

Salesforce Managed Package Installation &

Configuration Guide

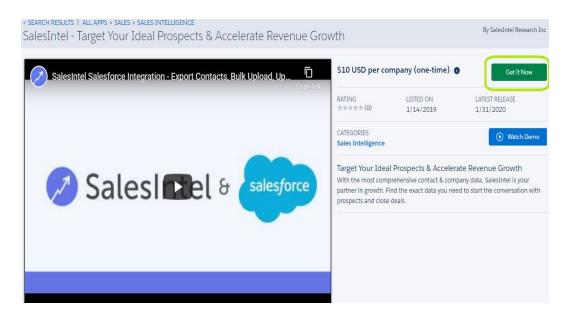
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Prerequisite

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 <u>AppExchange</u> 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
Cance

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.

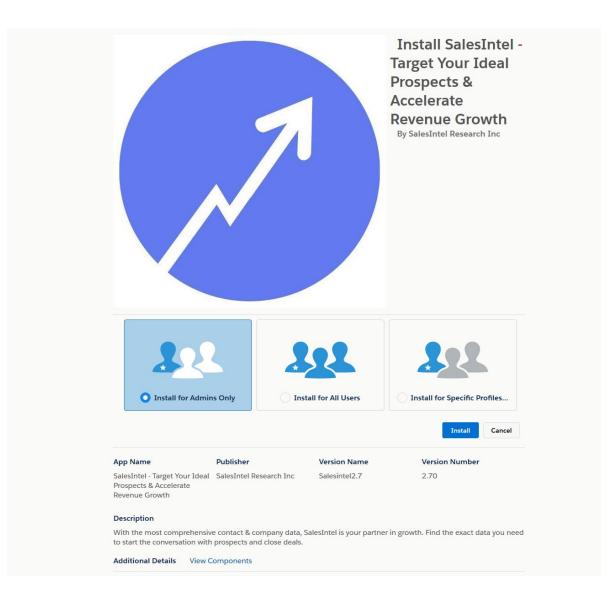
Whe	ere do you want to install this package?
Before you inst	all in a production org, we suggest testing in a sandbox.
	Install in a Production Environment
Install	where you or your users work, including developer orgs.
	Install in Production
	Install in a Sandbox
	Test in a copy of a production org.
	Install in Sandbox

4. Once you click on your desired environment, you will be prompted with **Confirm Installation Details** popup.

ALL APPS > SALES		Confirm Installation Details	
SalesIntel	Review the <u>customization guide</u> for installation a	configuration stars	↑ lesIntel Research In
	REVEWTRE CONCUTENCIAL FOR INSTANDARY	ла соледиация эксра.	Get It Now
Salesi	(are	Version	GPETINOW
	esIntel (SalesIntel 2.6 / 2.64.0)	SalesIntel 2.6 / 2.64.0	IELEASE 020
Sub	scription	Organization	
Free	1	Astegic	🕥 Watch Demo
	ation	Number of Subscribers	
Doe	is Not Expire	Site-wide	Growth sIntel is your
User	mame		onversation with
	* 🗸 I h	have read and agree to the terms and conditions.	
		-	
Salesfo	prce.com Inc. is not the provider of this application but	has conducted a limited security review. Please click here for detailed information of	n what is and is not

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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.

1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1	ckage may send or receive data from third-p es. What if you are unsure?	arty websites. Make sure you trust these
٧	Website	SSL Encrypted
a	api-gateway.qa.circleback.com	
a	api.circleback.com	\checkmark
a	api.clevertap.com	
C	laas-qa-sig-api.circleback.com	

- 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.

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.

Action		Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Obje
Uninstall Manage Licenses	ł		ScanBiz Mobile	1.52		Active	5	1	Does not Expire	5/12/2020, 6:10 AM		2	11	
Uninstall	Ł	<u>SalesIntel</u>	SalesIntel LLC	2.64	salesintelio	Active	Unlimited	0	Does not Expire	6/18/2020, 5:41 AM		1	1	
Uninstall	ł	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 of	ontains Connecte	d Applications for	r the officially suppo	rted Sale	sforce apps for iOS	S and Android ar	nd Chatter applic	ations on vo	ur deskt	00		

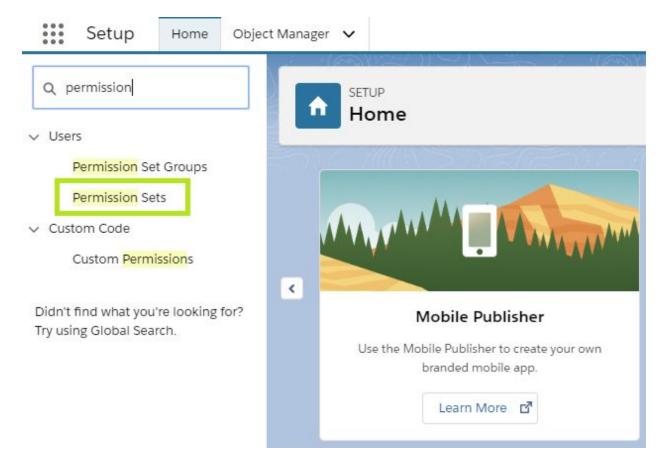
Congratulations! Your SalesIntel Package is now installed.

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.

Le Pe	up ermission Sets		
Permiss	sion Sets		
On this page y	ou can create, view, and manage permission set	5.	
In addition, yo	u can use the SalesforceA mobile app to assign p	ermission sets to a user. Download SalesforceA from the App Store or 0	Google Play: <u>iOS Andra</u>
All Dormies	ion Sets V Edit Delete Create New View		
All Pellillss	Edit Delete Create New View		
New 🗘		A B C D E F G H I J K L M	NOPQRST
Action	Permission Set Label ↑	Description	License
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
Clone	SalesIntel Permission Set		Salesforce
Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integra	Cloud Integration User

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

Permission Set SalesIntel Permission	n Set			
Q Find Settings	Clone	Manage Assignments		
Permission Set Overview				
Description			API Name	SalesIntel_Permission_Set
License	Salesforce		Namespace Prefix	salesintelio

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

Assigned Users SalesIntel Permission Set

« Back to: Permission Set

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P. P	~	· · · · ·	~	

		Add Assignm	Remove Assignment
Full Name 🕈	Alias	Username	Last Login
No records to display.			
		Add Accimp	nts Remove Assignments

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

II Users	S		
View: Al	Users Y Edit	<u>Create Ne</u>	
			A
			Assign Cancel
Action	Full Name ↑	Alias	Username
📃 Edit	Chatter Expert	Chatter	chatty.00d2v000001vldveak.1456qqwj4mpn@chatter.salesforce.
📃 Edit	<u>Johnson, Jacob</u>	<u>csbce</u>	bharti.chets@gmail.com
🕑 Edit	Smith, John	<u>CTest</u>	john@summer19release.com
📄 Edit	User, Integration	<u>integ</u>	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

	Done
Full Name	Username
John Smith	john@summer19release.com

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

Setup Inline Pages

Contact Object

1. Open contact record > Click Setting icon > Select Edit page

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Title Account Name Phone (2) 💌	Email beads@1800packrat.com	Contact Owner			Developer Cornole
Related Details News			Activity	Chatter	East Page
We found no potential duplicates of this co	A1.04		New Task	Log a Call New	Event Email
the Bullian sciences are all used for the Bullian sciences (b) if	nand burners to some some our			Create a tao	
Opportunities (0)		New		Fiter	s Alt time - Alt activities - Alt types Betresh - Expand Alt - V
Cases (0)		New	V Upcoming	& Overdue	
			To		ut steps. I a task or set up a meeting.
Campaign History (0)		Add to Campaign			rt activity
Dotes & Attachments (0)		Upload Files	- Past	meetings and tasks m	arked as done show up here.

2. Add tab from right palette as click to add tab > Click details > Select custom from drop down > Give label as SalesIntel > Click Done

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List View	A lementar /	Dave	+ Add Filter
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Potential Duplicates			
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3. Select created tab in (SalesIntel)> Drag component (Salesintel_ContactView) in SalesIntel tab > Click Save.

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4. After saving, you will receive prompt to Assign as Org default > Click on it > Click Next > Click Save

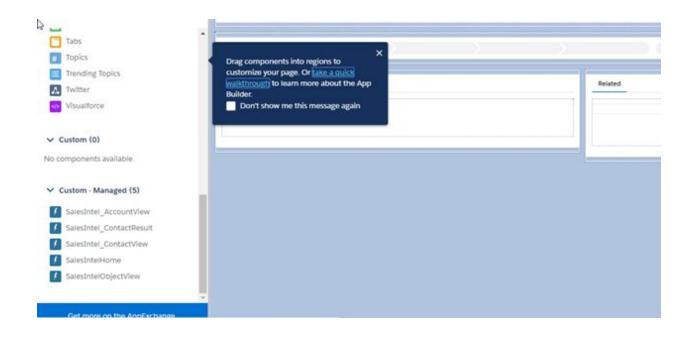
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	FORM FACTOR	CURRENT ORG DEFAULT	NEW ORG DEFAULT	
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				_
	Cancel		0	ack Save

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.

Related	Details	News	SalesInte	el		
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ruce Eads						
Contact I	nformation					
	nformation				Last Name	
	nformation				Last Name Eads	
irst Name Bruce	nformation					
irst Name Bruce itle	nformation	5	New		Eads	New
First Name Bruce Title		5	New		Eads Phone	New

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.

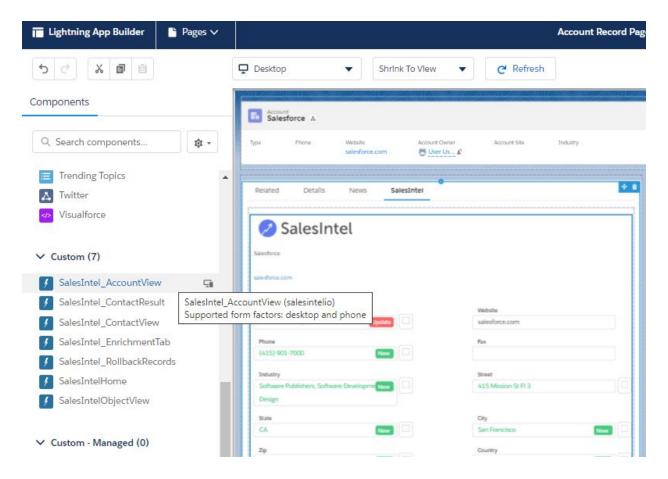
SalesIntel SalesIntel *Leods v X		
Harry Bookey		+ Follow New Case New Note Submit for Approval
ACTIVITY CHATTER DETAILS	NEWS SALESINTEL	We found no potential duplicates of this lead
SalesIntel		Campaign History (0)
Harry Bockey		
400 Lorust St Ste 190 Des Moines, Iowa 50209		
Contact Information		
First Name	Last Name	
Hany	Bookey	
Tetla	Phone	
Founder and Chairman	(515) 244-2622	
Email		

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.

SalesIntel SalesIntel	All ¥ Q, Search-SelesSonce	** 四 ? 卒 # 👼
🚼 Harry Bookey		+ Follow New Case Nove Submit for Approval
ACTIVITY CHATTER DETAILS	NEWS SALESINTEL	We found no potential duplicates of this lead.
Leed Owner Sorrtosh Ramnuni	Phone (515) 244-2522	Campaign History (0)
Name Harry Bookey	t/oble	2
Company Bh Management Services LLC	Fac.	
Title Founder and Chairman	Email hbookey@bnmanagement.com	
Lead Source	Website	
Industry	Lead Status Open - Not Contacted	
Annual Revenue	Rairg	
Salaslintal Envicted?	No. of Employees 5,000	· · · · · · · · · · · · · · · · · · ·

Account Object

 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.

Sales	t force 🔺						
Related	Details	News	<u>SalesInte</u>				
S	SalesIr	ntel					
Salesforce							
salesforce.co	m						
∨ Compa	ny Details						
∨ Compa _{Name}	ny Details			v	VebsIte		
Name	ny Details e.com, Inc		Update		Vebsite alesforce.com		
Name			Update	S			
Salesforce	com, Inc		Update	S	alesforce.com		
Name Salesforce Phone (415) 901	com, Inc			F	alesforce.com		
Name Salesforce Phone (415) 901 Industry	com, Inc	ware Developr	New	F	alesforce.com ax		

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.

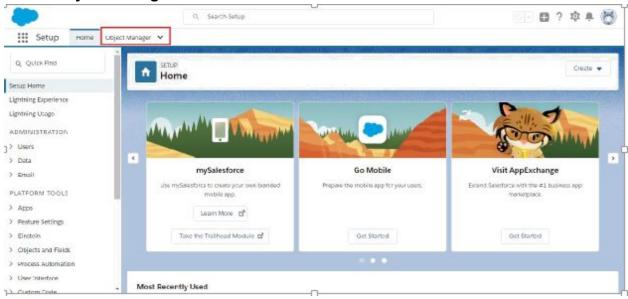
Sales Home Opportunities	s ∨ Leads ∨ Tas	sks 🗸 🛛 Files 🔨	Accounts	✓ Contacts ✓	Campaigns	∨ Da	shboards	✓ Reports ✓	Chatter	Groups	✓ Calenda	r 🗸 🔹 Mor	re
Account Salesforce								+ Follow	v New	/ Contact	New Case	New Note	
 <u>Contacts Information</u> 													
-	18,095 Total Con	itacts 💿 Humar	verified (2,138) (Pending Verificat	tion (15,957)								
FILTERS CLEAR SEARCH	NAME	JOB TITLE	LEVEL	DEPARTMENT									
ROLE	Yousef Abbasi	Lead Solutio	Manager	п	o 🛛 🖬 📥	00	-						
> Job Level	Mark Abram	Senior Vice	Vice President	Marketing	•	00							
> Job Department	Hooman Abri	CTO Advisor	Director	п	o 🛛 🖬 📥	00							
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> Job Title	Ron Acker	Account Dire	Director	Sales	o 🛛 🖬 📥	00							
> Contact's Name	Owen Adams	Manager	Manager	Cross Functi	0 % in 🌢	00							
> Contact's Email	Viktoria Adamy	Director, Ser	Director	Sales	• •	00							
	Vin Addala	Senior Direc	Director	Cross Functi	• in •	00							

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

Contacts Information			Q	uick Add as Lead	Quick Add	as Conta
FILTERS CLEAR SEARCH	9,986 Total Conta	acts 💿 Human	Verified (2,138)	Pending Verification	n (7,8 8)	T
> Results Include	NAME	JOB TITLE	LEVEL	DEPARTMENT		
ROLE	Yousef Abbasi	Lead Solutio	Manager	П	• • • •	00
> Job Level	Mark Abram	Senior Vice	Vice President	Marketing	🛛 🖥 💼 📥	00
> Job Department	Hooman Abri	CTO Advisor	Director	IT	• 🖬 🖨	00
> Job Title	Roger Accurso	Master Solut	Key Influencer	π	0%°in 📥	00
	Ron Acker	Account Dire	Director	Sales	🛛 🖥 💼 📥	00
> Contact's Name	Owen Adams	Manager	Manager	Cross Functi	⊙∜™ ≜	00
> Contact's Email	Viktoria Adamy	Director, Ser	Director	Sales	•	00
•	Vin Addala	Senior Direc	Director	Cross Functi	🛛 🖬 🖨	00

SalesIntel Enriched

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



1. Select Object Manager.

2. Select Lead or Contact or Account.

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3. Select Page Layouts.

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4. Select Lead Layout.

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avuis	Page Layouts	**	Q. Quick Find	New	Page Layout Assignme
ields & Relationships	PAGE LAYOUT NAME	· CPEATED BY	MODIFIED BY		
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Lightning Record Pages Buttons, Links, and Actions	Lead (Sales) Layout	Santosh Ramnani, 7/16/2018, 9:45 PM	Santosh Ramnani, 8/30/2	018, 2:12 AM	
Compact Layouts	Load (Support) Layout	Santusta Raino and, 7/16/2018, 9:45 PM	Sentory Renmand, 8/30/2	018, 2:12 AM	
field Sets	Lead Layout	Santosh Ramnani, 7/16/2018, 0:45 PM	Santosh Ramnani, 10/15/	2018, 6:46 PM	

5. Under Lead Layout you need to select **SalesIntel Enriched** by sliding horizontal bar to right.

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6. Drag and drop **SalesIntel Enriched** under Leads.

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	Expanded Lookupe	Ernal Oyl Dut	Los Buddow By	Load Balks	Number of Locations	Rating	7.0%		
Lightning Record Pages	Related Lists			12					(E) - 1
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7. You can check on/off to **Enable or Disable** SalesIntel Enriched.

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ightning Record Pages	Related Lists							
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ations, Links, and Actions								
ompact Layouts	14.000 Information prosts	c visites an area only)						
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	Leed Source	Sample Text				salah sampadjosmpan	in com	
acord Types	Campaign	Samale Text Sample Text			· · · · · · · · · · · · · · · · · · ·	never salesforce.com		

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.

	Sales Home	Opportunit	ie		
-					
	40 •	Q Search Sales	dona.		· · · · · · · · · · · · · · · · · · ·
App Laure	ther	Q. Hind an ap	p or item		Visit Apptiktrange
✓ All Apps					
Ŗ	Service Manage customer service with accounts, contacts, cases, and more	0	Marketing Best-in-class on-demand marketing automation	8	Community Salesforce CRM Communities
4	Selesforce Chatter The Selesforce Chatter social network, including profiles and fields		Content Salesforce CRM Content		Seles Console (Lightning Experience) Lets sales reps work with multiple _ More
0	Service Console (Lightning Experience) Lets support agents work with multi More	Ø	Sales Manager your lakes process with accounts, leads, opportunit	Ø	Boh Schutions Discurer and mariage basiness solutions designed for your industry.
5	Lightning Usage App View Adoption and Usage Metrics for Lightning Departence	C Labournal	SalesIntel		SelesIntel

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.

						() 3:833 ↓	50000 Support Welcome, laio
ettecn	Seved Search	zves					
10,7	38 Human Verifi	ed Contacts					
Centa	ct Selected 👷 Selected	1					
	NAME 1	108 101 K	ABBEL 1	CREATINGAL 1	CONTANT	нолелахон	
	Dale A. Nolaroth	Senior Azure Specia Ist, Infrastructure	Key Infuercer	п	Microsoft Carp	Redmond, VIA	×
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	Sara Abate	Belesse / Project Manager	Manager	π	Mexicol Corp	Redmond, VIA	¥8 00
	Anuj Abbi	Principal Software Engineering Mana .	Manager	п	Wexadd Carp	Redmond, WA	VB 00
	Rachel Abbott	Managar, Product Markating	Managar	Marketing	Microsoft Carp	Redmond, WA	S . 00

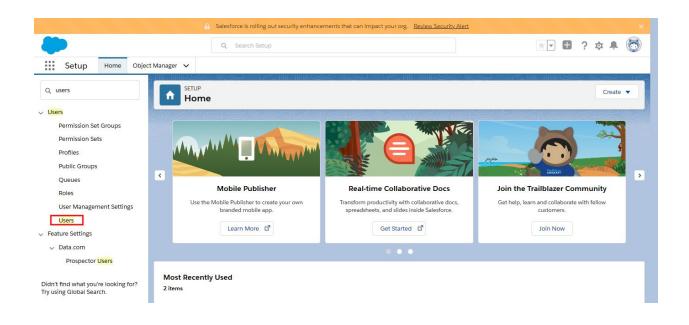
Enrichment

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**.

	🔒 Salest	force is rolling out securit	y enhancements that can impact your org.	Review Security	Alert				
	٩	Search Setup				*	• 🖬 ? 🌣	.	6
Setup Home Objec	t Manager 🗸			- X000 - 2-2		- 14.14.14 - N			
Q Quick Find	SETUP					a HIII			
etup Home	Users		2:111 -21 (5-2) 36 91/200	N 2011			2011-2015	2	15 g - 7
elease Updates (Beta)	View: All Users 🗸 Edi	it Create New View	AB	CDEFGH		QRS	T U V W X Y Z	Other 1	AII
ghtning Experience Transition ssistant			New User Reset Password(s) Add Multiple	e Users					
ew Salesforce Mobile App	Action Full Name *	Alias Username		Last Login	Role	Active Pr	ofile	Manage	er
uickStart	Edit babbage, Charles	cbabb cbabb@gmail.com		1	000	✓ W	ork.com Only User		
ghtning Usage	Edit Chatter Expert	Chatter chatty.00d2w0000	00fgxxeaw.h3hw8i8co4e@chatter.salesforce.com			✓ <u>Ch</u>	atter Free User		
ptimizer	Edit	ashri			Customer Support, International	✓ <u>Cr</u>	<u>oss Org Data Proxy User</u>	ſ	1
DMINISTRATION	Edit	VSriv		8/31/2020, 2:52 PM		✓ <u>S</u> y	stem Administrator	l	
Users	Edit Test2, Test	ttest2 adamtest@test.co	m		CFO	✓ St	andard Platform User		
Permission Set Groups	Edit User, Integration	integ integration@00d2v	w000000fgxxeaw.com			✓ Ar	nalytics Cloud Integration er		
Permission Sets	Edit User, Security	sec insightssecurity@	00d2w000000fgxxeaw.com				nalytics Cloud Security er		
Profiles	Edit User, Test	tuser tuser@astegic.com	<u>n</u>			✓ st	andard User		
Public Groups	Edit Walter, Peter	pete pwalter@gmail.co	m	1	Director, Channel Sales	✓ <u>St</u>	andard Platform User		
Oueues			New User Reset Password(s) Add Multiple	Users					

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.

٠	Q Search Setup		*• 🖬 ? 🌣 🐥 🐻
Setup Home Object Manag	r v		
Q Quick Find	SETUP	ANDIANNI ANTA ANDIANA	\$
Setup Home	Users		
Release Updates (Beta)			^
Lightning Experience Transition Assistant	CityState/Province		
New Salesforce Mobile App QuickStart	Zip/Postal Code		
Lightning Usage			
Optimizer S	gle Sign On Information		
ADMINISTRATION	Federation ID		
V Users	cale Settings		
Permission Set Groups		t Time (America/Los_Angeles) v	
Permission Sets	Locale English (United States)	~	
Profiles	Language English v		
Public Groups A	prover Settings		
Queues	Delegated Approver		
Roles	Manager		
User Management Settings 🗸 💦	seive Approval Request Emails Only if Tam an approvor		~

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.

🕗 SalesIntel		Trial period (3 day	ys left) 🕢 : 3/ 300 Upgrade Sup	port Welcome,
Seneral				
nrichment	Object Permissions			
ead Mapping		Allow Manual Enrichment	Allow Auto Update	
ontact Mapping	Account			
ccount Mapping	Contact			
og Out	Lead			
	When you enable Auto Update for an object, r	nake sure to also configure auto-update per field in the object	s mapping.	
	Auto Update Record			
	Run when object created			
	Schedule auto update date/time			
	Duplicate Resolution			

*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.

SalesInterior					
Companies	Contacts Save	d Searches Enrichment	Rollback		
List of Previous Enrichme	ent Jobs				2 Start New Job
JOB NAME			OBJECT TYPE STAT	US RECORDS ANALYZED	RECORDS UPDATED
Test1	Aug 28, 2020, 2:53 PM	Vijayant Srivastava	Contact Com	pleted 1	0

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.

Sales Home (Opportunities 🗸	Leads 🗸 Tasks 🗸 Files	✓ Accounts ✓ Contacts ✓	Campaigns 🗸	✓ Dashboards ∨ Reports √	✓ Chatter * SolesIntel ✓ X More ▼
SalesInt	el					() : 3/ 300 Upgrade Support Welcome,
neral		Lead Mapping				
ichment		SALESINTEL FIELD	SALESFORCE FIELD			ALLOW AUTO UPDATE
ad Mapping	>	First Name	FirstName		2	
ntact Mapping		Last Name	LastName			
count Mapping		Title	Title	;		
		Company	Company		1	
		Email	Email			V .
		Fax	skip	:		
		Work HQ	skip	:	1	
		Mobile Phone	Mobile Phone	:		
		Phone				

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

SalesIntel				Trial period (3 days left)	Trial period (3 days left) (O) : 3/ 300 Upgrade				
Companies	Contacts	Saved Searches	Enrichment	Rollback					
Select Object Type									
Lead		:							
Enter Job Name (min 5 ch	aracters) *								
Prospect Leads									
Apply Custom Filter									
Emall		‡ Equa		\$ vsrivastava@microsoft.com		+			
			CHILD OUT						

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

				2	Start New Job
			RECORDS ANALYZED		DATED
20, 2:26 AM Vijayant Sriv	vastava Lea	d Analyzing			
20, 2:53 PM Vijayant Sriv	vastava Cor	tact Completed	1	0	

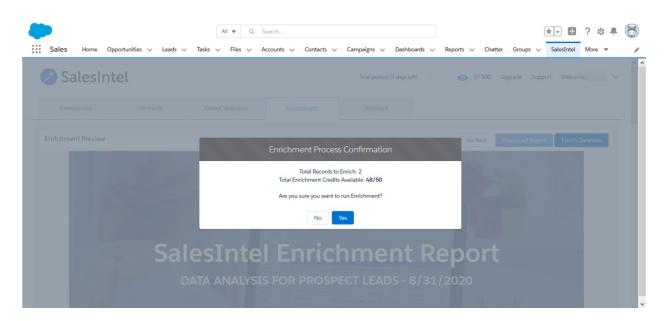
v) You can wait for a confirmation status or **Refresh** Status at the right-hand side top corner of this window.

Companies	Contacts Save	d Searches Enrichment	Rol	lback			
list of Previous Enrichment	Jobs					Start New J	ob
IOB NAME	CREATED ON	CREATED BY	OBJECT TYPE		RECORDS ANALYZED	RECORDS UPDATED	
Prospect Leads	Sep 01, 2020, 2:26 AM	Vijayant Srivastava	Lead	Report Ready	37	*	
Test1	Aug 28, 2020, 2:53 PM	Vijayant Srivastava	Contact	Completed	1	0	

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.

Companies	Contacts Save	d Searches Enrichment	Rol	llback			
list of Previous Enrichme				1000000		Start New	/ Job
IOB NAME Prospect Leads	CREATED ON Sep 01, 2020, 2:26 AM	CREATED BY Vijayant Srivastava	OBJECT TYPE	STATUS	RECORDS ANALYZED	RECORDS UPDATED	
fest1	Aug 28, 2020, 2:53 PM	Vijayant Srivastava	Contact	Completed	1	0	

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.**

Companies	Contacts Save	d Searches Enrichment	Rol	llback			
ist of Previous Enrichme	ent Jobs					,렸 Start	New Job
OB NAME			OBJECT TYPE		RECORDS ANALYZED	RECORDS UPDATED	
Prospect Leads	Sep 01, 2020, 2:26 AM	Vijayant Srivastava	Lead	Completed	37	0	
Test1	Aug 28, 2020, 2:53 PM	Vijayant Srivastava	Contact	Completed	1	0	

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**.

🖉 SalesInte	1			Trial period (3 da	ys left)	() : 3/ 300 Upgrade	Support Welcome, V
Companies	Contacts	Saved Searches	Enrichment	Rollback			CREDITS EXPIRE 09/13/2020
hy Saved Searches	^		-	ur search crite			FAQs Account Settings Settings Log Out
Company			Or t	try one of these popula	ar searches:		
Technographics			Sal	esforce	Honeywell	CapitalOne	

- On the next screen please select the respective objects which you want to be enriched automatically. Here we have toggled for Contact & Lead objects.

Object Permissions	
nent >	
apping Allow Manual Enrichment Allow Auto Update	
Mapping Account O	
t Mapping Contact 🔘	
t Lead 🕥 🔨	
When you enable Auto Update for an object , make sure to also configure auto-update per field in the objects mapping. Auto Update Record	

-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.

SalesInte	l	Trial p	erlod (3 days left) 💽 : 3 / 300 Upgrade Supp	oort Welcome, Vijay
ieneral	Object Permissions			
nrichment	>			
ad Mapping		Allow Manual Enrichment	Allow Auto Update	
ntact Mapping	Account			
	Contact			
ount Mapping	Contact			
ount Mapping	Lead	n object , make sure to also configure auto-update per field in the object		
	Lead			

-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**.

*		All 🔻 Q. Search						r		?‡		6
Sales Home Opportunities V	Leads 🗸 Tasks 🗸	Files 🗸 Accou	nts 🗸 Contacts 🗸	Campaigns 🗸	Dashboards 🗸	Reports 🗸	Chatter	Groups 🗸	SalesIntel	More	*	/
Account Mapping	Contact		0				~					
Log Out	Lead		0									
	When you enable A	uto Update for an obj	ect , make sure to also (configure auto-upo	date per field in the	objects mappir	ng.			٦		
	Auto Update Record	1										
	Run when ob	iect created										1
		o update date/time										
	Frequency *											
	Daily			\$								
	Select Hour	Select Minute										
	01	▼ 00	▼ PM	*								
	Duplicate Resolution			-								
	Always Update			:								
										ancel	6	
									0	nicer	Save	

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.

neral	Object Permissions			
richment	>			
ad Mapping		Allow Manual Enrichment	Allow Auto Update	
ntact Mapping	Account			
count Mapping	Contact			
our mopping				
	Lead When you enable Auto Update	for an object , make sure to also configure auto-update per field	J in the objects mapping.	
-		for an object , make sure to also configure auto-update per field	J in the objects mapping.	
g Out	When you enable Auto Update Auto Update Record		J in the objects mapping.	
	When you enable Auto Update Auto Update Record Run when object created		J in the objects mapping.	
	When you enable Auto Update Auto Update Record		I in the objects mapping.	
	When you enable Auto Update Auto Update Record Run when object created		J in the objects mapping.	

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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.

Sales Home Opp	ortunities 🗸 Leads 🗸 Tasks 🗸	Files V Accounts V Contacts	🗸 Campaigns 🗸 Dashboar	rds 🗸 Reports 🗸 Chatte	er *SalesIntel v × More v	
SalesIntel				() : 3/ 3	300 Upgrade Support Welc	ome,
Seneral	Lead Mapping					
nrichment	SALESINTEL FIELD	SALESFORCE FIELD	ALLOW OV		ALLOW AUTO UPDATE	
ead Mapping	> First Name	FirstName			×	
Contact Mapping	Last Name	LastName				
og Out	Title	Title	:	2		
	Company	Company		2		
	Email	Email				
	Fax	skip	;			
	Work HQ	skip	;	2	5	
	Mobile Phone	Mobile Phone	;	Z		
	Phone	Phone	:	V		

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.

	Intel			Trial period (3 day	s left) 💿 : 3/	300 Upgrade Support Welcom	b.
Companies	Contacts	Saved Searches	Enrichment	Rollback			
ata Rollback	k Logs						2ª
.CTION JC	DB NAME	ROLLBACK	START DATE	ROLLBACK END DATE	JOB STATUS	TOTAL RECORDS	
ollback A	uto Update Job 28 Aug 2020 03:23 PM				Not Started	1	

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**.

ripp contents	Q Search Files V Accounts V Contacts V Campaigns V Dashboards V	Dashboard Tab Reports v Chatter Groups v Calendar v More v s
Q. dashboards Apps No results Items Dashboards	As of Dec 17, 2019 1:56 PM C	Assistant
View All		Nothing needs your attention right now. Check back later.
1м		
500k 0 Oct 2019-11-01 0 Closed ■ Goal	Dec E Closed + Open (>70%)	
Today's Events	Today's Tasks	
Looks like you're free and clear the rest of the day.	Nothing due today. Be a go-getter, and check back soon.	

v) On the next screen, please click on All Dashboards from Left Menu and then select **SalesIntel Enrich ROI.**

ll Dashboards tem								Q, Search	n all dashboards	N	lew Dashboard New	Folder
ASHBOARDS	Dashboard Name	~	Description	~	Folder	~	Created By	~	Created On	~	Subscribed	
Recent	SalesIntel Enrich ROI]			SalesIntel Dashboards		Vijayant Srivastava		10/2/2020, 1:06 AM			
OLDERS												
All Folders Created by Me												
OLDERS All Folders Created by Me Shared with Me AVORITES												

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.

🖉 SalesInt	el			() : 19	67 / 6000	Upgrade	Support	Welcome, John	~
Companies	Contacts	Saved Searches	Enrichment	Rollback			CREDI Upgrad	TS EXPIRE 04/26/ le	2020
My Saved Searches FILTERS CLEAR SEA	¢ Â			rch criteria to th us sections to see add			FAQs Setting Log Ou	_	

- 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.

General >	
Enrichment	Settings not found for current Salesforce account.
ead Mapping	Please login to SalesIntel app to establish connection with Salesforce environment.
ontact Mapping	Login to SalesIntel > Go to Salesforce Settings > Login with current Salesforce account
ccount Mapping	
.og Out	Go to SalesIntel

- 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.

Lo	gin	
4	Email	
Q.	Password	
Ren	nember me	Login

Forgot Password?

- 8. Login with your SalesIntel credentials.
- 9. Once logged in, you can review settings.

General	General		
Lead Mapping	Export Default Type	Prompt	
Contact Mapping	Duplicate Resolution	Prompt	
Account Mapping	Prompt For Lead/Contact Owners		
	Set Lead/Contact Owner To Current User		
	Prompt For Campaigns		
	Create New Accounts		
	Create New Accounts Orphan Records		

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

General Enrichment	General			
Lead Mapping	Export Default Type	Prompt	÷	
Contact Mapping	Duplicate Resolution	Prompt	÷	
Account Mapping	Prompt for Lead/Contact Owners	\checkmark		
Log Out	Set Lead/Contact Owner to Current User			
	Prompt for Campaigns	\checkmark		
				Cancel Save

- 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.

ent	SALESINTEL FIELD	SALESFORCE FIELD	ALLOW OVERWRITE	ALLOW AUTO UPDATE
pping	Name	Name		
Mapping	Website	Website		
Mapping	> 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

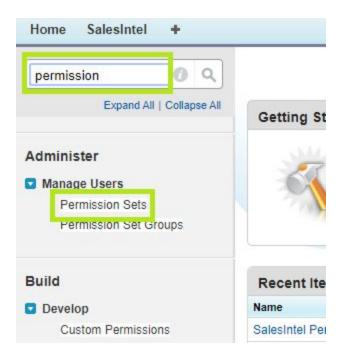
- 1. A list of all Active Users connected to SalesIntel will be displayed.
- 2. Admin can disconnect active users from here by clicking- Disconnect <Username> corresponding to the connected user.

Users	>				
Salesforce		Users			
		NAME	EMAR	ROLE	
			the second s	Admin	
			Contraction of the second	Rcie	

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.

	up ermission Sets		
2237031		OMENTE EN EN ZETAMENTE EN	\ -4023
Permiss	sion Sets		
On this page (you can create, view, and manage permissio	n coto	
on this page (ou can create, view, and manage permissio	11 3613.	
n addition, yo	u can use the SalesforceA mobile app to ass	sign permission sets to a user. Download SalesforceA from the App Store or (Google Play: <u>iOS And</u>
		sign permission sets to a user. Download SalesforceA from the App Store or (Google Play: <u>iOS And</u>
	u can use the SalesforceA mobile app to ass	sign permission sets to a user. Download SalesforceA from the App Store or o	Google Play: <u>iOS And</u>
		sign permission sets to a user. Download SalesforceA from the App Store or o A B C D E F G H I J K L M	
All Permiss			
All Permiss	ion Sets ▼ Edit Delete Create New View	A B C D E F G H I J K L M	1 N O P Q R S -
All Permiss	ion Sets Edit Delete Create New View Permission Set Label	A B C D E F G H I J K L M Description	1 N O P Q R S -
All Permiss	ion Sets Edit Delete Create New View Permission Set Label CRM User	A B C D E F G H I J K L M Description Denotes that the user is a Sales Cloud or Service Cloud user.	License

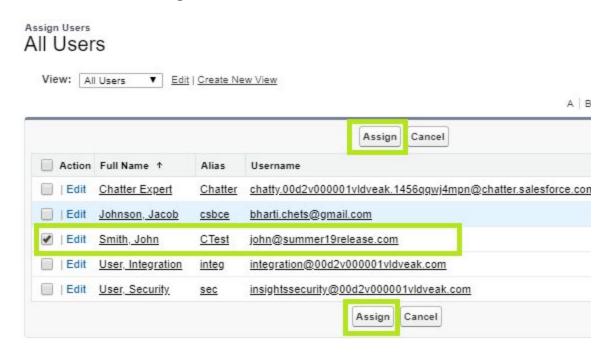
4. Click on **SalesIntel Permission Set** from the list of Permission sets.

Permission Set SalesIntel Permission	n Set			
Q Find Settings	Clone	Manage Assignments		
Permission Set Overview				
Description			API Name	SalesIntel_Permission_Set
License	Salesforce		Namespace Prefix	salesintelio

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

ssigned Users SalesIntel Permi	ssion Set			
Back to: Permission Set				
			A B C 1	D
		Add Assignme	Remove Assignments	
Full Name 个	Alias	Username	Last Login	
No records to display.				
		Add Assignmen	ts Remove Assignments	

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.

0	
Permission set S	alesIntel Permission Set has been assigned to 1 user.
	Done
ull Name	Username

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

Setup Inline Pages

1. Go to any Account record.

Microsoft Co	orp			
Microsoft Co			Customize Pa	ge Edit Layout Printable View Help for this Page
h- Show Feed				
Contacts [1] Open Activities [0]	Activity History [0] Licenses [0] Opportunities [0]	Google Docs, Notes, & Attachments [0] Partners	[0] Account	History [1] Campaign Members [0] Cases [0]
Account Detail	Edit Delete			
Account Name	Microsoft Corp [View Hierarchy]	Account Owner	4	[Change]
Parent Account		Named Acct	0	
Website	http://microsoft.com	Named Acct Outbound Campaign		
Account Source		IBDR		
Fax		Demo with Named Acct		
NAICS Code		Round Robin ID	5	

- 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.

Account Layout 👻		Custom Console Components Mini Page Layout Mini	Constant le View <u>Video Tutorial</u> <u>Help for this Page</u>
	Save V Quick Save Preview As Cancel 📣 Undo 🐟 Redo 📻 Layout Properties		
	Guiden Fotons Quick Find Page Name Mobile & Lightning Actions Section Expanded Lookups Find Page Name Repart Charts Satesintel Accoun Components Visualforce Pages		
Account Sample			
Highlights Panel			
Customize the highligh	ts panel for this page layout		
Quick Actions in t	he Salesforce Classic Publisher 🔟		
Post File	New Task New Contact New Case Log a Call New Not	e New Opportunity New Event	Link Poll Question
Email	New lask New Collact New Case Log a Call New Nor	New Opportunity New Event	Link Poil Question
Emai			
Salesforce Mobile	and Lightning Experience Actions		
Post File	New Task New Contact New Case Log a Call New Not	e New Opportunity New Event	Link Poll Question
	e Owner Include Offline Check for New Data Submit for Approval	Get Contacts Edit Delete	Change Record Type Sharing
View Account Hierard		Cur Contacto	change record type
View Account meran	Can Send text Email (mobile only) View Website		
Account Standa	rd Buttons	1	
	Change Owner Change Record Type Delete View Account Hierarchy Sharing Include Offline	Get Survey Invitation Check for New Data tew Partne	er Scorecard Add to Call List Printable View
- Custon	n Buttons - 2		
Account Information	(Header visible on edit only)		
Account Owne		Rating Sample Text	
* Account Nam		Phone 1-415-555-1212	
Parent Accourt	nt Sample Text	Fax 1-415-555-1212	
Account Numbe		Website www.salesforce.com	
Account Sit	te Sample Text	Ticker Symbol Sample Text	
Tvn	e Samnle Text	Ownership Sample Text	

- 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.

Width (in pixels or %)	100%	
Height (in pixels)	1000	
Show scrollbars		
Show label		

- 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.

Customize Page Edit Layout, Printable View Help for this Page		ft Corp	Microsoft Co
			- Show Feed
tners [0] Account History [1] Campaign Members [0] Cases [0]	Opportunities [0] Google Docs_Notes, & Attachments [0] Partners	ities [0] <u>Activity History [0]</u> <u>Licenses [0]</u>	Contacts [1] Open Activities [0]
	Delete	Edit	Account Detail
ner [Change]	Account Owner	Aame Microsoft Corp [View Hierarchy]	Account Name
cct 🥥	Named Acct 🥥	count	Parent Account
ign	Named Acct Outbound Campaign	bsite http://microsoft.com	Website
DR	IBDR	ource	Account Source
cct	Demo with Named Acct	Fax	Fax
1D 5	Round Robin ID	Code	NAICS Code
		iress	

- 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.

Save V Quick Save Previe	w As V Can	cel 🛛 🔷 Undo 🗥 R	edo 📘 🖪 Layout							
ields 📤	Quick	uick Find Field Name								
luttons		Account Owner	Account Owner Billing Address		Fax	NAICS Description	Phone	SIC Code		
Quick Actions	ace	Account Site	Clean Status	Description	Industry	Operating Hours	Rating	SIC Descriptio		
Iobile & Lightning ctions	ne	Account Source	Created By	D-U-N-S Number	Last Modified By	Ownership	SalesIntel Enriched?	Ticker Symbol		
xpanded Lookups	mber	Annual Revenue	D&B Company	Employees	NAICS Code	Parent Account	Shipping Address	Tradestyle		
elated Lists 👻	4									
Salesforce Mobile an	d Lightning	Experience Actio	nsi							
Post File	New Task	New Contac	t New Ca	ase Log a Call	New Note	New Opportunity	New Event	Thanks		
Question Email	Edit	Get Survey In	nvitation	View Account Hierarchy	Submit for Ap	proval Delete	View Partner	Scorecard		
Change Owner	Get Contacts	Change Rec	ord Type	Include Offline C	heck for New Data	Add to Call List	Printable View	Sharing		
Send Text Email	(mobile only)	View Websi	ite							
Detail [Edit] Chi	ttons eader visible on		Delete) View Acco	ount Hierarchy) Sharing) Ir	clude Offline) (Get Surv	ey Invitation) Check for Rating Sample Text	New Data) (View Partne	r Scorecard) Ad		
Account Information (He	ttons		Delete View Acco	ount Hierarchy] Sharing) [r	nclude Offline Get Surv		12	r Scorecard) [Ad		
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Detail Edit Chu Custom Bu Account Information (He Account Owner * • Account Name • Parent Account	ange Owner) C ttons ader visible on <u>Sample Text</u> Sample Text <u>Sample Text</u>		Delete) View Acco	ount Hierarchy] (Sharing) [r		Rating Sample Text Phone 1-415-555-12 Fax 1-415-555-12	12	r Scorecard) (Ad		
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Detail Edit Chu Custom Bu Account Information (He Account Owner	ange Owner C ttons adder visible on <u>Sample Text</u> Sample Text Sample Text Sample Text Sample Text		Delete) View Acco	ount Hierarchy) Sharing) [r	N Ticker Own	Rating Sample Text Phone 1-415-555-12 Fax 1-415-555-12 Website www.salesford Symbol <u>Sample Text</u>	12	r Scorecard) (Ad		
Detail Edit Chi Custom Bu Account Information (He Account Owner * Account Name Parent Account Account Site Type	ange Owner C ttons adder visible on <u>Sample Text</u> Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text		Delete) View Acco	ount Hierarchy) (Sharing) (Ir	Ticker Owi Env	Rating Sample Text Phone 1-415-555-121 Fax 1-415-555-121 Website www.salesforc Symbol <u>Sample Text</u> nership Sample Text	12 12 2e.com			
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Detail Edit Chu - Custom Bu - Custom Su - Custom Name - Account Number - Account Number - Account Site - Type - Industry - Save V Quick Save Previ Fields - Buttons - Quick Actions	ew As V Car	edit only) ncel I I Undo I R Find Field Name	Redo T E Layout	Properties	Ticker Ow Ema	Rating Sample Text Phone 1-415-555-12 Fax 1-415-555-12 Website www.salesford Symbol <u>Sample Text</u> nership Sample Text novces 1 002	12 12 :e.com Mini Page Layout Mini (Console View		
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- 4. From Items Panel Click on Fields.
- 5. Drag & drop **SalesIntel Enriched ?** field to the details section

elds	 Quic 	ck Find Field Name	*					
ittons		Account Owner	Billing Address	Data.com Key	Fax	NAICS Description	Phone	SIC Code
uick Actions	ace	Account Site	Clean Status	Description	Industry	Operating Hours	Rating	SIC Description
obile & Lightning	ne	Account Source	Created By	D-U-N-S Number	Last Modified By	Ownership	SalesIntel Enriched?	Ticker Symbol
tions panded Lookups	mber	Annual Revenue	D&B Company	Employees	NAICS Code	Parent Account	Shipping Address	Tradestyle
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				· · · · ·				
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Send Text Em	ail (mobile on	ly) View Web	site					
	d Buttons	(<u></u>)	(a) (a					
Detail Edit	Change Owner	Change Record Type	Delete View Account	t Hierarchy Sharing	Include Offline Get Surv	ey Invitation Check fo	r New Data View Partne	er Scorecard Ac
Custom	Buttons -							
Account Information	Headervisible	on edit only!						
Account Owner						Rating Sample Text		
* Account Name						Phone 1-415-555-12		
	oumpic res	*						
	Comple Tex	+						
Parent Account Account Number					,	Fax 1-415-555-12		
Account Number	Sample Tex	đ				Vebsite www.salesfo	rce.com	
Account Number Account Site	Sample Tex Sample Tex	d d			Ticker	Vebsite www.salesfo Symbol <u>Sample Text</u>	rce.com	
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Account Number Account Site Type Industry	Sample Tex Sample Tex Sample Tex Sample Tex	d d d			Ticker Owi Emp	Vebsite www.salesfo Symbol <u>Sample Text</u> hership Sample Text ployees 1,993	rce.com	
Account Number Account Site Type	Sample Tex Sample Tex Sample Tex Sample Tex	d d d			Ticker Owi Emp	Vebsite www.salesfo Symbol <u>Sample Text</u> nership Sample Text	rce.com	
Account Number Account Site Type Industry	Sample Tex Sample Tex Sample Tex Sample Tex	d d d			Ticker Owi Emp	Vebsite www.salesfo Symbol <u>Sample Text</u> hership Sample Text ployees 1,993	rce.com	42
Account Number Account Site Type Industry	Sample Tex Sample Tex Sample Tex Sample Tex \$123.45	d d d			Ticker Owi Emp	Vebsite www.salesfo Symbol <u>Sample Text</u> hership Sample Text ployees 1,993	rce.com	d?
Account Number Account Site Type Industry Annual Revenue	Sample Tex Sample Tex Sample Tex Sample Tex \$123.45	d d d			Ticker Owi Emp	Vebsite www.salesfo Symbol <u>Sample Text</u> hership Sample Text ployees 1,993	rce.com	d?
Account Number Account Site Type Industry Annual Revenue	Sample Tex Sample Tex Sample Tex Sample Tex \$123.45	d d d			Ticker Owi Emp	Vebsite www.salesfo Symbol <u>Sample Text</u> hership Sample Text ployees 1,993	rce.com	d?

Account Information (H	eader visible on edit only)		
Account Owner	Sample Text	Rating	Sample Text
\star 🍳 Account Name	Sample Text	Phone	1-415-555-1212
Parent Account	Sample Text	Fax	1-415-555-1212
Account Number	Sample Text	Website	www.salesforce.com
Account Site	Sample Text	Ticker Symbol	Sample Text
Туре	Sample Text	Ownership	Sample Text
Industry	Sample Text	Employees	1,993
Annual Revenue	\$123.45	SIC Code	Sample Text
		SalesIntel Enriched?	\checkmark

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

7. Added SalesIntel Enriched ? field will appear here:

ccount Detail	Edit Delete Sharing	Include Offline	
Account Owner	Liser User [Change]	Rating	
Account Name	Salesforce [View Hierarchy]	Phone	
Parent Account		Fax	
Account Number		Website	http://salesforce.com
Account Site		Ticker Symbol	
Туре		Ownership	
Industry		Employees	
Annual Revenue		SIC Code	
		SalesIntel Enriched?	✓
Billing Address		Shipping Address	
Created By	User User, 3/24/2020, 2:54 AM	Last Modified By	User User, 3/25/2020, 4:50 AM
Description			

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:

Contact Detail	Edit Delete Clone		
Contact Owner	Liser User [Change]	Phone	+16566641116
Name	Jacob Martin	Home Phone	
Account Name	Salesforce	Mobile	
Title		Other Phone	
Department	Finance	Fax	
Birthdate		Email	jack@salesforce.com
Reports To	[View Org Chart]	Assistant	
Lead Source		Asst. Phone	
		SalesIntel Enriched?	\checkmark
Mailing Address	199, New St. San Jose	Other Address	
Created By	User User, 3/25/2020, 4:54 AM	Last Modified By	User User, 3/25/2020, 4:56 AM
Description			

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:

ead Detail	Edit	Delete	Convert	Clone	Sharing	Find Duplicates		
Lead Owner	Liser User [Change]						Phone	
Name	Russ Aaron						Mobile	
Company	Golds Gym						Fax	
Title	Director, Compensation and Ben	efits					Email	raaron@goldsgym.com
Lead Source							Website	http://goldsgym.com
Industry						L	ead Status	Open - Not Contacted
Annual Revenue							Rating	
						No. of	Employees	7,422
						SalesIntel	Enriched?	
Address								
Created By	User User, 3/19/2020, 4:32 AM					Last N	lodified By	User User, 3/19/2020, 5:11 AM
Description								

Add SalesIntel Tab

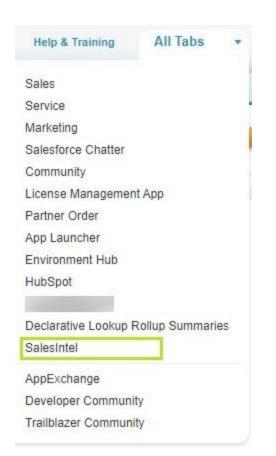
To add SalesIntel as a tab in the navigation menu, perform these steps.

Home	Profile	Chatter	Reports	Accounts	Contacts	Opportunities	Dashboards	Forecasts	SalesIntel	+
7.	Click	<pre>setup</pre>	D							
8.	Click	c Creat	te							
9.	Click	<pre>< Apps</pre>								

- 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.

						(3) 100 (100 (100 (100 (100 (100 (100 (100	50000 Support Welcome, la
tecn	Seved Search	Des					
0,7	738 Human Verifi	ed Contacts					
lanca	ct Selected 👷 See Search	1					
	NAME 1	408 1010E - 1	-	Conversion of	COMPANY 9	HORMANDE	
	Dale A. Nolaroth	Senior Azure Specia Ist, Infrastructure	Key Infuercer	п	Microsoft Carp	Redmond, VLA	×= 00
	Terre Aaron	Senior Soloware Engineer	Nej Informar	п	Microsoft Cera	Redmund, WA	¥8 00
	Cruck Alasee	Account Manager, Technical	Manager	п	Microsoft Carp	Redroced, VIA	ו 00
	Sare Abote	Belesse / Project Manager	Manager	п	Microsoft Cera	Redmond, VIA	50 0 °
	Anij Abbi	Principal Software Engineering Muna	Manager	н	Wielesoft Corp	Fedmend, WA	۵۵ ۳۲
	Rachel Abbott	Managar, Product Markating	Manager	Marketing	Worksoft Carp	Endmond, WA	8 . 00

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.

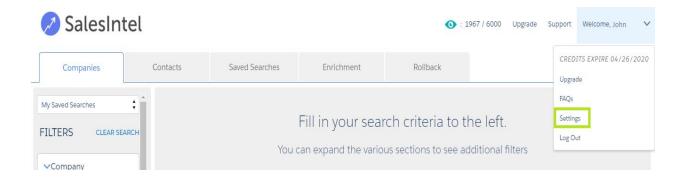
After successful installation of the package, you will need to add inline pages on the layout of Lead, Contact and Account details page. Inline pages display field values provided by the API results for that particular Lead, Contact and Account record. In our managed package, we have three inline pages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

General	>	
Enrichment		Settings not found for current Salesforce account.
Lead Mapping		Please login to SalesIntel app to establish connection with Salesforce environment.
Contact Mapping		Login to SalesIntel > Go to Salesforce Settings > Login with current Salesforce accoun
Account Mapping		
Log Out		Go to SalesIntel

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.

-00	gin	
4	Email	
Q.	Password	
Rem	ember me	Login

Login with your SalesIntel credentials.

From the web portal hover on the user's name available on the top right corner of the page.

Companies	Contacts	🖺 Saved Searches 🛛 🗮 Lists	Credits Renew 03/14/2 Need More Credits?
			Salesforce Settings
My Saved Searches	T		Hubspot Settings
	*		Outreach Settings
INDIVIDUAL			SalesLoft Settings
> Contact's Name		Type company name	About
, contacto name			FAQs
Contact's Email			Logout

Click on the **Salesforce Settings** menu from the dropdown list.

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

Login Salesforce - Google Chrome		.—		×
login.salesforce.com/?startURL=	=%2Fse	etup%2	2Fsecu	0-
salesfor	ce			
Username	1 Sa	wed U	sername	9
john@sidemo.com				
Password				
Log In				
Remember me				

Enter your Salesforce username and password and Login into Salesforce.

	Allow Access? Salesforce - Google chets-dev001-dev-ed.my.sal		- 🗆 setup/seci	× 1r/
	salesf	orce		
	Allow Ac	cess?		
Sa	alesIntel is asking to:			
	Access your basic informatio	on		- 1
	Access and manage your da	ta		- 1
•	Perform requests on your be	ehalf at any ti	me	- 1
D	o you want to allow access for			- 1
cł	netan@summer19release.con	n? (Not you?)	
	Deny	Allo	w	

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.

General	General		
Lead Mapping	Export Default Type	Prompt	
Contact Mapping	Duplicate Resolution	Prompt	
Account Mapping	Prompt For Lead/Contact Owners		
	Set Lead/Contact Owner To Current User		
	Prompt For Campaigns		
	Create New Accounts		
	Orphan Records		

Click on the **Save** button.

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

<u>General</u> Enrichment	>	General			
Lead Mapping		Export Default Type	Prompt	÷	
Contact Mapping		Duplicate Resolution	Prompt	*	
Account Mapping		Prompt for Lead/Contact Owners	\checkmark		
		Set Lead/Contact Owner to Current User			
		Prompt for Campaigns			
					Cancel Save

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.

ment	SALESINTEL FIELD	SALESFORCE FIELD	ALLOW OVERWRITE	ALLOW AUTO UPDATE
apping	Name	Name		
ct Mapping	Website	Website		
nt Mapping It	> 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		

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