DiscoverOrg CRM Application - Salesforce® Edition

Install Guide

Version 4.9

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INTRODUCTION

DiscoverOrg CRM Application - Salesforce Edition is a lead generation tool that allows subscribers to easily clean and update existing data, and import new data from the DiscoverOrg database into their Salesforce instances.

WITH THE DISCOVERORG CRM APPLICATION - SALESFORCE EDITION, USERS CAN:

- Search and import DiscoverOrg's profiled contacts at targeted accounts
- Cleanse existing records using DiscoverOrg's Append and Clean feature
- Administer field mapping settings and user permissions for data updates and additions
- Update records with accurate information from DiscoverOrg's database, both manually and through automated jobs

THIS DOCUMENT DETAILS THE INSTALLATION AND CONFIGURATION OF THE DISCOVERORG - SALESFORCE EDITION.

IMPORTANT ITEMS TO NOTE BEFORE INSTALLING DISCOVERORG CRM APPLICATION - SALESFORCE EDITION:

- Users must have either the System Administrator profile or "Download AppExchange packages" permission to install the app.
- An active DiscoverOrg user license is necessary to install the app.
- The app can be installed on the following versions of Salesforce:
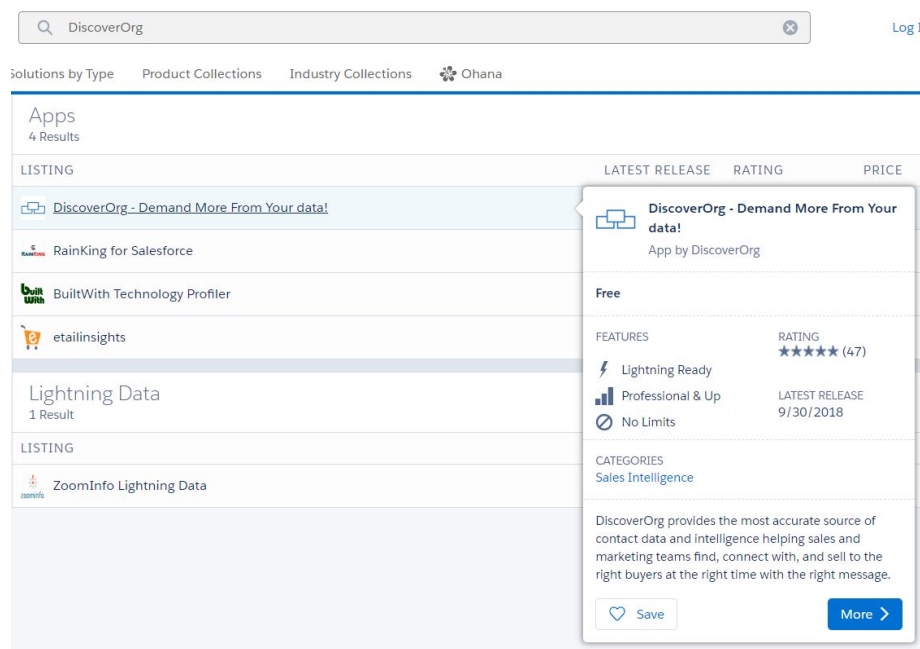 - Professional
  - Enterprise
  - Unlimited

PREPARATION

If upgrading to a new version of the app from an older one, taking notes or a screenshot of current mapping settings is **recommended** to verify settings after the upgrade.

No preparation is needed for new installations of DiscoverOrg for Salesforce.

GETTING THE APP

1. Visit the Salesforce AppExchange: https://appexchange.salesforce.com.

2. Search for `DiscoverOrg` using the search bar at the top of the page.

3. Hover over the DiscoverOrg app and select `More`.

4. Select the green `Get It Now` button on the right side of the page.

5. For first-time use, installation into a Sandbox org for testing is **recommended**. Otherwise, click `Install in production` when prompted.

6. On the `Almost there!` screen, after reading the terms and conditions, check the checkbox and click `Confirm and Install!`


7. Log in to the Salesforce user account tied to the desired org.

8. If prompted, select `Install for Admins Only.` (**Recommended**). Permission sets can be used to grant app access on a per-user basis. See the section Applying Permission Sets for more details.

SETUP PART 1A - CONNECTING TO DISCOVERORG

After the installation is complete, it's time for setup.

1. In **Salesforce Classic**, click the + sign at the top of the navigation bar then click on the "DiscoverOrg Search" tab:
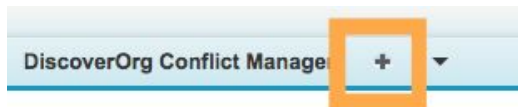
2. In **Salesforce Lightning** click the App Launcher then click click on "DiscoverOrg Search":
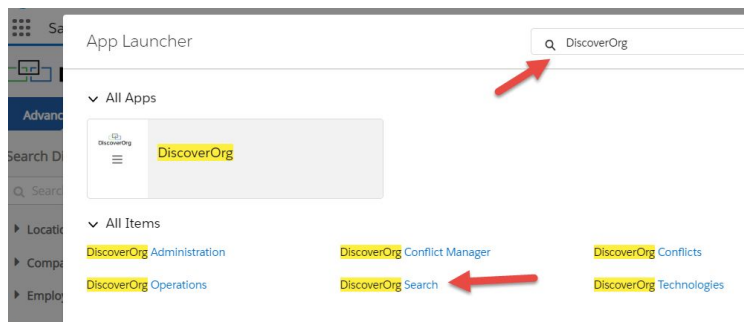
3. Enter DiscoverOrg credentials as if logging into the DiscoverOrg website, if not already authenticated. This links the app to the DiscoverOrg account.

NOTE: To switch to a different Salesforce user account in the future, contact your DiscoverOrg Customer Success Manager.

SETUP PART 1B - APPLYING PERMISSION SETS

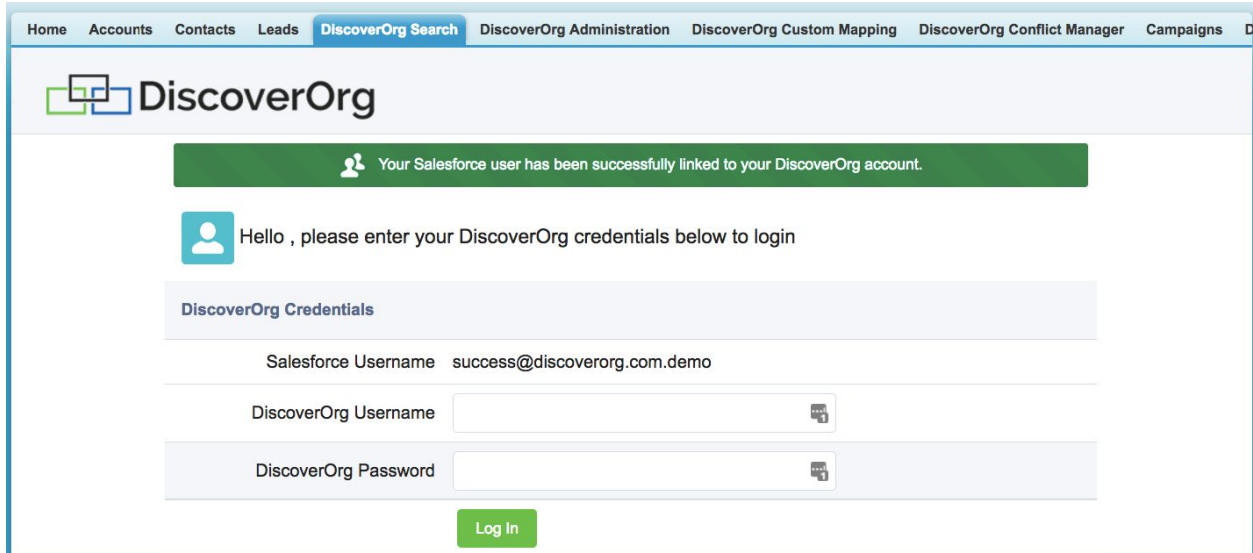There are three permission sets included in the app. They can be used to quickly grant necessary rights for DiscoverOrg for Salesforce to users and administrators.

The `Access to DiscoverOrg - Administrator` permission set should be applied to any users who will make configuration changes in the DiscoverOrg app, or use administrative tools such as Append and Clean. This set includes all permissions of the standard set as well.

The `Access to DiscoverOrg` and `Access to DiscoverOrg - Inline Only` permission sets should be assigned to all users in Salesforce who have a DiscoverOrg account.

- Go to the `Setup` page
- Search for `Permission Sets`
- Click on `Access to DiscoverOrg`
- Near the top of the page, select `Manage Assignments`

- Choose `Add Assignments`
- Select each user who has a DiscoverOrg account
- Click `Assign`

The `Access to DiscoverOrg - Inline Only` permission set is a special limited access set designed for users who should only have rights to DiscoverOrg's record-level inline Visualforce pages, but not its search capabilities.

SETUP PART 2A - EDITING PAGE LAYOUTS (CLASSIC)

This part of the setup explains how to update Lead, Contact, and Account page layouts to display DiscoverOrg's custom fields and page elements. The process is the same for all three pages.

1. Open an existing account and click `Edit Layout` in the upper-right corner of the page.
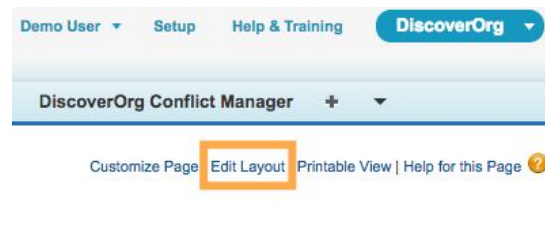

NOTE: Add a Section to the layout by clicking and dragging the orange Section into the layout, title it **DiscoverOrg***, and choose 1-column when Section Properties comes up.*
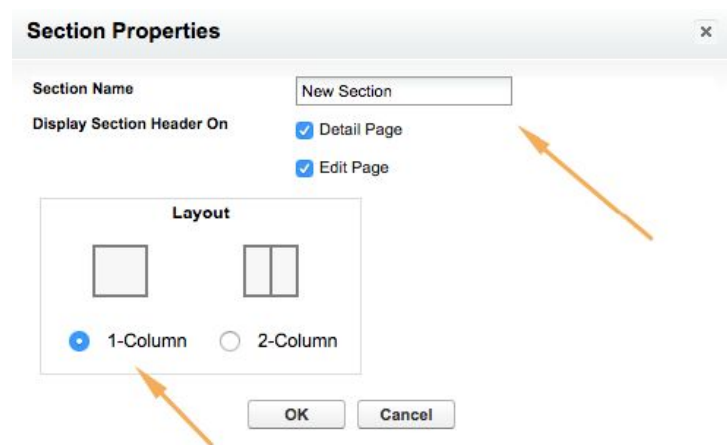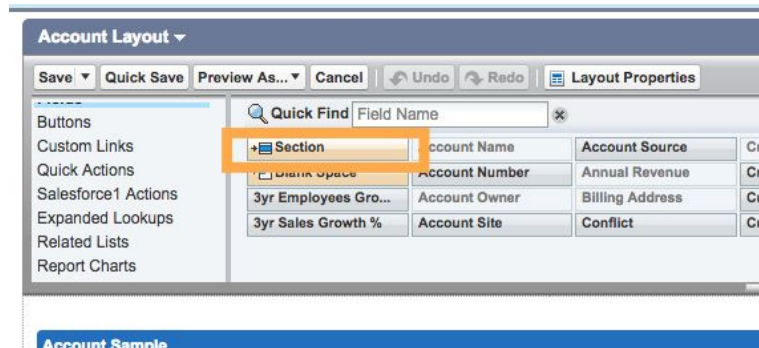
2. Add a second Section immediately beneath that one, choose 2-Column, and uncheck the Detail Page and Edit Page options. Name this one "DiscoverOrg Fields."

3. For Contacts, Leads, and Accounts, add the following Fields to the "DiscoverOrg Fields" Section:
   - `DiscoverOrg ID`
   - `DeletedFromDiscoverOrg`
   - `Created by DiscoverOrg`
   - `DiscoverOrg Last Update`
   - `Exclude from DiscoverOrg Auto- Updates`
   - `DiscoverOrg ReportsTo` (Applicable to Lead and Contact pages only)

4. Select `Visualforce Pages` on the left side of the toolbar and add the `DiscoverOrgAccountInlinePage` object to the bottom of the DiscoverOrg Section.

Note: if you are using Salesforce Lightning UI, we recommend an alternative approach in Setup Part 2b.
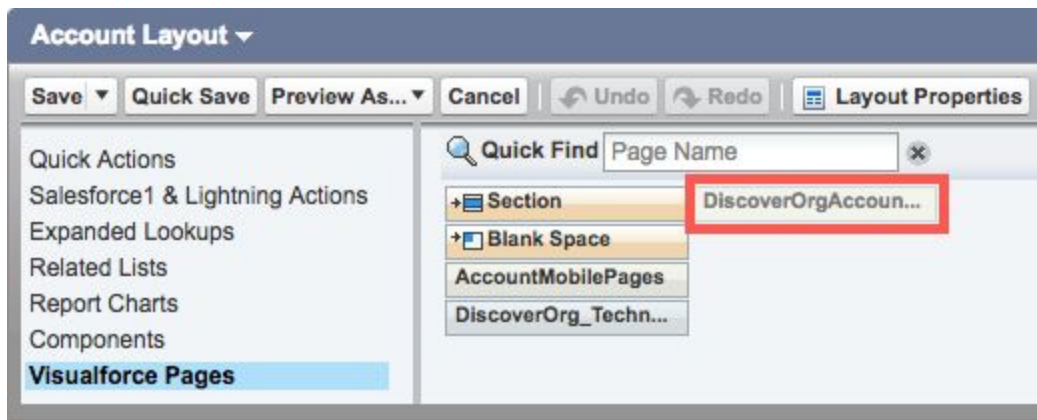
NOTE: The name of this page will be different when setting up Account, Contact, and Lead page layouts.

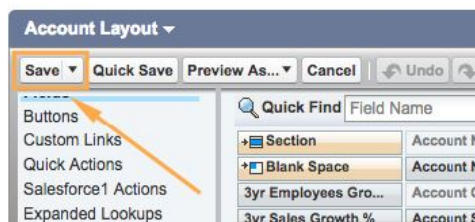4. To open the properties window, click on the wrench icon in the corner of the inline page that was just added. Select `Show scrollbars` and set the `Height` to `600`. Click `OK`.
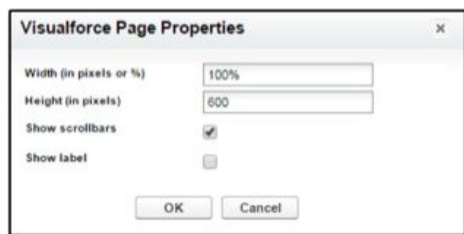
5. Click `Save` in the `Layout` toolbar to commit changes and reload the page with the new DiscoverOrg section, fields, and inline page.

6. Repeat this process on all desired page layouts for Accounts, Contacts, and Leads.
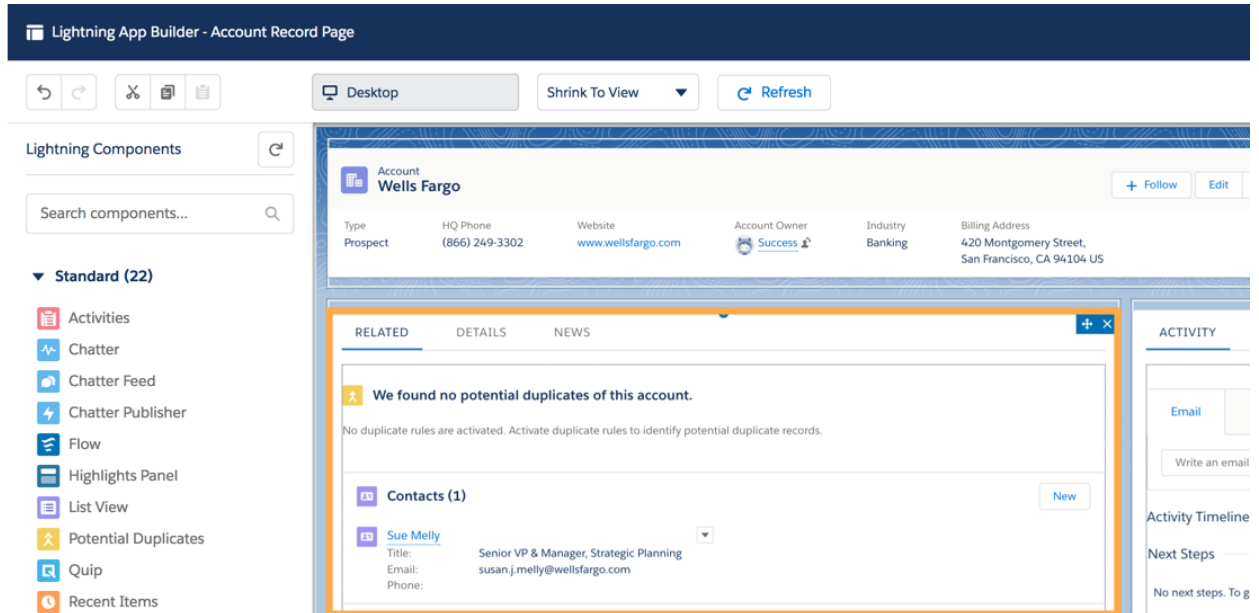
SETUP PART 2B - EDITING PAGE LAYOUTS (LIGHTNING)

We recommend additional configuration to make DiscoverOrg's page elements easily available within Salesforce's Lightning UI. If you are using Lightning UI, follow these steps to give your users better access to DiscoverOrg data.

1. Open an existing account, click on the upper-right gear icon, then click `Edit Page` to open the Lightning App Builder.
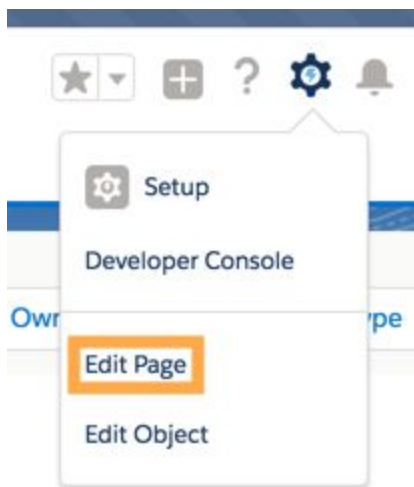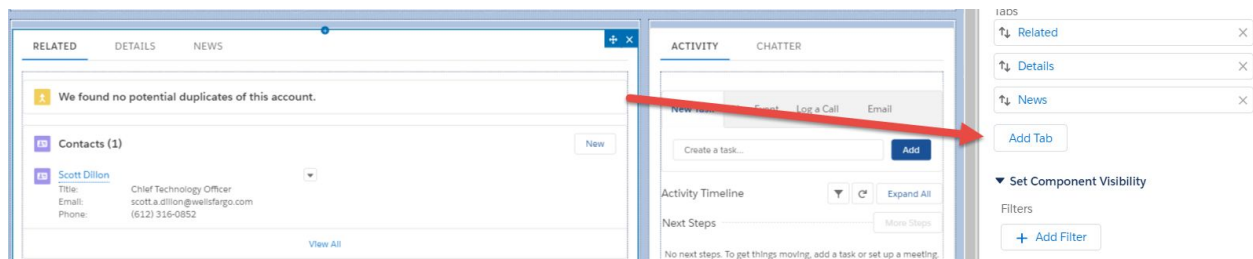
2. Click on the lower-middle element, which will show related lists by default.

3. Click the `Add Tab` button on the right-side panel.

4. Re-label the new tab by clicking on its name, then selecting Custom from the drop-down menu.
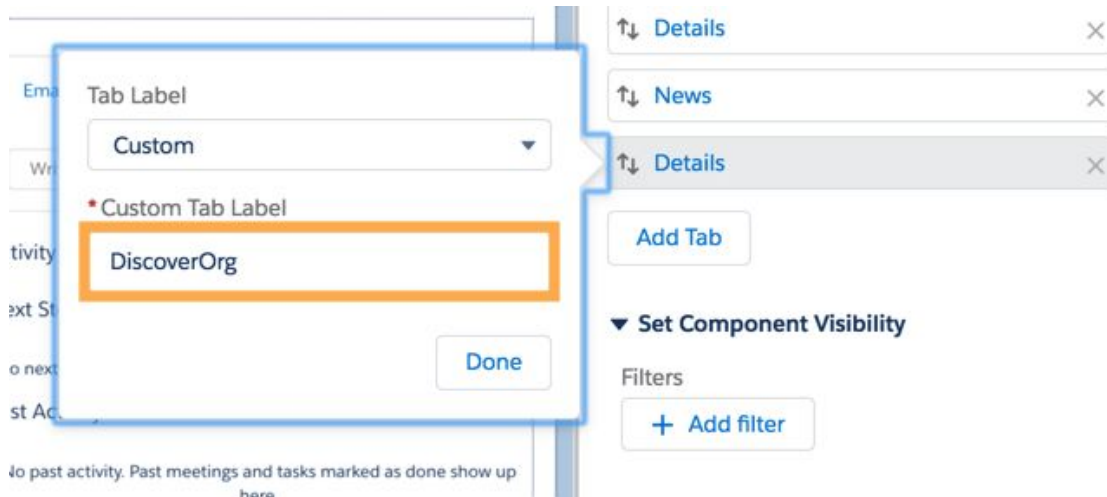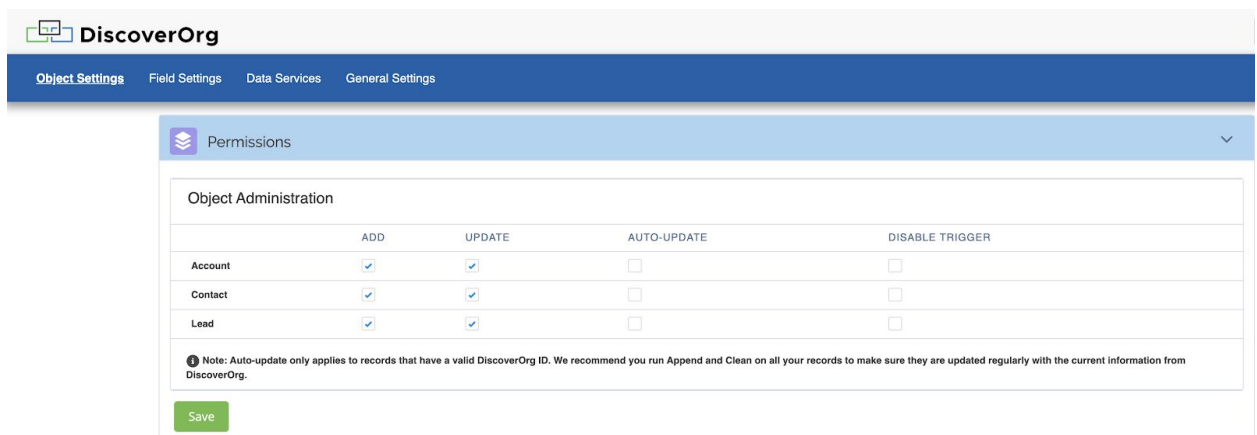
5. Label the tab "DiscoverOrg", and click Done.
6. Click on the newly re-labeled Discoverorg tab.
7. Click `Visualforce` from the left-side menu, and drag it into the new page. You should see the page highlight in light green. Click once more on the newly-added element.
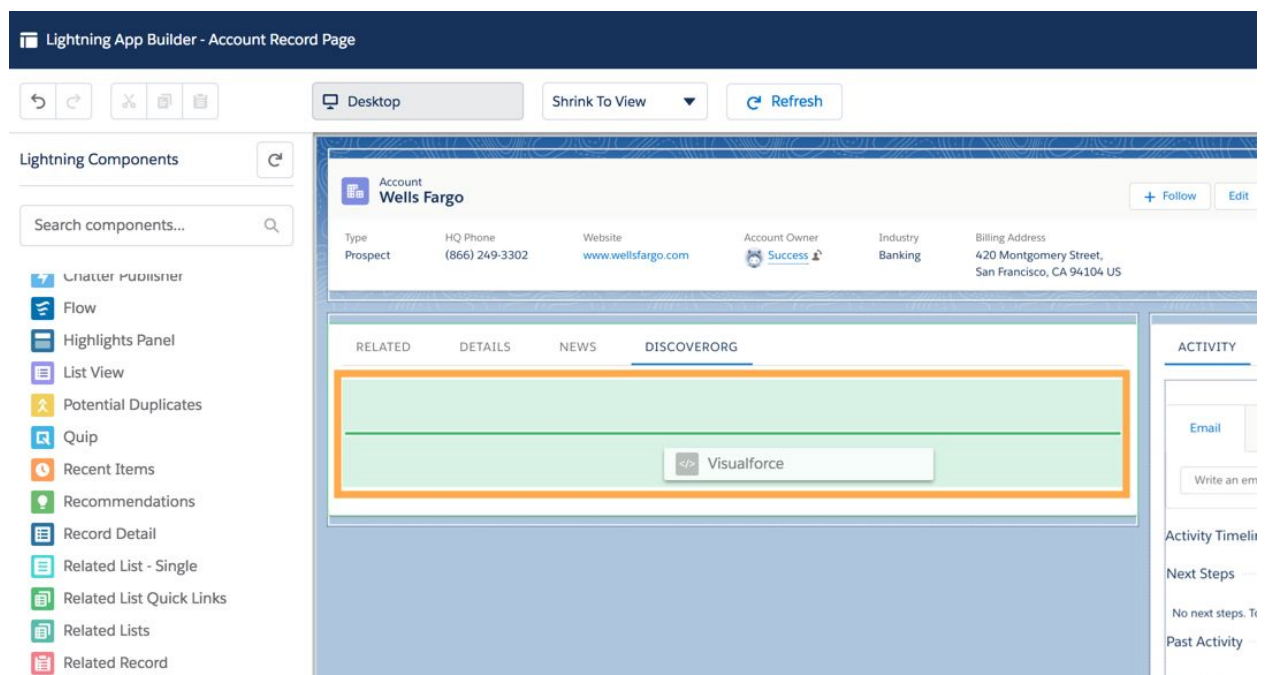
8. Locate the Visualforce Page Name drop-down menu on the right slide, then select "DiscoverOrgAccountInlinePage". Set label as "DiscoverOrg." Set height to 800 pixels.
9. Click `Save` in the upper-right corner, then `Activation...`
10. Assign the page to all DiscoverOrg app users.
11. Repeat this process on all desired page layouts for Accounts, Contacts, and Leads.

SETUP PART 3 - DISCOVERORG ADMINISTRATION

Find the `DiscoverOrg Administration` tab by clicking the plus symbol (+) at the top of the navigation bar in Salesforce Classic or via the App Launcher in Salesforce Lightning. This page is divided into 4 sub-sections to customize what users can do using DiscoverOrg, enable and run data services, and configure other advanced update-related settings.

On the `Object Settings` sub-tab, the checkboxes allow users to configure app permissions at the object level. This allows for quick, broad changes, such as disabling updates to Lead records.

- `Add` - Allows users to add new Accounts, Contacts, and Lead records using the app
- `Update` - Allows users to update existing Accounts, Contacts, and Leads using the app
- `Auto-Update` - Allows the app to automatically update linked Account, Contact, and Lead records (disable by default if Data Services are not added)

- **NEW to 4.9** `Disable Trigger` - Allows DiscoverOrg triggers to be disabled, temporarily or permanently, in order for the admin to perform other triggered operations in their org

The `Field Settings` sub-tab allows you to choose which Salesforce fields DiscoverOrg will populate. The checkboxes control the following:

- `Add` - Insert specified field(s) when creating records.
- `Update` - Update specified field(s) when updating records.
- `Blank Only` - Update specific field(s) only if they're blank. (If the field is already populated, no update occurs.)
- `Nightly Updates` - Automatically update specified field(s) for any linked records; that is, any record appended with a DiscoverOrg ID (disabled by default if Data Services are not enabled)
- `Skip Conflicts` - Do not create conflicts if specified field(s) values differ from Salesforce to DiscoverOrg. (**On by default -** if you'd like to turn on Conflict Creation see the General Settings tab)

The `Data Services` sub-tab is where additional data services jobs can be purchased and managed separately. If you do not have Data Services enabled and would like to add them please contact your CSM. If you installed the application then subsequently purchased Data Services click the **Update My Data Services** link in the top-right corner of the Data Services tab for the permissions to update:
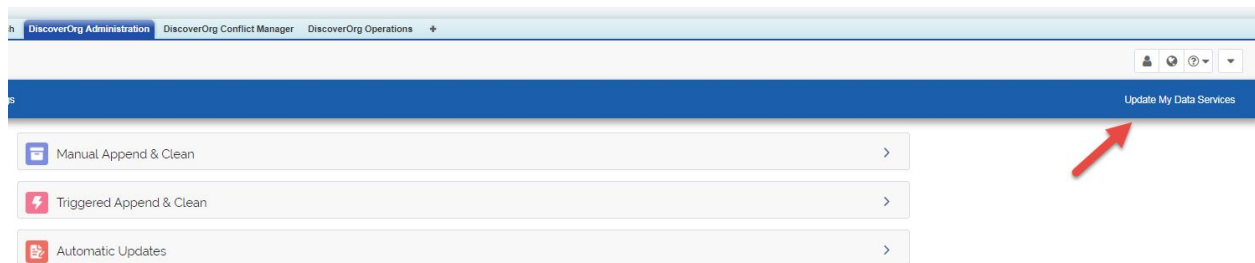
Using DiscoverOrg's Data Services you can enable and run automated data updates between your Salesforce and DiscoverOrg.   The sections control the following:

- `Manual Append & Clean` - Mass-update Lead, Contact, and Account records with a DiscoverOrg ID. Records can be appended just with a DiscoverOrg ID to allow

Automatic Updates to manage the records or records can be Appended with a DiscoverOrg ID and cleaned with fields updating per the field settings.

- `Triggered Append & Clean` - Enabling Triggered Append & Clean creates a regularly running job that looks for new records added to the Salesforce that have not been matched with DiscoverOrg and sends them to DiscoverOrg to match with a DiscoverOrg ID and update fields per the field settings. (**Recommended** to enable to ensure new records added to Salesforce are matched and updated from DiscoverOrg).

- `Automatic Updates` - Configure how frequently the app requests updates to records appended with a DiscoverOrg ID. (Choose between nightly, weekly, or monthly)
  - `Preferred Starting Hours` - set the start time for automatic updates between 10pm - 3am local time

- `Intelligence Imports`
  - `Technology Import Settings` - Enabling Technology Imports creates an automatic job in Salesforce to update newly added or updated records from DiscoverOrg with that record's Technologies in use. Technologies will import to the "DiscoverOrg Technologies" object which can be added to page layouts as a related list. Enabling Weekly Updates of DiscoverOrg Technologies creates a job that runs every week from the day of activation to update all DiscoverOrg Technologies in the Salesforce with new information from DiscoverOrg. Users can select individual Technology Categories or all Technology Categories. Please note that selecting All Technology Categories could potentially use significant storage in the Salesforce as Technologies exist as individual records.
  - `Scoop Import and Filter Settings` - Configure the app to import DiscoverOrg Scoops to store directly in the org. Imported Scoops are most useful for custom-configured analytics, scoring, and automation, changing Lead status based on new intel, or factoring new announcements into a multi-factor fit score. Import is configurable per-object type. Records are imported to a custom object. Imported Scoop records will count toward storage limits. Records can be automatically deleted based on age. (**Recommended**) Scoop types, departments, and topics can be pre-filtered for relevancy. (**Recommended**)
  - `OppAlert Import and Filter Settings` - Configure the app to import DiscoverOrg OppAlerts for storage directly in the org. Like Scoops, imported OppAlerts are most useful for custom-configured analytics, scoring, and automation. OppAlerts are tied to Companies, and signal new purchasing intent. Records are imported to a custom object related to Accounts. Imported OppAlert records will count toward storage limits. Records can be automatically deleted based on age. (**Recommended**). Opportunity types and contributory topics can be pre-filtered for relevancy. (**Recommended**)

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The `General Settings` sub-tab is where you can configure additional application functionality.   The sections control the following:

- Configure Add/Update Settings
  - `Change Owner` - Toggle to specify the record owner during imports.
  - `Custom Text` - Add custom text such as tags or messages, to a chosen mapped field during import. It's **recommended** that users create new custom text fields on each object where this option is enabled.
  - `Add/Update` - Toggle `Disable Add/Update All` button to remove the ability for users to import all found records at once. Toggle `Disable Add/Update Companies and their Contacts` features to remove the ability for users to simultaneously import contacts and companies in a single add/update operation.
  - `Duplicate Checking` - Configure the app to disregard duplicate or existing Contact or Leads records when adding Leads.
  - `Matching Existing Accounts` - Choose how DiscoverOrg will match companies to existing Salesforce accounts during an add/update.
  - `Update History` - Manually delete old Update History records
- Conflicts
  - `Conflicts` - "Do Not Create Conflicts" is on by default; conflicts will not be created when adding/ updating records. Matching records will automatically be updated with DiscoverOrg data
  - `Conflict History` - Manually delete old Conflict History records.
- Export to CSV
  - `Export to CSV` - Toggle to enable/disable the option to export search results to .CSV files.

SETUP PART 4 - APPLYING ADDITIONAL PERMISSIONS

There are three permission sets included in the app. They can be used to quickly grant necessary rights for DiscoverOrg for Salesforce to users and administrators.

The `Access to DiscoverOrg - Administrator` permission set should be applied to any users who will make configuration changes in the DiscoverOrg app, or use administrative tools such as Append and Clean. This set includes all permissions of the standard set as well.

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- Select each user who has a DiscoverOrg account
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The `Access to DiscoverOrg - Inline Only` permission set is a special limited access set designed for users who should only have rights to DiscoverOrg's record-level inline Visualforce pages, but not its search capabilities.

SETUP PART 5 - MAPPING FOR LEAD CONVERSIONS

This section is relevant for Salesforce's Lead conversion process. If a Lead has a DiscoverOrg ID appended to it, that ID value *will not* automatically carry over if the Lead is converted to a new Account and Contact.

Use the following steps to ensure that the ID transfers to the new records:
1. `Setup > Customize > Leads > Fields`
2. Scroll to `Lead Custom Fields & Relationships` section, click `Map Lead Fields` button
3. Map `DiscoverOrg Company ID` to `DiscoverOrg ID` on the `Account` tab. Save
4. Map `DiscoverOrg Id` to `DiscoverOrg Id` and `DiscoverOrg ID` to `DiscoverOrg ID` on the `Contacts` tab. Save
5. `Setup > Create > Workflow & Approvals > Workflow Rules`. Click past the `Understanding Workflow` screen, if shown
6. Click `New Rule`
7. Object: `Account`
8. Rule Name: `DiscoverOrg ID not blank on creation`
9. Description: `Evaluates whether DiscoverOrg ID is not null when an Account is created.`
10. Evaluate this rule when a record is: `created`

11. Run this rule if the following `criteria are met`
12. Field: Account: `DiscoverOrg ID`
13. Operator: `not equal to`
14. Leave Value blank
15. Save and click `Next`
16. `Add Workflow Action > New Field Update`
17. Name: `Copy DiscoverOrg ID`
18. Unique Name: `Copy_DiscoverOrg_ID`
19. Description: `Copy DiscoverOrg ID value to the DiscoverOrg ID field`
20. Field to Update: `DiscoverOrg ID`
21. Use a formula to set the new value
22. Formula: `DSCORGPKG__External_DiscoverOrg_Id__c` (remove quotes)
23. Save
24. `Done`
25. `Activate`

SETUP PART 6 - SINGLE SIGN-ON

If you would like to enable "Single Sign-on" between this Salesforce application and DiscoverOrg inform your DiscoverOrg Customer Success Manager so that they can enable this setting. Once enabled in DiscoverOrg, instead of showing the standard login screen the application will show this screen:

When users click "Authenticate DiscoverOrg" the Salesforce will pass these values to DiscoverOrg to authenticate:

- Salesforce Org ID
- Email Address in Salesforce of user
- Last Name in Salesforce of user

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If you enable Single sign-on with this application, please send your Salesforce Org ID and the list of users who will be using single sign-on including their Email Address and Last Name exactly as they're listed in Salesforce. If the Org ID, Last Name and Email Address match exactly between DiscoverOrg and Salesforce users can authenticate this application without the need for entering credentials. If details between Salesforce and DiscoverOrg do not match the user will be prompted to enter credentials.

Setup of the DiscoverOrg CRM Application - Salesforce Edition is now complete.

Contact the DiscoverOrg support team directly at helpmenow@discoverorg.com for further questions or concerns.