page, click 'Activate'.



9. A Configuration popup may appear. This Agent does not require the existence of Data Cloud, nor other connected channels. Select 'Ignore & Activate'.



10. The Agent is now configured & ready to use. We now need to add the Agent to the ‘Accounts’ page layouts.

Adding the Agent to Page Layouts

Using the default Account Record Page

1. Click on the gear icon on the top right corner & select Setup > Object Manager.
2. Go to Account > Lightning Record Pages.
3. Select 'S&P Capital IQ Pro Document Intelligence Account Record Page' and click on 'Edit'.
4. You will land on the 'Lightning App Builder'. Review the page layout and modify as required.
5. Click on 'Save' and then 'Activate'.
6. You can set the layout as the App Default or Org Default as per your organization's needs.

Note:

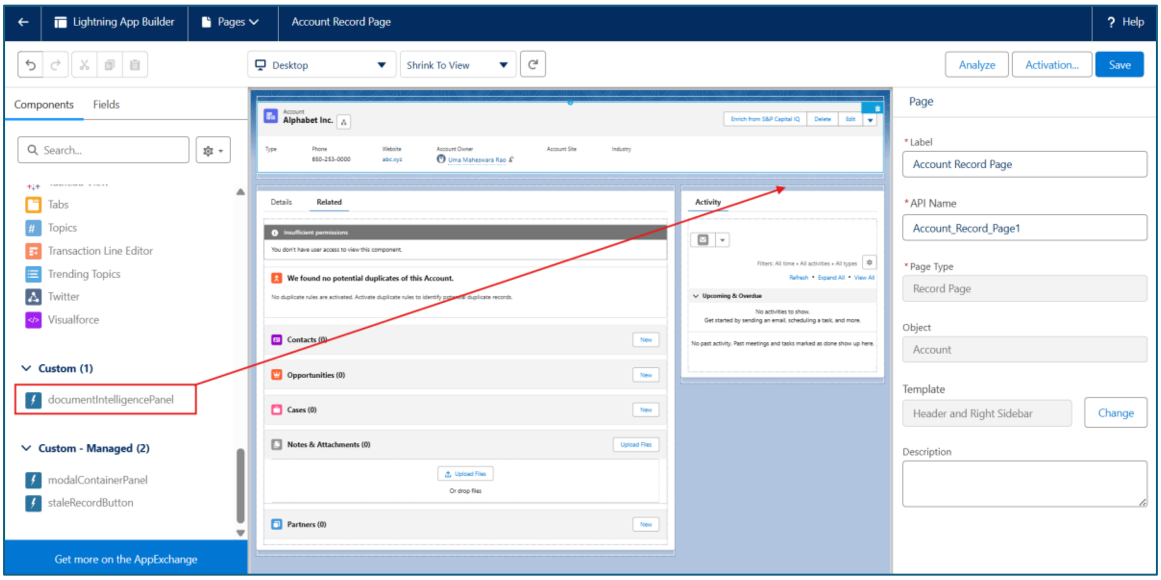
App Default: Setting as app default will display your LWC page as the default page for users of the S&P Global Market Intelligence App in your enterprise. If there is no App Default, then the Org default or the Profile default will be used.

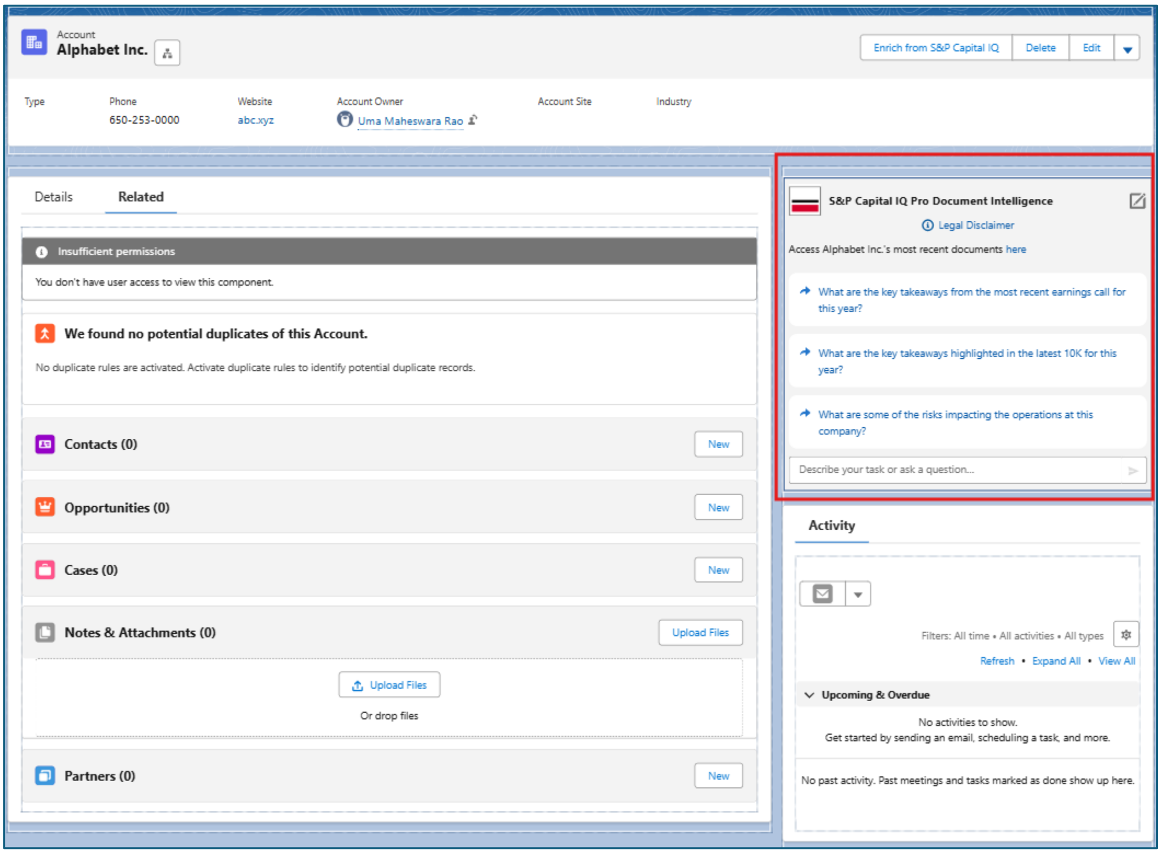
Org Default: Displays your LWC page for anyone who views that object's record in Salesforce, as long as they have access to that object. Org Default overrides the app default.

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

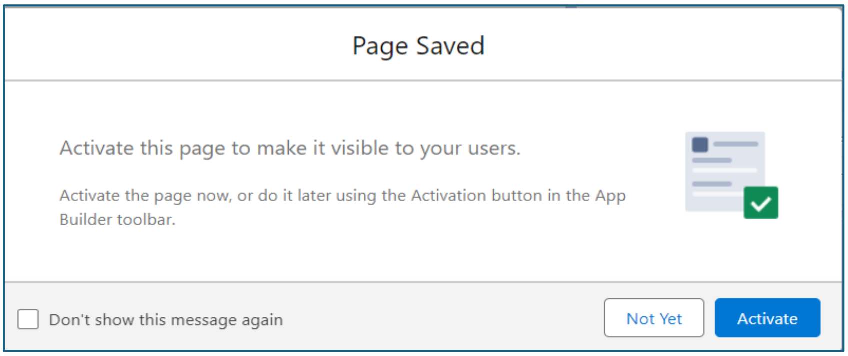
Adding the Agent to existing page layouts

1. Click on the gear icon on the top right corner & select Setup > Object Manager.
2. Go to Account > Lightning Record Pages > Choose the page to which you want to add the Agent.
3. Once the chosen page opens, select 'Edit'.
4. The 'Lightning App Builder' opens. Under the 'Components' tab, you will see a custom component by the name of '**documentIntelligencePanel**'.
5. Select an insertion point and drag the panel.

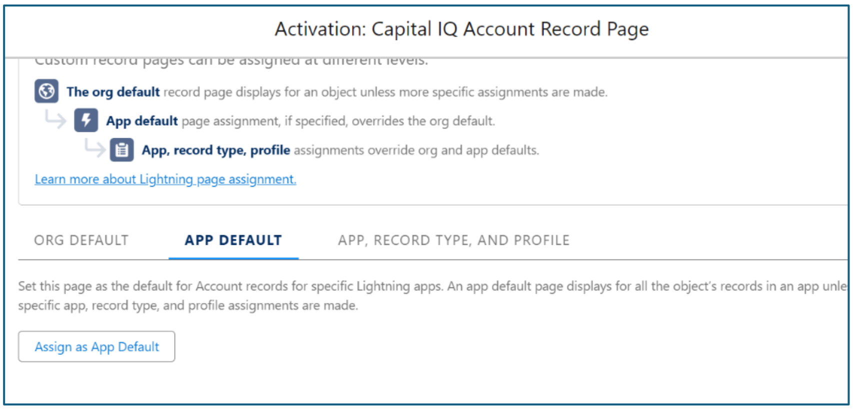

Lightning App Builder
Pages
Account Record Page
Help
Desktop
Shrink To View
Analyze
Activation...
Save
Components
Fields
Search...
Tabs
Topics
Transaction Line Editor
Trending Topics
Twitter
Visualforce
Custom (1)
documentIntelligencePanel
Custom - Managed (2)
modalContainerPanel
staleRecordButton
Get more on the AppExchange
Page
Label
Account Record Page
API Name
Account_Record_Page1
Page Type
Record Page
Object
Account
Template
Header and Right Sidebar
Change
Description


Account
Alphabet Inc.
Enrich from S&P Capital IQ
Delete
Edit
Type
Phone
650-253-0000
Website
abc.xyz
Account Owner
Uma Maheswara Rao
Account Site
Industry
Details
Related
Insufficient permissions
You don't have user access to view this component.
We found no potential duplicates of this Account.
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.
Contacts (0)
New
Opportunities (0)
New
Cases (0)
New
Notes & Attachments (0)
Upload Files
Upload Files
Or drop files
Partners (0)
New
S&P Capital IQ Pro Document Intelligence
Legal Disclaimer
Access Alphabet Inc.'s most recent documents here
What are the key takeaways from the most recent earnings call for this year?
What are the key takeaways highlighted in the latest 10K for this year?
What are some of the risks impacting the operations at this company?
Describe your task or ask a question...
Activity
Filters: All time • All activities • All types
Refresh • Expand All • View All
Upcoming & Overdue
No activities to show.
Get started by sending an email, scheduling a task, and more.
No past activity. Past meetings and tasks marked as done show up here.

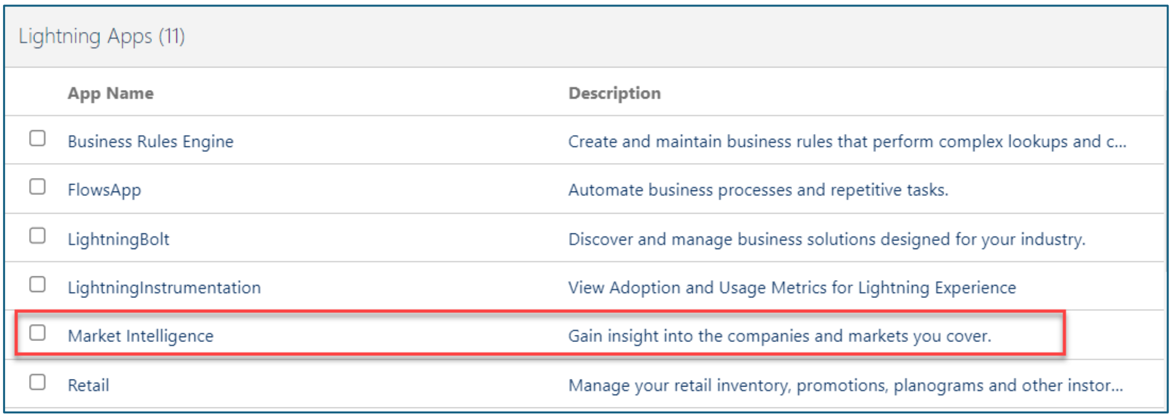
6. Click on ‘Save’. A dialog box will appear. Click on ‘Activate’.



7. Select "App Default" and assign as App Default. If required, you can choose to set it as Org Default.

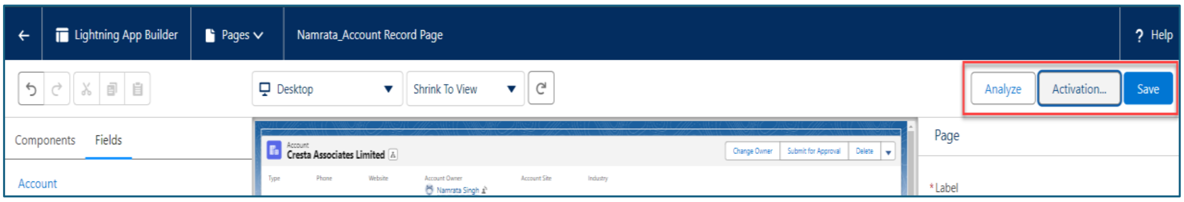


8. (a) For users who use the S&P Global Market Intelligence App, choose the **Market Intelligence** App and proceed with the next steps until you reach the final save.



9. (b) For users not having the S&P Global Market Intelligence App, choose the desired app and proceed with the next steps until you reach the final save.

10. Click ‘Save’ again on the Lightning Record page.



Version History

Version	Release Date	Comments
3.1	October 2025	Initial Version