



# Salesforce Managed Package Installation & Configuration Guide

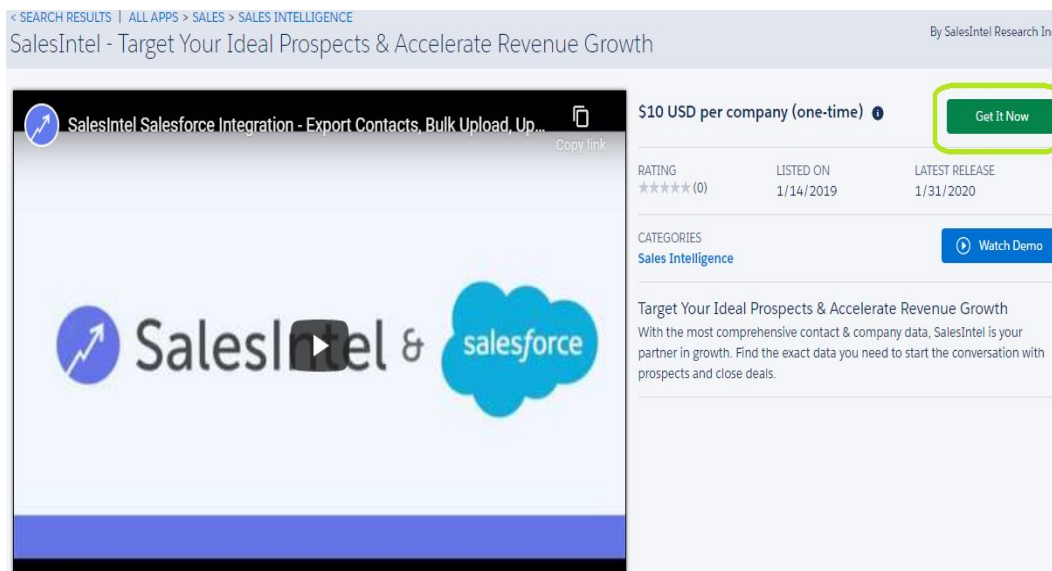
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## Prerequisite

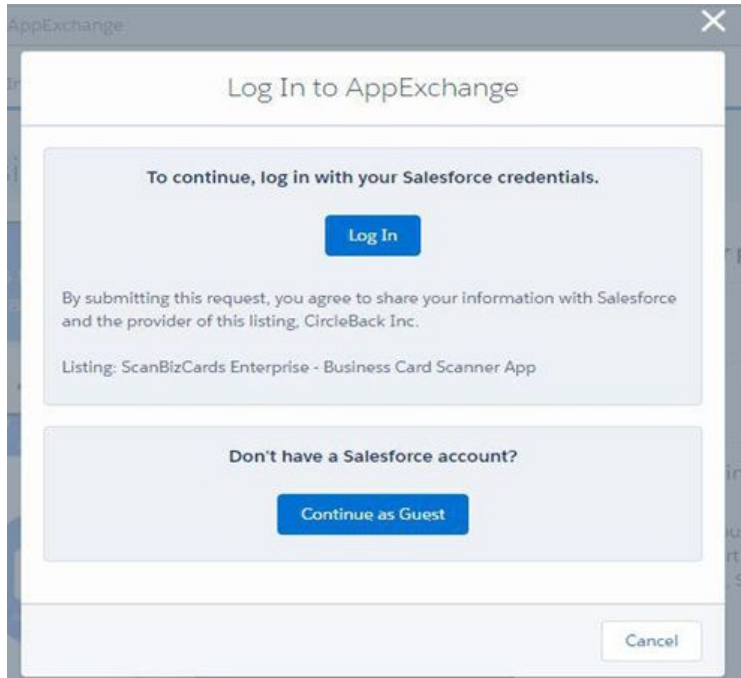
You must have Salesforce for Enterprise, Unlimited, Developer or Performance. API is not available in Professional and Essential. Professional edition can purchase API access for an additional fee.

## Install Managed Package

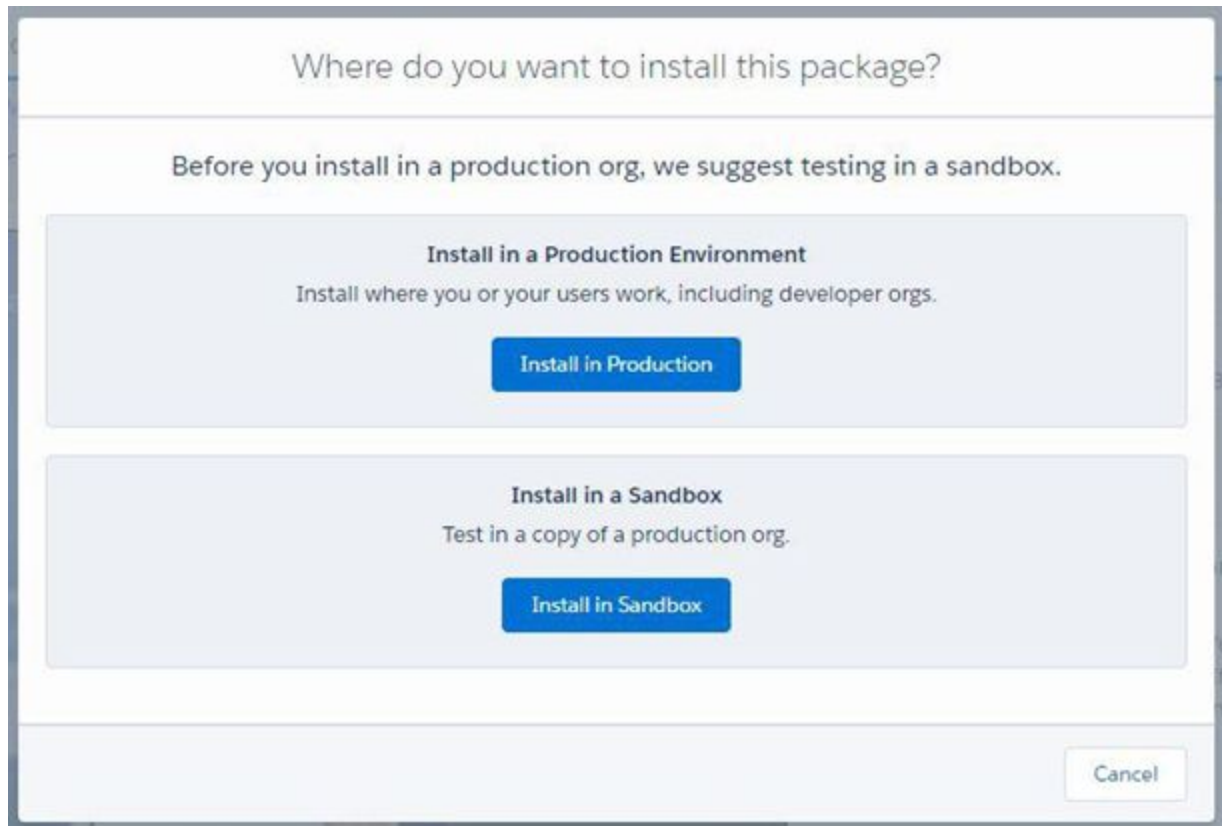
1. Search [AppExchange](#) for SalesIntel and click on **Get it Now**. You must be a Salesforce Administrator to install the SalesIntel managed package.



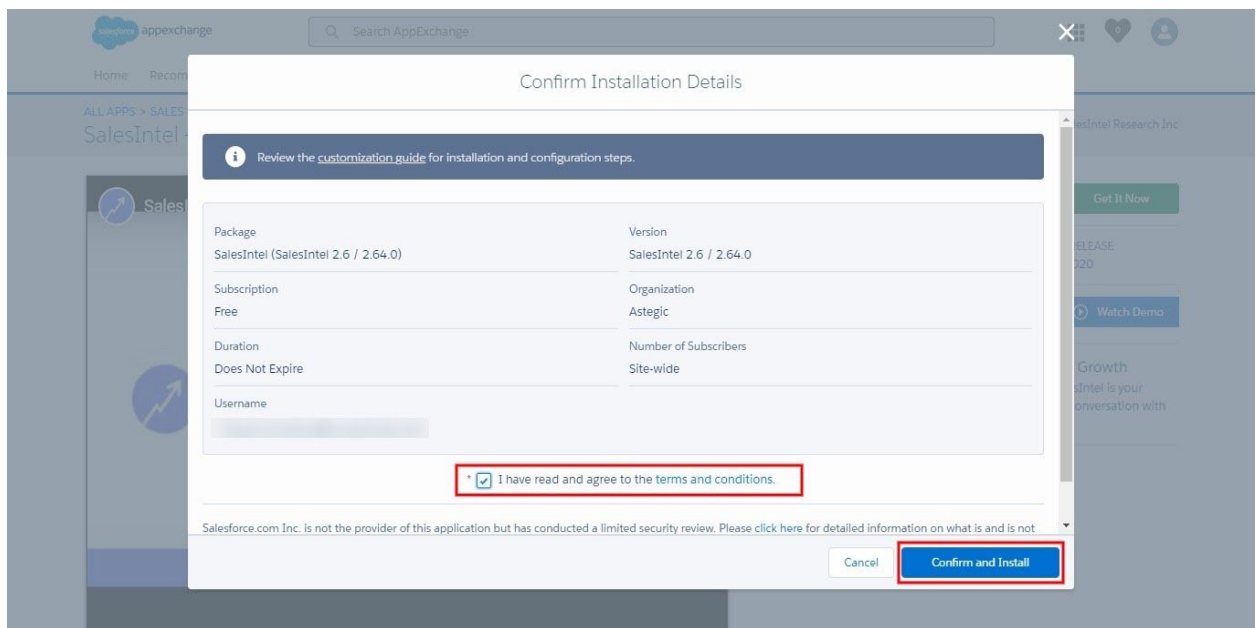
2. If you're an existing Salesforce user, login with your credentials. If you're new, Continue as a Guest and create a Salesforce account.




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.





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.



**Install SalesIntel -  
Target Your Ideal  
Prospects &  
Accelerate  
Revenue Growth**  
By SalesIntel Research Inc

  
☒ **Install for Admins Only**

  
☐ **Install for All Users**

  
☐ **Install for Specific Profiles...**

**Install**

Cancel

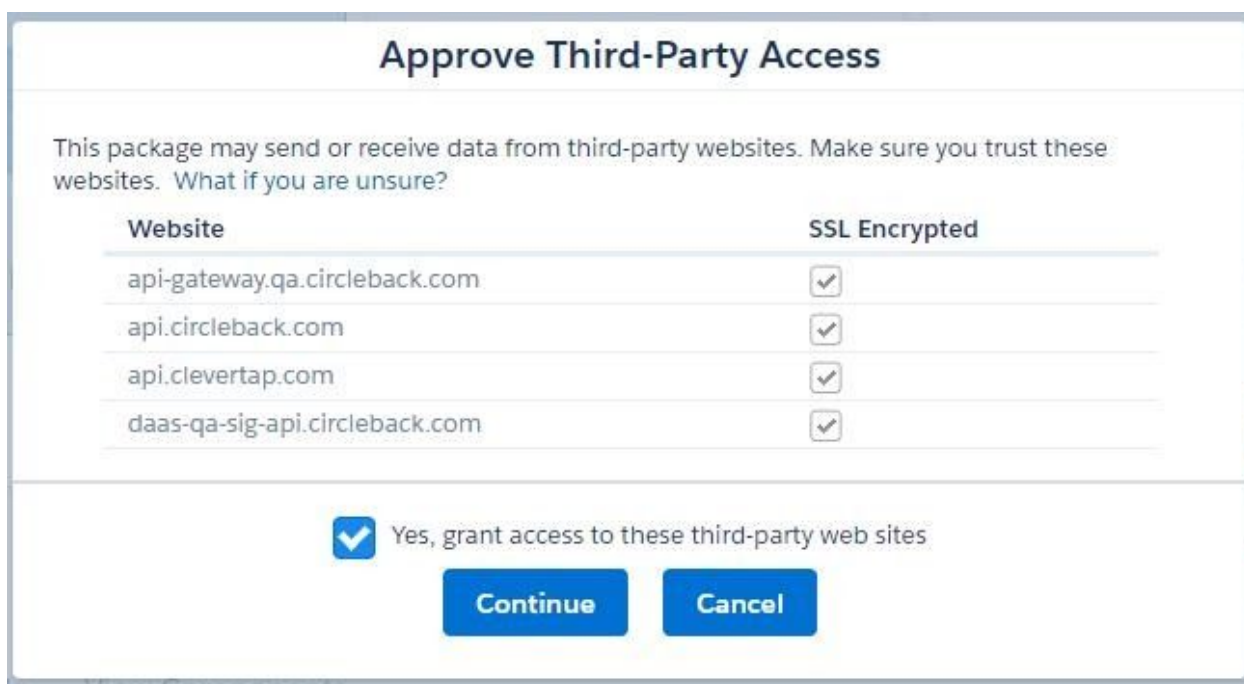
App Name	Publisher	Version Name	Version Number
SalesIntel - Target Your Ideal Prospects & Accelerate Revenue Growth	SalesIntel Research Inc	Salesintel2.7	2.70

**Description**  
With the most comprehensive contact & company data, SalesIntel is your partner in growth. Find the exact data you need to start the conversation with prospects and close deals.

**Additional Details** [View Components](#)

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.



**Approve Third-Party Access**

This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?

Website	SSL Encrypted
api-gateway.qa.circleback.com	<input checked="" type="checkbox"/>
api.circleback.com	<input checked="" type="checkbox"/>
api.clevertap.com	<input checked="" type="checkbox"/>
daas-qa-sig-api.circleback.com	<input checked="" type="checkbox"/>

☒ Yes, grant access to these third-party web sites

**Continue** **Cancel**

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
<a href="#">Uninstall</a>   <a href="#">Manage Licenses</a>		ScanBiz Mobile	1.52		Active	5	1	Does not Expire	5/12/2020, 6:10 AM		2	11	
<a href="#">Uninstall</a>	 <a href="#">SalesIntel</a>	SalesIntel LLC	2.64	salesintelio	Active	Unlimited	0	Does not Expire	6/18/2020, 5:41 AM		1	1	
<a href="#">Uninstall</a>	 <a href="#">Salesforce and Chatter Apps</a>	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...													

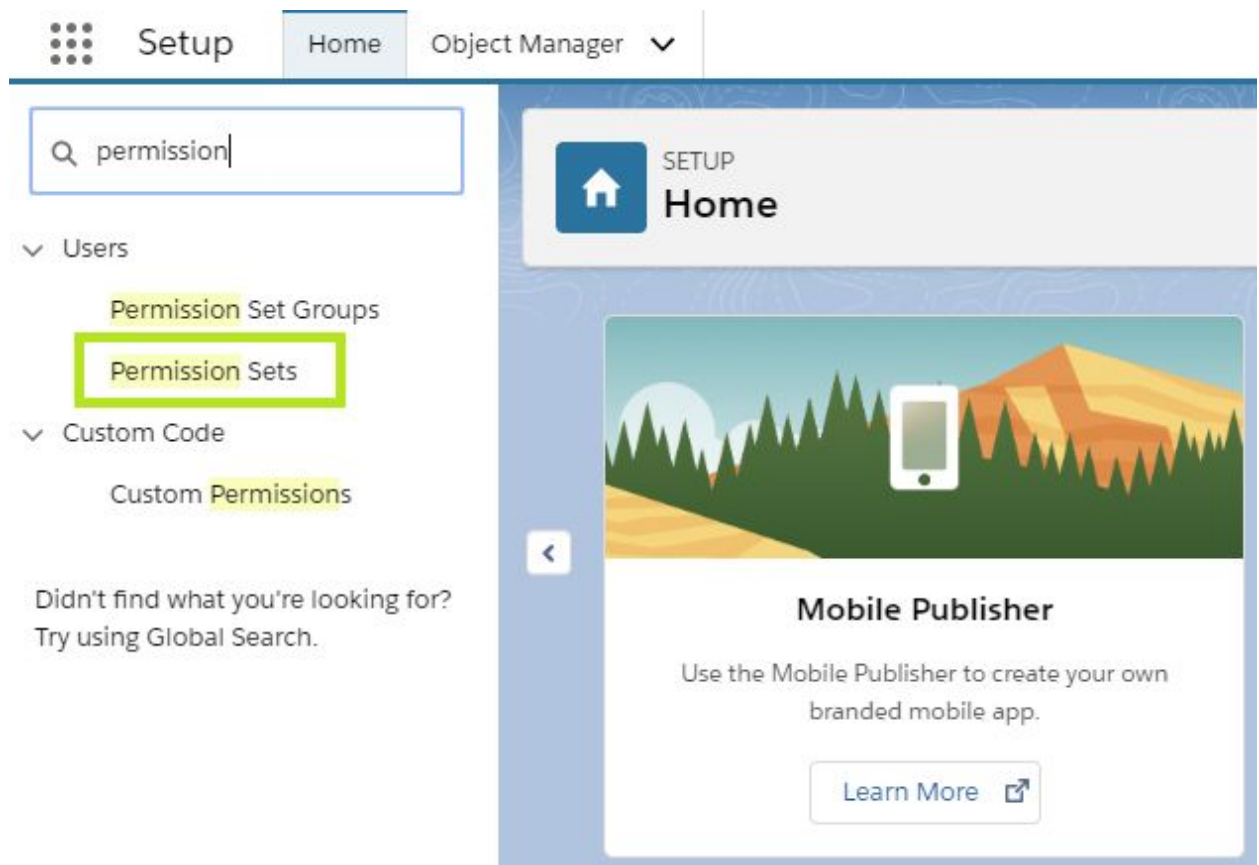
Congratulations! Your SalesIntel Package is now installed.

## 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.




**SETUP**  
**Permission Sets**

## Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

**All Permission Sets** ▾ [Edit](#) | [Delete](#) | [Create New View](#)


[New](#) 

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#)

<input type="checkbox"/>	Action	Permission Set Label ↑	Description	License
<input type="checkbox"/>	<a href="#">Clone</a>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	<a href="#">Clone</a>	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
<input type="checkbox"/>	<a href="#">Clone</a>	SalesIntel Permission Set		Salesforce
<input type="checkbox"/>	<a href="#">Clone</a>	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integra...	Cloud Integration User

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

Permission Set  
**SalesIntel Permission Set**

 [Clone](#) [Manage Assignments](#)

### Permission Set Overview

Description	API Name	SalesIntel_Permission_Set
License	Namespace Prefix	salesintelio

- 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

<a href="#">Add Assignments</a> <a href="#">Remove Assignments</a>			
Full Name ↑	Alias	Username	Last Login
No records to display.			
<a href="#">Add Assignments</a> <a href="#">Remove Assignments</a>			

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

Assign Users

## All Users

View: [All Users](#) ▼ [Edit](#) | [Create New View](#)

A | B

<a href="#">Assign</a> <a href="#">Cancel</a>			
<input type="checkbox"/> Action	Full Name ↑	Alias	Username
<input type="checkbox"/>   <a href="#">Edit</a>	<a href="#">Chatter Expert</a>	<a href="#">Chatter</a>	<a href="#">chatty.00d2v000001vldveak.1456ggwj4mpn@chatter.salesforce.com</a>
<input type="checkbox"/>   <a href="#">Edit</a>	<a href="#">Johnson, Jacob</a>	<a href="#">csbce</a>	<a href="#">bharti.chets@gmail.com</a>
<input checked="" type="checkbox"/>   <a href="#">Edit</a>	<a href="#">Smith, John</a>	<a href="#">CTest</a>	<a href="#">john@summer19release.com</a>
<input type="checkbox"/>   <a href="#">Edit</a>	<a href="#">User Integration</a>	<a href="#">integ</a>	<a href="#">integration@00d2v000001vldveak.com</a>
<input type="checkbox"/>   <a href="#">Edit</a>	<a href="#">User Security</a>	<a href="#">sec</a>	<a href="#">insightssecurity@00d2v000001vldveak.com</a>
<a href="#">Assign</a> <a href="#">Cancel</a>			

- 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
<u>John Smith</u>	<u>john@summer19release.com</u>

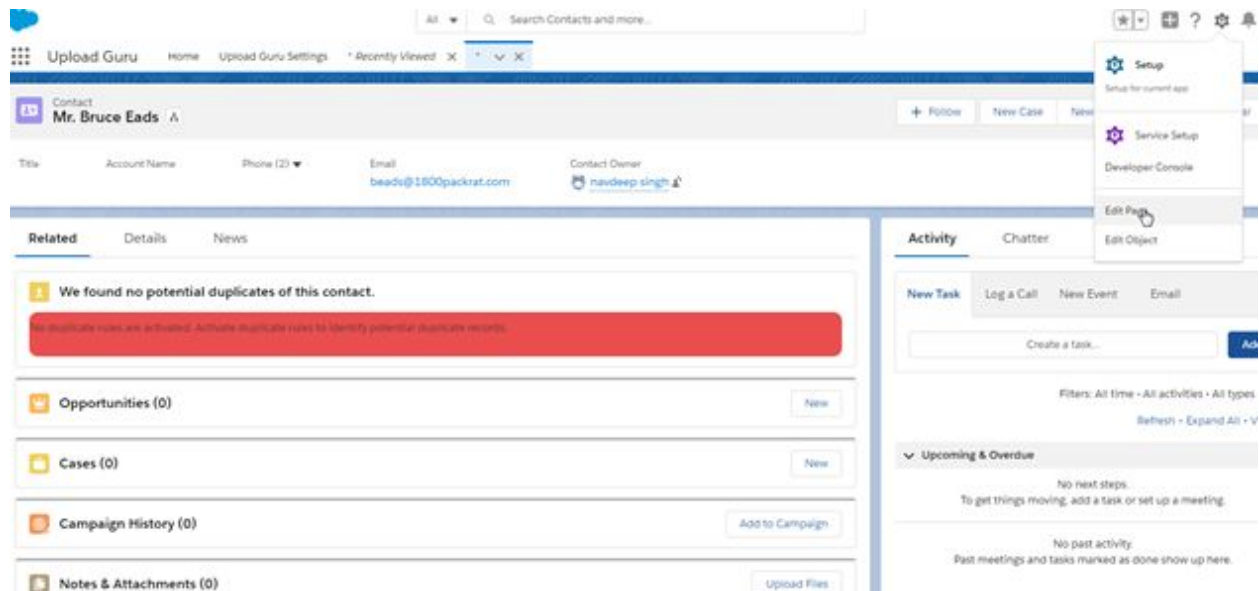
Done

- Click on the **Done** button.

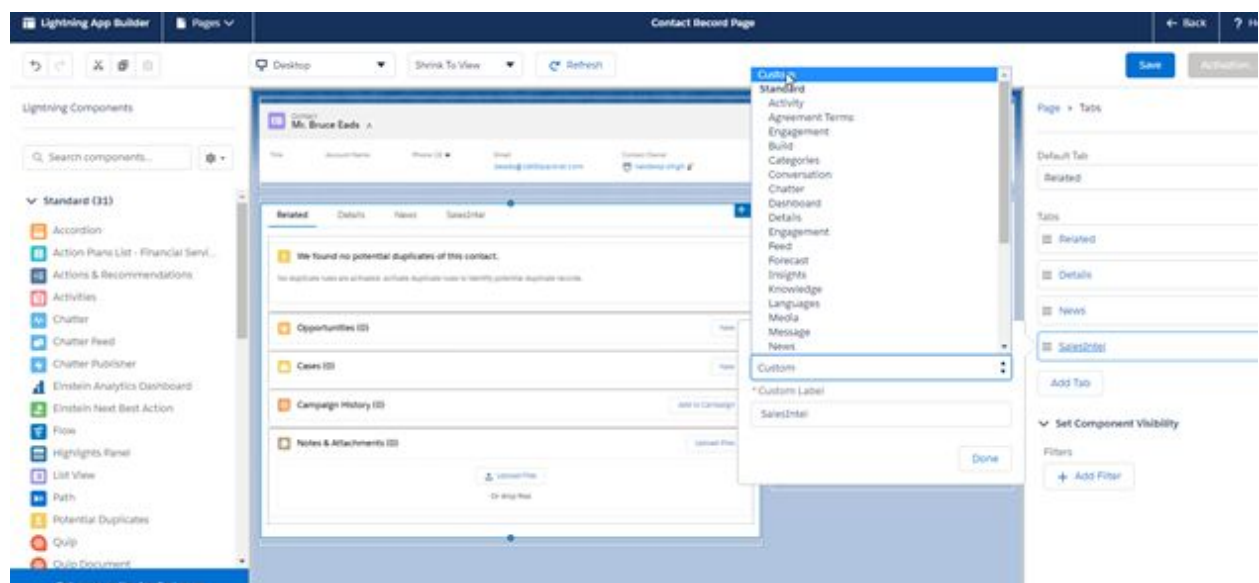
## Setup Inline Pages

### Contact Object

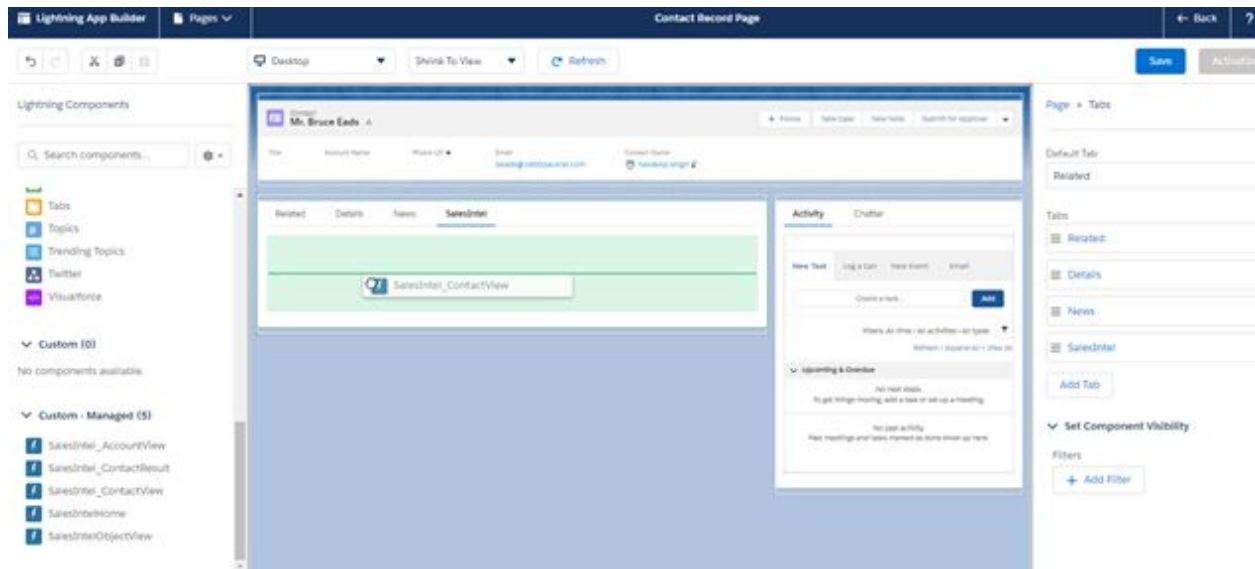
1. Open contact record > Click Setting icon > Select Edit page



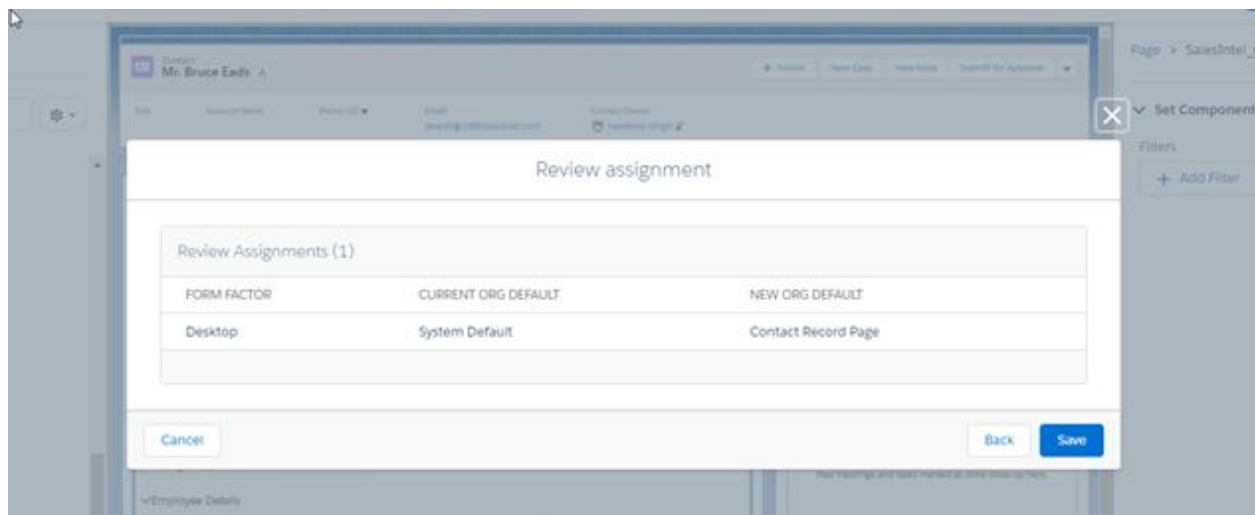
2. Add tab from right palette as click to add tab > Click details > Select custom from drop down > Give label as SalesIntel > Click Done



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.

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[Related](#) [Details](#) [News](#) [SalesIntel](#)

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 **SalesIntel**

Bruce Eads

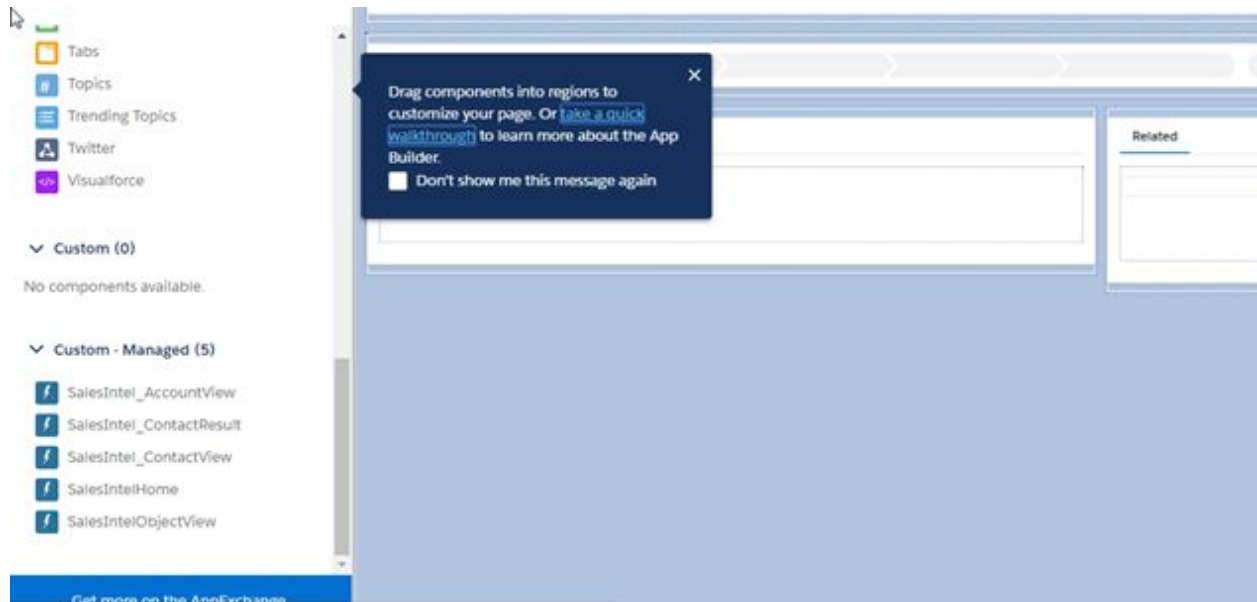
▼ Contact Information

First Name	<input type="text" value="Bruce"/>	Last Name	<input type="text" value="Eads"/>
Title	<input type="text" value="Manager, Market Operations"/> <span>New</span> <input type="checkbox"/>	Phone	<input type="text" value="(202) 362-0101"/> <span>New</span> <input type="checkbox"/>
Email	<input type="text" value="beads@1800packrat.com"/>		

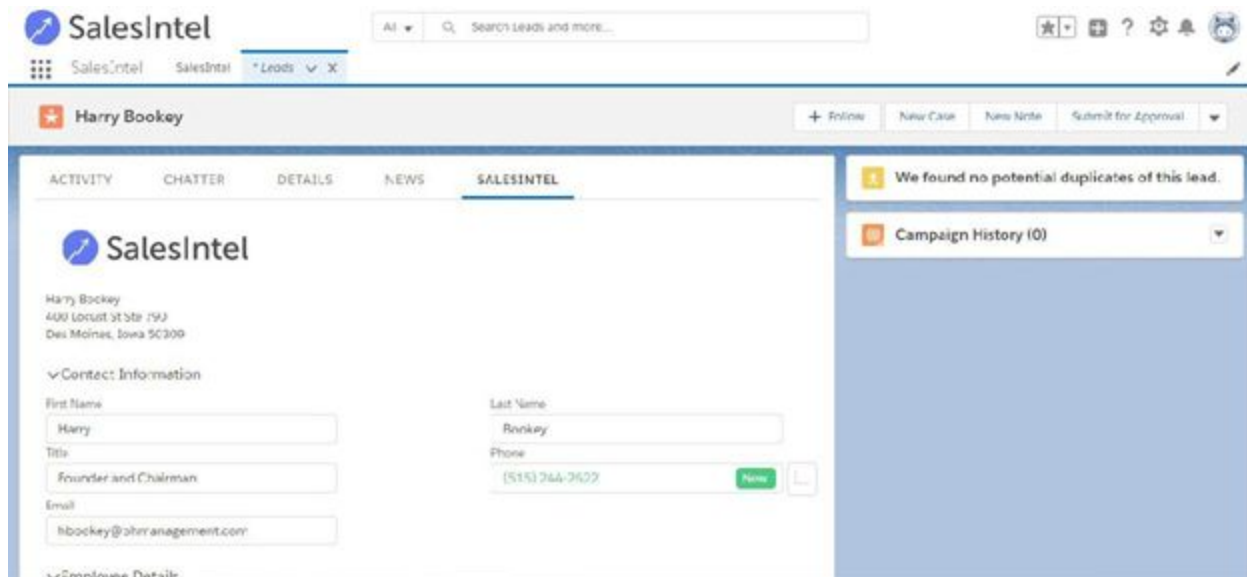
▼ Employee Details

## 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** | All | Search Leads and more...

**Harry Bookey** | + Follow | New Case | New Note | Submit for Approval

ACTIVITY | CHATTER | DETAILS | NEWS | **SALESINTEL**

**SalesIntel**

Harry Bookey  
400 Locust St Ste 19J  
Des Moines, Iowa 50309

✓ Contact Information

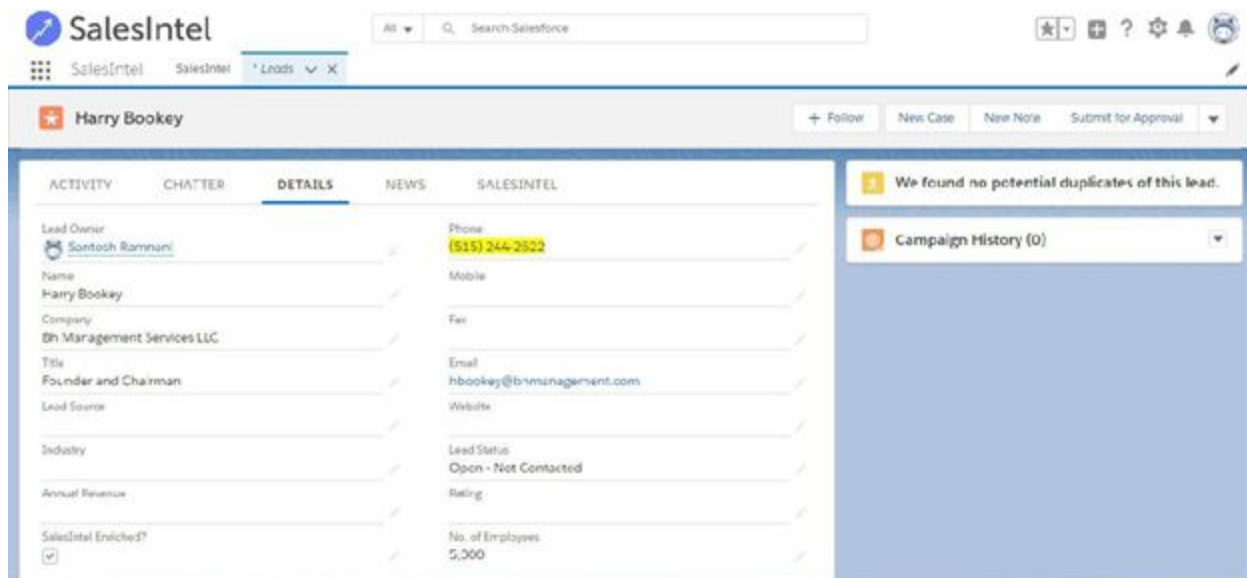
First Name	Last Name
Harry	Runkay
Title	Phone
Founder and Chairman	(515) 244-2522 <span>New</span>
Email	
hbookey@bmrmanagement.com	

✓ Employee Details

We found no potential duplicates of this lead.

Campaign History (0)

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** | All | Search Salesforce

**Harry Bookey** | + Follow | New Case | New Note | Submit for Approval

ACTIVITY | CHATTER | **DETAILS** | NEWS | SALESINTEL

Lead Owner	Phone
Santosh Ramnani	(515) 244-2522
Name	Mobile
Harry Bookey	
Company	Fax
Bh Management Services LLC	
Title	Email
Founder and Chairman	hbookey@bmrmanagement.com
Lead Source	Website
Industry	Lead Status
	Open - Not Contacted
Annual Revenue	Rating
SalesIntel Enriched?	No. of Employees
<input checked="" type="checkbox"/>	5,300

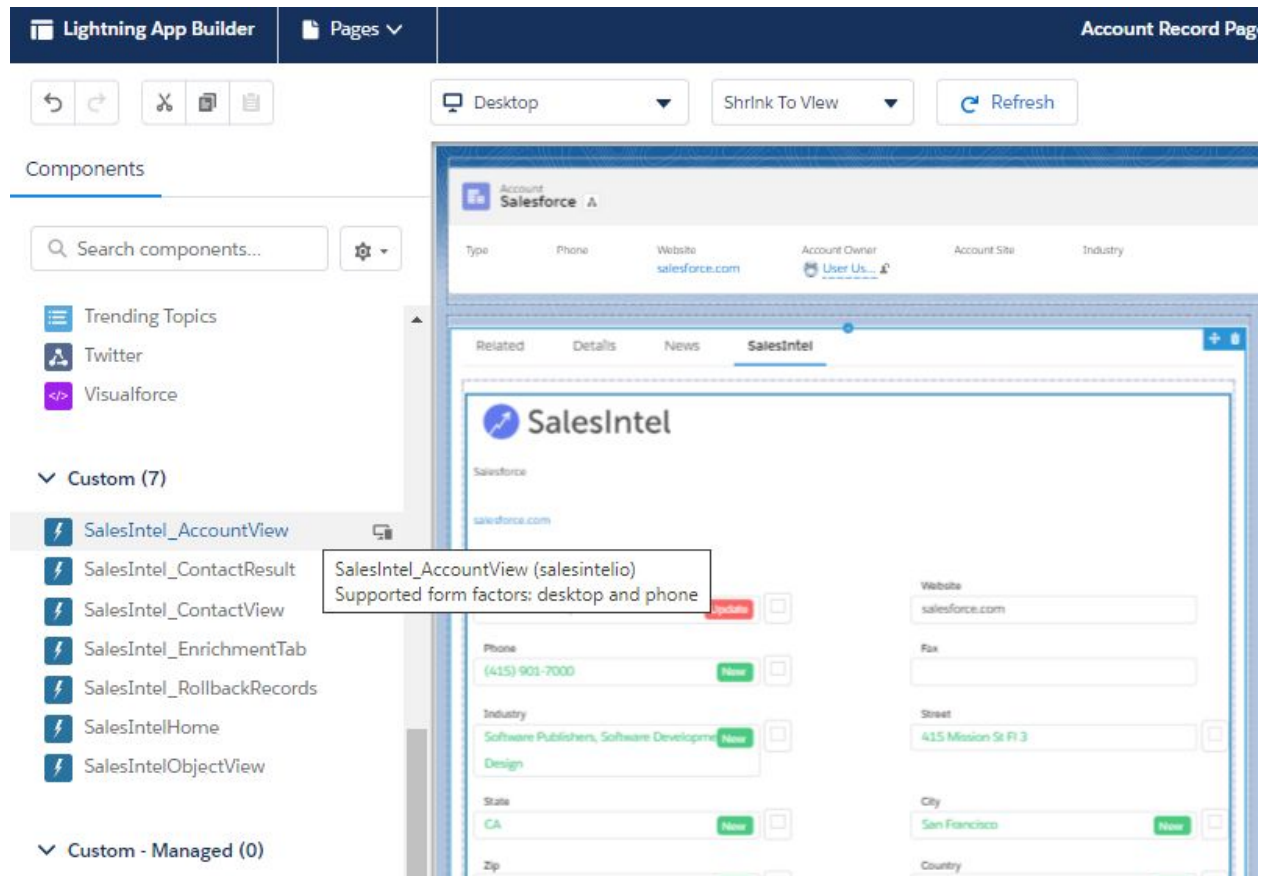
We found no potential duplicates of this lead.

Campaign History (0)



## 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.

Account

Salesforce

RelatedDetailsNewsSalesIntel

SalesIntel

Salesforce

salesforce.com

Company Details

Name

Salesforce.com, Inc

Update

Website

salesforce.com

Phone

(415) 901-7000

New

Fax

Industry

Software Publishers, Software Development

New

Design

Street

415 Mission St Fl 3

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.

Account  
Salesforce

Filters: CLEAR SEARCH

Results Include

ROLE

Job Level

Job Department

Job Title

INDIVIDUAL

Contact's Name

Contact's Email

Search

18,095 Total Contacts ☒ Human Verified (2,138) ☐ Pending Verification (15,957)

NAME	JOB TITLE	LEVEL	DEPARTMENT
Yousef Abbasi	Lead Solutio...	Manager	IT
Mark Abram...	Senior Vice ...	Vice President	Marketing
Hooman Abri...	CTO Advisor...	Director	IT
Roger Accurso	Master Solut...	Key Influencer	IT
Ron Acker	Account Dire...	Director	Sales
Owen Adams	Manager	Manager	Cross Functi...
Viktoria Adamy	Director, Ser...	Director	Sales
Vin Addala	Senior Direc...	Director	Cross Functi...

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

Account  
Salesforce

Filters: CLEAR SEARCH

Results Include

ROLE

Job Level

Job Department

Job Title

INDIVIDUAL

Contact's Name

Contact's Email

Search

9,986 Total Contacts ☒ Human Verified (2,138) ☐ Pending Verification (7,848)

NAME	JOB TITLE	LEVEL	DEPARTMENT
Yousef Abbasi	Lead Solutio...	Manager	IT
Mark Abram...	Senior Vice ...	Vice President	Marketing
Hooman Abri...	CTO Advisor...	Director	IT
Roger Accurso	Master Solut...	Key Influencer	IT
Ron Acker	Account Dire...	Director	Sales
Owen Adams	Manager	Manager	Cross Functi...
Viktoria Adamy	Director, Ser...	Director	Sales
Vin Addala	Senior Direc...	Director	Cross Functi...

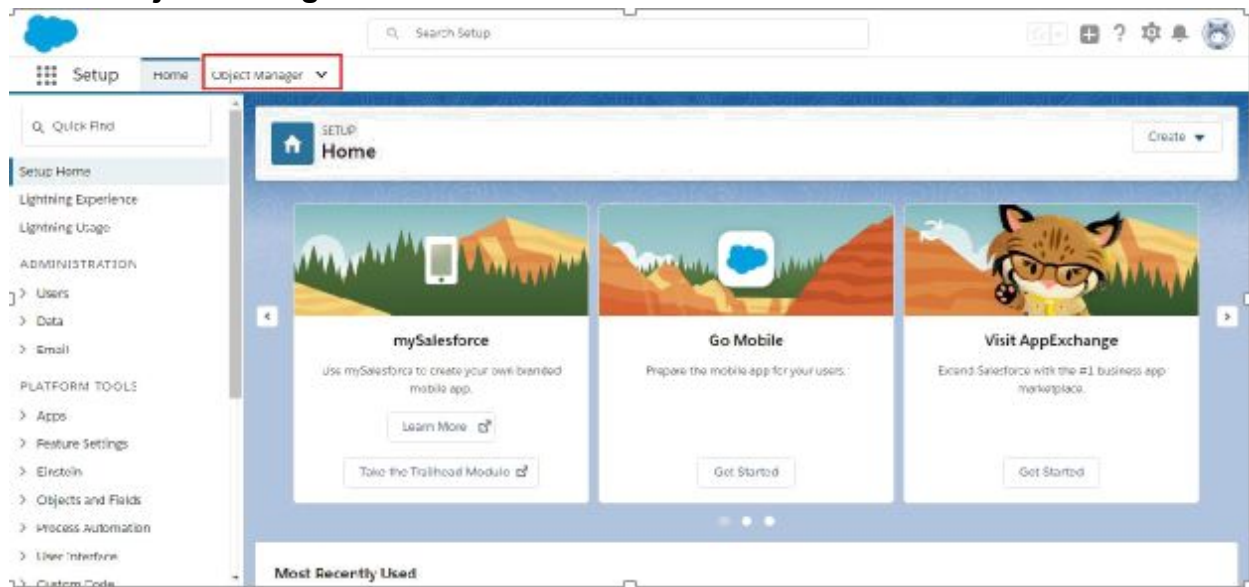
Quick Add as Lead

Quick Add as Contact

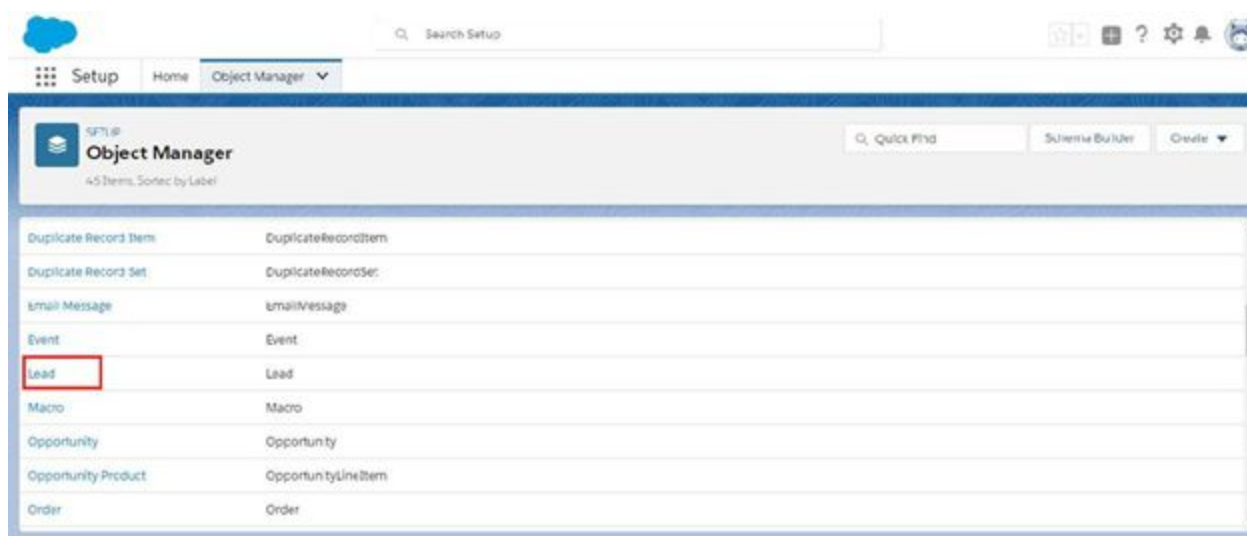
## SalesIntel Enriched

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

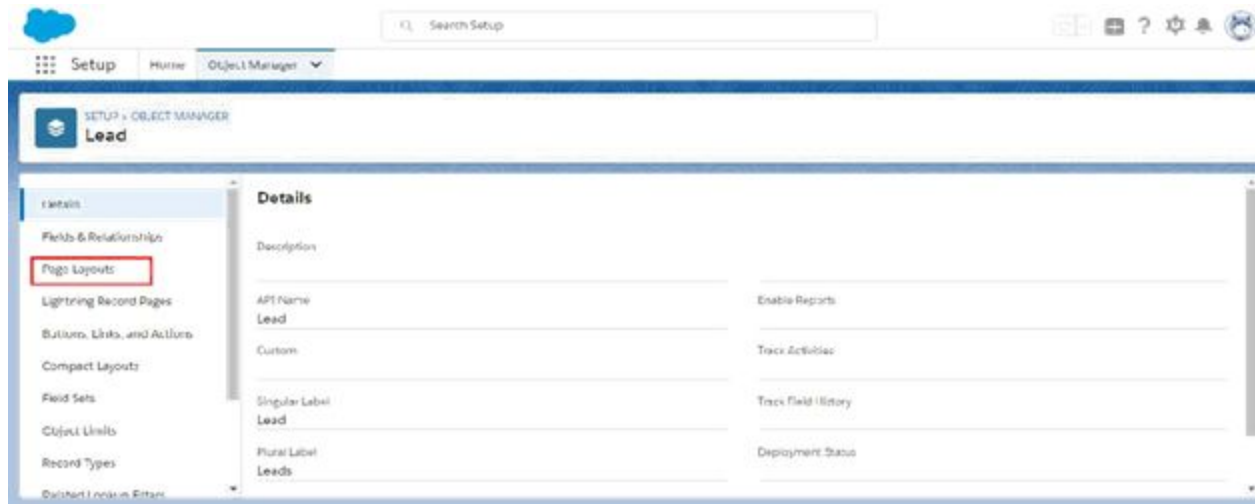
### 1. Select **Object Manager**.



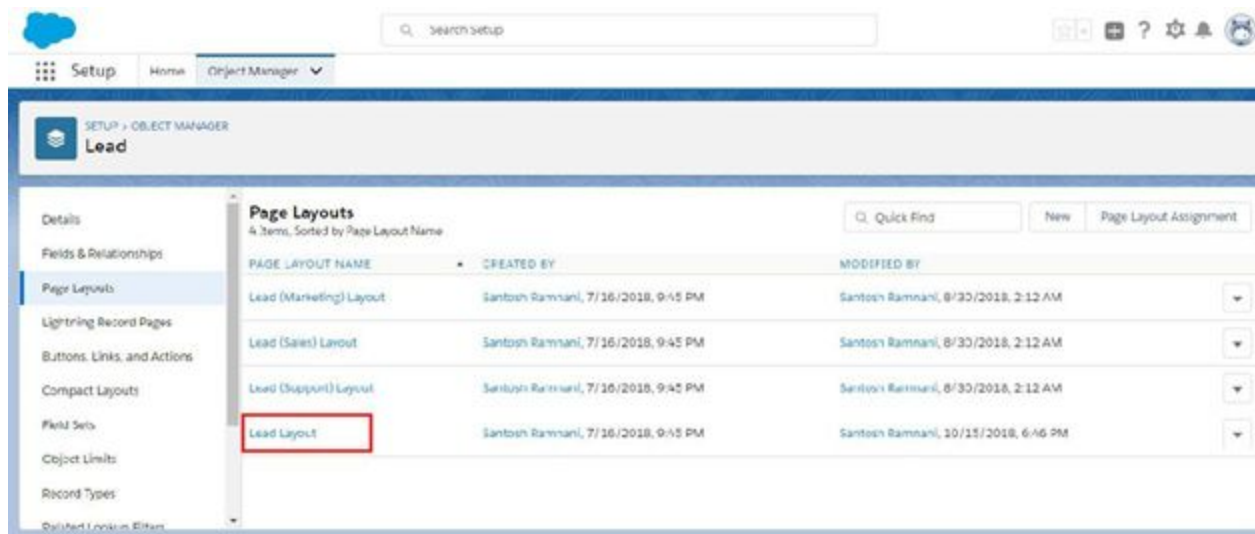
### 2. Select **Lead or Contact or Account**.



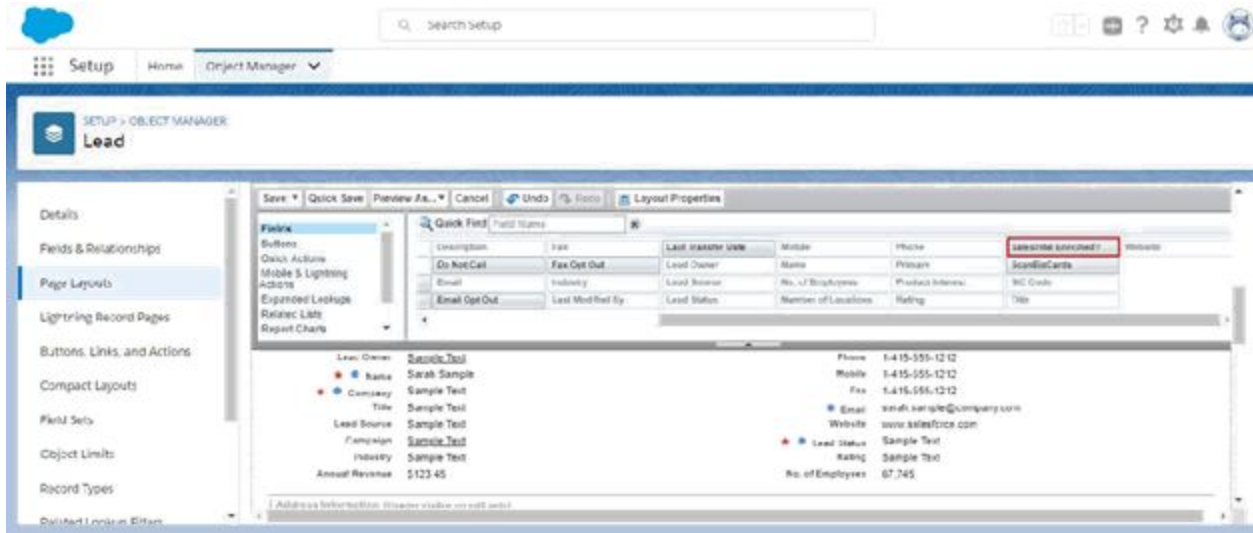
### 3. Select **Page Layouts**.



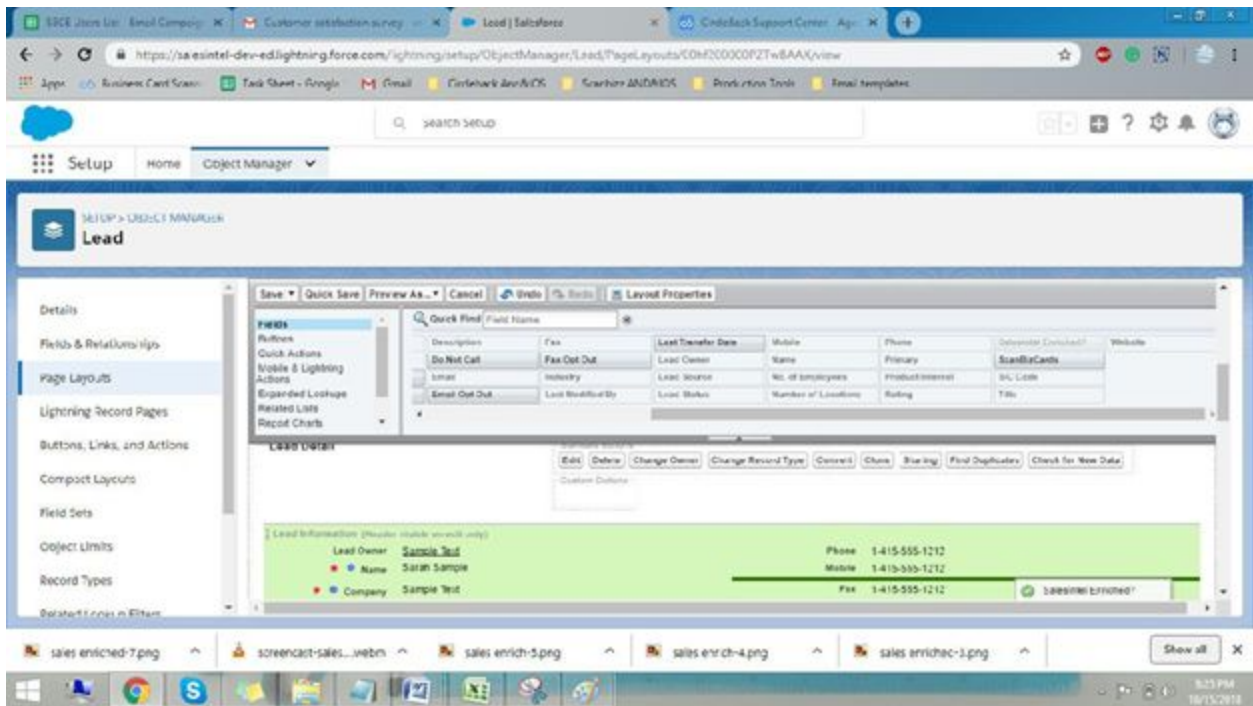
### 4. Select **Lead Layout**.



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

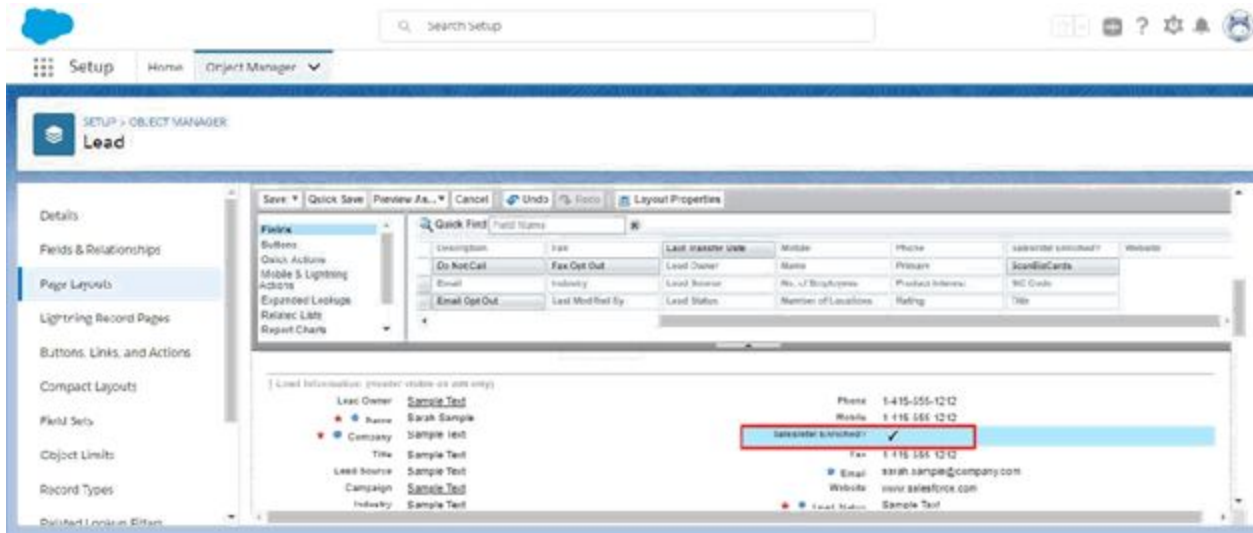


6. Drag and drop **SalesIntel Enriched** under Leads.



7. You can check on/off to **Enable** or **Disable** SalesIntel Enriched.





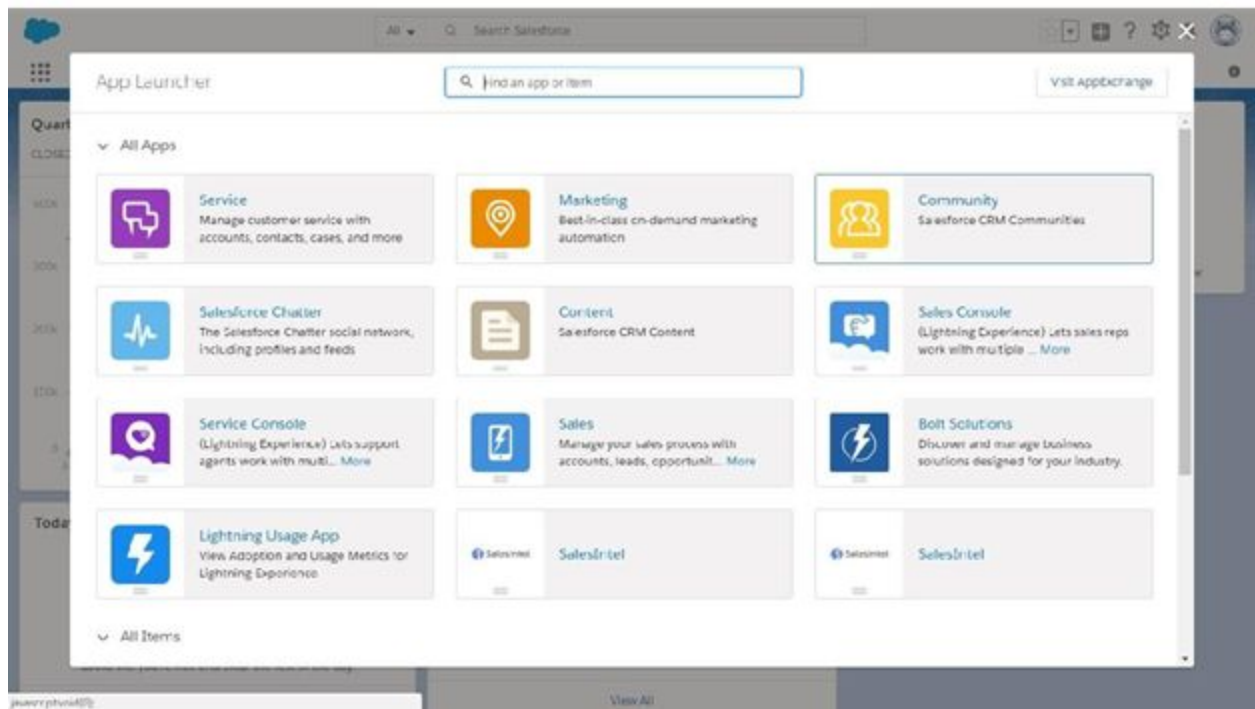
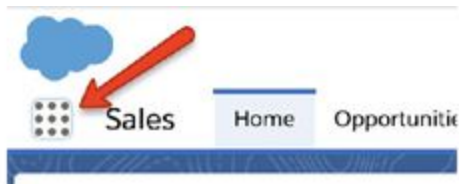
## Add SalesIntel Tab

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.



























3:02 / 5000 Support Welcome, Jason

Contacts Saved Searches

**10,738** Human Verified Contacts

0 Contact Selected [Save Search](#)

	NAME	JOB TITLE	LEVEL	DEPARTMENT	COMPANY	HQ/BRANCH	
<input type="checkbox"/>	Dale A. Natoroth	Senior Azure Specialist, Infrastructure...	Key Influencer	IT	Microsoft Corp	Redmond, WA	   
<input type="checkbox"/>	Tim Aarset	Senior Software Engineer	Key Influencer	IT	Microsoft Corp	Redmond, WA	   
<input type="checkbox"/>	Chuck Adams	Account Manager, Technical	Manager	IT	Microsoft Corp	Redmond, WA	   
<input type="checkbox"/>	Sara Abate	Release / Project Manager	Manager	IT	Microsoft Corp	Redmond, WA	   
<input type="checkbox"/>	Anuj Akhi	Principal Software Engineering Mana...	Manager	IT	Microsoft Corp	Redmond, WA	   
<input type="checkbox"/>	Rachel Abbott	Manager, Product Marketing	Manager	Marketing	Microsoft Corp	Redmond, WA	   

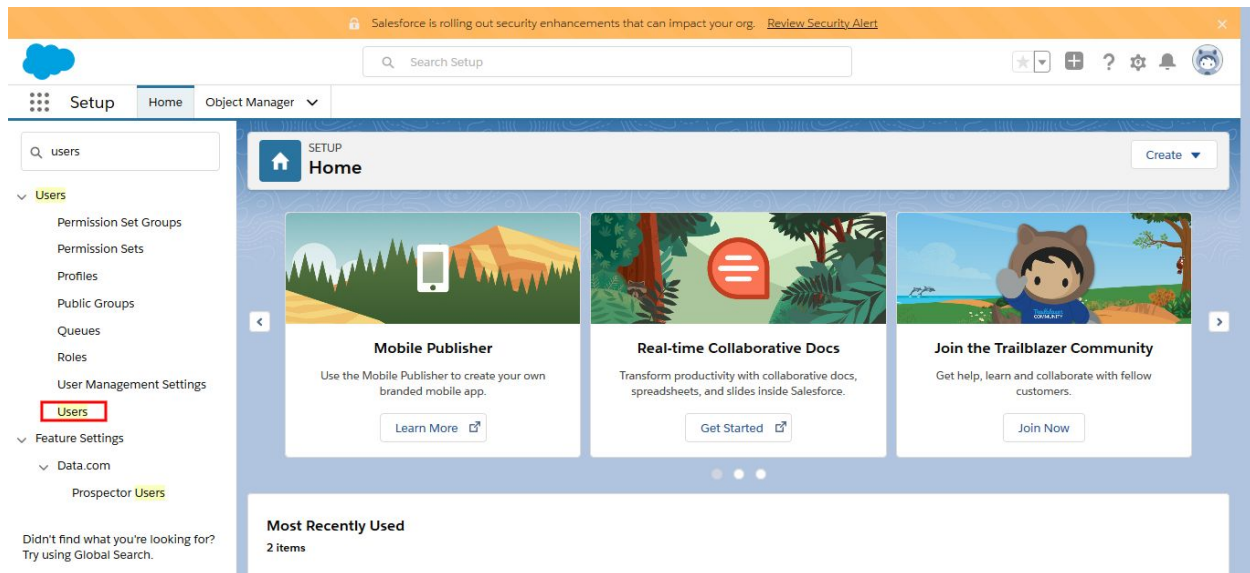
## Enrichment

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.

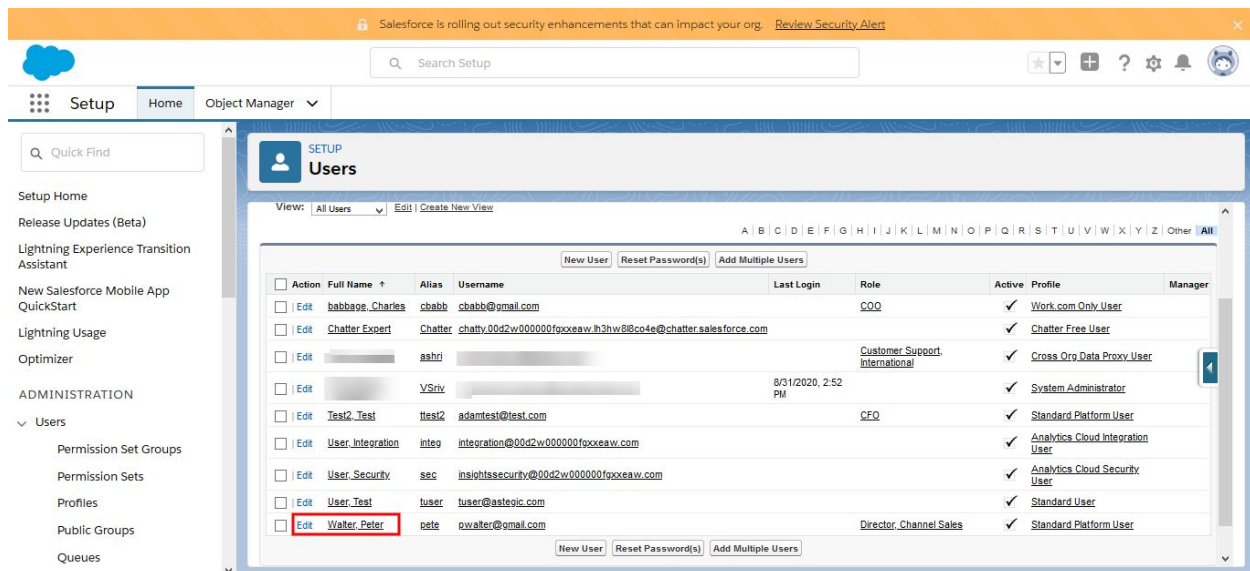
In order to Enrich your data across all objects, follow the instructions below.

**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.

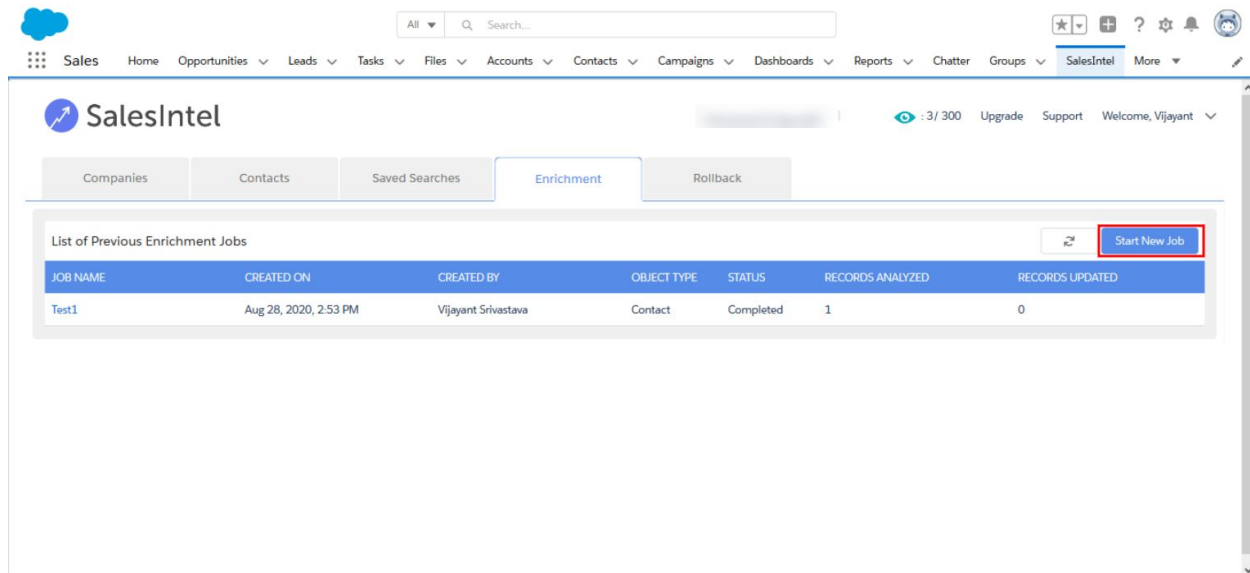
**b) Enrichment Setting:** This step is required for setup. This step determines which object (Lead, contact, account) you want to set for Manual or Auto Enrichment\*. Once you make the selection on this page please click on **Save** at the bottom of the page.

\*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.

SALESINTEL FIELD	SALESFORCE FIELD	ALLOW OVERWRITE <input checked="" type="checkbox"/>	ALLOW AUTO UPDATE <input checked="" type="checkbox"/>
First Name	FirstName	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Name	LastName	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Title	Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company	Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email	Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fax	-- skip --	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Work HQ	-- skip --	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mobile Phone	Mobile Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone	Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

Select Object Type: Lead

Enter Job Name (min 5 characters) \*: Prospect Leads

Apply Custom Filter

Email Equal vsr@vastava@microsoft.com

AND OR

None Equal eg: value or true/false

Cancel Run Process

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

SalesIntel

Trial period (3 days left) | 3 / 300 Upgrade Support Welcome

Companies Contacts Saved Searches **Enrichment** Rollback

List of Previous Enrichment Jobs Start New Job

JOB NAME	CREATED ON	CREATED BY	OBJECT TYPE	STATUS	RECORDS ANALYZED	RECORDS UPDATED
Prospect Leads - (Pending)	Sep 01, 2020, 2:26 AM	Vijayant Srivastava	Lead	Analyzing	-	-
Test1	Aug 28, 2020, 2:53 PM	Vijayant Srivastava	Contact	Completed	1	0

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

SalesIntel

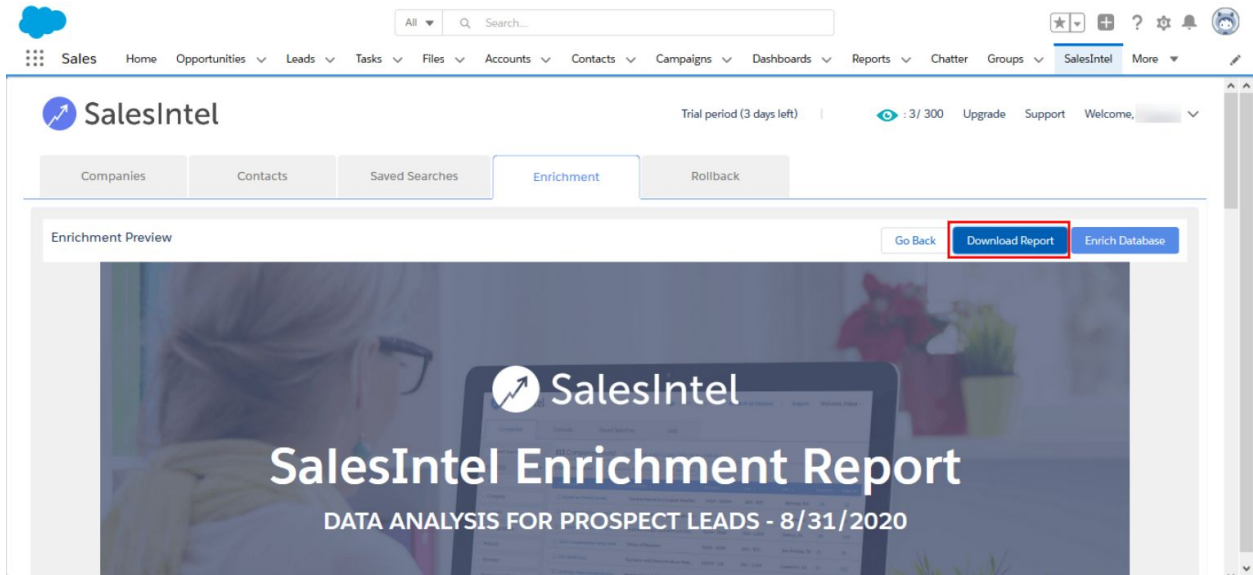
Trial period (3 days left) | 3 / 300 Upgrade Support Welcome

Companies Contacts Saved Searches **Enrichment** Rollback

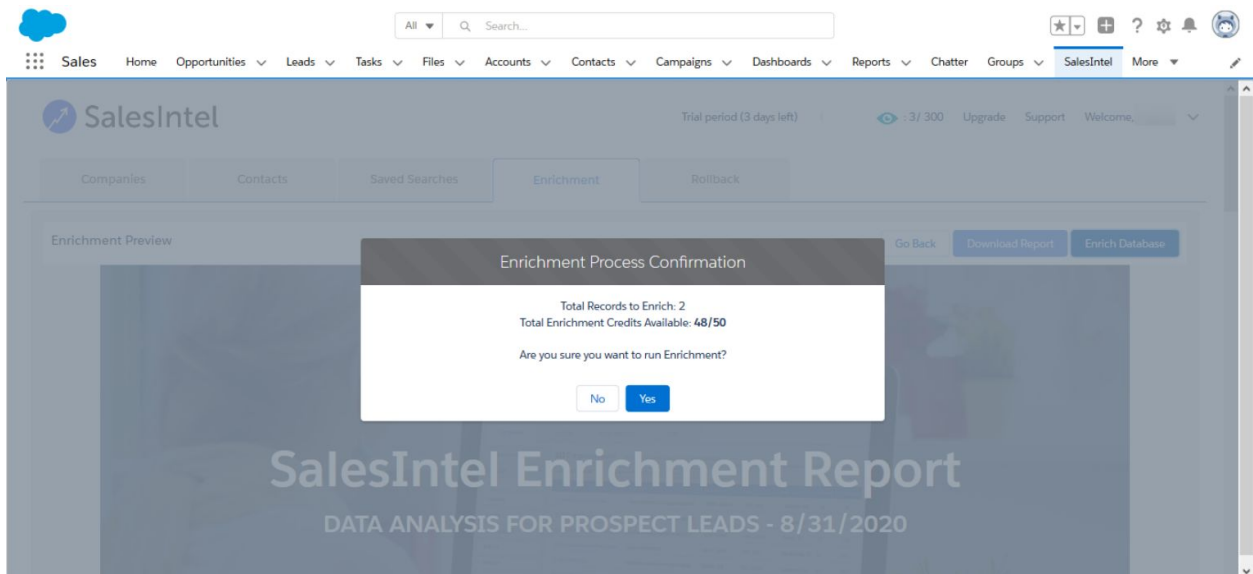
List of Previous Enrichment Jobs Refresh Start New Job

JOB NAME	CREATED ON	CREATED BY	OBJECT TYPE	STATUS	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.



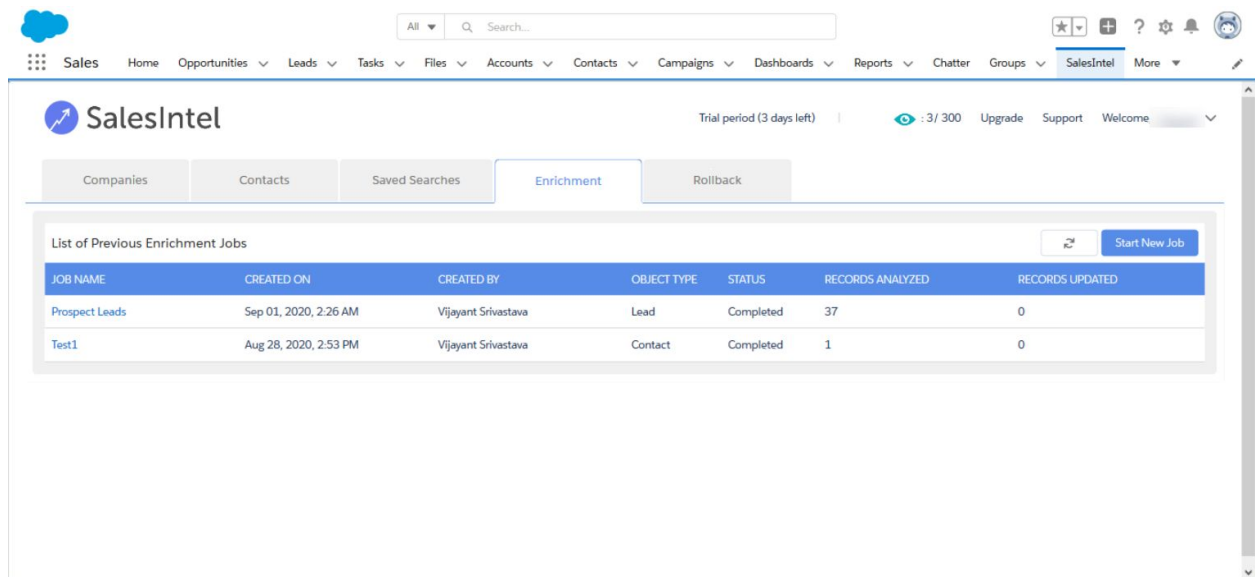
viii) You will see the status is updated to Enriching.

The screenshot shows the SalesIntel application interface. At the top, there is a navigation bar with a search bar and various menu items. Below the navigation bar, the 'Enrichment' tab is selected. The main content area displays a table titled 'List of Previous Enrichment Jobs'. The table has columns for Job Name, Created On, Created By, Object Type, Status, Records Analyzed, and Records Updated. Two jobs are listed: 'Prospect Leads' with a status of 'Enriching' and 'Test1' with a status of 'Completed'.

JOB NAME	CREATED ON	CREATED BY	OBJECT TYPE	STATUS	RECORDS ANALYZED	RECORDS UPDATED
Prospect Leads	Sep 01, 2020, 2:26 AM	Vijayant Srivastava	Lead	Enriching	37	-
Test1	Aug 28, 2020, 2:53 PM	Vijayant Srivastava	Contact	Completed	1	0

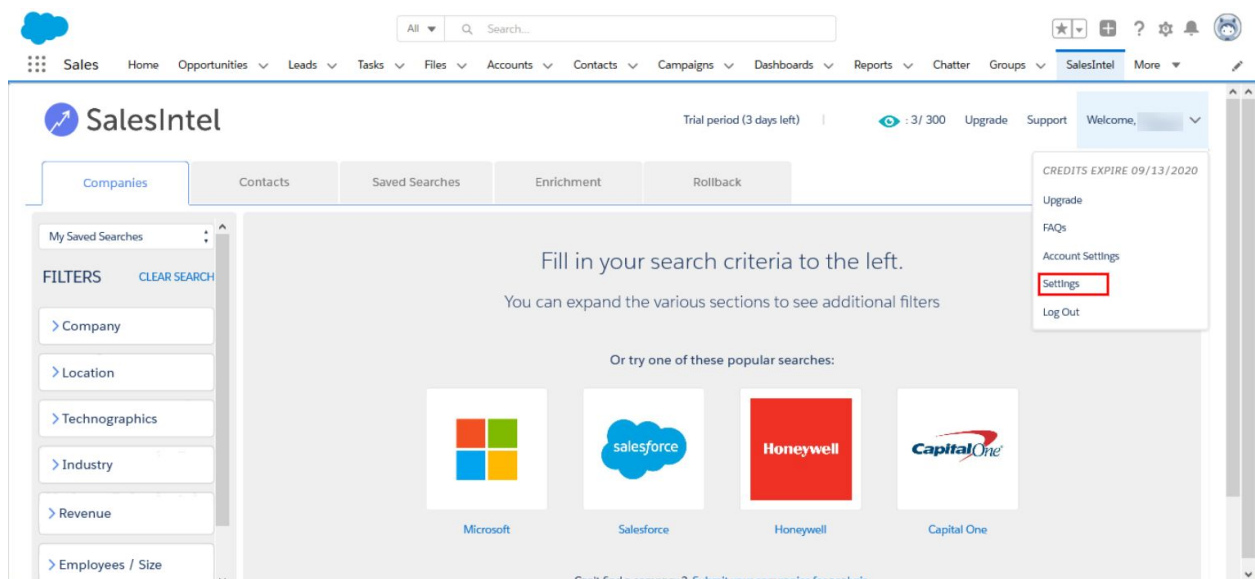
ix) You can click on Refresh Status at the right-hand side top corner of this window or wait to confirm the status of your job. Your data will be Enriched within your Salesforce account once the status is **Completed**.





**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.

General

Enrichment

Lead Mapping

Contact Mapping

Account Mapping

Log Out

### Object Permissions

	Allow Manual Enrichment	Allow Auto Update
Account	<input type="checkbox"/>	<input type="checkbox"/>
Contact	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Lead	<input type="checkbox"/>	<input checked="" type="checkbox"/>

When you enable Auto Update for an object, make sure to also configure auto-update per field in the objects mapping.

### Auto Update Record

☒ Run when object created

☐ Schedule auto update date/time

Duplicate Resolution:

-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.

General

Enrichment

Lead Mapping

Contact Mapping

Account Mapping

Log Out

### Object Permissions

	Allow Manual Enrichment	Allow Auto Update
Account	<input type="checkbox"/>	<input type="checkbox"/>
Contact	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Lead	<input type="checkbox"/>	<input checked="" type="checkbox"/>

When you enable Auto Update for an object, make sure to also configure auto-update per field in the objects mapping.

### Auto Update Record

☒ Run when object created

☐ Schedule auto update date/time

Duplicate Resolution

Always Update

Cancel Save

-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**.

Account Mapping  
Log Out

Contact ☐ ☒  
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**

☐ Run when object created  
☒ Schedule auto update date/time

Frequency\*  
Daily

Select Hour: 01 Select Minute: 00 PM

Duplicate Resolution  
Always Update

Cancel 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.

General  
Enrichment  
Lead Mapping  
Contact Mapping  
Account Mapping  
Log Out

**Object Permissions**

Allow Manual Enrichment Allow Auto Update

Account ☐ ☐  
Contact ☐ ☐  
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**

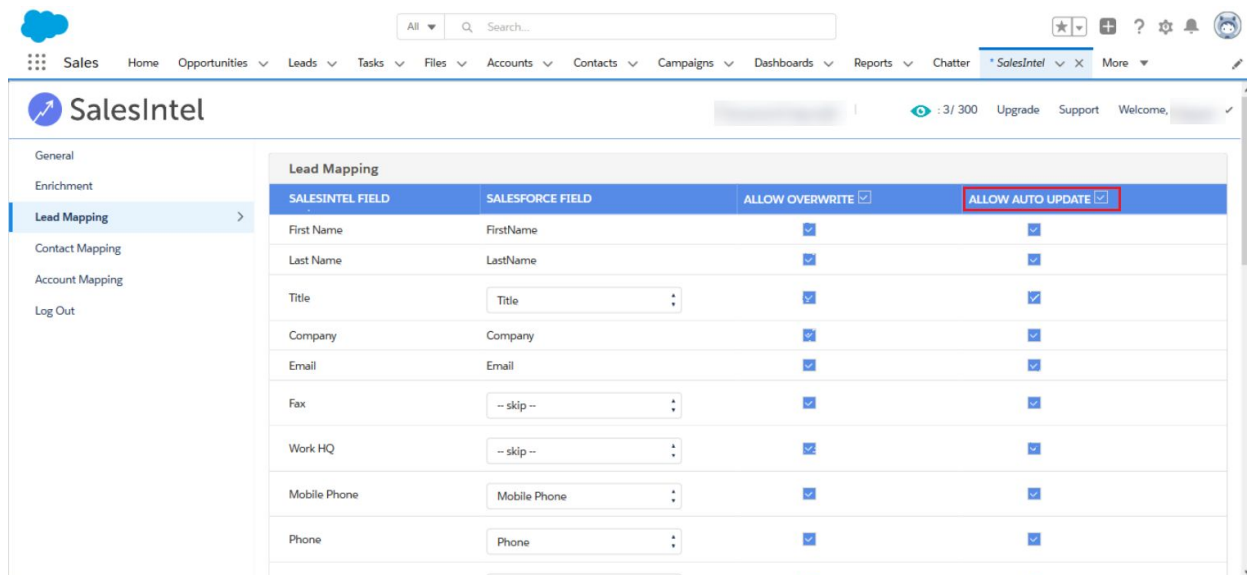
☐ Run when object created  
☐ Schedule auto update date/time

Duplicate Resolution  
Always Append Only (only blanks)  
Skip  
Always Append Only (only blanks)  
Always Update

Cancel Save

## 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.



The screenshot displays the SalesIntel Lead Mapping configuration interface. On the left, a sidebar lists navigation options: General, Enrichment, Lead Mapping (selected), Contact Mapping, Account Mapping, and Log Out. The main content area is titled 'Lead Mapping' and contains a table with the following columns: SALESINTEL FIELD, SALESFORCE FIELD, ALLOW OVERWRITE, and ALLOW AUTO UPDATE. The ALLOW AUTO UPDATE column is highlighted with a red box. The table lists various fields with their corresponding Salesforce fields and checkboxes for overwrite and auto-update.

SALESINTEL FIELD	SALESFORCE FIELD	ALLOW OVERWRITE	ALLOW AUTO UPDATE
First Name	FirstName	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Name	LastName	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Title	Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company	Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email	Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fax	-- skip --	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Work HQ	-- skip --	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mobile Phone	Mobile Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone	Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**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.

The screenshot displays the SalesIntel web application. The top navigation bar includes a search bar, a dropdown menu with 'All', and various icons. The main menu on the left lists 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', 'SalesIntel', and 'More'. The 'SalesIntel' section is active, showing a 'Trial period (3 days left)' and a user profile 'Welcome, [user]'. Below the navigation bar, there are tabs for 'Companies', 'Contacts', 'Saved Searches', 'Enrichment', and 'Rollback'. The 'Rollback' tab is selected, displaying the 'Data Rollback Logs' section. This section contains a table with the following data:

ACTION	JOB NAME	ROLLBACK START DATE	ROLLBACK END DATE	JOB STATUS	TOTAL RECORDS
Rollback	Auto 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**.

**Install SalesIntel ROI Dashboard**  
By Sales Intel

What if existing component names conflict with ones in this package?

☒ Do not install.  
☐ Rename conflicting components in package.

☒ Install for Admins Only  
☐ Install for All Users  
☐ Install for Specific Profiles...

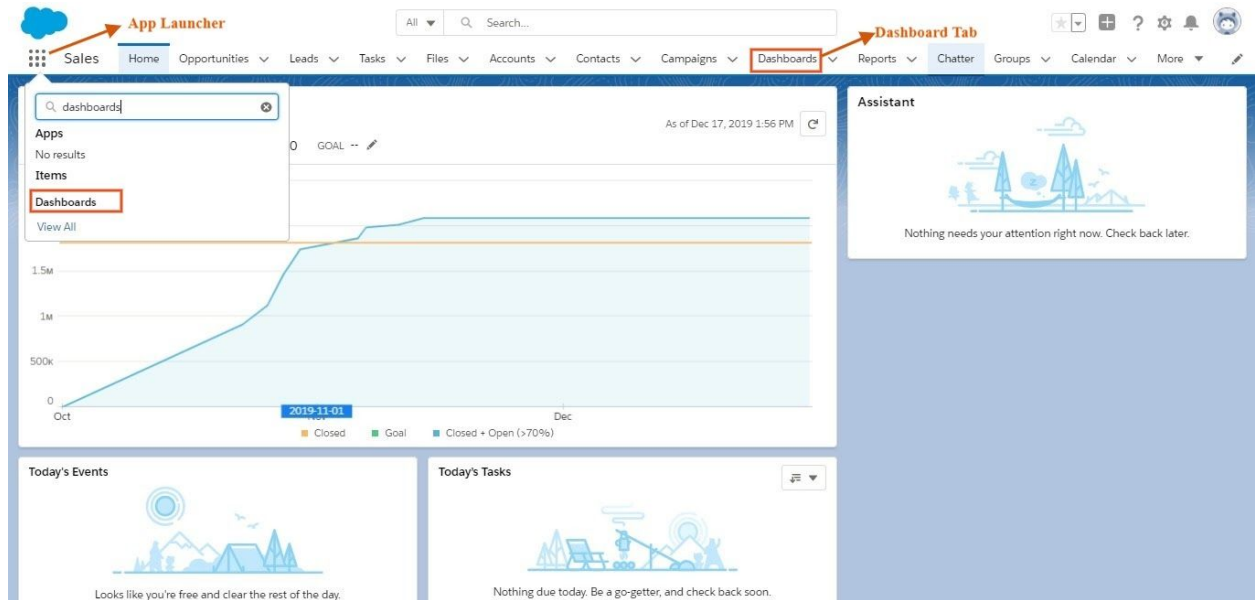
**Install** Cancel

App Name	Publisher	Version Name	Version Number
SalesIntel ROI Dashboard	Sales Intel	SalesIntel Enrich ROI v1	1.0

[Additional Details](#) [View Components](#)

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**.

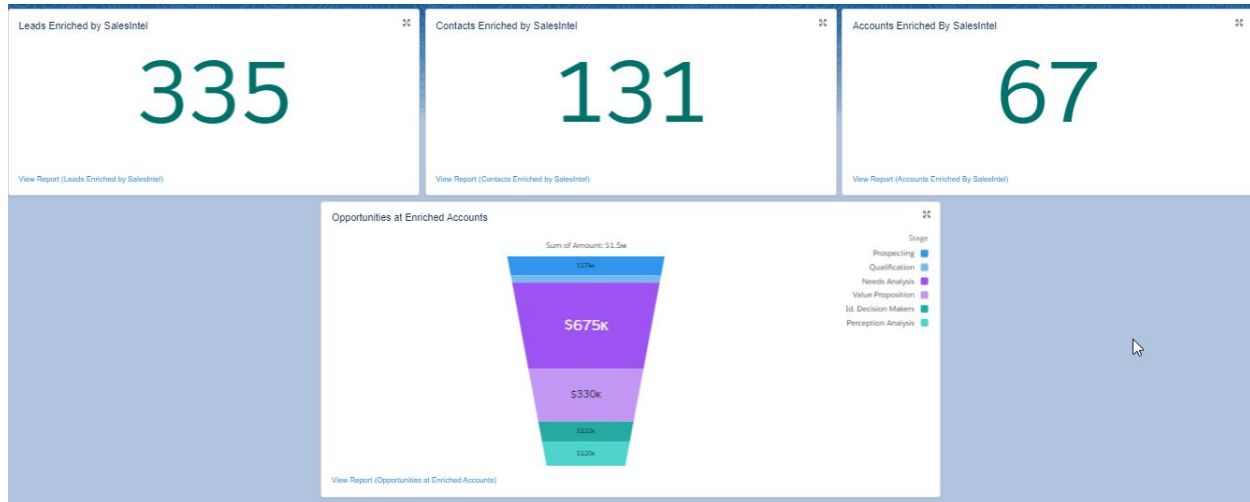


v) On the next screen, please click on All Dashboards from Left Menu and then select **SalesIntel Enrich ROI**.

The screenshot shows the Salesforce Dashboards page. The left sidebar contains a list of items: Recent, Created by Me, Private Dashboards, All Dashboards (selected), FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, and All Favorites. The main content area displays a table of dashboards. The table has columns for Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. The 'SalesIntel Enrich ROI' dashboard is highlighted in the list.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	SalesIntel Enrich ROI		SalesIntel Dashboards	Vijayant Srivastava	10/2/2020, 1:06 AM	

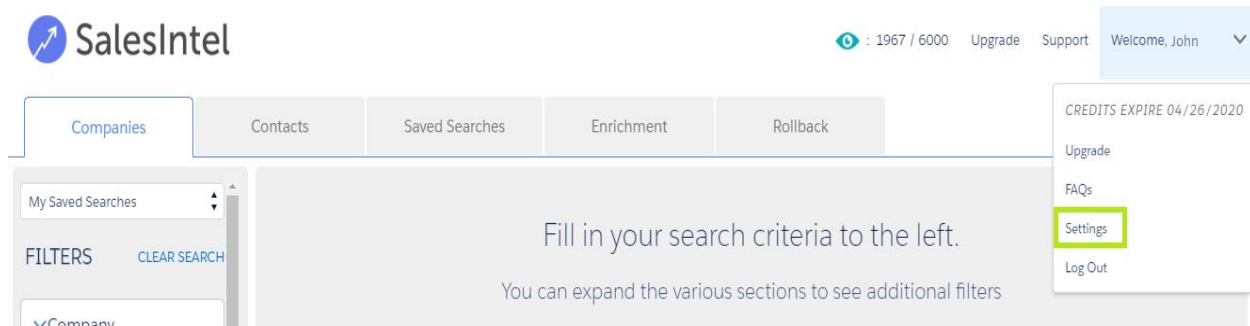
vi) Now from here you will be able track **Leads, Accounts** and **Contacts** enriched by SalesIntel along with the **Value of Opportunities** generated from Account enriched by SalesIntel.



## SalesIntel Field Mapping

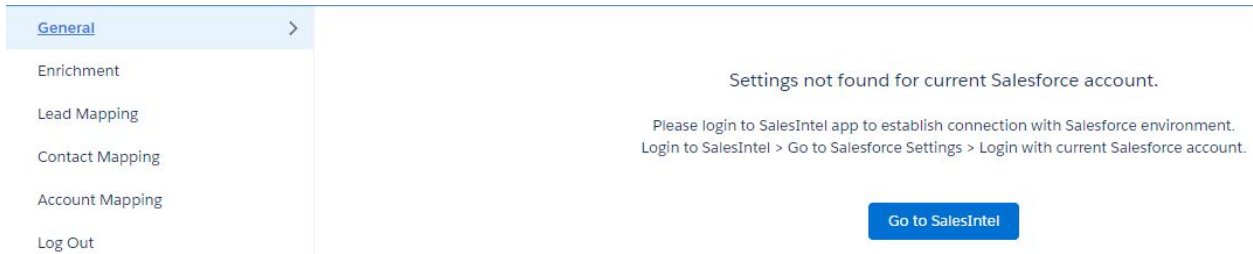
Before adding Inline pages on record's details layout, you will need to set up the field mapping from Application's setting page.

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.

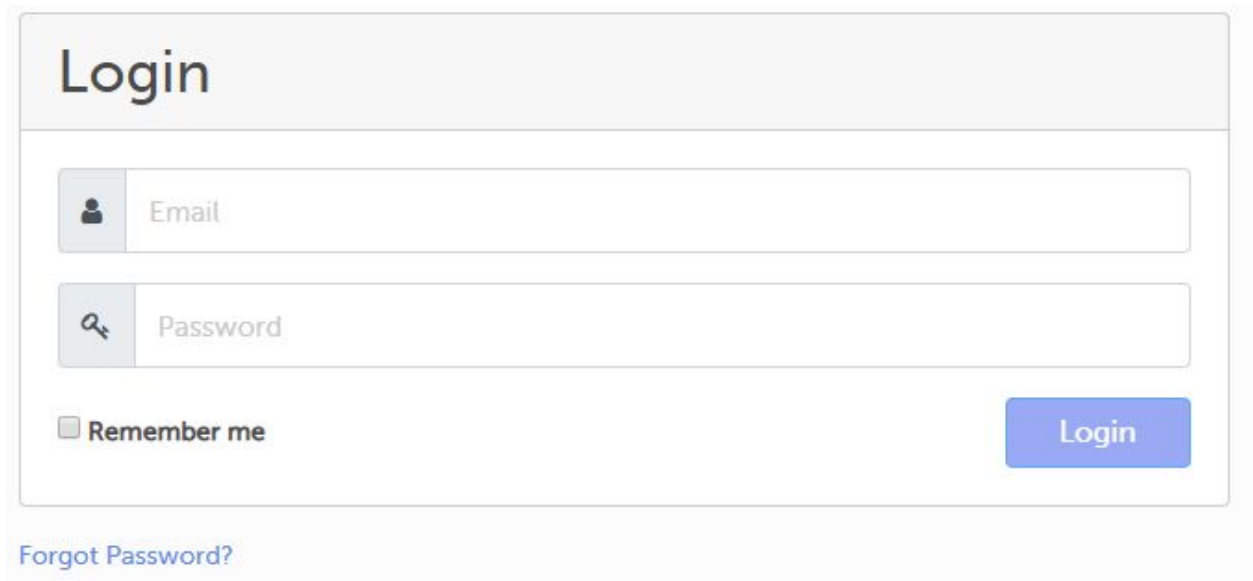




4. Click **Settings** menu from the drop-down.
5. You need to Login into SalesIntel web portal so your credentials can be activated for Salesforce.



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.

General  
Enrichment  
Lead Mapping  
Contact Mapping  
Account Mapping >  
Log Out

Account Mapping

SALESINTEL FIELD	SALESFORCE FIELD	ALLOW OVERWRITE	ALLOW AUTO UPDATE
Name	Name	<input type="checkbox"/>	<input type="checkbox"/>
Website	Website	<input type="checkbox"/>	<input type="checkbox"/>
Work HQ	Account Phone	<input type="checkbox"/>	<input type="checkbox"/>
Street	Billing Street	<input type="checkbox"/>	<input type="checkbox"/>
City	Billing City	<input type="checkbox"/>	<input type="checkbox"/>
Postal Code	Billing Zip/Postal Code	<input type="checkbox"/>	<input type="checkbox"/>
State	-- skip --	<input type="checkbox"/>	<input type="checkbox"/>
Country	-- skip --	<input type="checkbox"/>	<input type="checkbox"/>
State Abbreviation	Billing State/Province	<input type="checkbox"/>	<input type="checkbox"/>
Country Abbreviation	Billing Country	<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	Annual Revenue	<input type="checkbox"/>	<input type="checkbox"/>
No Of Employees	Employees	<input type="checkbox"/>	<input type="checkbox"/>
Sector	-- skip --	<input type="checkbox"/>	<input type="checkbox"/>
Industry	Industry	<input type="checkbox"/>	<input type="checkbox"/>
Naics	-- skip --	<input type="checkbox"/>	<input type="checkbox"/>
Source	-- skip --	<input type="checkbox"/>	<input type="checkbox"/>

Cancel
Save

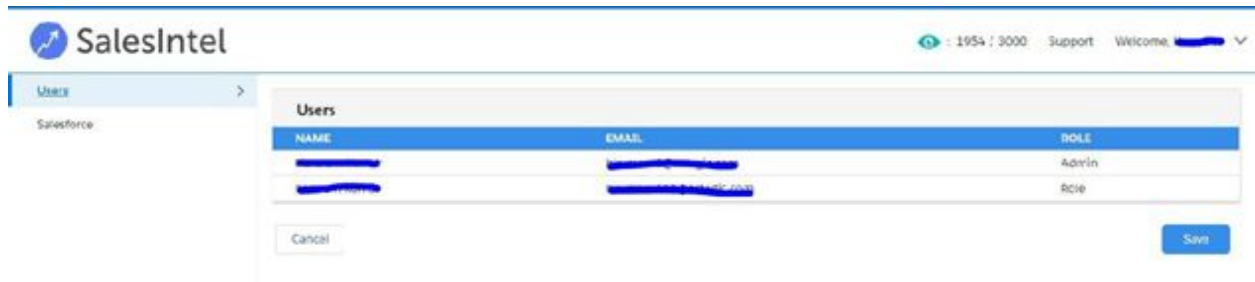
13. Select Salesforce field from fields dropdown next to each field name.

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

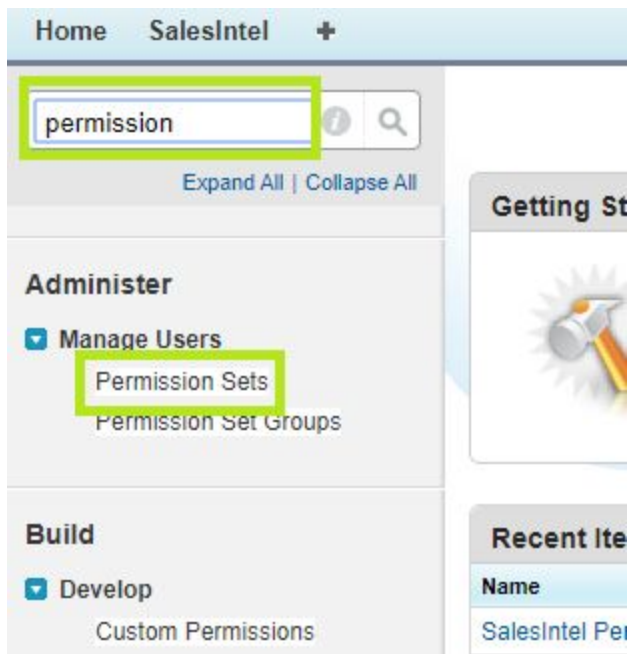
1. A list of all Active Users connected to SalesIntel will be displayed.
2. Admin can disconnect active users from here by clicking- Disconnect <Username> corresponding to the connected user.



# 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.

**SETUP**  
**Permission Sets**

## Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

**All Permission Sets** ▾ [Edit](#) | [Delete](#) | [Create New View](#)

[New](#) [Refresh](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#)

Action	Permission Set Label ↑	Description	License
<a href="#">Clone</a>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<a href="#">Clone</a>	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
<a href="#">Clone</a>	<b>SalesIntel Permission Set</b>		Salesforce
<a href="#">Clone</a>	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integra...	Cloud Integration User

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

Permission Set  
**SalesIntel Permission Set**

[Clone](#) [Manage Assignments](#)

**Permission Set Overview**

Description	API Name
License: Salesforce	SalesIntel_Permission_Set
	Namespace Prefix: salesintelio

- 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](#)

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

Assign Users  
All Users

View: All Users ▼ Edit | Create New View

A | B

<input type="checkbox"/>	Action	Full Name ↑	Alias	Username
<input type="checkbox"/>	<a>Edit</a>	Chatter Expert	Chatter	chatty.00d2v000001vldveak.1456ggwj4mpn@chatter.salesforce.com
<input type="checkbox"/>	<a>Edit</a>	Johnson, Jacob	csbce	bharti.chets@gmail.com
<input checked="" type="checkbox"/>	<a>Edit</a>	Smith, John	CTest	john@summer19release.com
<input type="checkbox"/>	<a>Edit</a>	User_Integration	integ	integration@00d2v000001vldveak.com
<input type="checkbox"/>	<a>Edit</a>	User_Security	sec	insightssecurity@00d2v000001vldveak.com

Assign Cancel

Assign Cancel

- 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

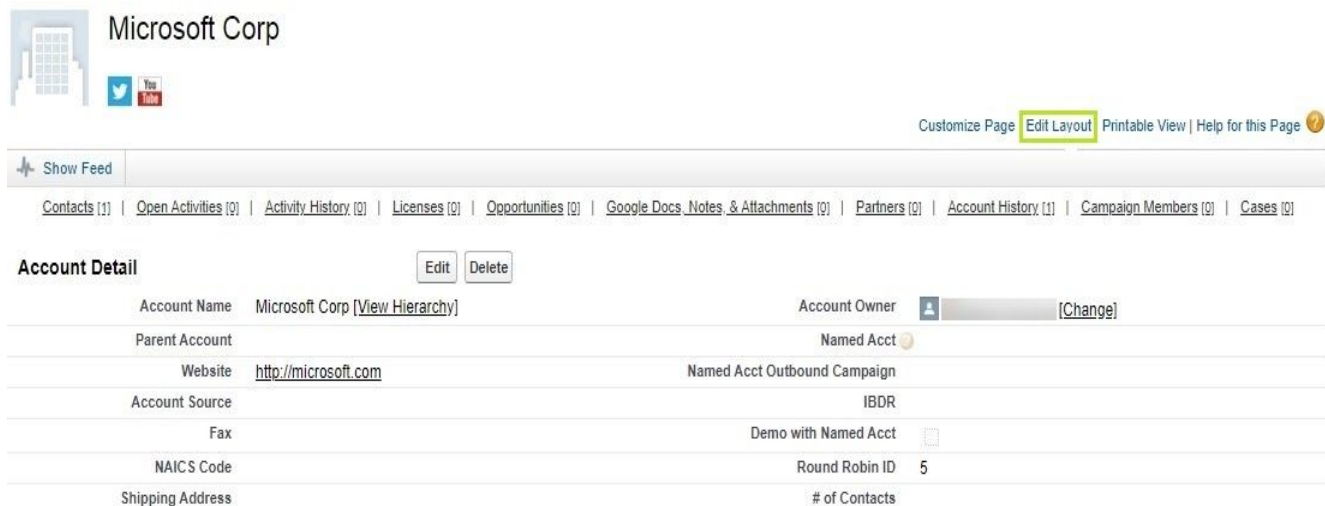
Full Name	Username
<a>John Smith</a>	<a>john@summer19release.com</a>

Done

- Click on the **Done** button.

## Setup Inline Pages

1. Go to any Account record.



Microsoft Corp

Customize Page **Edit Layout** Printable View | Help for this Page ?

Show Feed

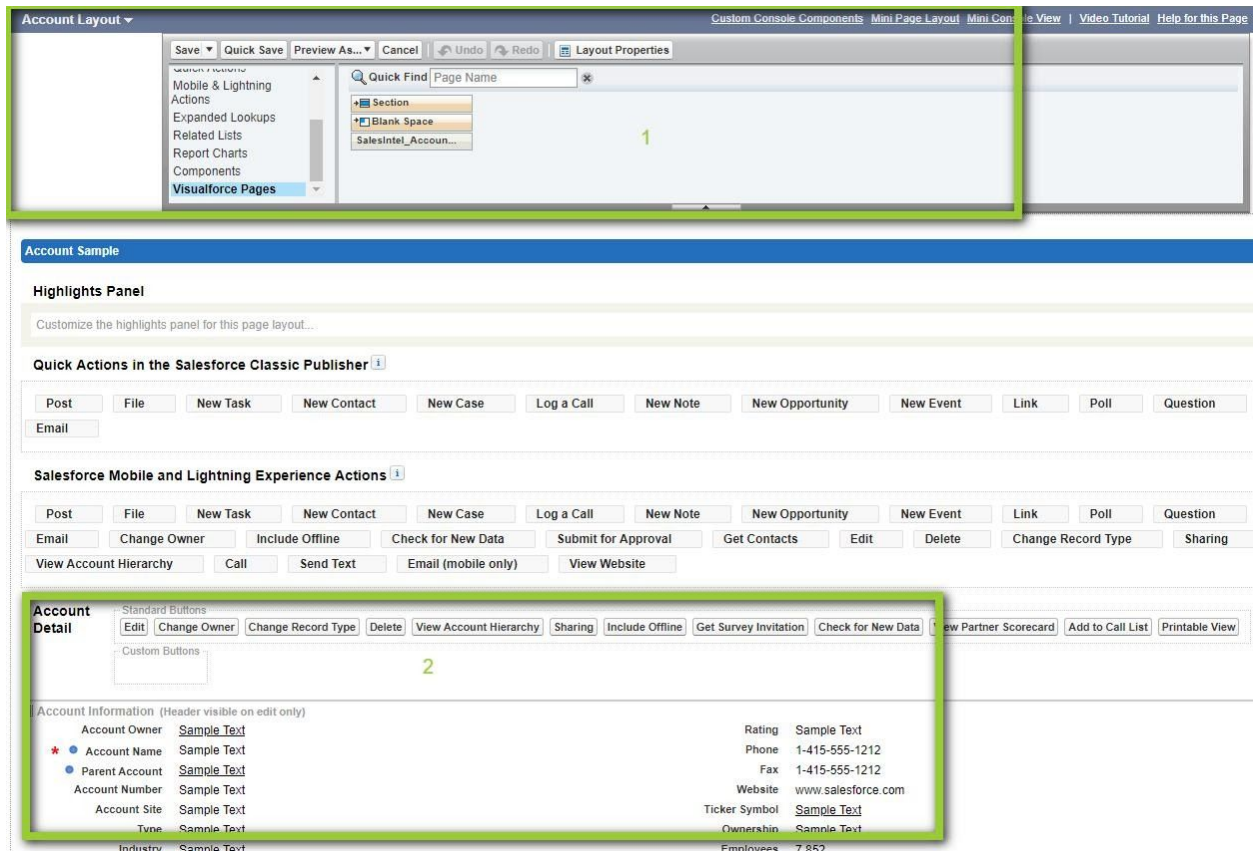
Contacts [1] | Open Activities [0] | Activity History [0] | Licenses [0] | Opportunities [0] | Google Docs, Notes, & Attachments [0] | Partners [0] | Account History [1] | Campaign Members [0] | Cases [0]

**Account Detail** Edit Delete

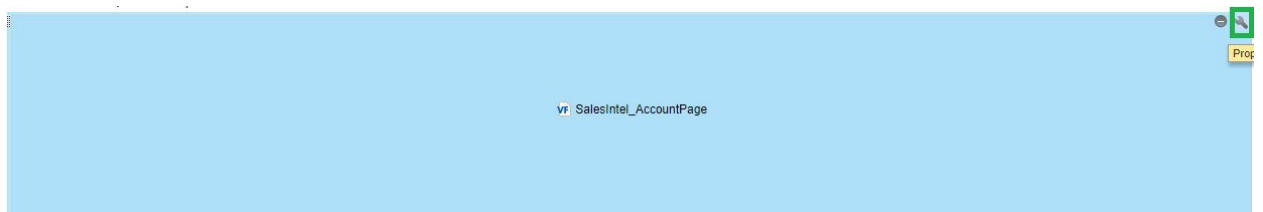
Account Name	Microsoft Corp [View Hierarchy]	Account Owner	[User] (Change)
Parent Account		Named Acct	
Website	<a href="http://microsoft.com">http://microsoft.com</a>	Named Acct Outbound Campaign	
Account Source		IBDR	
Fax		Demo with Named Acct	
NAICS Code		Round Robin ID	5
Shipping Address		# of Contacts	

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.

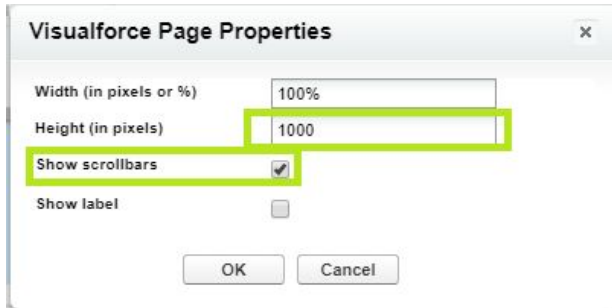




4. From Panel 1, click on the Visualforce option.
5. Scroll down the page till the section where you want to add the Account Inline page.
6. Click on **SalesIntel\_AccountPage** and then drag and drop the page to the details section (Panel 2) wherever you want to place.



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.

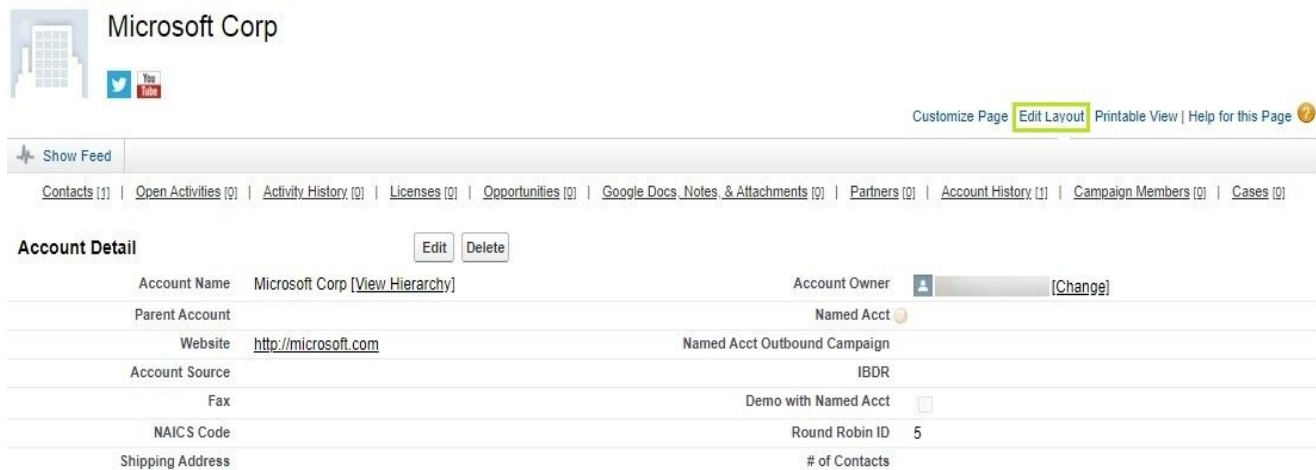
Add **SalesIntel\_Contact** and **SalesIntel\_Lead** inline page on Contact and Lead record details page layout also by following the same process that we did for Account layout.

## 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.



Microsoft Corp

Customize Page **Edit Layout** Printable View | Help for this Page

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 <a href="#">[View Hierarchy]</a>	Account Owner	<a href="#">[Change]</a>
Parent Account		Named Acct	
Website	<a href="http://microsoft.com">http://microsoft.com</a>	Named Acct Outbound Campaign	
Account Source		IBDR	
Fax		Demo with Named Acct	
NAICS Code		Round Robin ID	5
Shipping Address		# of Contacts	

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 Console View | View

Save ▾ Quick Save Preview As... ▾ Cancel Undo Redo Layout Properties

**Fields**

Quick Find Field Name \*

Account Owner	Billing Address	Data.com Key	Fax	NAICS Description	Phone	SIC Code
Account Site	Clean Status	Description	Industry	Operating Hours	Rating	SIC Description
Account Source	Created By	D-U-N-S Number	Last Modified By	Ownership	SalesIntel Enriched?	Ticker Symbol
Annual Revenue	D&B Company	Employees	NAICS Code	Parent Account	Shipping Address	Tradestyle

**Salesforce Mobile and Lightning Experience Actions**

Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event Thanks

Question Email Edit Get Survey Invitation View Account Hierarchy Submit for Approval Delete View Partner Scorecard

Change Owner Get Contacts Change Record Type Include Offline Check for New Data Add to Call List Printable View Sharing

Send Text Email (mobile only) View Website

**Account Detail**

Standard Buttons

Edit Change Owner Change Record Type Delete View Account Hierarchy Sharing Include Offline Get Survey Invitation Check for New Data View Partner Scorecard Add to

Custom Buttons

Account Information (Header visible on edit only)

Account Owner	Sample Text	Rating	Sample Text
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
Type	Sample Text	Ownership	Sample Text
Industry	Sample Text	Employees	1,000

Account Layout ▾ Custom Console Components Mini Page Layout Mini Console View | View

Save ▾ Quick Save Preview As... ▾ Cancel Undo Redo Layout Properties

**Fields**

Quick Find Field Name \*

Account Owner	Billing Address	Data.com Key	Fax	NAICS Description	Phone	SIC Code
Account Site	Clean Status	Description	Industry	Operating Hours	Rating	SIC Description
Account Source	Created By	D-U-N-S Number	Last Modified By	Ownership	SalesIntel Enriched?	Ticker Symbol
Annual Revenue	D&B Company	Employees	NAICS Code	Parent Account	Shipping Address	Tradestyle

- From Items Panel Click on Fields.
- Drag & drop **SalesIntel Enriched ?** field to the details section

Quick Find

Account Owner	Billing Address	Data.com Key	Fax	NAICS Description	Phone	SIC Code
Account Site	Clean Status	Description	Industry	Operating Hours	Rating	SIC Description
Account Source	Created By	D-U-N-S Number	Last Modified By	Ownership	SalesIntel Enriched?	Ticker Symbol
Annual Revenue	D&B Company	Employees	NAICS Code	Parent Account	Shipping Address	Tradestyle

Send Text Email (mobile only) View Website

**Account Detail**

Standard Buttons: [Edit](#) [Change Owner](#) [Change Record Type](#) [Delete](#) [View Account Hierarchy](#) [Sharing](#) [Include Offline](#) [Get Survey Invitation](#) [Check for New Data](#) [View Partner Scorecard](#) [Add to](#)

Custom Buttons:

Account Information (Header visible on edit only)

Account Owner	Sample Text	Rating	Sample Text
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
Type	Sample Text	Ownership	Sample Text
Industry	Sample Text	Employees	1,993
Annual Revenue	\$123.45	SIC Code	Sample Text

Address Information (Header visible on edit only)

☒ SalesIntel Enriched?

Account Information (Header visible on edit only)

Account Owner	Sample Text	Rating	Sample Text
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
Type	Sample Text	Ownership	Sample Text
Industry	Sample Text	Employees	1,993
Annual Revenue	\$123.45	SIC Code	Sample Text

SalesIntel Enriched? ☒

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

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

**Account Detail**

[Edit](#) [Delete](#) [Sharing](#) [Include Offline](#)

Account Owner	User User [Change]	Rating	
Account Name	Salesforce [View Hierarchy]	Phone	
Parent Account		Fax	
Account Number		Website	http://salesforce.com
Account Site		Ticker Symbol	
Type		Ownership	
Industry		Employees	
Annual Revenue		SIC Code	
		SalesIntel Enriched?	<input checked="" type="checkbox"/>
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

## 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	User User <a href="#">[Change]</a>	Phone	+16566641116
Name	Jacob Martin	Home Phone	
Account Name	<a href="#">Salesforce</a>	Mobile	
Title		Other Phone	
Department	Finance	Fax	
Birthdate		Email	<a href="mailto:jack@salesforce.com">jack@salesforce.com</a>
Reports To	<a href="#">[View Org Chart]</a>	Assistant	
Lead Source		Asst. Phone	
		SalesIntel Enriched?	<input checked="" type="checkbox"/>
Mailing Address	199, New St. San Jose	Other Address	
Created By	<a href="#">User User</a> , 3/25/2020, 4:54 AM	Last Modified By	<a href="#">User User</a> , 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:

**Lead Detail** Edit Delete Convert Clone Sharing Find Duplicates

Lead Owner	User User <a href="#">[Change]</a>	Phone	
Name	Russ Aaron	Mobile	
Company	Golds Gym	Fax	
Title	Director, Compensation and Benefits	Email	<a href="mailto:raaron@goldsgym.com">raaron@goldsgym.com</a>
Lead Source		Website	<a href="http://goldsgym.com">http://goldsgym.com</a>
Industry		Lead Status	Open - Not Contacted
Annual Revenue		Rating	
		No. of Employees	7,422
		SalesIntel Enriched?	<input type="checkbox"/>
Address			
Created By	<a href="#">User User</a> , 3/19/2020, 4:32 AM	Last Modified By	<a href="#">User User</a> , 3/19/2020, 5:11 AM
Description			

## Add SalesIntel Tab

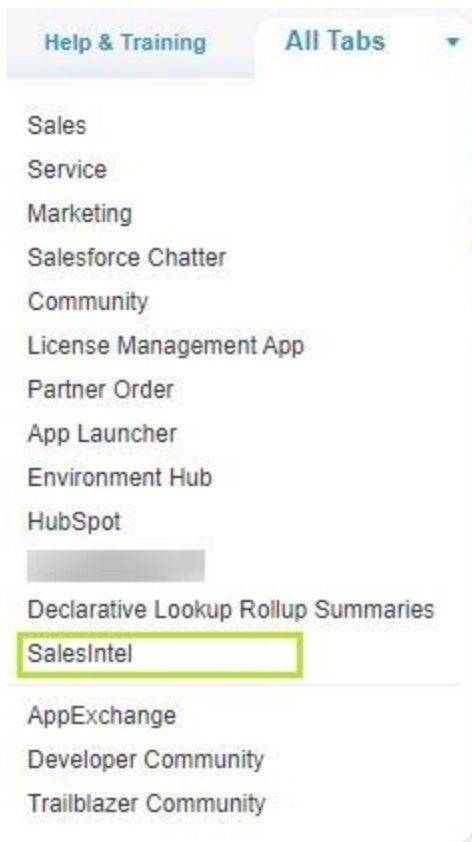
To add SalesIntel as a tab in the navigation menu, perform these steps.



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](mailto: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.

10,738 Human Verified Contacts

0 Contact Selected [Save Search](#)

NAME	JOB TITLE	LEVEL	DEPARTMENT	COMPANY	LOCATION	CONTACT	EXPORT
<input type="checkbox"/> Dave A. Naloroth	Senior Azure Specialist, Infrastructure...	Key Influencer	IT	Microsoft Corp	Redmond, WA		
<input type="checkbox"/> Tim Aaron	Senior Software Engineer	Key Influencer	IT	Microsoft Corp	Redmond, WA		
<input type="checkbox"/> Chuck Adams	Account Manager, Technical	Manager	IT	Microsoft Corp	Redmond, WA		
<input type="checkbox"/> Sara Abate	Release / Project Manager	Manager	IT	Microsoft Corp	Redmond, WA		
<input type="checkbox"/> Anuj Abbi	Principal Software Engineering Mana...	Manager	IT	Microsoft Corp	Redmond, WA		
<input type="checkbox"/> Rachel Abbott	Manager, Product Marketing	Manager	Marketing	Microsoft Corp	Redmond, WA		



## 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.

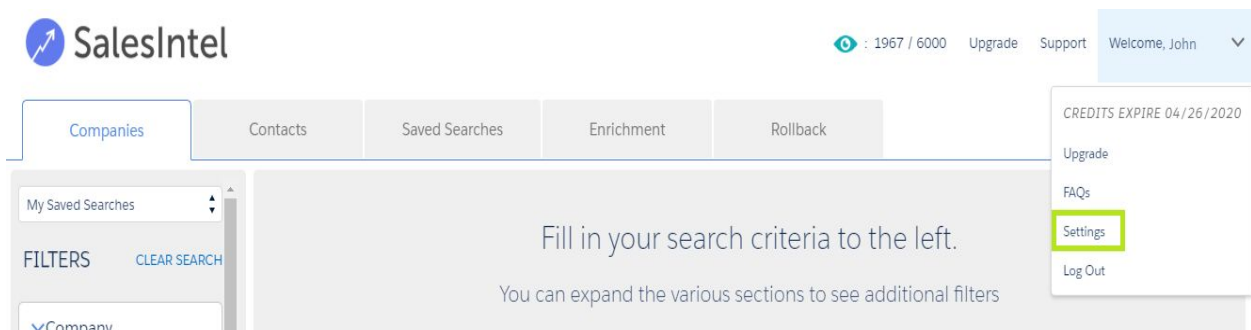
After successful installation of the package, you will need to add inline pages on the layout of Lead, Contact and Account details page. Inline pages display field values provided by the API results for that particular Lead, Contact and Account record. In our managed package, we have three inline pages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

Settings not found for current Salesforce account.

Please login to SalesIntel app to establish connection with Salesforce environment.  
Login to SalesIntel > Go to Salesforce Settings > Login with current Salesforce account.

[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.

## Login

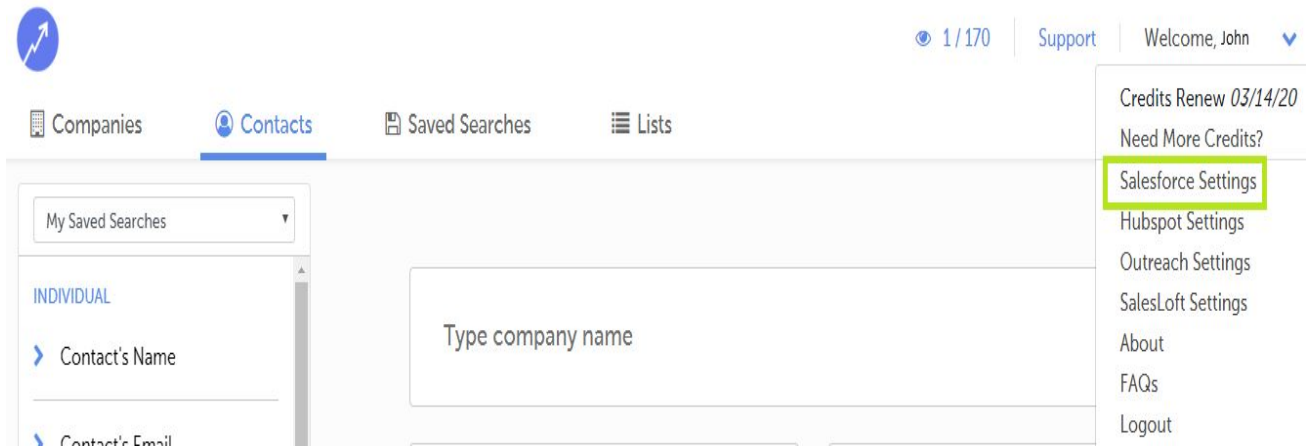
☐ Remember me

[Forgot Password?](#)

Login

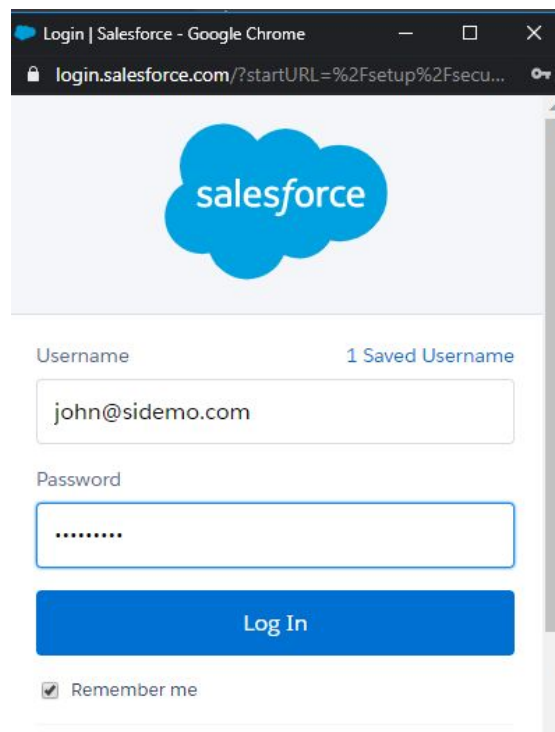
Login with your SalesIntel credentials.

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

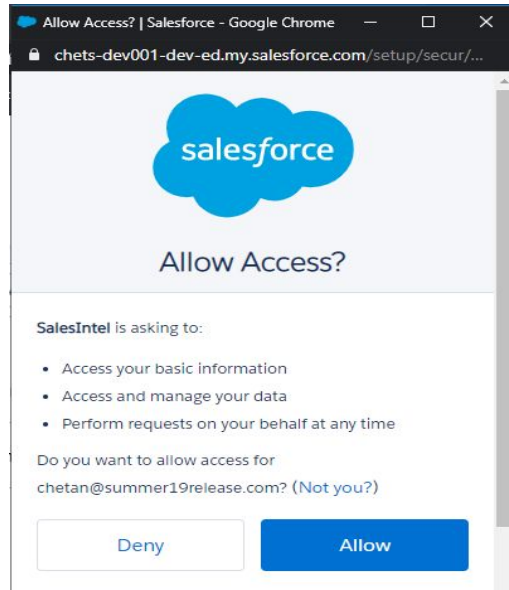


Click on the **Salesforce Settings** menu from the dropdown list.

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

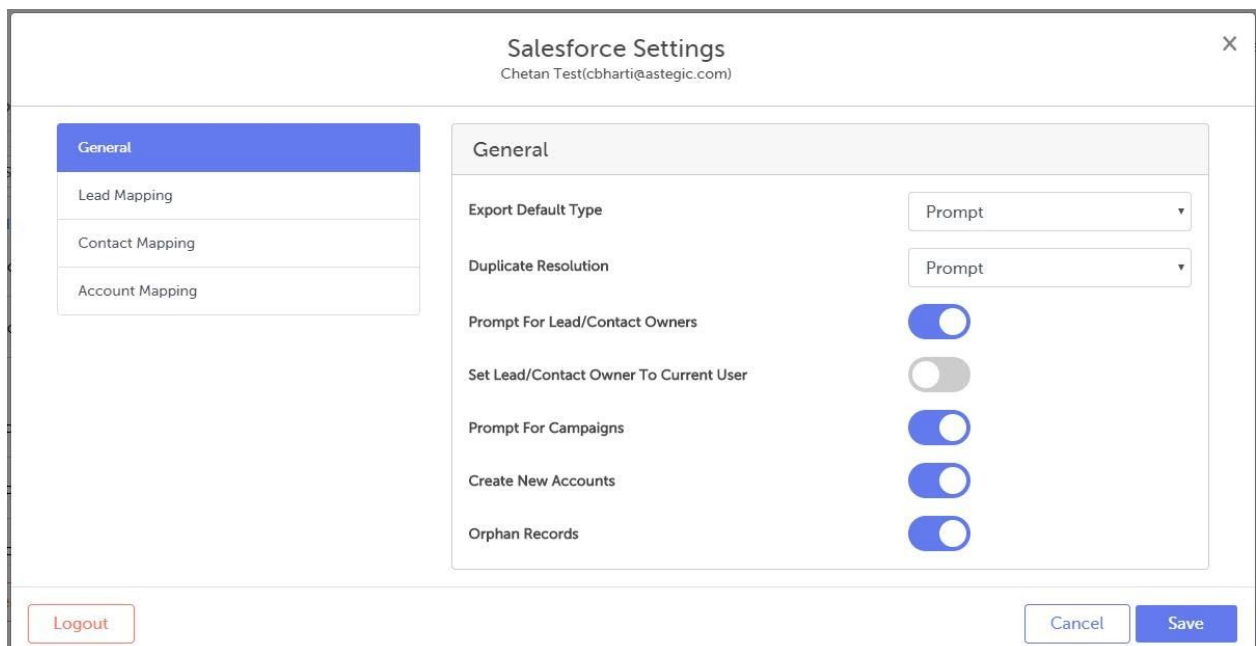


Enter your Salesforce username and password and Login into Salesforce.



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.

The screenshot displays the Salesforce 'General' settings page. On the left sidebar, the 'General' menu item is selected, and a green box highlights the 'Lead Mapping', 'Contact Mapping', and 'Account Mapping' options. The main content area, titled 'General', contains the following settings:

- Export Default Type:** Set to 'Prompt' (dropdown menu).
- Duplicate Resolution:** Set to 'Prompt' (dropdown menu).
- Prompt for Lead/Contact Owners:** Enabled (toggle switch).
- Set Lead/Contact Owner to Current User:** Disabled (toggle switch).
- Prompt for Campaigns:** Enabled (toggle switch).

At the bottom right of the settings panel, there are 'Cancel' and 'Save' buttons.

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.

General  
 Enrichment  
 Lead Mapping  
 Contact Mapping  
**Account Mapping** >  
 Log Out

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

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](mailto:support@salesintel.io)