Salesforce Managed Package Installation & Configuration Guide
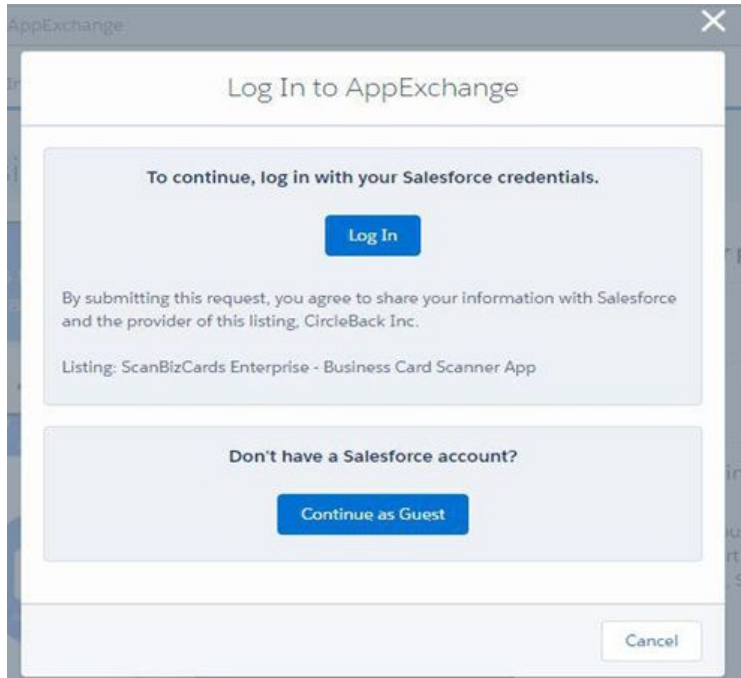
Prerequisite

You must have Salesforce for Enterprise, Unlimited, Developer or Performance. API is not available in Professional and Essential. Professional edition can purchase API access for an additional fee.

Install Managed Package

1. Search [AppExchange](#) for SalesIntel and click on **Get it Now**. You must be a Salesforce Administrator to install the SalesIntel managed package.
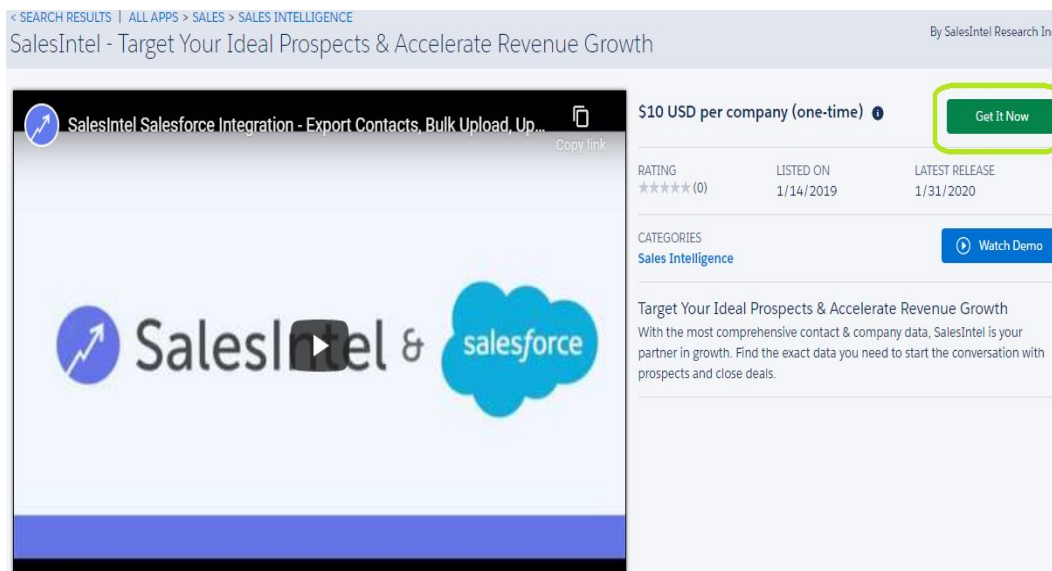

2. If you're an existing Salesforce user, login with your credentials. If you're new, Continue as a Guest and create a Salesforce account.

Log In to AppExchange

To continue, log in with your Salesforce credentials.

Log In

By submitting this request, you agree to share your information with Salesforce and the provider of this listing, CircleBack Inc.

Listing: ScanBizCards Enterprise - Business Card Scanner App

Don't have a Salesforce account?

Continue as Guest

Cancel

3. Choose an environment (i.e. Production or Sandbox) where you would like to install the SalesIntel package. We recommend that you first install the package in your sandbox, and use it for a few days before you're ready to install the package in your production environment.
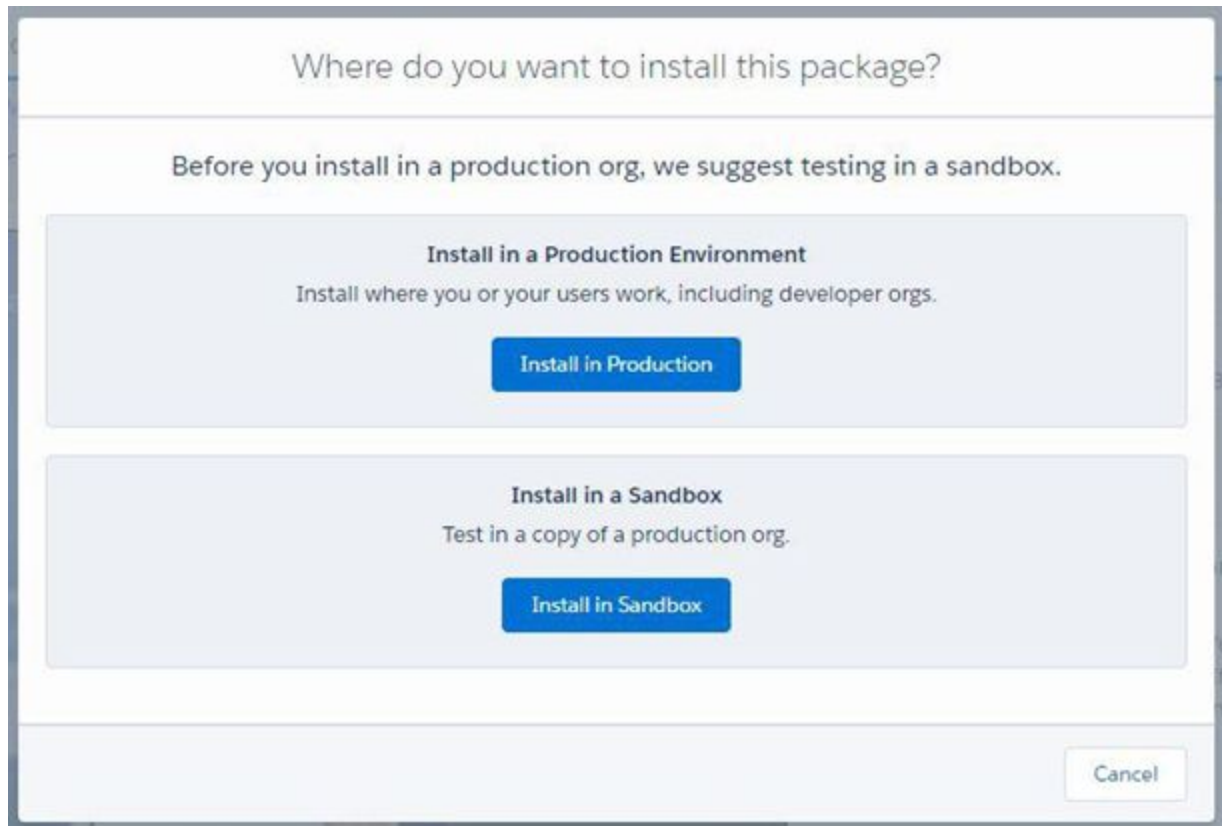
4. Once you click on your desired environment, you will be prompted with **Confirm Installation Details** popup.

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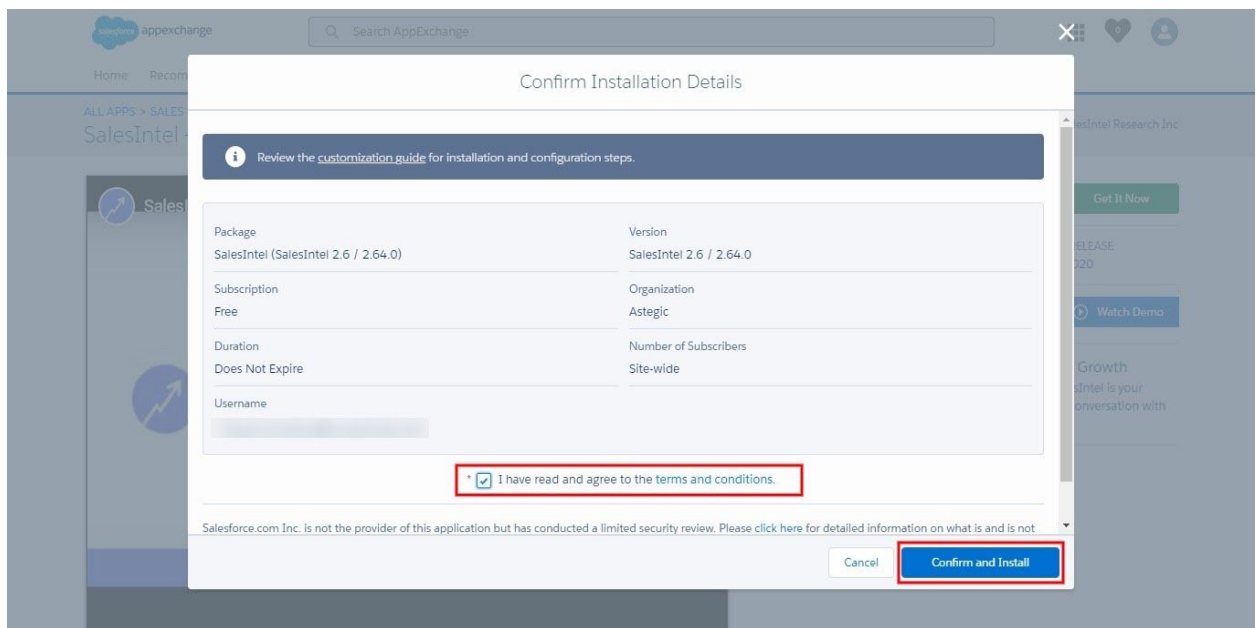
5. Click the checkbox as true next to *I have read and agree to the terms and conditions.*

6. Confirm the Install by clicking the **Confirm and Install** button.

7. Then you will be redirected to the Package Details Page from where you need to select Users for whom you want to install the package.

There are three options for Installation, select one and click Install:

 a. **Install for Admins Only:** Your Salesintel Salesforce package will be installed only for users with Admin roles.
 b. **Install for All Users:** Your Salesintel Salesforce package will be installed for all the users within the organization. *(Recommended)*
 c. **Install for Specific profiles:** Your Salesintel Salesforce package will be installed only for specific user profiles.

8. Provide access to third party websites by clicking checkbox next to *Yes, grant access to these third-party web sites* from Popup.

9. Click the Continue button.
10. After the Installation is done, you will get an Email for successful package installation as well as get a message on the same screen.
11. Click the Done button then you will be redirected into the Installed package window in Salesforce, from there you can see your Installed SalesIntel package.

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. Learn More about Installing Packages.

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Installed Packages

Action		Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Obje
Uninstall | Manage Licenses			ScanBiz Mobile	1.52		Active |	5	1	Does not Expire	5/12/2020, 6:10 AM	☐	2	11	
Uninstall		SalesIntel	SalesIntel LLC	2.64	salesintelio	Active	Unlimited	0	Does not Expire	6/18/2020, 5:41 AM	☐	1	1	
Uninstall		Salesforce and Chatter Apps	Salesforce.com	1.19	sf_chttr_apps	Free	N/A	N/A	N/A	4/21/2020, 5:36 AM	☐	0	0	
		Description												
		This package contains Connected Applications for the officially supported Salesforce apps for iOS and Android and Chatter applications on your desktop...												

Congratulations! Your SalesIntel Package is now installed.

Salesforce Lightning

If you are on Salesforce Classic, skip this section and move to the Salesforce Classic section. Next, you need to provide field level permission to all SalesIntel custom object fields and give permission to SalesIntel App and tabs followed by adding an inline page into the Lead, Contact, and Account pages. To provide all the permissions required to use the SalesIntel managed package, we have a permission set called **SalesIntel Permission Set** which needs to be assigned to users.

Permission Set Assignment

1. Login to your org
2. Go to setup and search for **"permission"**

3. Click **Permission Sets** under Users section.

4. Click on **SalesIntel Permission Set** from the list of Permission sets.

5. Click on the **Manage Assignments** button from the Permission Set page.

Assigned Users
SalesIntel Permission Set
« Back to: Permission Set

A | B | C | D | E

				Add Assignments	Remove Assignments
Full Name ↑		Alias	Username	Last Login	
No records to display.					
				Add Assignments	Remove Assignments

6. Click on the **Add Assignments** button.

Assign Users
All Users

View: All Users ▼ Edit | Create New View

A | B

			Assign	Cancel
Action	Full Name ↑	Alias	Username	
☐	Edit	Chatter Expert	Chatter	chatty.00d2v000001vldveak.1456ggwj4mpn@chatter.salesforce.com
☐	Edit	Johnson, Jacob	csbce	bharti.chets@gmail.com
☑	Edit	Smith, John	CTest	john@summer19release.com
☐	Edit	User, Integration	integ	integration@00d2v000001vldveak.com
☐	Edit	User, Security	sec	insightssecurity@00d2v000001vldveak.com
			Assign	Cancel

7. Select the checkbox as checked next to users to whom you want to give permissions to access the SalesIntel Managed Package and click the Assign button.

Assignment Summary
SalesIntel Permission Set

Permission set SalesIntel Permission Set has been assigned to 1 user.

Done

Full Name	Username
John Smith	john@summer19release.com

Done

8. Click on the **Done** button.

Setup Inline Pages

Contact Object

1. Open contact record > Click Setting icon > Select Edit page
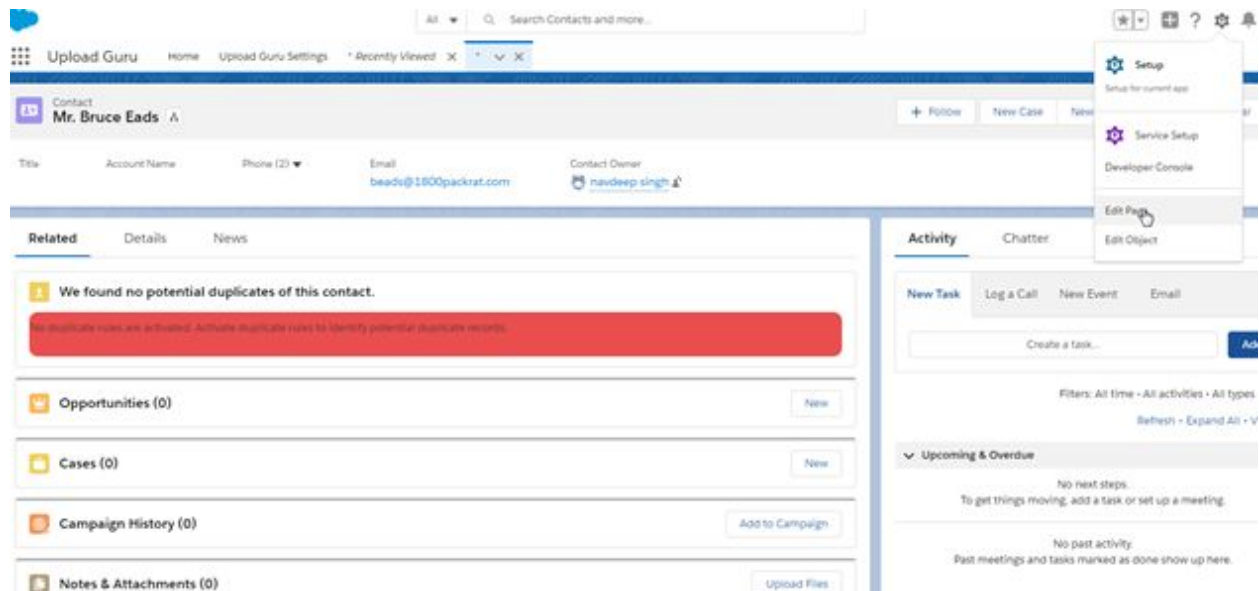
2. Add tab from right palette as click to add tab > Click details > Select custom from drop down > Give label as SalesIntel > Click Done
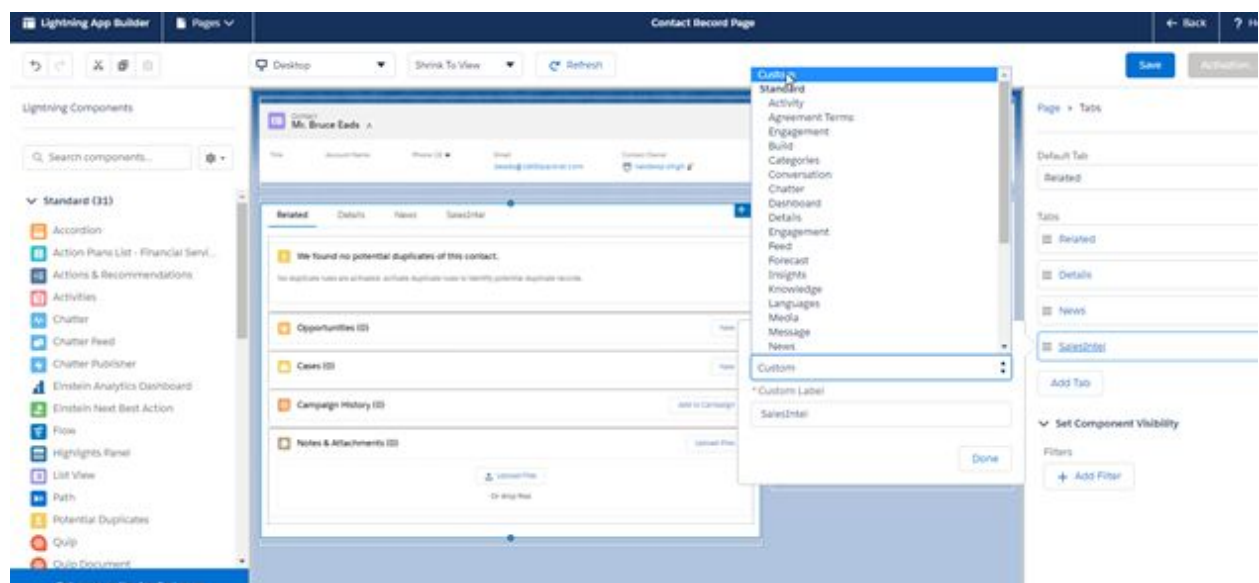
3. Select created tab in (SalesIntel)> Drag component (Salesintel_ContactView) in SalesIntel tab > Click Save.
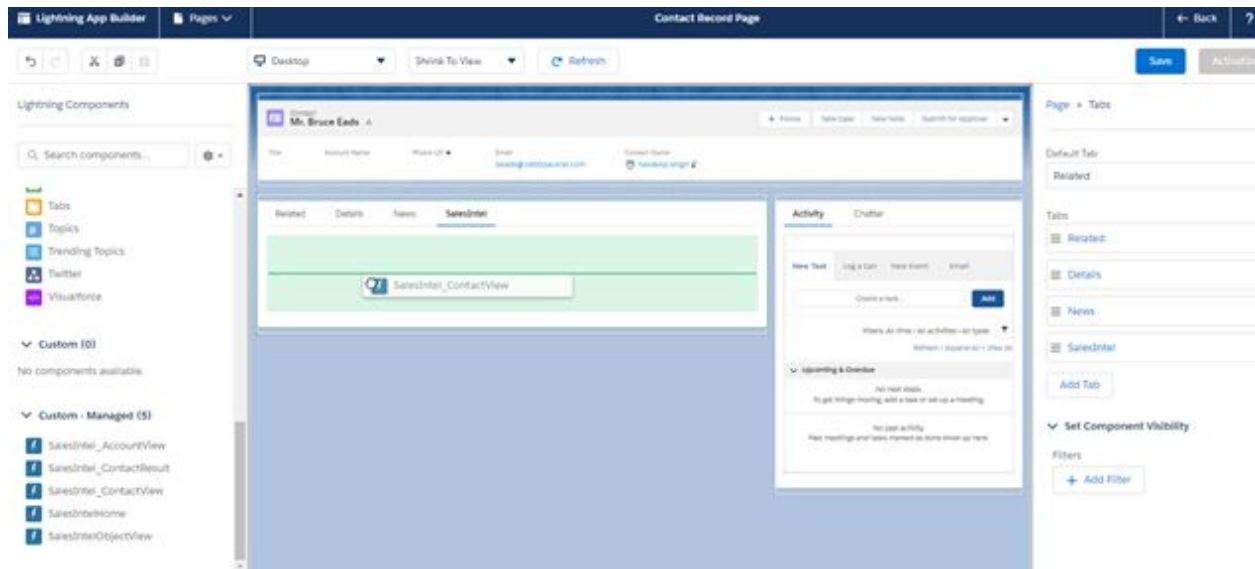
4. After saving, you will receive prompt to Assign as Org default > Click on it > Click Next > Click Save
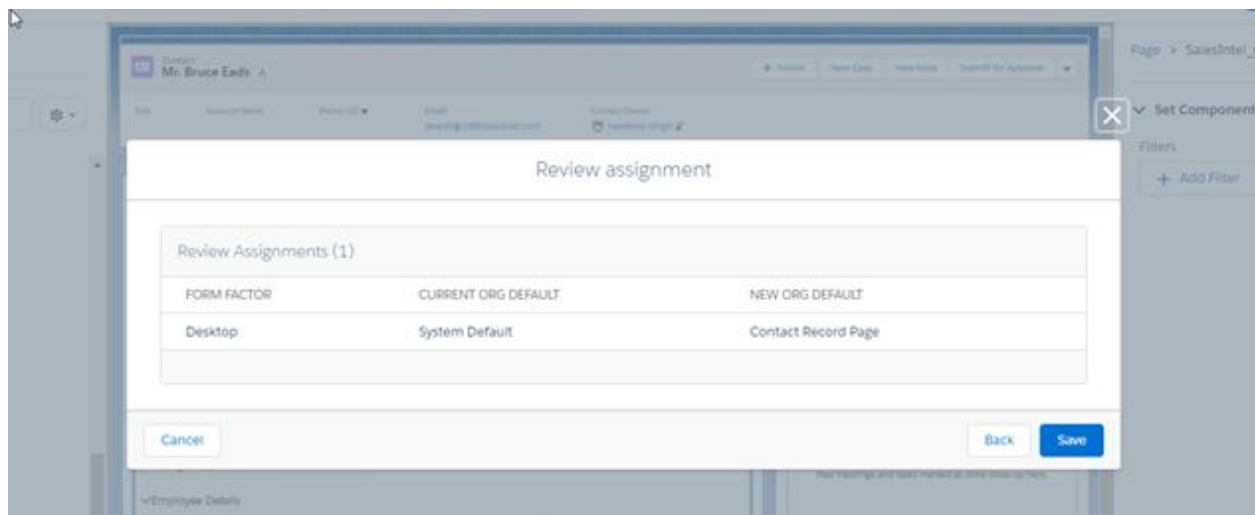
5. Click the back button in the top right corner. You will be taken to the Contact detail screen where you will see the new section, SalesIntel.
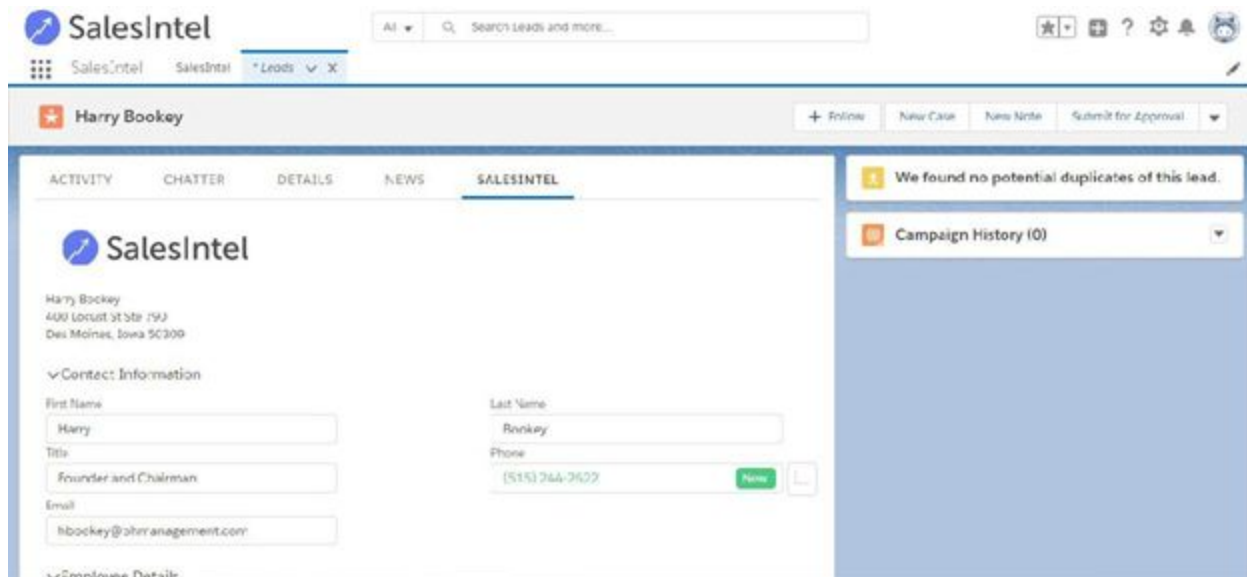
Lead Object

1. Follow steps 1-5 as above for Contact Object, only difference is to drag SalesIntelObjectView from left palette for **Lead** object.
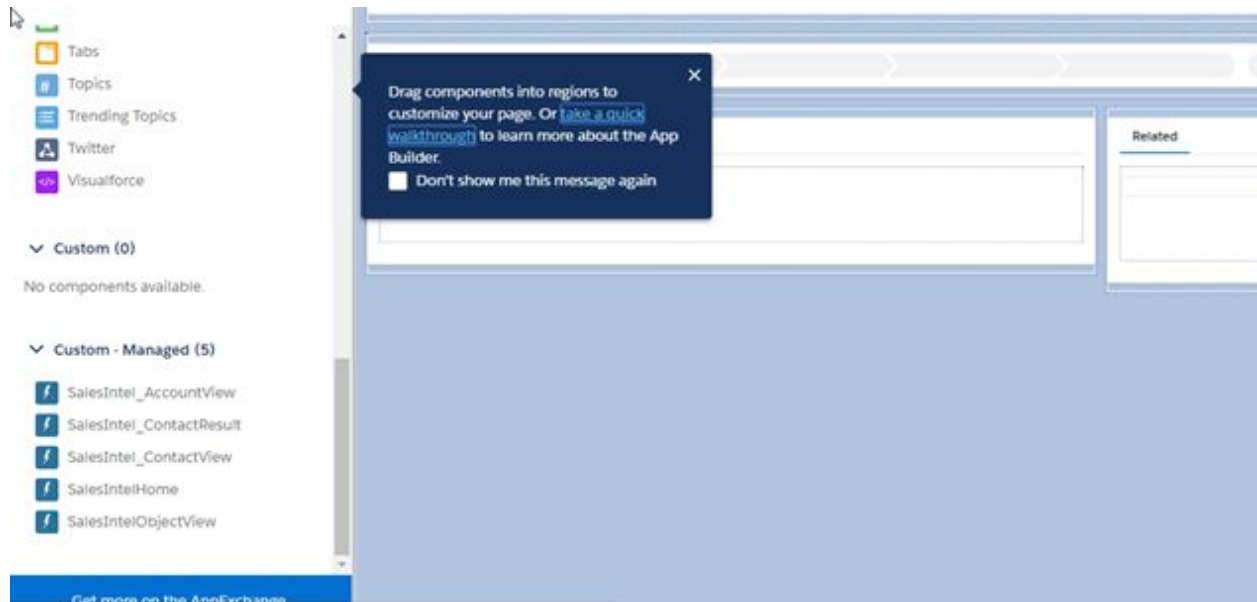
2. You will be taken to the Lead detail screen where you will see the new section, SalesIntel.
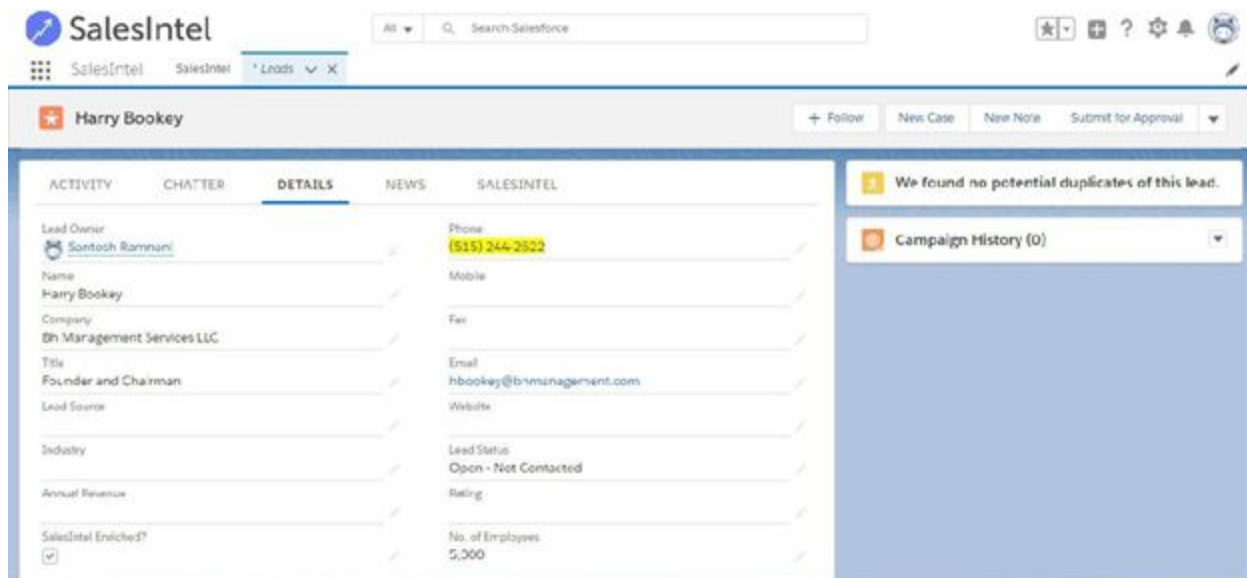
Here we can see there is a new update available for the Lead. If there is updated information it will appear in Red. To confirm or update the changes, select the checkmark next to "New" label and click Update Selected Fields.

Account Object

1. Follow steps 1-5 as above for Contact Object, only difference is to drag **SalesIntel_AccountView** from left palette for **Account** object.
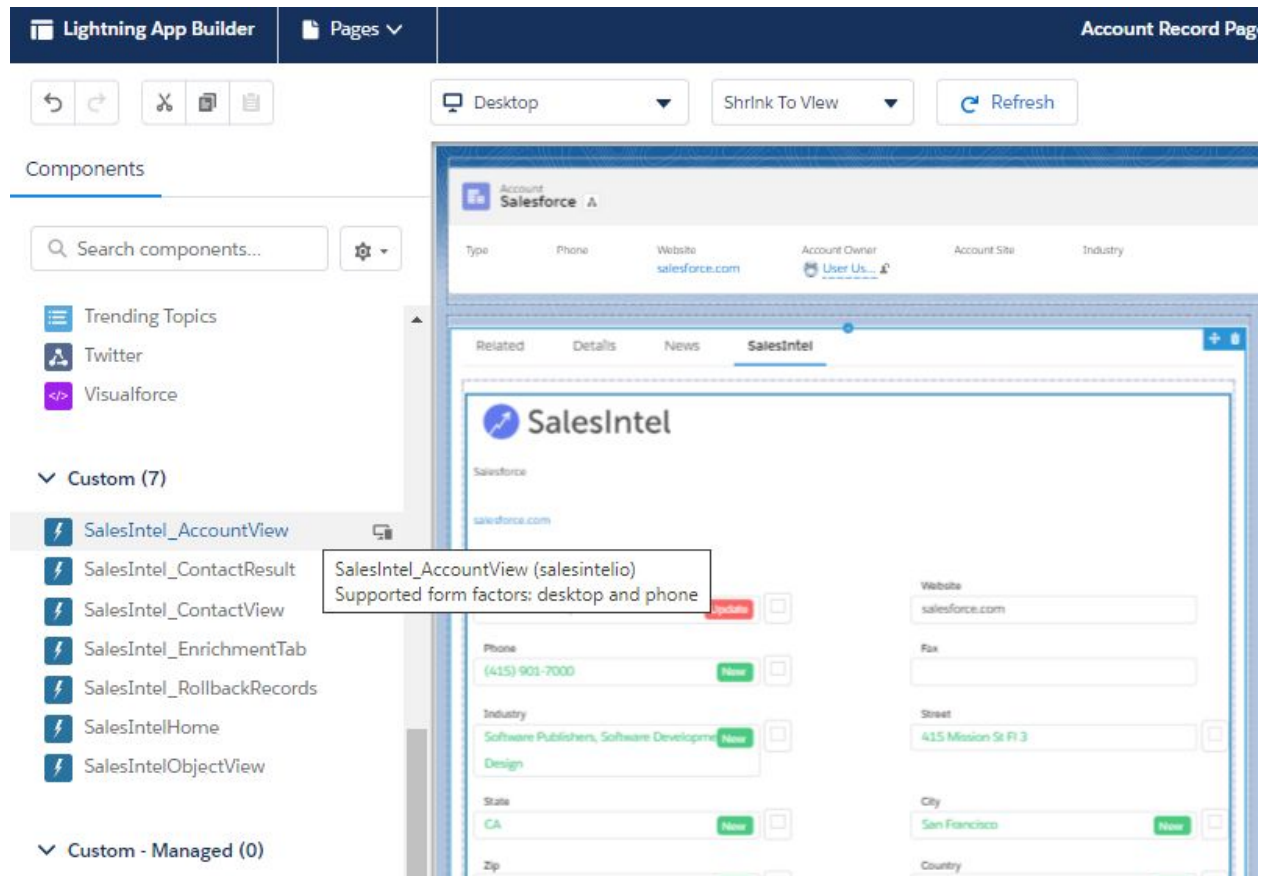
2. You will be taken to the Account detail screen.

Here you can not only see account level data but also contact level data for the account. This section includes the ability to search:

1. Search using the **Results Include**- You can refine your search results by including Direct Phone, Any Phone, title & Address.

2. Search by **Role** attribute**:** You can search a contact by job level, department or job title. When searching by job title, you may use a full or partial title, but we recommend using title keywords (such as "security", "benefits", etc) in combination with the role (department and/or seniority) to find the best match.

3. Search by **Individual:** You may search a contact using first/last name and contact's *e-mail address* with both personal & business e-mail address search preferences.

You can export Leads/Contacts to Salesforce clicking on the Quick Export options in red/purple. The export will use the default settings.

SalesIntel Enriched

Custom field for identifying creation / update of contact data from SalesIntel

1. Select **Object Manager**.
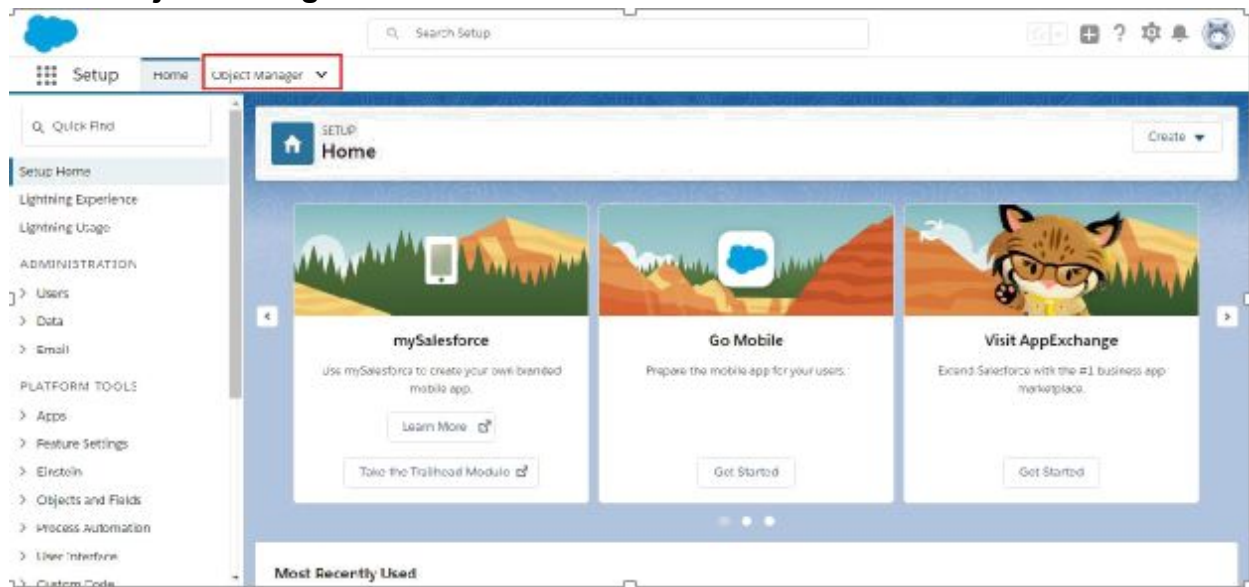
2. Select **Lead or Contact or Account.**
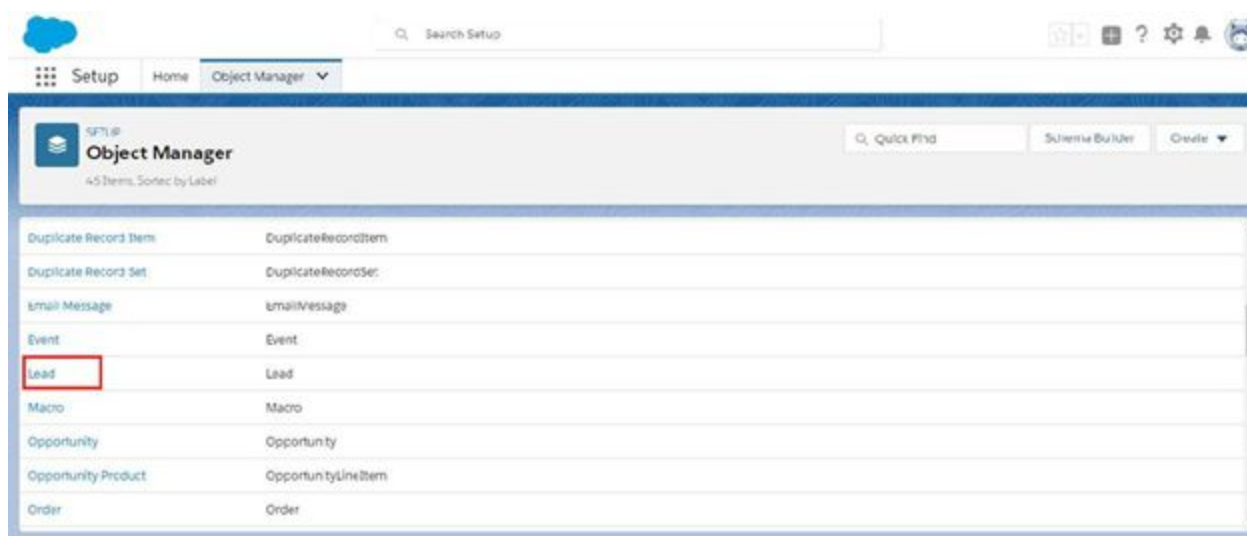
3. Select **Page Layouts.**
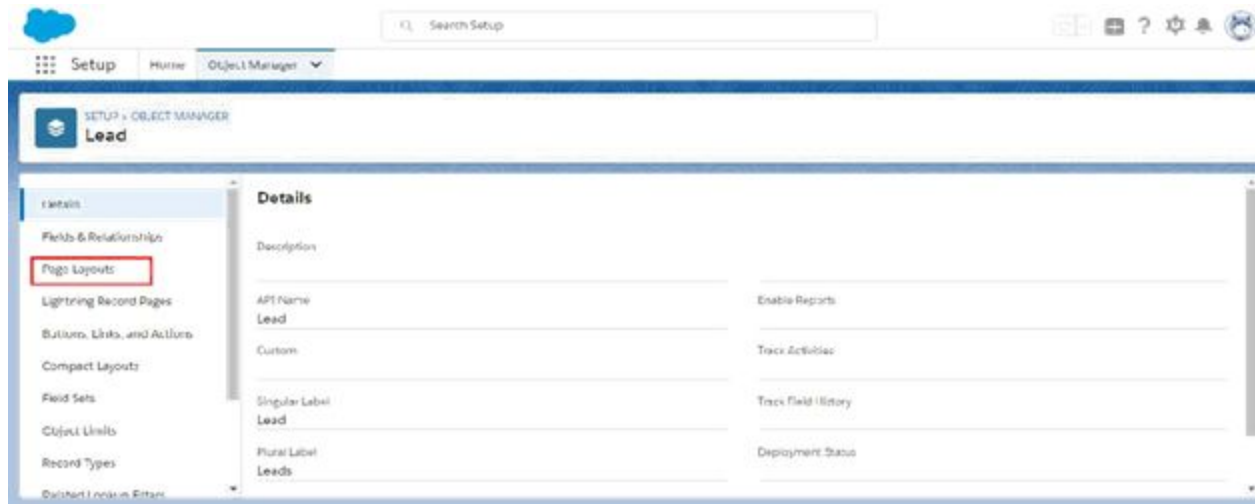
4. Select **Lead Layout.**
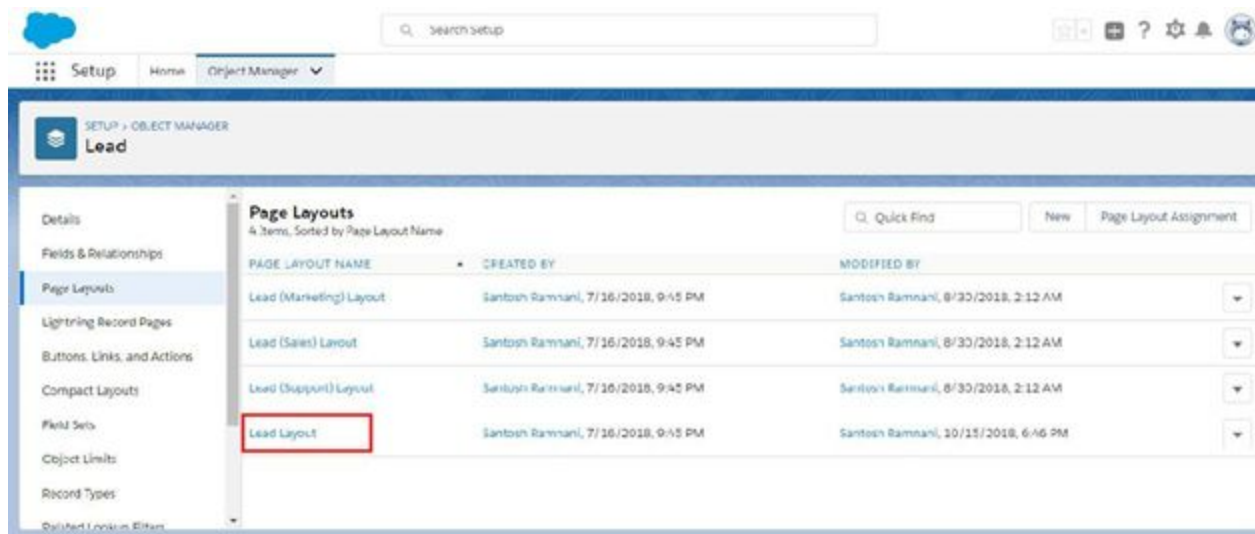
5. Under Lead Layout you need to select **SalesIntel Enriched** by sliding horizontal bar to right.
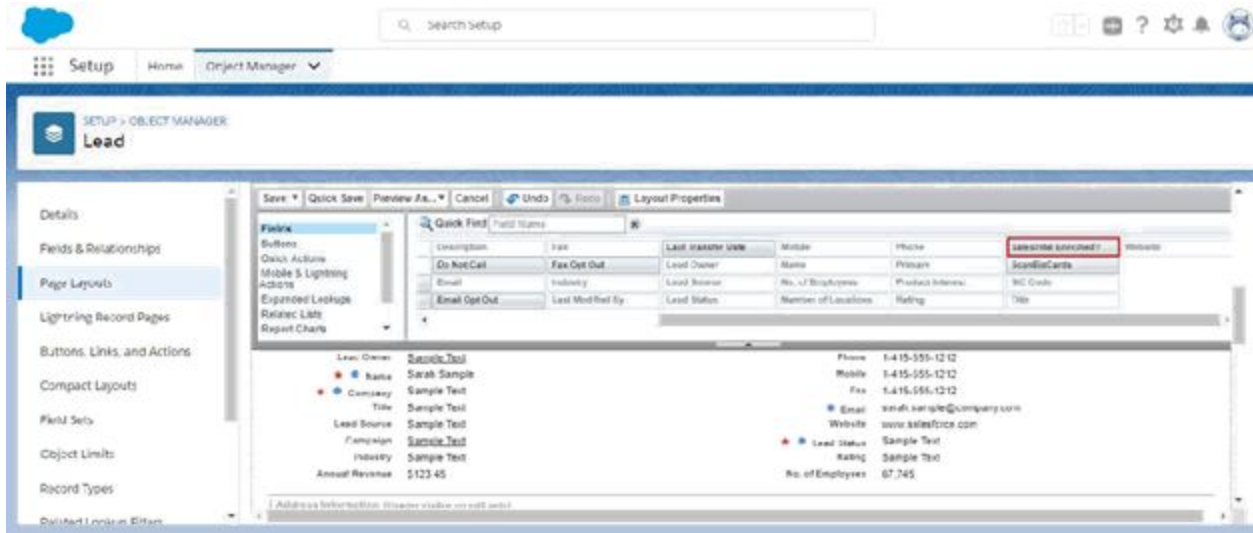
6. Drag and drop **SalesIntel Enriched** under Leads.
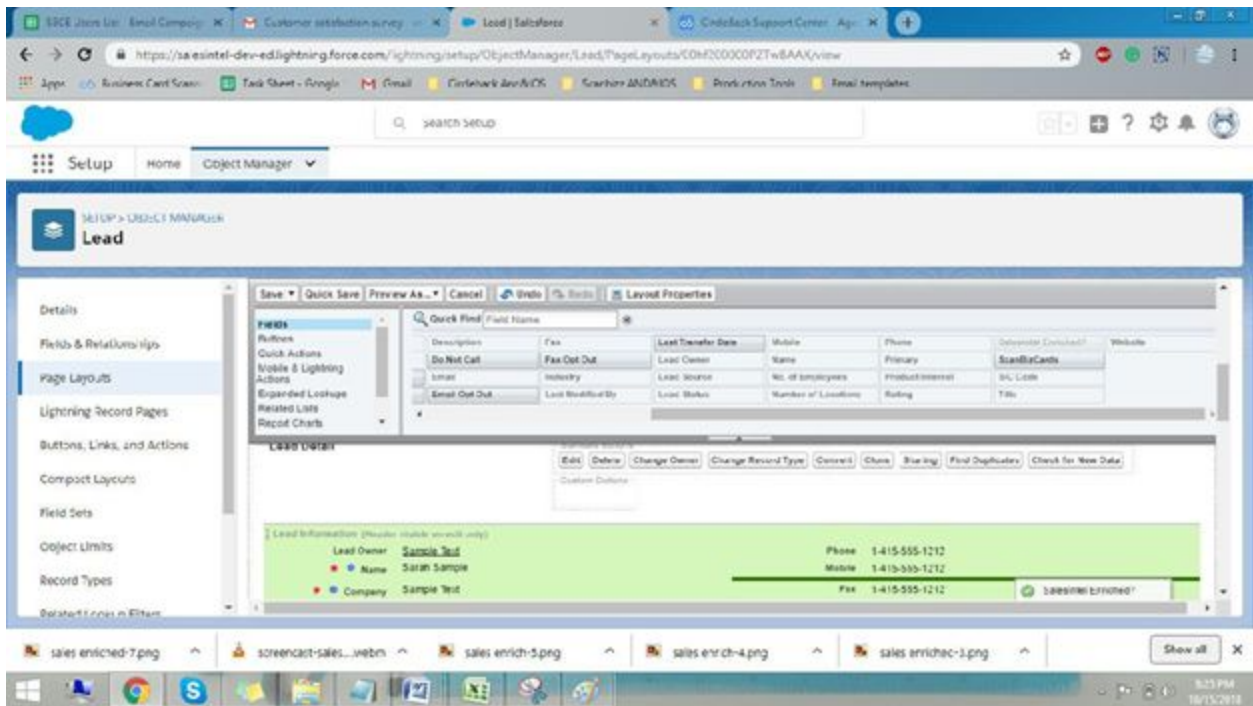
7. You can check on/off to **Enable or Disable** SalesIntel Enriched.
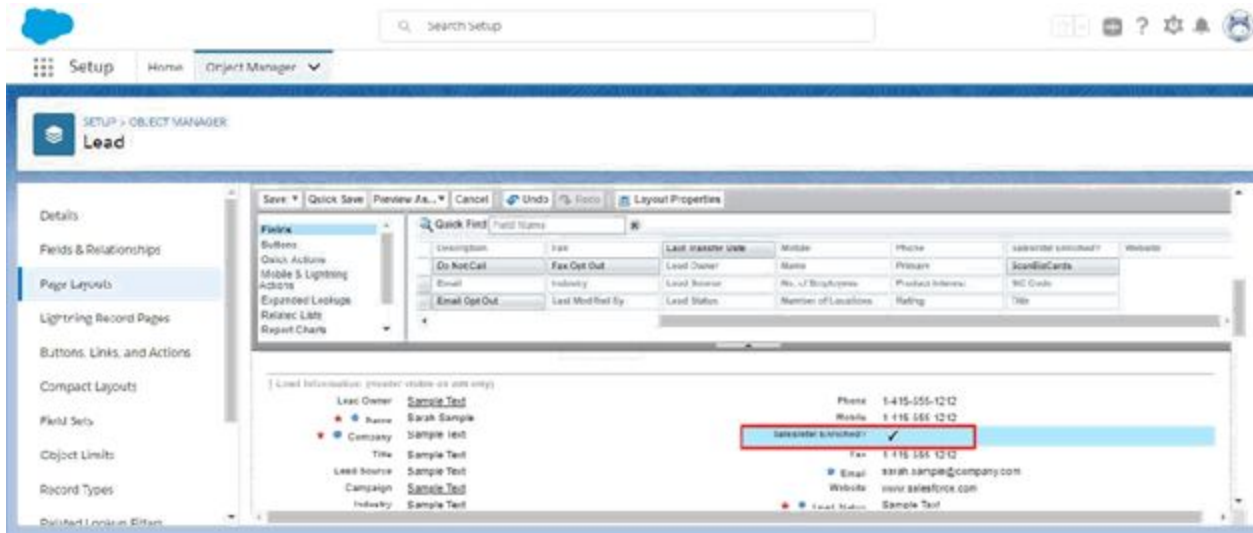
Add SalesIntel Tab

To add SalesIntel as a tab in the navigation menu, perform these steps.

1. Click Setup
2. Click Create
3. Click Apps
4. Click Edit for the app label you want to edit
5. Edit the tabs you want visible
6. Save

Access the Managed Package

1. Go to the tabs section in the Salesforce environment and click on the nine dots icon.

Quick Export

You may quickly export Leads/Contacts to Salesforce without going through a wizard by clicking on the Quick Export options in red/purple. The export will use the default settings.

Enrichment

Using the Enrichment feature you can keep up to date, append, update any incorrect or missing information across your all objects (Lead, contact, & Account) within your Salesforce CRM.

In order to Enrich your data across all objects, follow the instructions below.

a) Matching the time zone for Automatic Enrichment: It is necessary for your Salesforce account's timezone to be synced with your computer system's timezone. Follow the instructions below to confirm that both have a matching timezone.

i) Within your Salesforce CRM open Setup and type in **Users.**
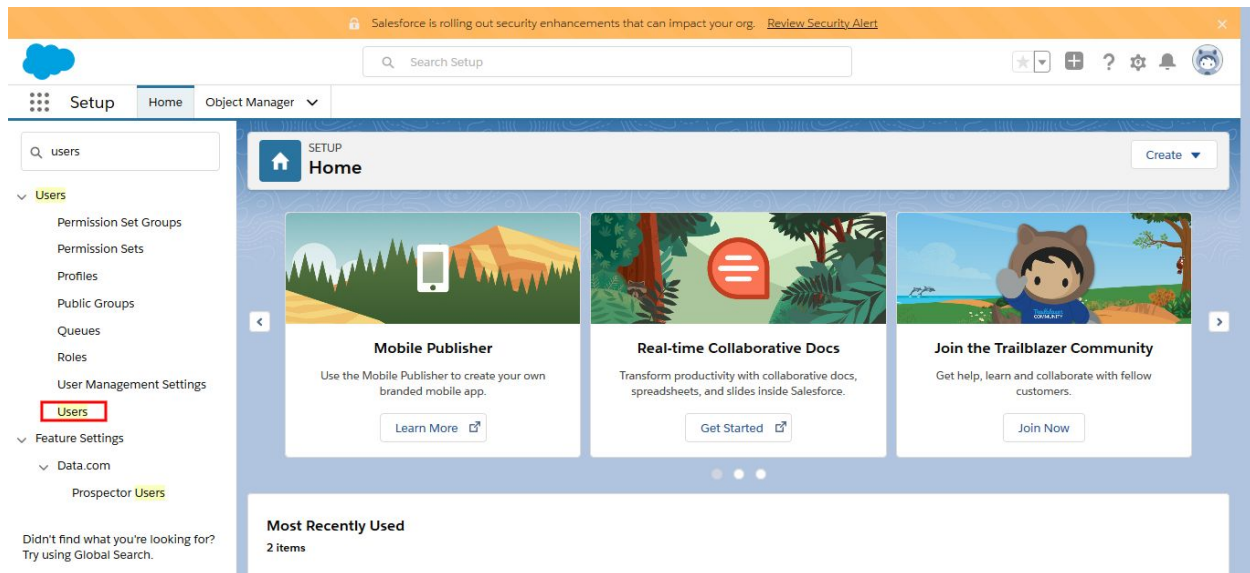
ii) Select Users, now on the next screen locate and select your Salesforce user name and then click on **edit**.
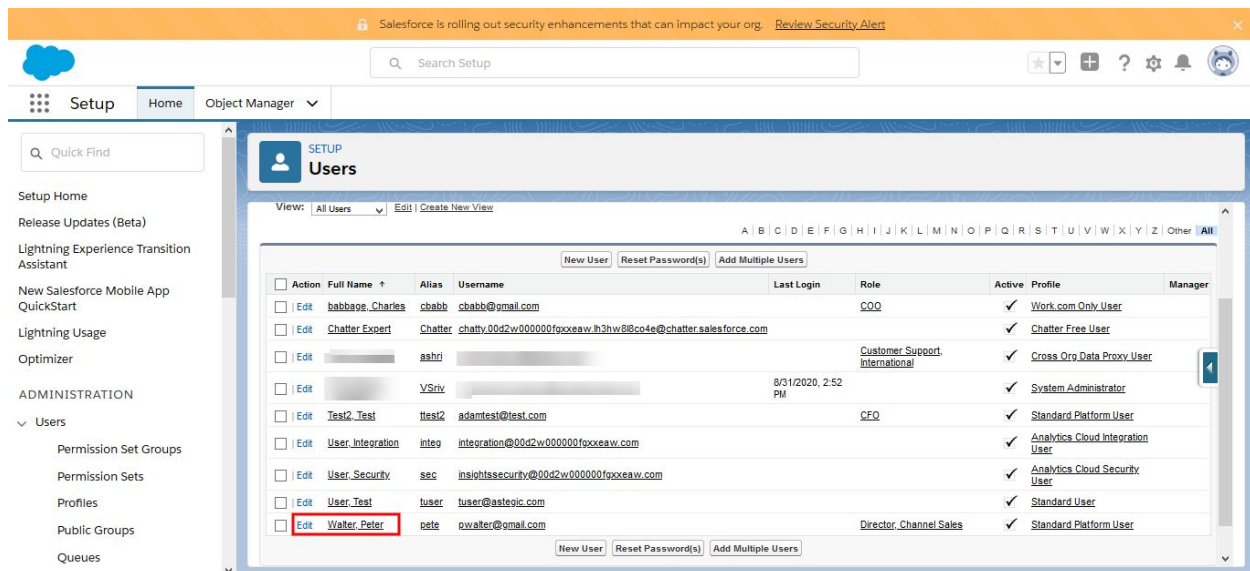
iii) On the next screen scroll down and look for **Locale settings,** once you locate that make sure this is the same timezone which you have on your computer system, if not please change it accordingly.

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b) Enrichment Setting: This step is required for setup. This step determines which object (Lead, contact, account) you want to set for Manual or Auto Enrichment*. Once you make the selection on this page please click on **Save** at the bottom of the page.

*See below on the definitions for manual or auto enrichment.

Enrichment Type

a) Manual Enrichment:

i) Select the Enrichment tab and then click on Start New Job.
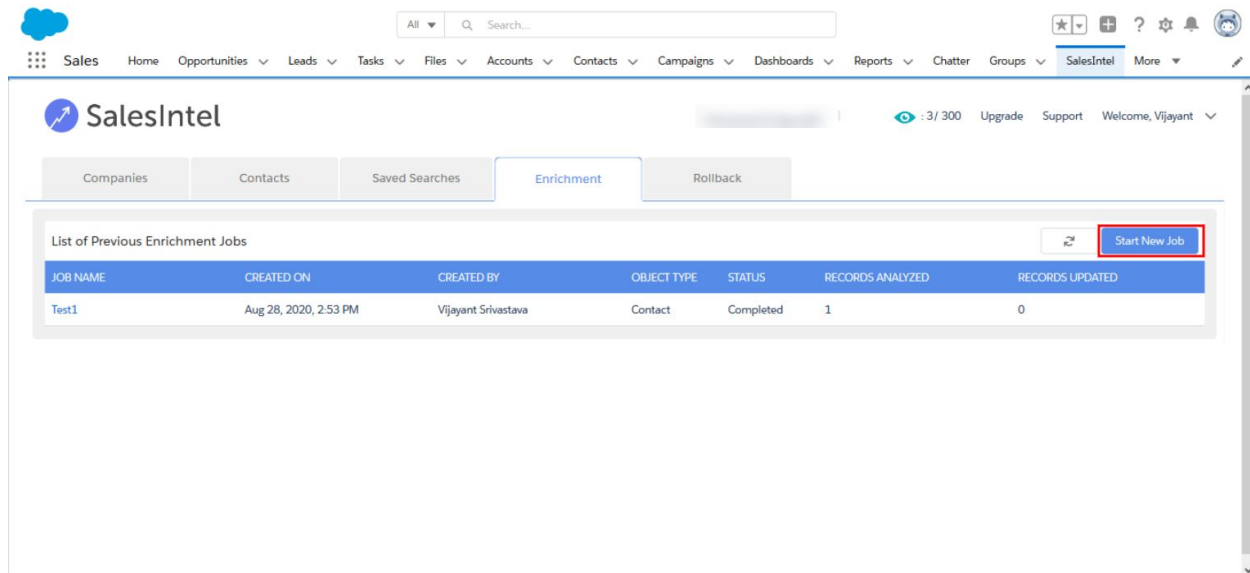
ii) On the next screen, please select your object type (ie: Lead, Account, & Contact), Job Name, and then if you wish you can apply a Custom Filter (optional). In this example, we are using **Email,** only the email address in the Lead object will be enriched, no other leads will be enriched during the process.

Important Note:If you want to enrich all of the mapped fields in an object (ie: Lead, Account, & Contact) then the custom filter should be none.

iii) Once you confirm the selection you need click on **Run Process** at the bottom.

iv) You will receive a confirmation that your requested enrichment job is queued and the status will be set to Analyzing

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v) You can wait for a confirmation status or **Refresh** Status at the right-hand side top corner of this window.
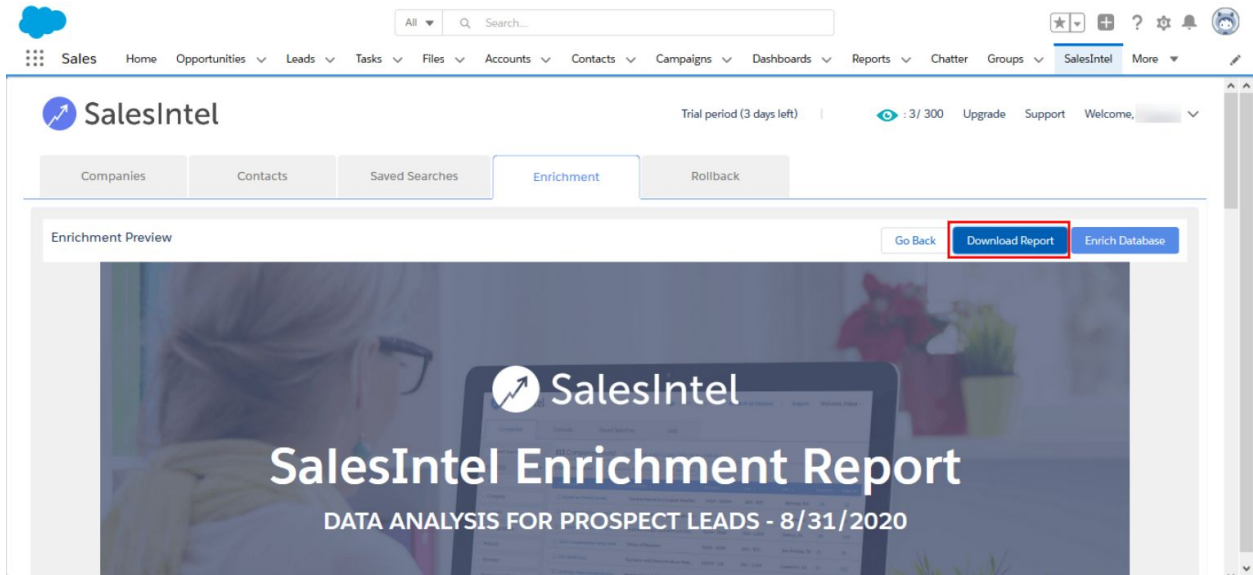

vi) Click on your Job name (example: Prospect Leads) to see the Enrichment Preview window, from here you can read and download the Enrichment report.

vii) Select **Enrich Database**, you will see your total available enriched credits along with the total records which you have requested to enrich. Click on **Yes** to proceed.
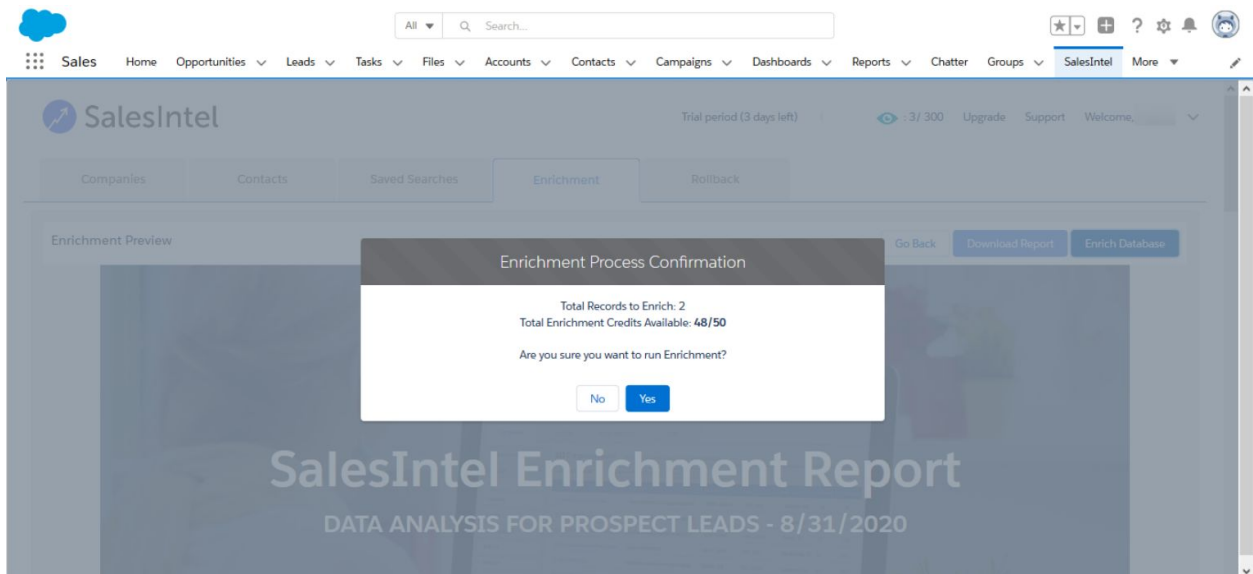
viii) You will see the status is updated to Enriching.

ix) You can click on Refresh Status at the right-hand side top corner of this window or wait to confirm the status of your job. Your data will be Enriched within your Salesforce account once the status is **Completed.**
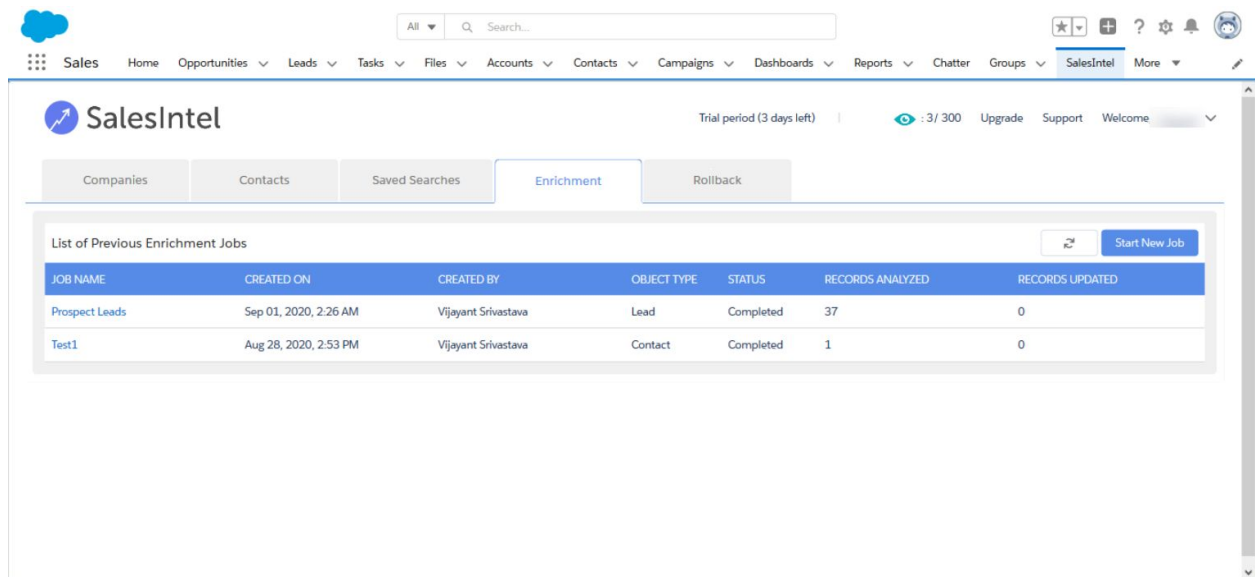
Auto Enrichment: To automate the enrichment process you will need to set up the settings within the SalesIntel Salesforce Managed package accordingly.

- Click on the User name at the right-hand side of the top corner and then click on **settings**.
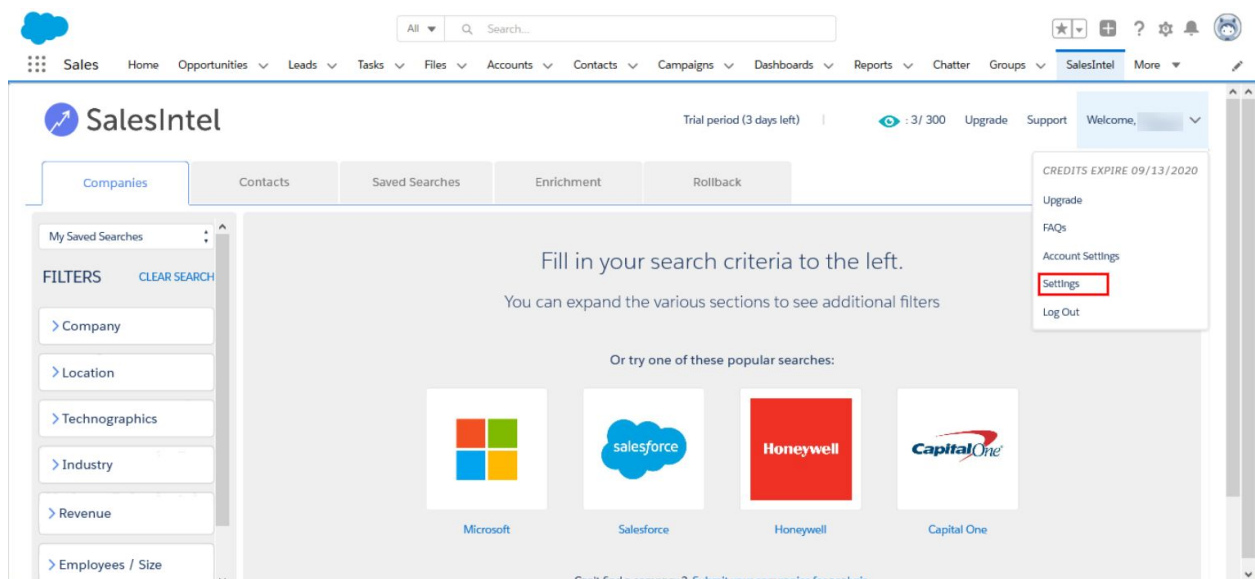
- On the next screen please select the respective objects which you want to be enriched automatically. Here we have toggled for Contact & Lead objects.

-You can select from **run when object created** or from **schedule auto update date/time**. Select one and click **Save.** In this example, we are selecting to run when object created.

-Alternatively, you can also schedule enrichment on a Daily, Weekly or Monthly basis. In the example below we are scheduling for enrichment **Daily 1 PM.**

Duplicate Contacts

In case of Duplicate contacts, you can resolve Duplicate contacts by choosing from:

i) Skip, ii) Always Append for blank fields only, & iii) Always Update.

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Important Note for Auto Updates:

When you enable Auto Update for an object, you need to configure auto-update in the objects mapping or your objects will not be enriched during the enrichment process.

Rollback: If you would like to remove the Enriched Data, you can Rollback the enrichment job. This will return your objects (lead, contact & Account) to their previous state.

Click on the Rollback tab and then select the job you would like to rollback.

Important Note: The rollback process will not credit back enrichment credits used.

Enrichment Dashboard

We can track Leads, Accounts and Contacts enriched by SalesIntel and the value of Opportunities generated from Account enriched by SalesIntel.In order to set up the Enrichment Dashboard you are required to follow the instructions below:

i) Please follow below mentioned URL in order to install the Enrichment Dashboard. You must be a Salesforce Administrator to install the Enrichment Dashboard managed package and also make sure that you have already installed the SalesIntel Managed package within your Salesforce Environment .

https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4W000002ecGZ

ii) On the next screen Please click on **Install.**

iii) Once you're done with the installation part, you will receive a message for **Installation complete.**

iv) Now if you have already configured a **Dashboard Tab** within your Salesforce environment please click on it or else you may click App launcher and type in **Dashboards**.
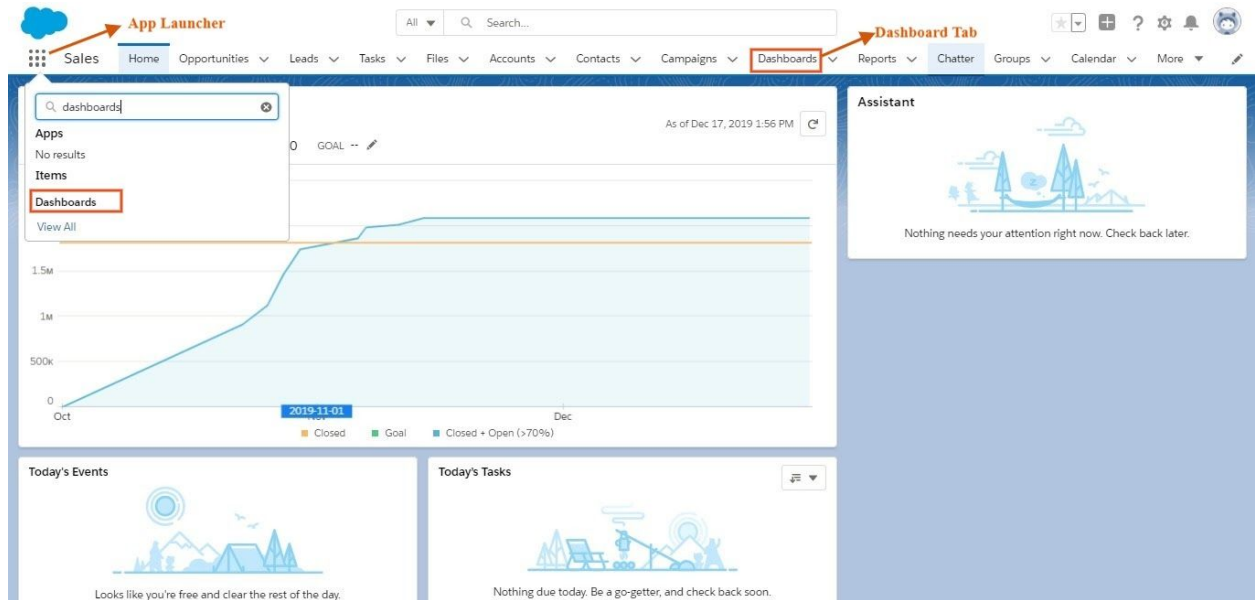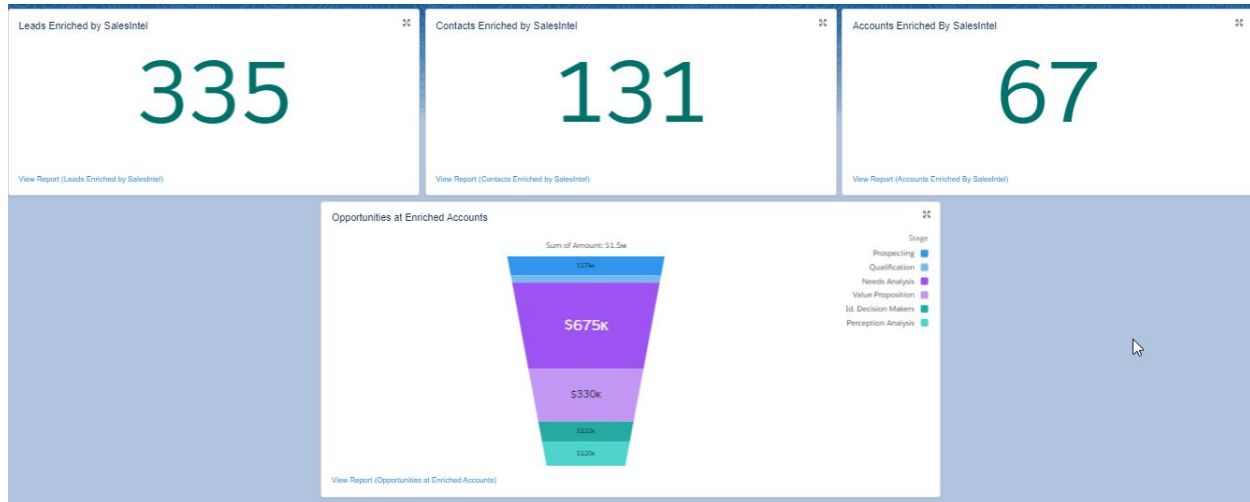
v) On the next screen, please click on All Dashboards from Left Menu and then select
**SalesIntel Enrich ROI.**

vi) Now from here you will be able track **Leads**, **Accounts** and **Contacts** enriched by SalesIntel along with the **Value of Opportunities** generated from Account enriched by SalesIntel.


SalesIntel Field Mapping

Before adding Inline pages on record's details layout, you will need to set up the field mapping from Application's setting page.

1. Click on the SalesIntel tab.
2. Enter username and password on login page and click on Login button.
3. From the application home page hover on User's name available on the top right corner of the page.
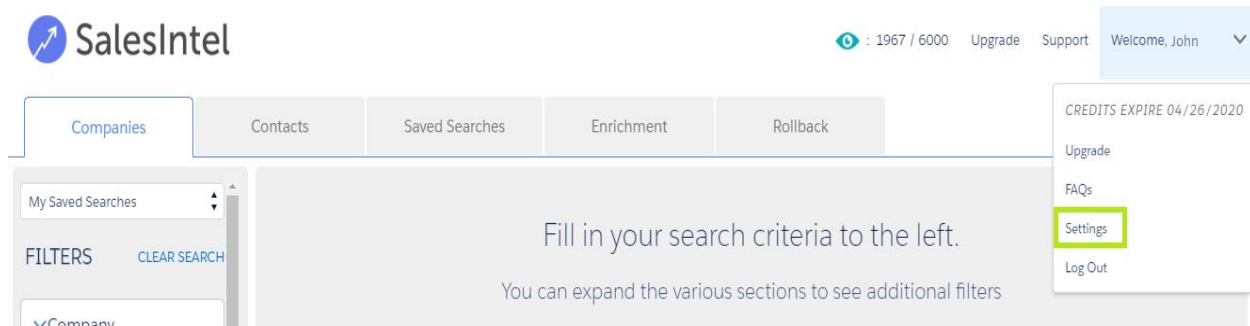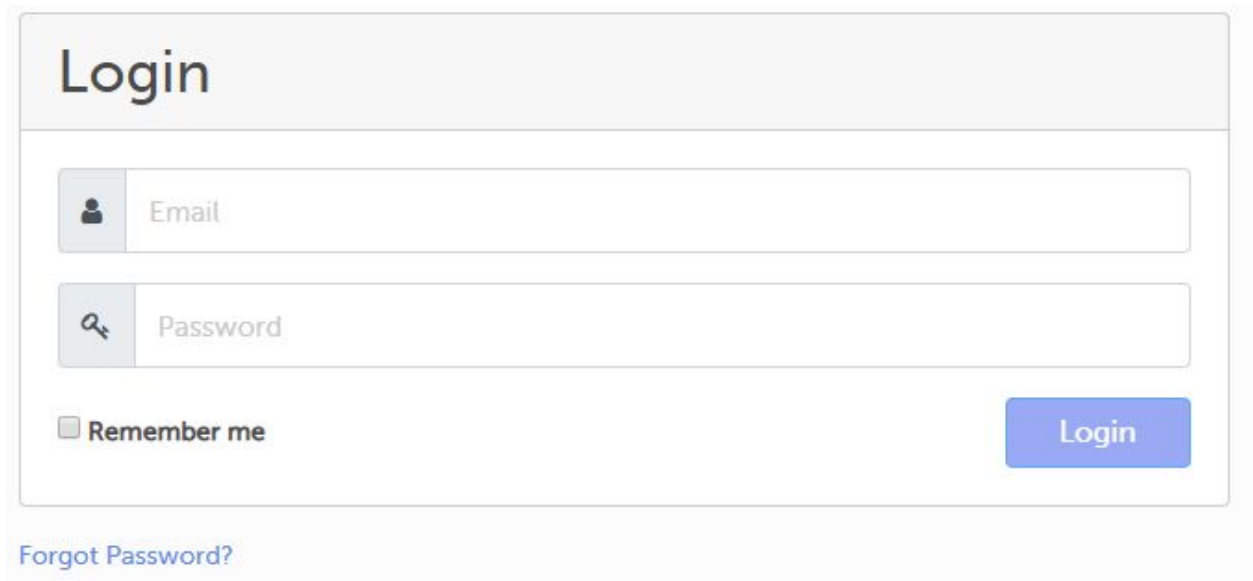
4. Click **Settings** menu from the drop-down.

5. You need to Login into SalesIntel web portal so your credentials can be activated for Salesforce.
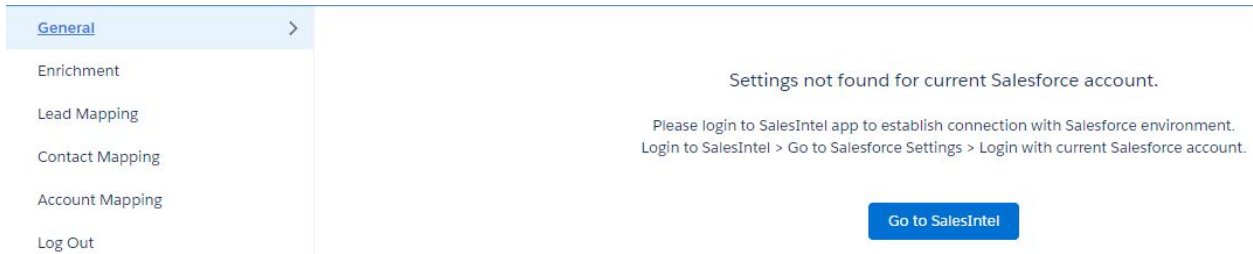
6. To login into SalesIntel web portal, Click on **Go to SalesIntel** button.

7. Click on the **Login** button on the top right corner from the SalesIntel web portal page.

8. Login with your SalesIntel credentials.

9. Once logged in, you can review settings.

10. Click on the **Settings** menu.

11. Here users can find **Lead Mapping**, **Contact Mapping** and **Account Mapping** options for set up fields mapping.

12. Click on each option and setup fields mapping.

	Account Mapping			
SALESINTEL FIELD	**SALESFORCE FIELD**	**ALLOW OVERWRITE**	**ALLOW AUTO UPDATE**	
Name	Name	☐	☐	
Website	Website	☐	☐	
Work HQ	Account Phone	☐	☐	
Street	Billing Street	☐	☐	
City	Billing City	☐	☐	
Postal Code	Billing Zip/Postal Code	☐	☐	
State	-- skip --	☐	☐	
Country	-- skip --	☐	☐	
State Abbreviation	Billing State/Province	☐	☐	
Country Abbreviation	Billing Country	☐	☐	
Annual Revenue	Annual Revenue	☐	☐	
No Of Employees	Employees	☐	☐	
Sector	-- skip --	☐	☐	
Industry	Industry	☐	☐	
Naics	-- skip --	☐	☐	
Source	-- skip --	☐	☐	

13. Select Salesforce field from fields dropdown next to each field name.

14. Click the **Save** button.

15. Now, you are all set up with fields mapping. Please use the following steps to add your inline page on record page layout of each Lead, Contact and Account object.

SalesIntel Connected User

1. A list of all Active Users connected to SalesIntel will be displayed.

2. Admin can disconnect active users from here by clicking- Disconnect <Username> corresponding to the connected user.
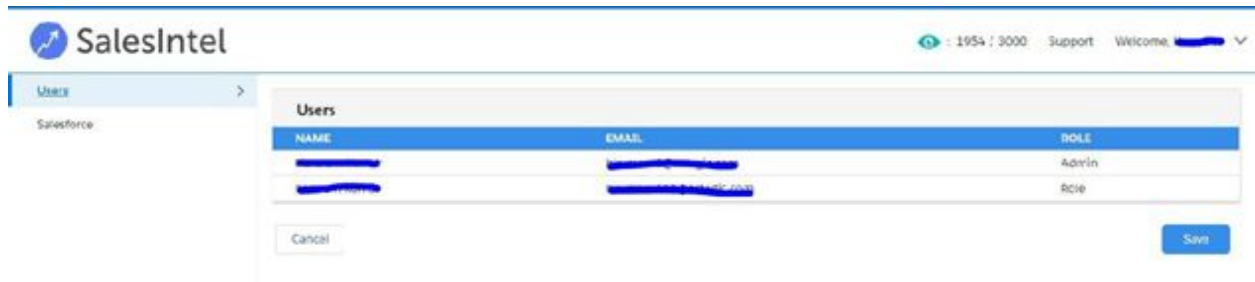
Salesforce Classic

Permission Set Assignment

1. Login in to your org.
2. Go to setup and search for **"permission"**

3. Click **Permission Sets** under Users section.

4. Click on **SalesIntel Permission Set** from the list of Permission sets.

5. Click on the **Manage Assignments** button from the Permission Set page.

6. Click on the **Add Assignments** button.

7. Select the checkbox as checked next to users to whom you want to give permissions to access the SalesIntel Managed Package and click the Assign button.

8. Click on the **Done** button.

Setup Inline Pages

1. Go to any Account record.

2. On the Account record details page, click on the **Edit Layout** link.
3. On the Edit page layout window, users can find two panels- Items Panel and Page details Panel.

4. From Panel **1**, click on the Visualforce option.
5. Scroll down the page till the section where you want to add the Account Inline page.
6. Click on **SalesIntel_AccountPage** and then drag and drop the page to the details section (Panel 2) wherever you want to place.
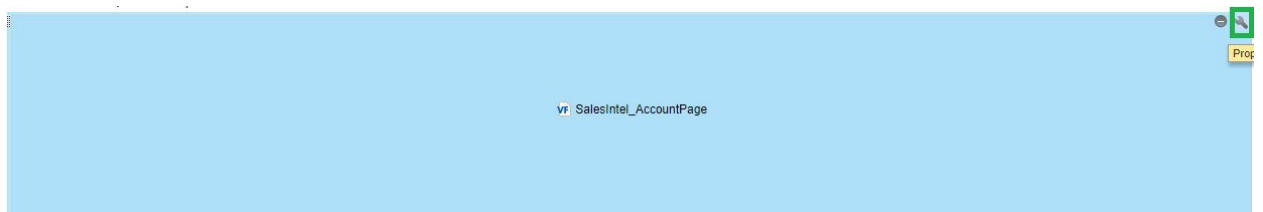
7. Once you drop a page on the layout, click on the wrench icon to edit properties of the page from the top right corner of the placed page.
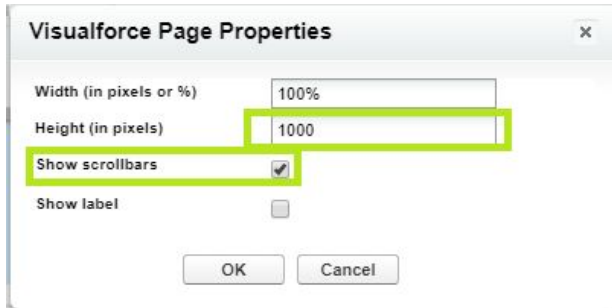
8. From the Visualforce Page Properties popup, set height as 1000 in pixels
9. Set the checkbox as true, next to the *Show scrollbars* option.
10. Click the **Ok** button.

11. Click on the **Save** button.
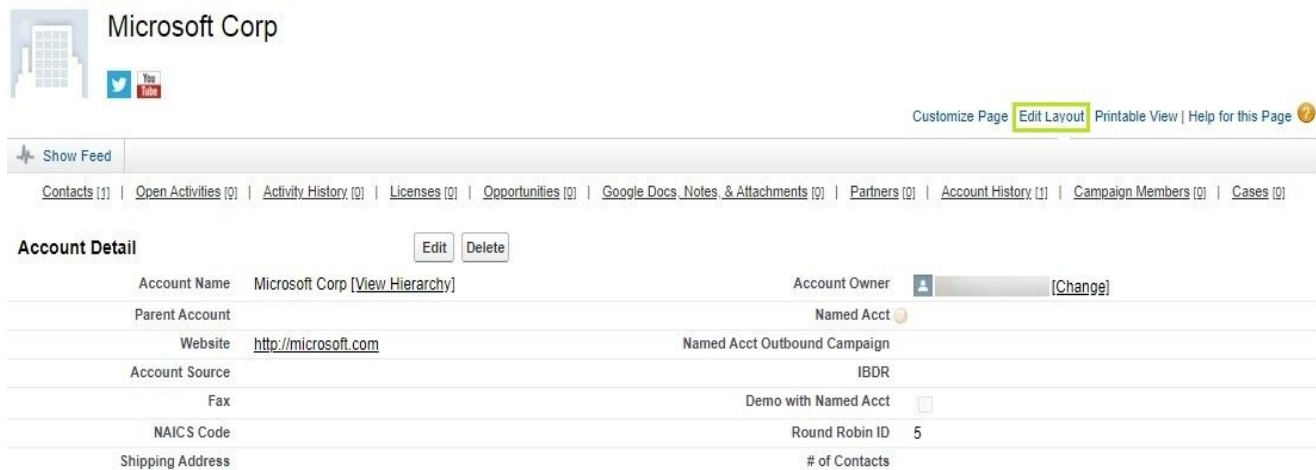
Add **SalesIntel_Contact** and **SalesIntel_Lead** inline page on Contact and Lead record details page layout also by following the same process that we did for Account layout.

SalesIntel Enriched

Custom field for identifying creation / update of contact data from SalesIntel

Setup SalesIntel Enriched field for Account Details Page.

1. Go to any Account record.

2. On the Account record details page, click on the **Edit Layout** link.

3. On the Edit page layout window, users can find two panels- Items Panel and Page details Panel.

4. From Items Panel Click on Fields.

5. Drag & drop **SalesIntel Enriched ?** field to the details section

6. Click on the **Save** button.

7. Added **SalesIntel Enriched ?** field will appear here:

Setup SalesIntel Enriched field for Contact Details Page
1. Go to any Contact record.
2. Follow step 2 to step 6 as we have followed for the Account object.
3. Added **SalesIntel Enriched ?** field will appear here:

Setup SalesIntel Enriched field for Lead Details Page
1. Go to any Contact record.
2. Follow step 2 to step 6 as we have followed for the Account object.
3. Added **SalesIntel Enriched ?** field will appear here:

Add SalesIntel Tab

To add SalesIntel as a tab in the navigation menu, perform these steps.

| Home | Profile | Chatter | Reports | Accounts | Contacts | Opportunities | Dashboards | Forecasts | SalesIntel | + |

7. Click Setup
8. Click Create
9. Click Apps
10. Click Edit for the app label you want to edit
11. Edit the tabs you want visible
12. Save

Access the Managed Package

1. Select application as **SalesIntel** from application drop down available in top right corner.
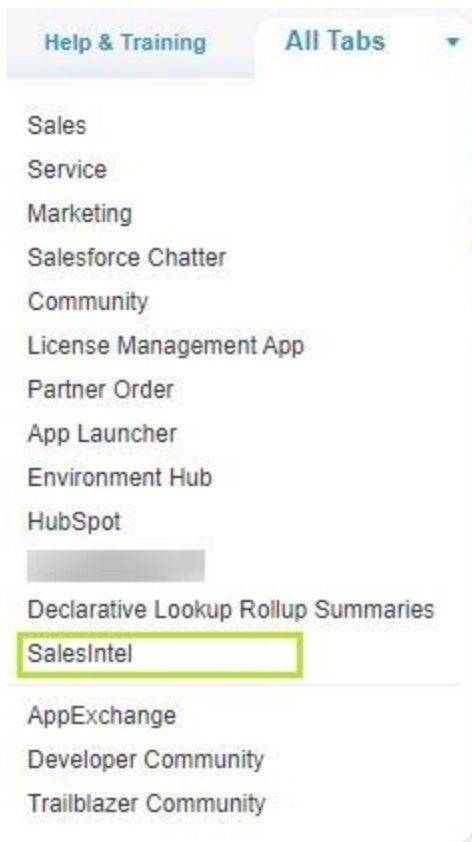
2. Click on the SalesIntel tab. Log in with your SalesIntel credentials. If you do not have a set of SalesIntel credentials, please email support@salesintel.io or ask your admin.

Quick Export

You may quickly export Leads/Contacts to Salesforce without going through a wizard by clicking on the Quick Export options in red/purple. The export will use the default settings.

SalesIntel Field Mapping

When viewing a Lead or Contact in Salesforce, you may view SalesIntel updates in the SalesIntel section. If there is updated or new data which is different than what is in your Salesforce org, you will be able to accept the updates directly within the Lead, Contact or Account screen. Account will only show firmographic data.

After successful installation of the package, you will need to add inline pages on the layout of Lead, Contact and Account details page. Inline pages display field values provided by the API results for that particular Lead, Contact and Account record.
In our managed package, we have three inline pages available for Lead, Contact and Account objects.

Before adding Inline pages on record's details layout, you will need to set up the field mapping from Application's setting page.

Click on the **SalesIntel tab**.

Enter username and password on login page and click on Login button.

From the application home page hover on User's name available on the top right corner of the page.
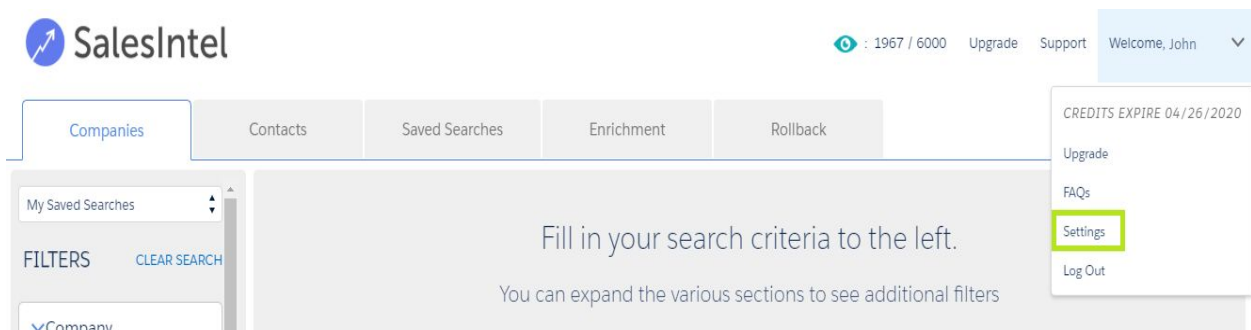
Click **Settings** menu from the drop-down.

If you do not see any settings, Log into SalesIntel web portal so your credentials could be activated for Salesforce.

To login into SalesIntel web portal, Click on **Go to SalesIntel** button.

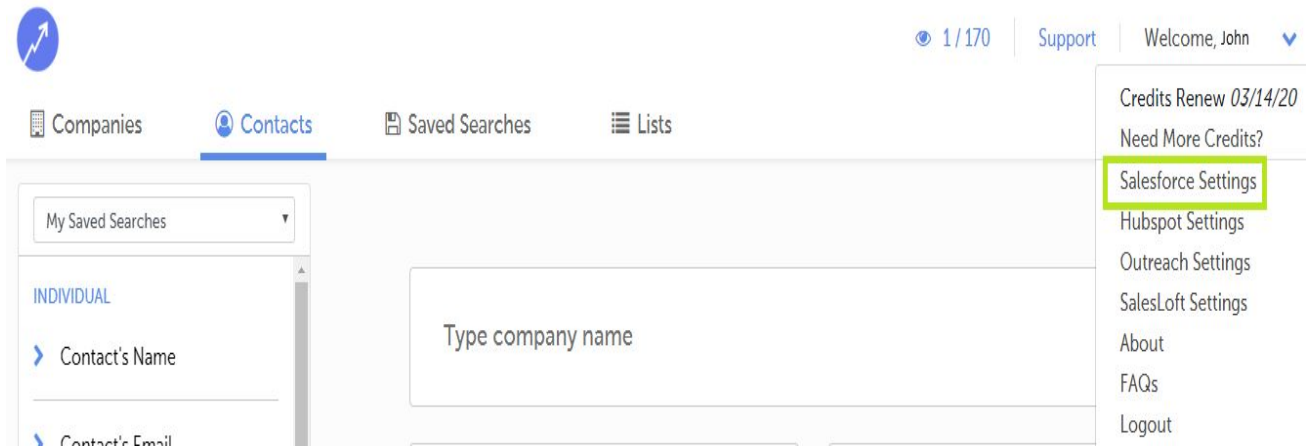Click on the **Login** button on the top right corner from the SalesIntel web portal page.
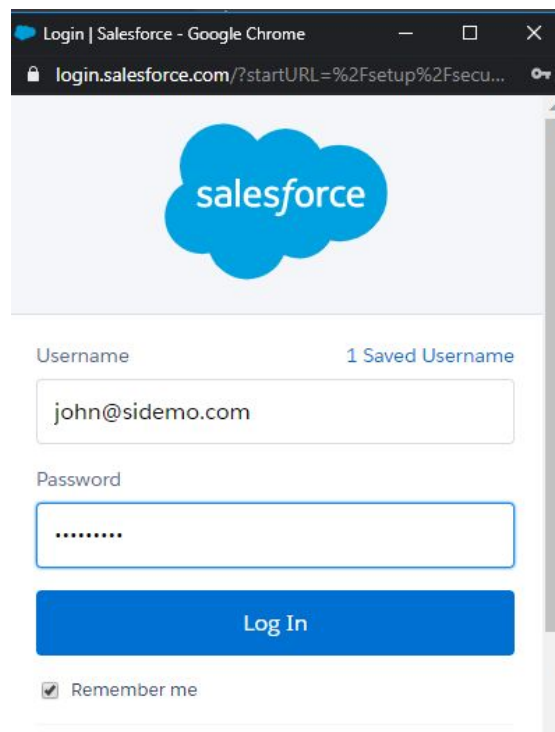

Login with your SalesIntel credentials.

From the web portal hover on the user's name available on the top right corner of the page.
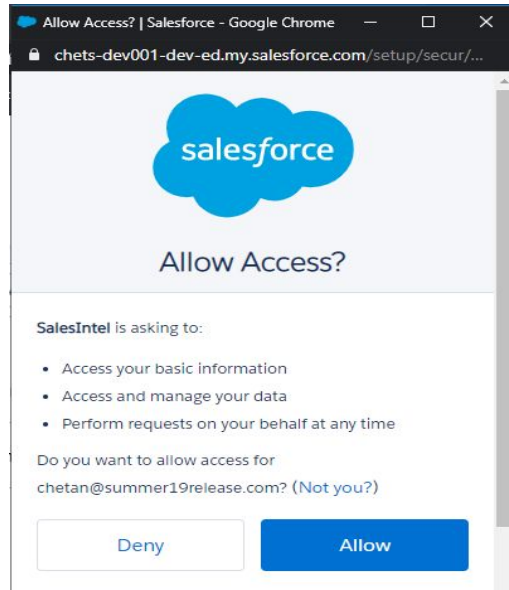
Click on the **Salesforce Settings** menu from the dropdown list.

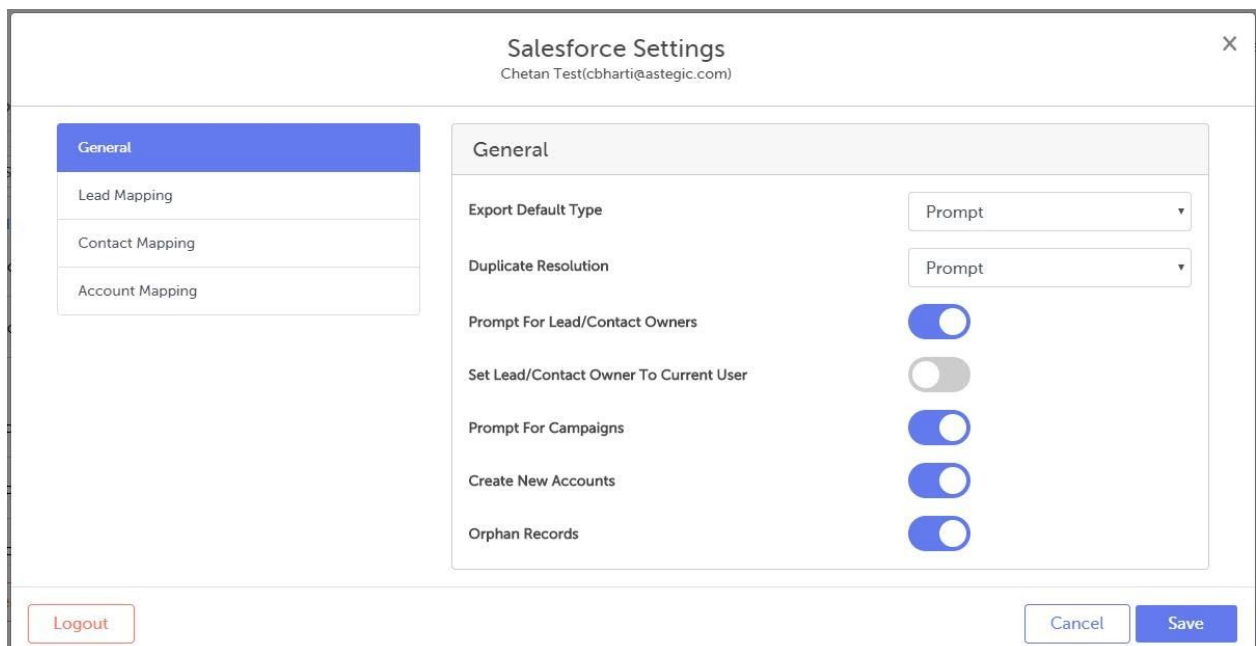You will be prompted for a popup for login into Salesforce.

Enter your Salesforce username and password and Login into Salesforce.

Click on the **Allow** button from the next popup to provide access to your Salesforce information.

Once you Allow access from popup in the web portal you will get a Salesforce setting Popup window.

Click on the **Save** button.

Now again back to Salesforce and click on the **Settings** menu from dropdown as we did earlier.

Here users can find **Lead Mapping**, **Contact Mapping** and **Account Mapping** options for set up fields mapping.

Click on each option and setup fields mapping.

Select Salesforce field from fields dropdown next to each field name.

Click the **Save** button.

Now, you are all set up with fields mapping. Please use the following steps to add your inline page on record page layout of each Lead, Contact and Account objects.

SalesIntel Connected User

1. A list of all Active Users connected to SalesIntel will be displayed.

2. Admin can disconnect active users from here by clicking Disconnect <Username>.

Technical Support

If you have any questions, please contact us at support@salesintel.io