



# Salesforce Managed Package Installation & Configuration Guide

Last update: 18 March 2026

---

## Quick Start Checklist

- Install Package for all users
  - Build and assign Permission Sets
  - Set object enrichment settings and mappings
  - Add desired inline enrichment components to objects
  - Add desired fields to page layouts
  - Test inline and manual enrichment
  - Set up Auto Enrichment jobs
- 

[Major Release Update - March 2026](#)

[Major Release Update - January 2026](#)

[Major Release Update - November 2025](#)

[Major Release Update - October 2025](#)

[Prerequisites](#)

[Supported Editions of Salesforce](#)

[SalesIntel CRM Admin Role](#)

[SalesIntel-Salesforce Connector](#)

[Install Managed Package](#)

[Items Installed](#)

[Access the App](#)

[Navigation Bar Configuration](#)

[Permission Sets](#)

[Who will need permission sets?](#)

[Permission Set Assignment](#)

[Preparing for Enrichment](#)

[Types of Enrichment](#)

[Diagnosis Jobs](#)

[Object Settings and Field Mappings](#)

[State and Country Picklists](#)

[Custom Address Fields](#)

[Buyer Persona Groups](#)

[Page Components](#)



[Object fields](#)

[Enrichment Jobs](#)

[Contact and Company Enrichment](#)

[Inline Enrichment](#)

[Scheduled Enrichment](#)

[Triggered Enrichment](#)

[Manual Enrichment](#)

[Identifying Job Changes](#)

[Enrichment Reporting & Analytics](#)

[Roll Back Your Enrichment](#)

[Disabling Rollback](#)

[Data Matching](#)

[Buying Center Enrichment \(BCE\)](#)

[Scheduled Buying Center Enrichment](#)

[Triggered Buying Center Enrichment](#)

[Manual Buying Center Enrichment](#)

[Buying Center Enrichment Reporting & Analytics](#)

[Roll Back](#)

[Enrichment Dashboard & Reporting](#)

[Admin Data Confirmation Exercises](#)

[Technical Support & FAQ](#)

[Heap Size Custom Settings](#)

[API Request Usage](#)

[Person Account Support](#)

[SSO Support](#)

[Support](#)

[Appendix - Prior Release Notes](#)

[Major Release Update - June 2025](#)

[Major Release Update - May 2025](#)

[Major Release Update - Mar 2025](#)

[Major Release Update - Dec 2024](#)

[Major Release Update - Oct 2024](#)

[Major Release Update - Aug 2024](#)

[Major Release Update - Apr 2024](#)

[Major Release Update - Sept 2023](#)

[Major Release Update - June 2023](#)



## Major Release Update - March 2026

- A set of new fields is available for enrichment:
  - **New Company Enrichment Fields**
    - SalesIntel Company ID
    - Year founded
    - Last Funding Round
    - Last Funding Date
    - Last Funding Amount
    - Total Funding Amount
    - Sector List
    - Industry List
    - NAICS List
    - Finance Department Size
    - HR Department Size
    - IT Department Size
    - Legal Department Size
    - Marketing Department Size
    - Operations Department Size
    - Procurement Department Size
    - R&D Department Size
    - Sales Department Size
  - **New Contact Enrichment Fields**
    - SalesIntel Match ID
    - HQ Street
    - HQ City
    - HQ State
    - HQ Postal Code
    - HQ Country
    - HQ State Abbreviation
    - HQ Country Abbreviation
  - **New Lead Enrichment Fields**
    - A union of all of the above
- By default, once a contact record is flagged as having changed jobs, it is no longer reprocessed in future jobs. You can now opt in to reprocess job change records during manual enrichment jobs, allowing you to [update contact linkages](#) if you had not previously set those up.



## Major Release Update - January 2026

- [Identification of job changes](#) has been redesigned, giving users the option to create new records for new roles and optionally link old and new roles together via a lookup field.
- Object settings and mappings have been separated into two distinct tabs to make navigation easier.

## Major Release Update - November 2025

- Jobs older than 6 months are no longer listed in your job list. To access these reports, use the Analyze History custom object.
- Bug fixes and clean up

## Major Release Update - October 2025

- [Buying center enrichment](#) is now available for all enrichment users. Make sure you have the contacts you need to close open opportunities.

For other release updates, see [the appendix](#) of this document.

## Prerequisites

### Supported Editions of Salesforce

The edition or version of Salesforce that you subscribe to is important when setting up the integration with SalesIntel. To use the Salesforce API, your organization must use the Performance, Developer, Enterprise, or Unlimited editions.

You may also use the Professional edition, if you have API access on your account. If you do not have the API package there is a manual export/import workaround we can assist you with, but enrichment is not available.

Professional edition can purchase API access for an additional fee. API details can be found [here](#).

You can install the managed package in a sandbox org for testing purposes. To do so, select the Try It Free button when installing, rather than the Get It Not button. More information can be found [here](#).



## SalesIntel CRM Admin Role

In order to use SalesIntel enrichment services, you must have a designated CRM Admin on your SalesIntel account. That SalesIntel admin must also have access to an active Salesforce account. You may also designate other users as Operations Admins. Operations admins have the same access as CRM Admins, so that the team can work together. Contact [support@salesintel.io](mailto:support@salesintel.io) or your CS/AM team to set your CRM Admin and any additional OpsAdmins.

## SalesIntel-Salesforce Connector

Your CRM Admin must connect SalesIntel and Salesforce through [our oAuth integration](#) in addition to the managed package installation. This connection is required to provide SalesIntel with the necessary access to your Salesforce schema (objects and fields) to allow you to complete the enrichment process. Access the connection in the [web app](#) under Settings > Integrations > Salesforce Settings.

If you intend to use Buying Center enrichment, it is recommended that you review the mappings in use in the connector, as well, as those mappings will be used to create new buying center contacts.

## Install Managed Package

1. Go to AppExchange from the [webpage](#) or Salesforce app
2. Search '**SalesIntel**' and access the app in the listing.
3. Click '**Get It Now**' from SalesIntel's application information page (or **Try It Free** if you wish to install in a sandbox environment first).



**SalesIntel - B2B Data, Sales Intelligence**  
By SalesIntel Research Inc  
Find your next customer and build your pipeline with B2B data  
★★★★☆ 4.33 Average Rating (3 Reviews)

**Business Need**  
Sales Intelligence

**Requires**  
Platform Cloud

**\$10** USD/company/one-time payment  
[Pricing Details](#)

**Get It Now** More ▾

SalesIntel helps marketing, sales, and revenue operations teams deliver up to a 5x improvement in pipeline efficiency leveraging comprehensive, quality B2B account intelligence and contact data.

4. Log in to the Salesforce org where the application will be installed, and enter your **Admin** credentials.

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, Salesforce Labs.  
Listing: Magic Mover for Notes And Attachments to Lightning Experience

Don't have a Salesforce account?  
**Continue as Guest**

Cancel

salesforce

Username  
|

Password

**Log In**

Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)

[Not a customer?](#) [Try for Free](#)

5. Choose to install either in the production environment or sandbox.



Where do you want to install this package?

Before you install 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**

Cancel

6. Accept terms & conditions, then confirm the installation.

Confirm Installation Details

*Review the [customization guide](#) for installation and configuration steps.*

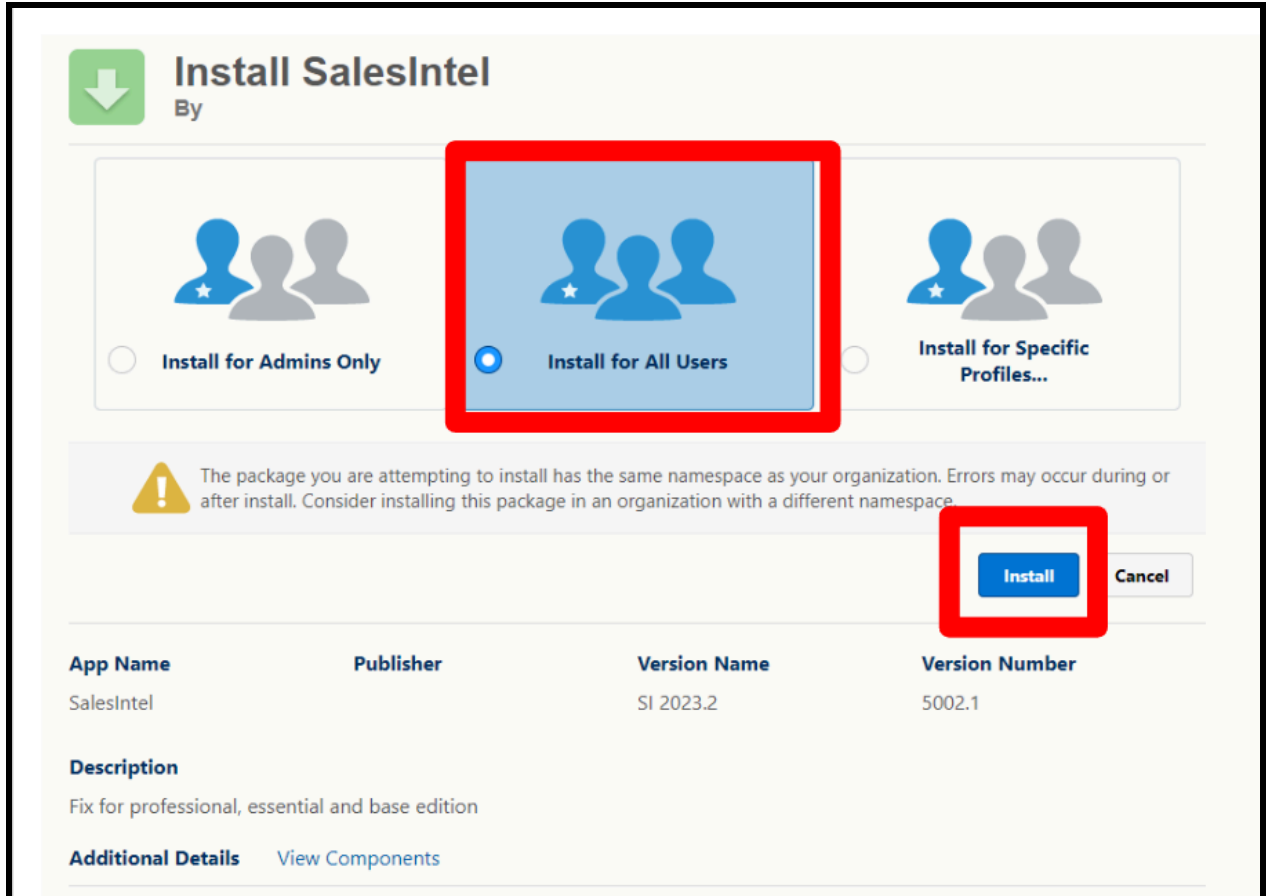
Package	Version
SalesIntel (SI 2023.4.2 / 5004.14.0)	SI 2023.4.2 / 5004.14.0
Subscription	Organization
Free	Salesintel.io
Duration	Number of Subscribers
Does Not Expire	Site-wide
Username	
marie.turek@salesintel.io.dev	

I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. [Learn More about the AppExchange Security Review.](#)

Cancel **Confirm and Install**

7. Re-enter credentials for Salesforce org where the application will be installed. 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**  
By

Install for Admins Only  **Install for All Users**  Install for Specific Profiles...

**Warning:** The package you are attempting to install has the same namespace as your organization. Errors may occur during or after install. Consider installing this package in an organization with a different namespace.

**Install** Cancel

App Name	Publisher	Version Name	Version Number
SalesIntel		SI 2023.2	5002.1

**Description**  
Fix for professional, essential and base edition

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


- There are three options for Installation, select one and click Install. We recommend that you install for all users and set appropriate permissions in a later step.
- Provide access to third party websites by clicking the checkbox next to Yes, grant access to these third-party web sites from Popup and clicking Continue.

*A note on the third party Apps that SalesIntel uses*

- analytics.churnzero.net - Tracking Analytics and Usage
  - api.circleback.com and api.salesintel.io - SalesIntel API Endpoints
  - api.datadoghq.com - Error Capture and Internal Notification
  - salesintel.us1app.churnzero.net - Tracking Analytics and Usage
  - salesintel.us.kinde.com - Identity management for SSO users; this third party is disabled by default and can be activated when [using SSO](#)
- After the installation is done, you will get an email for successful package installation, as well as get a message on the same screen. It may take a few minutes for the entire




installation to complete.



## Install SalesIntel

By SalesIntel LLC

 **Installing and granting access to all Users...**

App Name	Publisher	Version Name	Version Number
SalesIntel	SalesIntel LLC	SI 2023.4.4	5004.16

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

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.

## Congratulations! Your SalesIntel Package is now installed!

### Items Installed

The SalesIntel Salesforce Managed Package is comprised of five components:

- SalesIntel Application (SalesIntel Tab)
  - SalesIntel prospecting search and other web application functionality. This functionality is identical to the standalone web application. Find web app training [here](#).
- SalesIntel EnrichIntel (SalesIntel EnrichIntel Tab)
  - Settings and configurations for your enrichment program
- SalesIntel Analyze History (SalesIntel Analyze History tab)
  - See enrichment job history and data enrichment results. This is a custom object that is used by the EnrichIntel tab or can be accessed directly.
- Inline enrichment components
  - Lightning web components that can be installed on your object pages for one-off enrichment activities
- Reporting and dashboards
  - Custom reporting and dashboards
- A set of custom fields

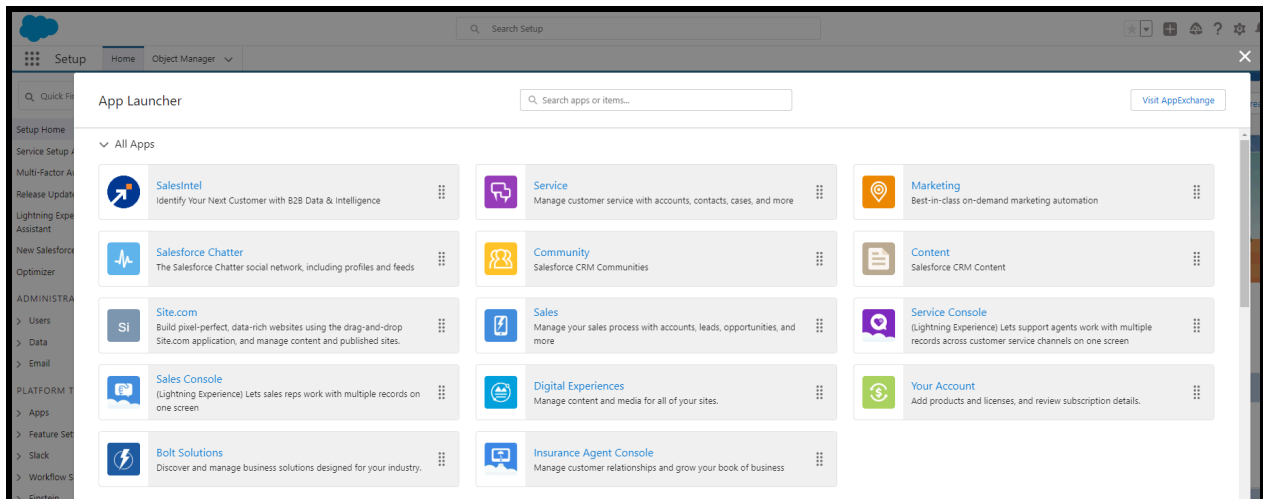
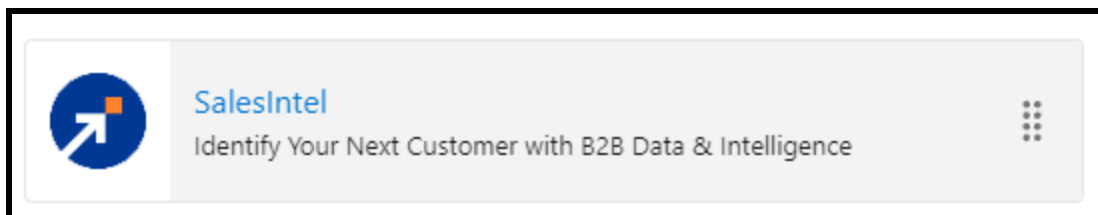


- Custom fields on each object that are used to track enrichment history. These fields are not automatically added to any of your page layouts, but you can add them if you choose

You can access the three tabs above either in the SalesIntel App or by adding tabs to your navigation bar.

## Access the App

Click the App Launcher in the top Left Corner and Choose the SalesIntel App. Users can re-order the apps as desired. The SalesIntel app includes all of the SalesIntel-specific tabs, along with the objects impacted by these workflows.



## Navigation Bar Configuration

If you choose not to use the App, you can add the SalesIntel tabs to your Navigation bar by clicking the Pencil at the far right of your Navigation Bar.

Click Add more Items button, select All or search for Salesintel.

Add :

- SalesIntel
- SalesIntel EnrichIntel

Click the + and "Add 2 Nav Item. Drag and Drop the tabs to your desired location.



### Edit SalesIntel App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.  
[Learn More](#) ⓘ

NAVIGATION ITEMS (10) Add More Items

- Home
- SalesIntel
- SalesIntel EnrichIntel
- Accounts
- Contacts
- Campaigns
- Leads
- Dashboards
- Reports
- SalesIntel Analyze History

[Reset Navigation to Default](#) ⓘ

Cancel Save

## Permission Sets

Next, you need to provide field level permission to all SalesIntel custom object fields. To provide all the permissions required to use the SalesIntel managed package, we have a permission set named **SalesIntel Permission Set** which needs to be assigned to users.

### Who will need permission sets?

Any operations admin who will be managing/running enrichment should have these permissions. Any user who will be using inline enrichment via the lightning web components should have these permissions. The same permission set is used - your SalesIntel user role will ensure that the user has the proper functionality. While the directions below will help you assign the permission set to specific users, you may also use Permission Set Groups to streamline your workflow.



## Permission Set Assignment

1. Login to your org
2. Go to Setup and search for “**Permission**”. Click on “**Users > Permission Sets**”
3. Click on **SalesIntel Permission Set** from the list of Permission sets.
4. Click on the **Manage Assignments** button from the Permission Set page.
5. Click on the **Add Assignments** button.
6. Select the checkbox as checked next to users to whom you want to give permissions to access the SalesIntel Managed Package and click the next button. You can set these permissions to expire on the next step, if desired.
7. Assign the App and click Done. Users are now summarized in the Current Assignments Table.

**If a new user is added please remember to add the permission set at the time of building the User Record. Consider using Permission Set Groups with roles to automate this process.**

## Preparing for Enrichment

To prepare for enrichment, you'll need to understand the four different types of enrichment, set up your field settings, set up buyer persona groups and add components and fields to your Salesforce object pages.

## Types of Enrichment

Object	Description
Company	Update or fill missing company information.
Contact	Update or fill missing contact information.
Opportunity (Buying Center)	Add buying center (persona) contacts to companies associated with open opportunities. This type of enrichment does not update existing records.

All enrichment types can be run on Company, Contact, and Opportunity records. Each object is managed and run separately. The length of time it takes to complete an enrichment task is dependent on the size of the task and busyness of the platform.



Type	Timing	Description
Inline	Completes in real time	Inline enrichment occurs by installing our page components. When you install an inline enrichment component on an object's record view, you can see out-of-date fields and update the record in real time.
Manual	Asynchronous process	Manual enrichment is a one-time enrichment job that you set up and run on a set of records of interest.
Triggered	Asynchronous process	Triggered enrichment runs when a new record is created. You can add filters to triggered enrichment to enrich only certain records. This is a "set and forget" style of enrichment.
Scheduled	Asynchronous process	Scheduled enrichment runs on a frequency of your choosing. You can add filters to scheduled enrichment to enrich only certain records. This is a "set and forget" style of enrichment.

### Diagnosis Jobs

While not an enrichment job, SalesIntel also offers a diagnosis job, which will review the full set of data in your desired object and report back on the health of that data. This type of job will never write results back to the Salesforce org. Access diagnosis jobs from the Quick Start Menu on the landing page. To run an effective diagnosis job, it is important to [fully map your Salesforce fields](#) so that data is available to create matches between your data and SalesIntel data and to report back the data health and completeness.

## Object Settings and Field Mappings

In order to enrich your data, you will need to apply settings and field mappings for each object that you want to enrich. Only your integration admin or operations admins can set up field mappings and enrichment jobs. Without an integration admin, you will not be able to access this area of the managed package or run enrichment. If you need to set an integration admin or additional operations admins on your account, work with your Customer Success team or [support@salesintel.io](mailto:support@salesintel.io).

Start by going to the SalesIntel EnrichIntel tab and selecting Enrichment Settings from the Welcome menu. For each object you'd like to enrich, the process will be the same.



First, decide if you want to Allow Manual Enrichment only (for one-time manual jobs), Allow Auto Update only (for triggered and scheduled) or both. Turning these toggles on by themselves WILL NOT start any enrichment processes.

Object Permissions  
Last Modified By : [redacted] Last Modified Date/Time : 2024-12-11 07:38:16.0

> Detailed Instructions

Allow Manual Enrichment Allow Auto Update

Lead

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

Cancel Save

If you turn on Auto Update, additional settings will appear to configure your auto enrichment. These details will be covered later. While these toggles remain off, no auto enrichment will be run.

Object Permissions  
Last Modified By : Peeyushi (Main QA) Sharma Last Modified Date/Time : 2024-12-11 07:38:16.0

> Detailed Instructions

Allow Manual Enrichment Allow Auto Update

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

> Detailed Instructions

Run when new record created

Schedule auto update date/time (using your Salesforce org timezone - America/Los\_Angeles - current time: 17:15)

Cancel Save

Next, scroll down to map the fields in your Salesforce instance to the SalesIntel fields. For each field, you will also be able to set an Overwrite directive (1). If this value is unchecked, your original data will be preserved. If this value is checked, SalesIntel will overwrite your data with updates that we may have (if we have no data, your data will be preserved).

In column (2) you can designate similar instructions for email verified data (applicable to contacts and leads only). Your main mappings and settings apply to SalesIntel's human verified data - our highest accuracy tier. You can also choose to enrich with email verified data, which is one step down. If you choose to do so, you can decide to either fill only missing values with this type of data, or overwrite your existing data.



For example, you may choose to overwrite phone data with human verified phone numbers, but only fill empty phone fields with email verified data. To skip all email verified data, just leave the field on –Skip–.

*The difference between human verified data and email verified data is that human verified data has been reviewed by a researcher and is 95% accurate. Email verified data has not been reviewed, but has a 90% email deliverability rate.*

In each case, you can also decide if you want to write data during Auto Updates (triggered or scheduled enrichment), or skip the field entirely (3). If you skip the field by leaving the box unchecked, enrichment of that field will only occur during inline and manual enrichment tasks.

Lead Mapping		1	2	3
SALESINTEL FIELD	SALESFORCE FIELD	ALLOW OVERWRITE	EMAIL VERIFIED DATA	ALLOW AUTO UPDATE
Source	--Skip--	<input checked="" type="checkbox"/>	--Skip--	<input checked="" type="checkbox"/>
First Name	FirstName	<input checked="" type="checkbox"/>	Append	<input checked="" type="checkbox"/>
Last Name	LastName	<input checked="" type="checkbox"/>	Append	<input checked="" type="checkbox"/>
Email	Email	<input checked="" type="checkbox"/>	--Skip--	<input checked="" type="checkbox"/>
Personal Email	--Skip--	<input checked="" type="checkbox"/>	--Skip--	<input checked="" type="checkbox"/>
Company	Company	<input checked="" type="checkbox"/>	--Skip--	<input checked="" type="checkbox"/>
Website	Website	<input checked="" type="checkbox"/>	Append	<input checked="" type="checkbox"/>
LinkedIn	--Skip--	<input checked="" type="checkbox"/>	--Skip--	<input checked="" type="checkbox"/>
Title	Title	<input checked="" type="checkbox"/>	Overwrite	<input checked="" type="checkbox"/>
Job Department	--Skip--	<input checked="" type="checkbox"/>	--Skip--	<input checked="" type="checkbox"/>

It is important to map as many fields as possible, as your original data is used to find the match to the SalesIntel database. More data means more matches, so that we can service more records for you.

## State and Country Picklists

If you have the [state and country picklists](#) activated in your instance you will need to map address fields in pairs. For example,

- Map state and country code
- Map state and country full name

The fields must be mapped in pairs to produce the correct address results, as they are dependent on each other.



SalesIntel uses standard ISO state and country codes. By default, Salesforce does not add ISO state/region codes across all countries in their picklists, but does allow a user to add these options to their own org. If you do not add state options for these countries and enrich data from SalesIntel to Salesforce from a corresponding country, SalesIntel will not be able to write the state/region data, even if that field is mapped, as there is no acceptable picklist value. The rest of the data will be written as requested.

## Custom Address Fields

Starting with package version:

- Version Name: SI 2023.4.2
- Version Number: 5004.14

SalesIntel supports [Custom Address fields](#). Please note [these](#) limitations.

## Buyer Persona Groups

If you wish to run buying center enrichment, you must create buyer persona groups which will be included in buying center jobs. You can create buyer persona groups using any combination of job level, department (or sub-departments), and title based on your decision-makers and key stakeholders.

To create buyer persona groups, go to the Quick Action Menu and follow this path: Specify your settings > Buyer Personas. Click on 'Add New' and start creating the buyer persona groups as below. You can edit/delete the buyer persona groups post creation.



✕

### Buyer Persona Group

**Name:**

**Filters:** (Please specify at least one filter from Job Level, Department, Title to save the Buyer Persona Group)

**Levels:**

- Select All
- Board Members
- C-level Executives
- Vice Presidents
- Directors
- Managers
- Key Influencers

**Department:**

- ▶  Finance
- ▶  HR
- ▶  IT
- ▶  Legal
- ▶  Marketing
- ▶  Operations
- ▶  Procurement
- ▶  R&D
- ▶  Sales
- ▶  Cross Functional

**Title:**

Once buyer persona groups are created, they can be either edited/deleted as below:

Lead Mapping
Buyer Persona Groups
Buying Center Settings
+ Add New

Contact Mapping

NAME	LAST MODIFIED DATE	ATTRIBUTES
Decision-Makers	Sep 07, 2025, 01:29 PM	Board Members, C-level Executives, Vice Presidents, Directors, Managers, Key Influencers <span style="float: right; font-size: 0.8em;">✎ 🗑</span>
influencers	Aug 13, 2025, 05:28 PM	Board Members, C-level Executives, Vice Presidents, Directors, Managers, Key Influencers, HR, IT (An... <a href="#">More</a> ) <span style="float: right; font-size: 0.8em;">✎ 🗑</span>

Please note that buyer persona groups are mandatory for creating buying center enrichment jobs. Once they are linked to asynchronous jobs (scheduled or triggered), they can't be edited or deleted unless you first remove them from those job settings.

## Page Components

If you wish to run inline enrichment, you must add the inline components to your object record pages. You may pick and choose which objects you'd like to cover. If your team will not be running inline enrichment, you can skip this step.



The following objects are covered:

- Contacts (inline enrichment)
- Leads (inline enrichment)
- Accounts - (inline enrichment and TechIntel technographics summary)

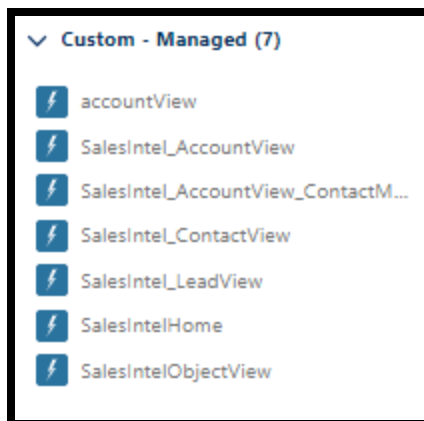
To install the components on your page views, follow these steps:

- Navigate to any record in the object
- Start > Edit Page
- Highlight Tabs Component
- At Right > Choose Add Tab > Tab Label > Custom > Add Name > Done
- Highlight Tab you just Created > Drag in Appropriate Custom Component
- Save > Activate Page
- Back to Production Page
- Confirm Connection via Testing

In this process, we add the SalesIntel component to its own tab within the record view, which is the preferred approach for most users. However, you can embed it in an existing tab, if desired.

The Custom Managed Components are:

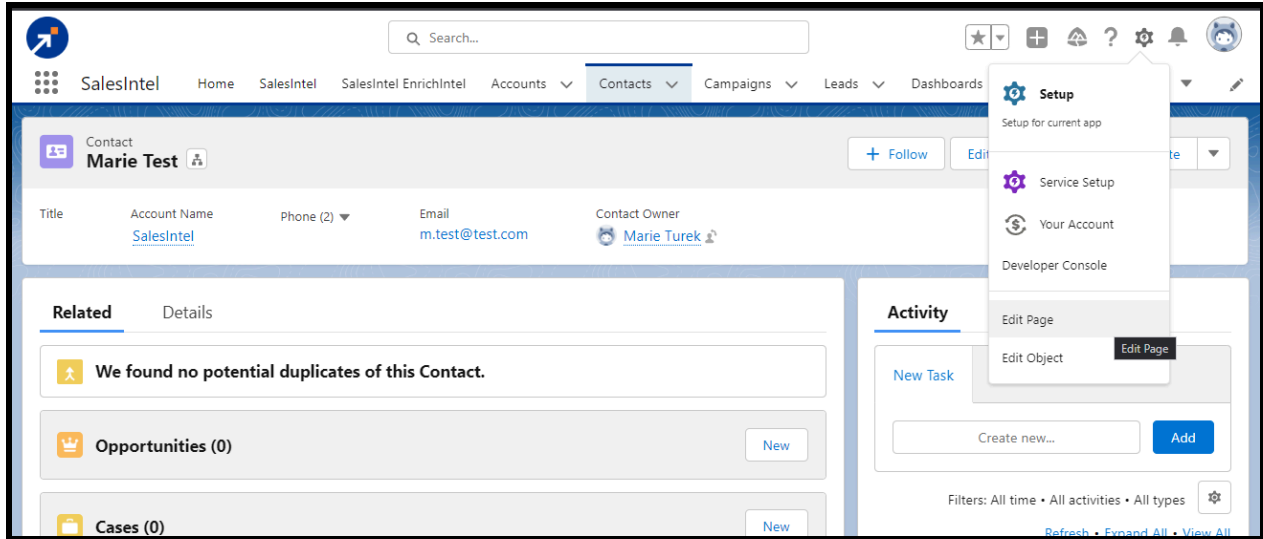
- SalesIntel\_AccountView - Account Object
- SalesIntel\_ContactView - Contact Object
- SalesIntel\_LeadView - Lead Object



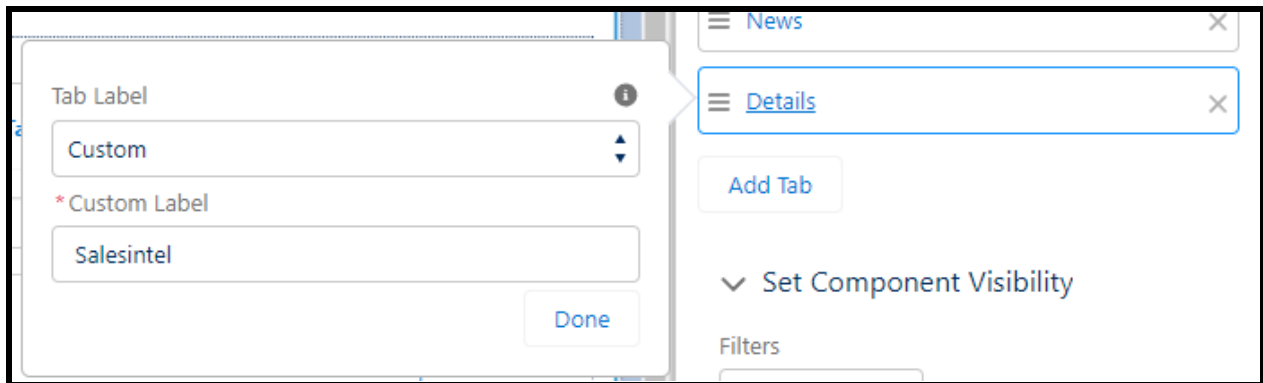
All other views are deprecated and should not be used. Be sure to add the right component to the right object to avoid an endless loading state.

For more specific instructions, follow this step by step install, using the Contact object as an example. The same process can be followed for Lead or Account objects.

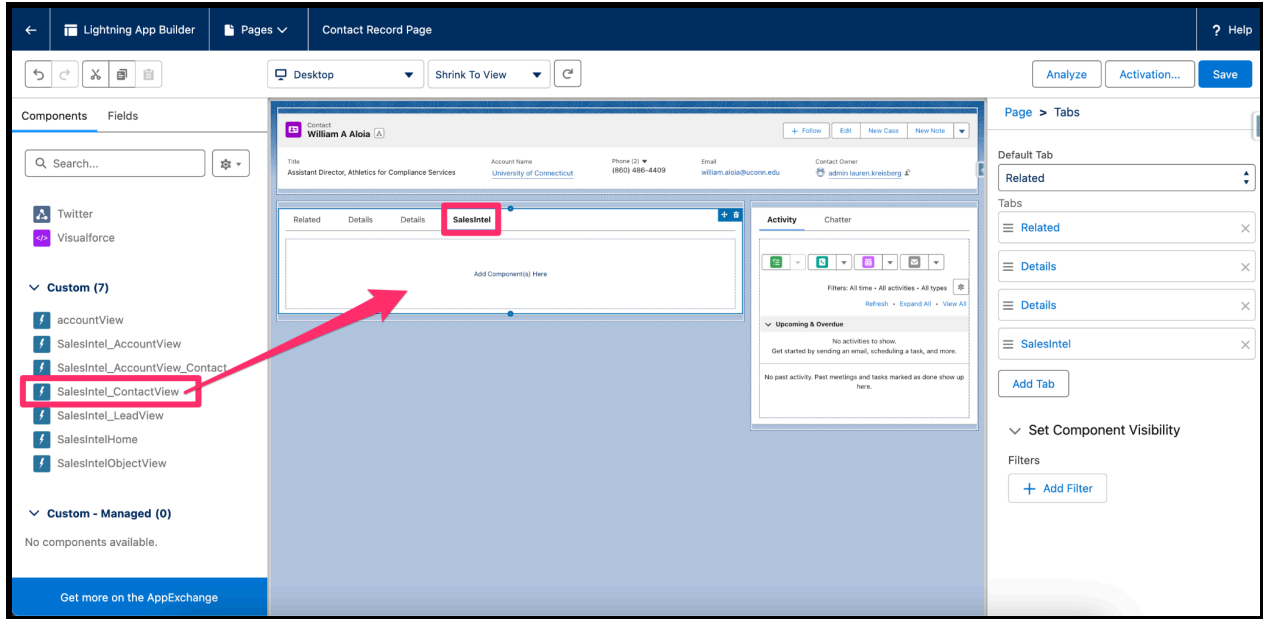
1. Open any contact record > Click Setting icon > Select Edit page



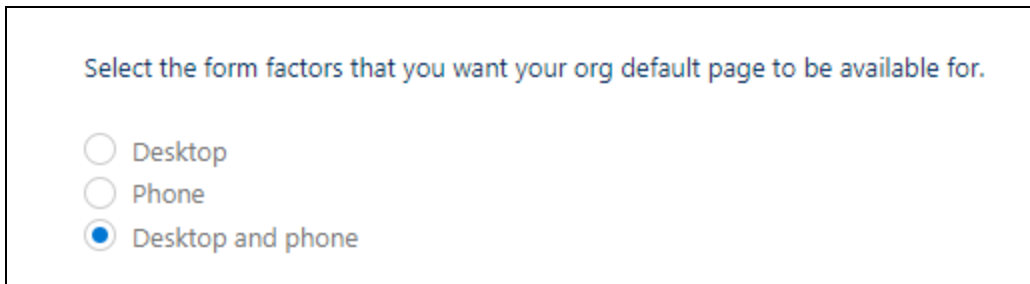
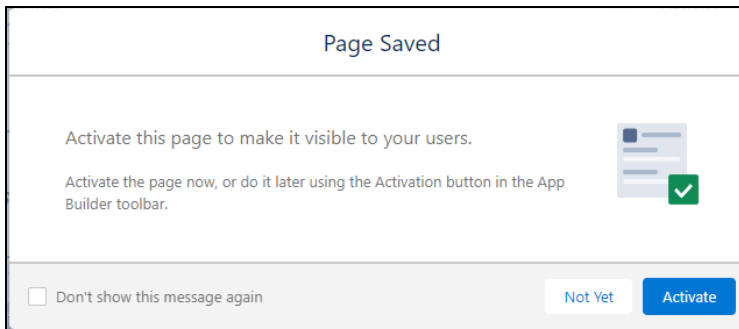
2. Highlight the section where you wish to place the Salesintel tab. This will activate the tabs table customization panel on the left of the screen.
3. Add tab from right palette as click to add tab > Click details > Select custom from drop down > Give label as Salesintel > Click Done



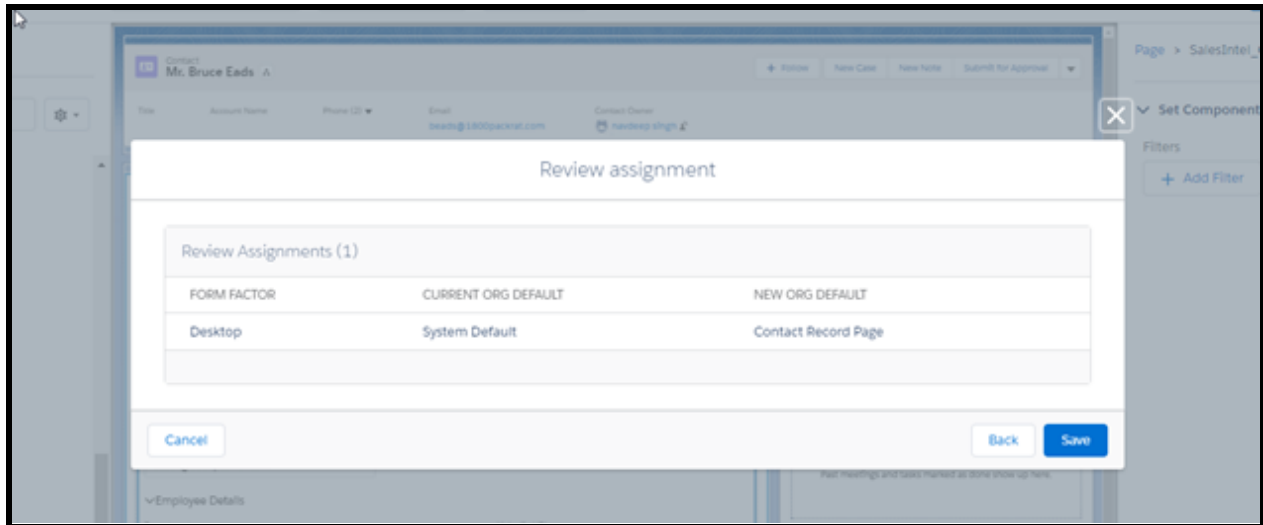
4. Now we will drop the custom component into the tab we have just created. First, select the Salesintel tab we have just created. This will highlight the components list on the left of the screen. Scroll to the bottom under Custom - Managed. Choose **SalesIntel\_ContactView** and drag it to the “Add Component Here” section of the Salesintel tab. (for Accounts, choose SalesIntel\_AccountView; for Leads, choose SalesIntel\_LeadView)



5. Click Save. You may need to Activate the page and Assign it as the Org Default as shown below, if prompted.



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



7. Click the back button in the top left corner. You will be taken to the Contact detail screen where you will see the new tab, SalesIntel.

## Object fields

The following custom fields are installed on each impacted object (Accounts, Contacts, Leads, Opportunities) when installing the managed package. You may choose to add these to your object views to assist you in understanding the impact of SalesIntel enrichment on your data. If you do not add these to your object views, they will still be available for reporting.

The following fields are available on each supported object:



<b>First Enriched Date</b>	Date that data was added to the record for the first time.
<b>Last Enriched Date</b>	If the record has produced a positive Enrichment, then the date that Enrichment was made will populate. Each Enrichment event will update the field
<b>SalesIntel Enriched?</b>	If SalesIntel has added data to a record with the checkbox will be marked TRUE
<b>Attempted Enrichment</b>	SalesIntel has read the record and has attempted to enrich the data
<b>Attempted Enrichment Disposition</b>	Users can determine which records are up to date and what happened on that record. In cases where SalesIntel has attempted to enrich the record, but no new data was found - the users will be confident that enrichment has run. (Matched / Unmatched / Invalid)
<b>Last Attempted Enrichment</b>	Last date that SalesIntel attempted to add data to the record.
<b>Last Matched Date</b>	Matched Date would indicate that the record has matched to a record in the SalesIntel database, whether the data has enriched or not.
<b>SalesIntel Up-To-Date</b>	If your last match date is greater than or equal to your last enriched date then you are up to date. Each time the record is updated this formula will fire.
<b>SalesIntel Machine Verified (deprecated)</b>	<p>If an enrichment was attempted but the record is marked as Machine verified in the SalesIntel database then the box will be checked TRUE.</p> <p>As of March 2025, this field is no longer in use or updated. Please reference the SalesIntel Enrichment Accuracy Tier field instead.</p>
<b>SalesIntel Enrichment Accuracy Tier</b>	The accuracy tier of the SalesIntel data match: Human Verified, Email Verified, Machine Verified, Outdated. By default, Human Verified data is available for enrichment. You may optionally add Email Verified data matches.
<b>SalesIntel Changed Job (contacts only)</b>	For contacts only, if the person is found to be at another organization now, this checkbox will be marked TRUE
<b>SalesIntel Job Change Date (contacts only)</b>	For contacts and leads only, the date when the contact was marked as having changed jobs. This may not match the date of the change. Once marked, it does not update during future jobs.
<b>Buying Center Enriched (contacts only, when Buying Center Enrichment is enabled)</b>	The value will be 'Created' for contacts exported during buying center enrichment jobs.



## Enrichment Jobs

### Contact and Company Enrichment

#### Inline Enrichment

To run inline enrichment, make sure that the user has the [SalesIntel permission set assigned](#) and that you have [installed the inline component](#) on the desired object(s).

At the object, when new or updated information is available, notifications are inline with the field to be updated. Inline updates can be run by any SalesIntel user (but only if Integration Admin is assigned and connected to the SF org); the SalesIntel widget is added to their view of the object page and they have the SalesIntel permission set. If you want to limit access to this feature, do so by restricting the widget on their view and/or restricting them from the permission set.

Inline enrichment acts on a single record at a time, matching the fields mapped to SalesIntel data.



Accounts Mapped Data (9 fields)

**Enrich**  
Checked values will get updated

FIELD	CURRENT VALUE	SALESINTEL VALUE	UPDATE
Name	Society for Science	Society for Science	<input type="checkbox"/>
Website	https://www.societyforscience.org/	societyforscience.org	<input type="checkbox"/>
HQ Phone	-----	(202) 785-2255	<input checked="" type="checkbox"/>
Annual Revenue	-----	15500000	<input checked="" type="checkbox"/>
No Of Employees	95	120	<input checked="" type="checkbox"/>
Industry	-----	Nonprofit and Charitable Organizations	<input checked="" type="checkbox"/>
Street	-----	1719 N St	<input checked="" type="checkbox"/>
City	-----	Washington	<input checked="" type="checkbox"/>
Postal Code	-----	20036-2801	<input checked="" type="checkbox"/>

Additional Data (8 fields)

FIELD	SALESINTEL VALUE
LinkedIn	linkedin.com/company/society-for-science-&-the-public
State	District of Columbia
Country	United States
State Abbreviation	DC
Country Abbreviation	US
Sector	Other Services (except Public Administration)
NAICS	8132
SIC	67

## Scheduled Enrichment

**Note: For scheduled auto-enrichment, SalesIntel recommends using non-operational hours, such as evenings and weekends, to avoid any potential disruption to workflows, as Salesforce will need to re-index updated data.**

Scheduled jobs can be created for daily, weekly or monthly intervals. In order for enrichment to occur, you must schedule the job and set [Allow Auto Enrichment toggles](#) for the object and the Allow Auto Update checkbox for the specific fields you'd like to update. Only the integration admin or operations admins can set/run these jobs.

Once turning on the Allow Auto Enrichment option, you will see a new option to schedule auto updates. When enabled, the scheduler and filter settings are shown.

When setting up this job, you have the option to create a filter that is evaluated before the job runs. Only records meeting this filter criteria will be checked for updates. If this option is not chosen, ALL records will be qualified for enrichment. The preview button will tell you how many of your current records meet the criteria selected, to help you validate your settings.



For leads, scheduled enrichment is only available on non-converted leads. Converted leads become read-only and cannot be updated by this operation.

The screenshot shows a configuration window for a scheduled automation job. At the top, there is a checked checkbox labeled "Schedule auto update date/time (using your Salesforce org timezone - America/Los\_Angeles)". Below this, the "Frequency" is set to "Daily". The "Select Hour" is set to "01" and "Select Minute" is set to "00", with "AM" selected. A second checked checkbox is labeled "Apply record filter for scheduled job". Below this, a filter configuration box is visible. It has a "Filters" header with a plus icon. On the right side of the filter box are two buttons: "Add Filter" and "Remove All Filters". The filter criteria are: "Last Modified Date" (selected from a dropdown), "greater than" (selected from a dropdown), "Jun 1, 2024" (with a calendar icon), and "12:00 AM" (with a clock icon). A "Preview" button is located at the bottom left of the filter box.

Automated enrichment is run via the Salesforce Process Automation User. Updates related to this process will be attributed to this user. If this user has a different timezone than your org, the schedule may not run as expected. This is a rare case that may occur when your org timezone and org locale do not match. To fix it, go to Setup > Company Settings > Company Information and ensure that the Default Timezone and Default Locale match.

## Triggered Enrichment

Triggered enrichment runs when new records are created in the object. In order for enrichment to occur, you must set [Allow Auto Enrichment toggles](#) for the object and the Allow Auto Update checkbox for the specific fields you'd like to update. Only the integration admin or operations admins can set/run these jobs.

Once turning on the Allow Auto Enrichment option, you will see a new option to run when an object record is created. When enabled, triggered enrichment will run and the filter settings are shown.

When setting up this job, you have the option to create a filter that is evaluated before the job runs. Only records meeting this filter criteria will be checked for updates. If this option is not chosen, ALL records will be qualified for enrichment. The preview button will tell you how many of your current records meet the criteria selected, to help you validate your settings (although only new records will qualify for enrichment).

For leads, triggered enrichment is only available on non-converted leads. Converted leads become read-only and cannot be updated by this operation.



The screenshot displays a configuration window for a Salesforce automation job. At the top, there are two checked toggle switches: "Run when new record created" and "Apply record filter for triggered job". Below these, a "Filters" section is visible, containing a dropdown menu labeled "Industry" with "Information Technology" selected, followed by a dropdown menu labeled "equals" and a text input field containing "Information Technology". To the right of the filters are two buttons: "Add Filter" and "Remove All Filters". A "Preview" button is located at the bottom left of the filter configuration area.

Automated enrichment is run via the Salesforce Process Automation User. Updates related to this process will be attributed to this user.

## Manual Enrichment

Manual enrichment is a one-off task based on defined criteria, to enrich a set of records for Account, Contact, or Lead objects. Only the integration admin or operations admin can create these jobs. Manual enrichment is the only type of asynchronous enrichment that requires manual intervention to complete the task. After the records are analyzed, you will receive an email alert. You must come back to Salesforce to start the process of writing back your enrichment results.

The stages in a manual enrichment job are as follows:

- Analyzing - Opportunities and associated accounts are being analysed to estimate the number of contacts which can be exported based on the buying center and other export criteria. You'll be notified once analysis is complete.
- Report Ready - The analysis is complete and the job report is ready for preview.  
\*\* Manual intervention required at this step to continue Enrichment.
- Enriching - Contact export is underway. You'll be notified once it's complete.
- Complete - The contact export is complete.

For leads, manual enrichment is only available on non-converted leads. Converted leads become read-only and cannot be updated by this operation.

1. Select Create a one-time job > Get Started from the left-hand Quick Action Menu. You may also start by cloning an existing job (if you have one) from the table in the center well.











### QUICK ACTION MENU

[Full User Guide](#)

 Specify your settings

Create a one-time job

 Schedule recurring enrichment

	On Create	Schedule
Accounts		
Contacts		
Leads		
Buying Center		

2. Choose an Object to enrich (account, contact or lead records).
3. Enter the enrichment task name (minimum 5 characters).



**SalesIntel**

Enrichment Rollback SalesIntel

### New Enrichment

Type: Account Contact **Lead**

Enrichment Task Name (min 5 characters) \*: Leads with No Email

Filters ?

Email equals eg: value or true/false

Analyze Cancel

4. Apply filter(s) to enrich records that meet specified criteria or omit filters to enrich all records. Use the Preview button to check how many records currently meet your filter criteria

**SalesIntel**

Enrichment Rollback SalesIntel

### New Enrichment

Type: Account Contact **Lead**

Enrichment Task Name (min 5 characters) \*: Leads with no phone

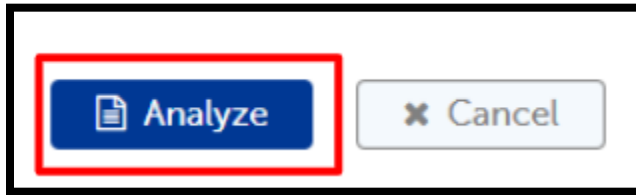
Filters ?

Phone equals

Preview

Analyze Cancel

5. Select '**Analyze**' to prepare Enrichment Task.



- The new enrichment task will enter the queue in the Analyzing state. Depending on queue traffic and the size of your batch, this may take anywhere from a few minutes to several hours to complete. You will need to come back to this view to start the enrichment process after reviewing the results.

Your enrichment job has been queued. You will receive an email when the analysis is completed.

### Enrichment Tasks

[New Enrichment](#) [Refresh](#)

ENRICHMENT TASK NAME	CREATED ON	CREATED BY	TYPE	STATUS
Enriched Last (Pending)	Nov 14, 2023, 10:52 AM	Marie Turek	Account	Analyzing

## Identifying Job Changes

When a contact changes jobs, it's important to understand that movement and keep your CRM up-to-date. By default, SalesIntel will mark the Changed Jobs disposition field and indicate the date when that change was identified in your CRM. However, you can also set up your manual or scheduled job to create a new contact for the new role and, optionally, link these contacts to each other.

To create the new contact during enrichment, choose the option "Flag the change and create a new contact." This option is available on the manual enrichment configuration on a job-by-job basis, and in the scheduled enrichment settings, applying to all scheduled jobs.



**SalesIntel** Welcome, Lauren (Main QA) ▾

[Enrichment](#) [Rollback](#) [SalesIntel](#)

### New Enrichment

Type: Account **Contact** Lead Buying Center

\* Job Change handling

Flag the change and create a new contact. Records will be connected if you provide lookup ... ▾

Map a lookup field to link your old contact with its new role.

Filters ⊕ [Add Filter](#) [Remove All Filters](#)

None ▾ equals ▾ eg: value or true/false

[Preview](#)

Lead Mapping Contact Mapping Contact Settings [Back to main](#)

[Contact Mapping](#) [Cancel](#) [Save](#)

Account Mapping

Buying Center

Log Out

#### Auto Update Record

> Detailed Instructions

Run when new record created

Schedule auto update date/time (using your Salesforce org timezone - America/Los\_Angeles - current time: 09:54)

Frequency \*  
Daily ▾

Select Hour: 01 ▾ Select Minute: 00 ▾ AM ▾

\* Job Change handling

Flag the change and create a new contact. Records will be connected if you provide lookup values in your mappings. ▾

Map a lookup field to link your old contact with its new role.

Apply record filter for scheduled job

When using this option, you also have the option to link the new contact and old contact, making it easier for your team to see the full history of their relationship with a person. If you do not add these linkages, the new contact will be created, but not linked to the original contact.



Lead Mapping    Contact Mapping    **Contact Settings**    Back to main

Cancel    Save

01    00    AM

**\*Job Change handling**

Flag the change and create a new contact. Records will be connected if you provide lookup values in your mappings.

Map a lookup field to link your old contact with its new role.

Apply record filter for scheduled job

---

**Job Change Settings**

Optionally, connect the contact's old role with their new role via lookup fields, by mapping your fields below. You may map one or both fields. This only applies if you choose to create new contacts when job changes are identified.

Old Contact (value is set on the new contact record)

None

New Contact (value is set on the old contact record)

None

Before starting, consider if you want one or both of these fields. You will need to create these fields in your Salesforce org as "lookup" field types on the Contact object. It is important to follow these steps carefully, to avoid swapping the old and new job labels.

To show the New Job Contact on the Old Job Contact record:

1. Go to Setup > Object Manager > Contact > Fields & Relationships > New
2. Set the field type as Lookup Relationship
3. Set the related object to Contact (two contacts will be related to each other)
4. Set the field label to New Job (or any name you'd like - as long as it's clear to you that, when you see this field populated on the record, the field is populated with that contact's New Job). Set field name and child relationship name to new\_job (or similar).
5. Determine who in your org should see or modify this field. You can set this later, as well, but your SalesIntel CRM Admin must be able to write to this field.
6. Add the field to any page layouts that you'd like. You can also set this later.
7. If you want to show this data in a Related view on the profile (recommended), set the related list label to Old Job and choose the page layouts you'd like. When this New Job value is populated, a related list will show on the new contact that shows their old job, as the relationship is made from the old job to their new job.

To show the Old Job Contact on the New Job Contact record, you'll do the same, but with opposite labels:

1. Go to Setup > Object Manager > Contact > Fields & Relationships > New
2. Set the field type as Lookup Relationship
3. Set the related object to Contact (two contacts will be related to each other)
4. Set the field label to Old Job (or any name you'd like - as long as it's clear to you that, when you see this field populated on the record, the field is populated with that contact's Old Job). Set field name and child relationship name to old\_job (or similar).

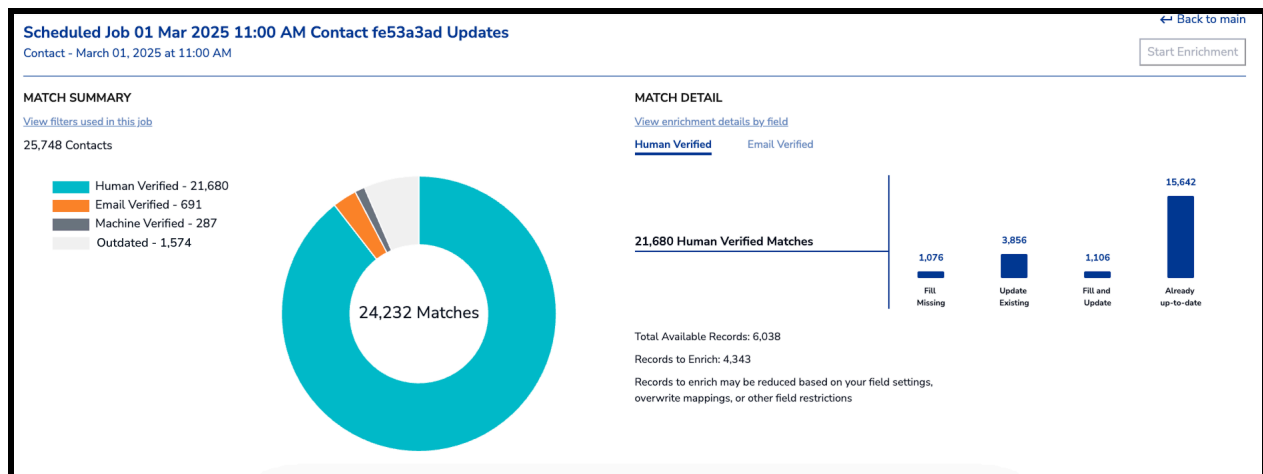


5. Determine who in your org should see or modify this field. You can set this later, as well, but your SalesIntel CRM Admin must be able to write to this field.
6. Add the field to any page layouts that you'd like. You can also set this later.
7. If you want to show this data in a Related view on the profile (recommended), set the related list label to New Job and choose the page layouts you'd like. When this Old Job value is populated, a related list will show on the old contact that shows their new job, as the relationship is made from the new job to their old job.

Now, come back to the contact enrichment settings and choose the correct new job and old job fields under Job Change Settings.

## Enrichment Reporting & Analytics

To review what occurred during your enrichment task, or to start the writing process on a manual enrichment task, access the report by selecting the job from the enrichment task table. The *Start Enrichment* button in the upper right will begin the process of writing back your updated data.



The left side of the report shows your overall match rate, broken down by accuracy tier. Only your human verified and email verified (for contacts and leads) matches are eligible for enrichment.

The right side of the report further breaks down those human or email verified matches based on the updates provided:

1. **Fill missing:** The number of matches where only empty fields could be updated
2. **Updated existing:** The number of matches where only fields with existing data could be updated
3. **Fill and update:** The number of matches where both empty fields and existing fields could be updated



4. **Already up-to-date:** The number of matches where nothing needs updating

The total available records is the sum of 1, 2, and 3 above – all records where something could be updated. However, based on your overwrite settings, it is possible that we will not be able to write all updates. The “Records to Enrich” value indicates the records that both have data to write and which follow your settings.

By clicking on the link “View enrichment details by field”, you can also see the individual fields that will be updated, overwritten, or skipped, as well as possible additional data that is available should you map more fields. In this example, the job level field is not mapped, but SalesIntel has 376 records with this information. Mapping this field in the future will get you access to this data.

ENRICHMENT BY FIELD				Filled Fields	Updated Fields	Also Available
Human Verified		Email Verified		621	365	1,872
SALESINTEL FIELD	SALESFORCE FIELD	FILL DATA	UPDATE DATA	ALLOW UPDATE	ALSO AVAILABLE	
First Name	FirstName	0	0	✓		
Last Name	LastName	0	0	✓		
Email	Email	0	0	✓		
Title	Title	0	365	✓		
Job Department	Department	0	0	✓		
Work Phone	Phone	0	0	✓		
Mobile	MobilePhone	0	0	✓		
Street	MailingStreet	0	0	✓		
City	MailingCity	0	0	✓		
Postal Code	MailingPostalCode	0	0	✓		
State Abbreviation	MailingState	292	0	✓		
Country Abbreviation	MailingCountry	329	0	✓		
Personal Email	--Skip--				7	
Linkedin	--Skip--				167	
Job Level	--Skip--				376	

## Roll Back Your Enrichment

Occasionally, you may find it necessary to roll back an enrichment due to mistakes in mapping fields or applying settings. You have 15 days to roll back a job. Rolling back a job will reset any fields updated by that job back to their status before the job started. Any further changes made to these fields after the enrichment tasks ran will be lost.

1. Inside the SalesIntel EnrichIntel Tab Click on the **Rollback** tab to undo an Enrichment task. The Job Name will give you info if the enrichment was done using **Auto-Enrichment** (will show as Auto-Update) or **Manual Enrichment** (will show the name of the Enrichment Job).
2. Select Enrichment task to undo and click **Rollback**.



The screenshot shows the SalesIntel dashboard. The 'SalesIntel EnrichIntel' menu item is highlighted in a red box. Below it, the 'Rollback' button is also highlighted in a red box. The 'Data Rollback Logs' table is displayed with the following data:

ACTION	JOB NAME	ROLLBACK START DATE	ROLLBACK END DATE	JOB STATUS	TOTAL RECORDS
Rollback	Leads Less than Today			Not Started	28
Rollback	Accounts			Not Started	5

3. **Confirm** Rollback to continue.

**Rollback Process Confirmation**

Are you sure you want to perform Rollback? Any fields manually updated will not be impacted.

Cancel Confirm

### Disabling Rollback

Rollback emits DataChange records for each record-field combination that is updated. In some cases, with large orgs or frequent enrichment, the user may find that these records take up more storage than desired. Rollback records are auto-deleted after 15 days.

Rollback can be disabled at Set up > Custom Settings > SalesIntel Rollback Customization > Manage. Uncheck “Create Rollback Logs” to stop emitting datachange events. Please use this setting with care, as you will no longer be able to roll back your enrichment jobs.

### Data Matching

For all asynchronous jobs (manual, scheduled, triggered), SalesIntel uses multiple fields to match your data to our database. The more fields you have mapped, the more matches can be made, and the more up-to-date your resulting data will be. If you want to map a field but want



your existing data to take priority, make sure to set the Allow Overwrite checkbox to unchecked when mapping your fields.

The following fields are used in the matching process:

- **Accounts:** name, website, country, LinkedIn URL, HQ Phone (some fields are used in pairs to ensure uniqueness)
- **Contacts:** name, email, personal email, LinkedIn URL, company name, company website, mobile phone, work phone, title (some fields are used in pairs to ensure uniqueness)
- **Leads:** name, email, personal email, LinkedIn URL, company name, company website, mobile phone, work phone, title
- **Partial Lead Enrichment:** If an exact contact cannot be matched for a lead, any available company data is used to derive a company match, to assist in routing and prioritization, including email domain, company website, country, company name

## Buying Center Enrichment (BCE)

Buying Center Enrichment is a special type of enrichment that adds contacts to companies based on open Deal records and your defined buyer persona groups. For each buyer persona group, we'll export the top contacts based on accuracy tier and hierarchy. In future runs, only new contacts that qualify among the top for their group will be exported.

To get started with Buying Center enrichment, review the prerequisites [here](#). Buying Center enrichment creates new contacts in company records, using SalesIntel export credits associated with the connected CRM Admin.

Since Buying Center enrichment concludes with the export of the contacts, your CRM Admins and Operation Admins who want to use this service must connect the main SalesIntel-Salesforce export integration by navigating to Settings > Integrations > Salesforce Settings. More information on connecting to Salesforce and setting up your contact export mappings is available [here](#).

A snapshot of the CRM Admin's export mappings at the start of the job can be seen from "View Export Settings" in the job report.

## Scheduled Buying Center Enrichment

Scheduled jobs can be created for weekly or monthly intervals only. In order for enrichment to occur, you must set Allow Auto Update toggle and schedule the job in the Buying Center Settings page. Only the integration admin or operations admins can set/run these jobs.

Once the Allow Auto Update toggle is turned on, you will see an option to schedule auto updates. When setting up this job, you have the option to create an opportunity filter that is



evaluated before the job runs. Only records meeting this filter criteria will be enriched. If this option is not chosen, ALL records will be qualified for enrichment. The preview button will tell you how many open opportunities with associated companies meet the filter criteria.

In order to get the best contacts for your opportunities, you must select buyer persona groups which you define [here](#). At least 1, and at most 5, buyer persona groups can be selected per job. Specify the maximum number of contacts which need to be exported per buyer persona group, and the accuracy tier of contacts to be exported. If Machine Verified export is enabled for the CRM Admin, you will be able select Machine Verified as the accuracy tier; otherwise, only Human Verified or Email Verified will be available. [Learn more about accuracy tiers](#).

Schedule auto update date/time (using your Salesforce org timezone - America/Los\_Angeles - current time: 15:47)

Frequency \*

Weekly

Repeat every week on:

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Select Hour: 

01

Select Minute: 

00

AM

Apply record filter for scheduled job (Contacts will be exported to only those accounts which have open opportunities linked to them)

**Opportunity Filters** ⓘ

(Contacts will be exported to only those accounts which have open opportunities linked to them)

Add Filter
✕ Remove All Filters

None

equals

eg: value or true/false

Preview

**Buyer Persona Selection\***

Select distinct buyer persona groups. For each buyer persona group, we'll export the top contacts based on accuracy tier and hierarchy. In future runs, only new contacts that qualify among the top for their group will be exported.

Select the Buyer Persona Groups:

\* Select at least 1 and no more than 5

Q Search Buyer Persona Group...

Maximum Contacts per Buyer Persona Group: \* 

Select

Accuracy Tier: Human Verified, Email Verified

Machine Verified
●
Email Verified
●
Human Verified

Cancel
Save



## Triggered Buying Center Enrichment

Triggered enrichment runs when new records are created in the opportunity object. In order for enrichment to occur, you must set the Allow Auto Update toggle and enable the triggered job in the Buying Center Settings page. Only the integration admin or operations admins can set/run these jobs.

Once the Allow Auto Update toggle is turned on, you will see an option to run enrichment when a new opportunity record gets created. The opportunity must be an open opportunity with an associated account. When enabled, triggered enrichment will run and export the contacts to the associated account.

When setting up this job, you have the option to create an opportunity filter that is evaluated before the job runs. Only records meeting this filter criteria will be enriched. If this option is not chosen, ALL records will be qualified for enrichment. The preview button will tell you how many of your current opportunities meet the criteria selected, to help you validate your settings (although only new records will qualify for enrichment).

In order to get the best contacts for your opportunities, you must select buyer persona groups which you define [here](#). At least 1, and at most 5, buyer persona groups can be selected per job. Specify the maximum number of contacts which need to be exported per buyer persona group, and the accuracy tier of contacts to be exported. If Machine Verified export is enabled for the CRM Admin, you will be able select Machine Verified as the accuracy tier; otherwise, only Human Verified or Email Verified will be available. [Learn more about accuracy tiers.](#)



**Auto Update Record**

> Detailed Instructions

Run when new Opportunity gets created  
 Apply record filter for triggered job (Contacts will be exported to only those accounts which have open opportunities linked to them)

**Buyer Persona Selection\*** Select distinct buyer persona groups. For each buyer persona group, we'll export the top contacts based on accuracy tier and hierarchy. In future runs, only new contacts that qualify among the top for their group will be exported.

Select the Buyer Persona Groups:  
 \* Select at least 1 and no more than 5

Maximum Contacts per Buyer Persona Group: \*

Accuracy Tier: Human Verified, Email Verified

Machine Verified
  Email Verified
  Human Verified

Schedule auto update date/time (using your Salesforce org timezone - America/Los\_Angeles - current time: 15:44)

## Manual Buying Center Enrichment

Manual enrichment is a one-off task based on defined criteria, to add a set of contacts based on accounts with open opportunities. Only the integration admin or operations admin can create these jobs. Manual enrichment is the only type of asynchronous enrichment that requires manual intervention to complete the task. After the records are analyzed, you will receive an email alert. You must come back to Salesforce to start the process of exporting your enrichment results.

The stages in a manual enrichment job are as follows:

- Analyzing - Opportunities and associated accounts are being analysed to estimate the number of contacts which can be exported based on the buying center and other export criteria. You'll be notified once analysis is complete.
- Report Ready - The analysis is complete and the job report is ready for preview.  
\*\* Manual intervention required at this step to continue Enrichment.
- Enriching - Contact export is underway. You'll be notified once it's complete.
- Complete - The contact export is complete.

To get started, select Create a one-time job > Get Started from the left-hand Quick Action Menu. Choose "Buying Center", and give your task a name.

### Step 1: Opportunity Filters

Select the opportunities which you want to enrich by applying optional filters. You can click on "Preview" to view the number of opportunities meeting the filter criteria. Buying Center



enrichment jobs will only consider the opportunities which are open (opportunity stage is not closed lost/closed won) and have associated accounts.

### Step 2: Buying Center Selection

In order to get the best contacts for your opportunities, you must select buyer persona groups which you define [here](#). At least 1, and at most 5, buyer persona groups can be selected per job. Specify the maximum number of contacts which need to be exported per buyer persona group, and the accuracy tier of contacts to be exported. If Machine Verified export is enabled for the CRM Admin, you will be able select Machine Verified as the accuracy tier; otherwise, only Human Verified or Email Verified will be available. [Learn more about accuracy tiers.](#)

Clicking on “Analyze” will start the manual Buying Center enrichment job.

To maximize the data available to you, select mutually exclusive and non-overlapping buyer persona groups for the contacts export.



## Buying Center Enrichment Reporting & Analytics

To review what occurred during your enrichment task, or to start the writing process on a manual enrichment task, access the report by selecting the job from the enrichment task table. The *Start Enrichment* button in the upper right will begin the process of writing back your updated data if you ran a manual one-time job.

The pre-enrichment and post-enrichment reports are slightly different in terms of job summary.

The pre-enrichment report has below major highlights:

1. Job Summary - This includes number of deals analyzed, total companies associated with the open deals, matched companies against the SalesIntel records and total number of estimated contacts to be exported.
  - a. Opportunities - These are the number of open opportunities with associated accounts in Salesforce.
  - b. Companies - These are the number of accounts having open opportunities.
  - c. Matched Companies - These are the number of companies which matched against the SalesIntel database.
  - d. Estimated Contacts - Post analysis, these are the maximum number of contacts which will be exported to Salesforce post successful enrichment.

The screenshot shows a web interface for a report titled "BuyingCenter Buying Center Updates". At the top right, there is a "Back to main" link and a "Start Enrichment" button. Below the title, the report date and time are shown: "Buying Center - September 12, 2025 at 02:45 PM". The main section is labeled "JOB SUMMARY:" and contains four data cards: "#Opportunities" with a value of 3, "#Accounts" with a value of 1, "#Matched Accounts" with a value of 1, and "#Estimated Contacts" with a value of 10. Below these cards are three links: "View Opportunity Filters", "View Buyer Personas", and "View Export Settings".

Metric	Value
#Opportunities	3
#Accounts	1
#Matched Accounts	1
#Estimated Contacts	10

2. View Buyer Personas: This displays the buyer personas along with the attributes chosen during the enrichment job.



3. View Export Settings: This displays the export settings of the CRM Admin which will be used for buying center contacts export, maximum number of contacts to be exported per buyer persona group and the accuracy tier for the contacts to be exported.

SALESINTEL FIELD	SALESFORCE FIELD
Source	--- skip ---
Accuracy Tier	--- skip ---
First Name	First Name
Last Name	Last Name

4. Contacts Matrix: Select accuracy tier, job level, department, opportunity stage, or opportunity type as row or column headers to see how contacts are grouped within each category.



Contacts (Use the row and column dropdowns to view the number of contacts in each category)

Rows:  Columns:

	Finance	HR	IT	Legal	Marketing	Operations	Procurement	R&D	Sales	Cross Functional	TOTAL
Board Member	0	0	0	0	0	0	0	0	0	0	0
C-level Executive	1	0	0	0	1	0	0	0	0	0	2
Vice President	0	0	0	0	0	0	0	0	0	0	0
Director	1	0	1	0	0	0	0	1	0	0	3
Manager	0	0	1	0	0	1	0	1	2	0	5
Key Influencer	0	0	0	0	0	0	0	0	0	0	0
Total	2	0	2	0	1	1	0	2	2	0	10

Once the job is completed, you can click on the job name and view the post-enrichment report as well. The post-enrichment report job summary includes number of opportunities analyzed, total accounts associated with the open opportunities, number of matched accounts against the SalesIntel records, actual number of contacts exported along with count of duplicate contacts, if any.

### Roll Back

Roll back is not available for buying center enrichment, as SalesIntel does not delete contacts from your Salesforce account.

## Enrichment Dashboard & Reporting

When you install the managed package, SalesIntel includes a set of reports to help you understand the outcome of your enrichment program. These reports have been streamlined with the March 2025 release. The main reports are part of the March '25 release folder, while other reports have been deprecated.

Report Folder:



Reports

**All Folders > SalesIntel**

Items

REPORTS	Name	Description	Folder
Recent	Depr - Accounts - SalesIntel/EnrichIntel		SalesIntel
Created by Me	Depr - Leads - SalesIntel/EnrichIntel		SalesIntel
Private Reports	Depr - Contacts - SalesIntel/EnrichIntel		SalesIntel
Public Reports	Depr - SalesIntel Analyze History		SalesIntel
All Reports	<b>SalesIntel Enrichment - Mar '25 Release</b>		SalesIntel

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

Report List:

<u>Report</u>	Description
<b>Accounts - SalesIntel Enriched</b>	Which accounts have been enriched by SalesIntel? All SI Tracking Fields.
<b>Accounts - Up-To-Date</b>	If your last match date is greater than or equal to your last enriched date then you are up to date. Each time the record is updated this formula will fire.
<b>Contacts - SalesIntel Enriched</b>	Which contacts have been enriched by SalesIntel? All SI Tracking Fields.
<b>Contacts - Up-To-Date</b>	If your last match date is greater than or equal to your last enriched date then you are up to date. Each time the record is updated this formula will fire.
<b>Leads - SalesIntel Enriched</b>	Which leads have been enriched by SalesIntel? All SI Tracking Fields.
<b>Leads - Up-To-Date</b>	If your last match date is greater than or equal to your last enriched date then you are up to date. Each time the record is updated this formula will fire.
<b>Opportunities - SalesIntel Enriched</b>	Which Opportunities have been enriched by SalesIntel? All SI Tracking Fields.
<b>Opportunities - Up-To-Date</b>	If your last match date is greater than or equal to your last enriched date then you are up to date.



	Each time the record is updated this formula will fire.
<b>BCE - Contacts</b>	Which Contacts have been created as part of Buying Center Enrichment?

## Admin Data Confirmation Exercises

After the following tests, you will be able to confirm field mapping and how enrichment is reported.

1. Inline Enrichment Test
  - a. Navigate to the SalesIntel web app and search for an Account that is not currently in your Salesforce ORG.
  - b. Manually create a new Account with only the Name and Website and save.
  - c. Navigate to the Inline enrichment component on the page for that account and ensure that the remaining data fields are highlighted as available additions to your record.
  - d. Click Enrich All, Look to the details tab and compare the information.
  - e. Repeat this process for Contacts and Leads using a contact record email address from the SalesIntel web app.
2. Asynchronous (Manual, Triggered, Scheduled) Enrichment Test
  - a. Navigate to EnrichIntel Tab
  - b. Click Create a one-time job > Get Started
  - c. Type = Account
  - d. Use a set of filters that will impact a small number of records, such as Created Date - Greater Than - a recent date
  - e. Preview to confirm that you are working with a small enough set of records, then click Analyze
  - f. Pending Job will return results to your email. Return to Salesforce, review the report, and start the writing process.
  - g. Run a report for all Accounts where SalesIntel Enriched = TRUE. Review the results to ensure you are satisfied with your mappings and settings.
  - h. Repeat this process for Leads and Contacts.

---

## Technical Support & FAQ

Heap Size Custom Settings



If you receive heap size error messages at the Apex Jobs list page, changing the heap size may correct your errors. At Set up, navigate to Custom Settings within Custom Code. Click 'Manage' at the Actions menu. Adjust the SalesIntel Batch Size to 500 as a first step and if the errors continue then try 100, for example. These errors typically occur when you have wide-ranging workflows that are invoked by record changes.

The screenshot shows the Salesforce Setup interface. The 'Setup' tab is selected in the top navigation bar. The left sidebar shows the 'Setup' menu with 'Custom Settings' highlighted under the 'Custom Code' section. The main content area displays the 'Custom Settings' page, which includes a table of settings. The 'SalesIntel Batch Size Customization' setting is highlighted, and its 'Manage' action is circled in red.

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a>	SalesIntel Auto Update Setting	Public	List	salesintelio	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a>	SalesIntel Batch Size Customization	Public	Hierarchy	salesintelio	This cu
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a>	SalesIntel Configuration	Protected	Hierarchy	salesintelio	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a>	SalesIntel Mapping Settings	Protected	Hierarchy	salesintelio	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a>	SalesIntel Private Setting	Public	Hierarchy	salesintelio	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a>	SalesIntel States	Public	List	salesintelio	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a>	SalesIntel Update Settings	Public	List	salesintelio	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a>	SalesIntel User Data	Protected	List	salesintelio	

From there you can edit the Heap Batch Size Configuration.



## SalesIntel Batch Size Customization Edit

Provide values for the fields you created. This data is cached with the application.

**Edit SalesIntel Batch Size Customization** Save Cancel

**SalesIntel Batch Size Customization Information**

Location QA-Api-May

SalesIntel AccountAnalysis Batch	<input type="text" value="1,000"/>
SalesIntel ContactAnalysis Batch	<input type="text" value="1,000"/>
SalesIntel ContactEnrichment Batch	<input type="text" value="200"/>
SalesIntel EnrichData Batch	<input type="text" value="200"/>
SalesIntel Enrichment Disposition Batch	<input type="text" value="200"/>
SalesIntel RollbackLogRecords Batch	<input type="text" value="2,000"/>

## API Request Usage

The API limits on your accounts are based on requests IN to Salesforce, not outgoing requests made FROM Salesforce. Our managed package is designed such that most requests required for enrichment are outgoing to fetch data (not pushing in data) and thus have no impact on your limits. Even enriching large amounts of data will have minimal impact on your API allocation.

## Person Account Support

Person Accounts store information about individual people by combining certain account and contact fields into one record. More information can be found in the article [Person Accounts](#). SalesIntel allows enrichment of such records as contact enrichment jobs or as account enrichment jobs.

If you want to completely enrich all contact-based and account-based fields for Person Accounts, set both account and contact enrichment jobs, as Person Accounts contain fields from both account and contact record.

The contact mappings will be considered for Person Accounts > contact enrichment jobs. The account mappings will be considered for Person Accounts > account enrichment jobs. Please refer to the [Object Settings and Field Mappings](#) section for more details.

Currently, we do not support roll back of enrichment jobs run for Person Accounts if they are run as contact enrichment jobs. Rollback is supported for account enrichment jobs.



Inline and triggered enrichment is not fully supported for Person Accounts. If a Person Account is created, account fields for the record will be enriched if triggered enrichment is enabled for Account records, but the contact fields will not be enriched, regardless of triggered enrichment settings.

## SSO Support

SSO is available for clients who have added these features to their plan. To add SSO, please talk to your Success Team.

As part of setting up SSO for your org, you will need to activate the Kinde remote site settings by navigating to Setup > Quick Find > Remote Site Settings. Search for Kinde, click on Edit and activate it as below. Kinde is the SalesIntel identity authorization partner.

### Remote Site Edit

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.

The screenshot shows the 'Remote Site Edit' form in Salesforce. The form has a title bar with 'Remote Site Edit' and buttons for 'Save', 'Save & New', and 'Cancel'. The form fields are: 'Remote Site Name' with the value 'Kinde', 'Remote Site URL' with the value 'https://salesintel.us.kinde.com', 'Disable Protocol Security' with an unchecked checkbox, and 'Description' with an empty text area. At the bottom, the 'Active' checkbox is checked, and a red tooltip message says 'Initially deactivated, make it active and Save'. There are 'Save', 'Save & New', and 'Cancel' buttons at the bottom of the form.

## Support

If you have any questions, please contact us at [support@salesintel.io](mailto:support@salesintel.io)

## Appendix - Prior Release Notes

### Major Release Update - June 2025

- This release will [support SSO](#) for the enrichment application. Please contact your Success Team to enable SSO.

### Major Release Update - May 2025

- [Inline enrichment](#) has received a major redesign. The visual components are clearer and more intuitive. The matching process to find the SalesIntel record with which to enrich now follows the same process as for all other enrichment jobs, offering new ways to match your data, such as by LinkedIn URL. Finally, the SalesIntel [enrichment disposition fields](#) will also be honored by inline enrichment actions going forward, for consistency with all other enrichment activities.



- Support for Person Accounts is more consistent and has been more clearly outlined [in this guide](#).

## Major Release Update - Mar 2025

- You can now **choose to enrich your data with email verified data**. Previously, only the SalesIntel human verified accuracy tier was available for enrichment. Now, the email verified accuracy tier can also be included; you can make this decision on a field by field basis in order to fill more data that matters to you. This setting applies only to contacts and leads.
- The **SalesIntel Machine Verified custom field** has been **replaced** with the **SalesIntel Enrichment Accuracy Tier field**. This field will identify each matched contact as one of Human Verified, Email Verified, Machine Verified, or Outdated.
- Records that are known to be outdated but for which we do not have an update will be **matched and indicated as Outdated** to help you clean up your data set. Outdated applies only to contacts and leads.
- The **enrichment reporting module has been overhauled** entirely with a new, improved, and easier-to-read enrichment report. Have true confidence and understanding in what improvements were made to your data for each and every job you run.

## Major Release Update - Dec 2024

- Happy holidays! The landing page for the enrichment experience has been updated to expose shortcuts to the different areas of settings to improve navigation and help guide new users.
- A new [diagnosis job](#) is available for users. A diagnosis job evaluates the entire object and reports what fields can be updated or added. Field mapping is required before the job to get the best match rate and a clear indication of SalesIntel can enrich your data.
- [Partial lead enrichment](#) is now available. Partial lead enrichment will enrich company information on a lead, even if the exact contact does not match the SalesIntel database, through the use of the email domain and/or additional company information. This additional enrichment helps you prioritize and route more leads more quickly.
- Look forward to a higher match rate with [new matcher fields](#) in our enrichment service. We now use more of your data to find you more, and better, matches.

## Major Release Update - Oct 2024

- [Filters are now available for scheduled and triggered enrichment jobs](#). Set these filters up in the enrichment settings and they will be applied each time enrichment runs to ensure only target records are enriched
- Clone previous manual enrichment jobs to view or re-apply filters using the Copy button on the job table



- View filters from previous jobs in Analyze History records. For existing users, you may need to add this field to your Analyze History record page using the Lightning Page Builder to add field “Filter Expression”. This field will only be available for jobs run after this upgrade.

## Major Release Update - Aug 2024

- This release is primarily a refactor of existing features and functionality - no changes to your experience are expected.
- Of note, running manual, scheduled, or triggered enrichment jobs requires creation of scheduled Apex jobs. Salesforce limits scheduled jobs to a queue of 100. Previously, if there were no slots available in your queue, these enrichment jobs would silently fail. Now, you will receive a warning and will not be able to start the enrichment process until you have queue slots available.

## Major Release Update - Apr 2024

- Only organizations with a dedicated integration admin can run enrichment. The integration admin must be both an active SalesIntel and an active SFDC user, and must have their accounts connected via the SalesIntel oauth integration
- Operations admin role now available for enrichment users. Users who are designated as an “operations admin” in SalesIntel can work together to adjust enrichment mappings and settings for the whole organization. To add operations admins, reach out to [support@salesintel.io](mailto:support@salesintel.io)
- Triggered enrichment on record creation will no longer send an email notification for each job
- Scheduled enrichment will be set and run using your shared SFDC org timezone. Any existing jobs will continue to run at the same “clock” time, but will be represented using the org timezone
- Scheduled and triggered enrichment will be conducted with a system user. All updates will be represented in the Last Modified field by user “Automated Process”
- [Rollback customization](#) is now available in Custom Settings to stop collecting DataChange records for rollback. Use this setting with care.

## Major Release Update - Sept 2023

- Enrichment field mappings are now completely separate from export field mappings. The mappings used by your team when exporting net-new contacts are managed within the [SalesIntel web application](#), while the field mappings used by your team for enrichment are managed within the SalesIntel Salesforce Managed Package.
  - Web App: Salesforce Integration Settings > Export
  - Managed Package: EnrichIntel > Enrichment > Enrichment Settings



- Enrichment on creation no longer requires the creator to have the SI Permission Set; it will work for any created record in your org

## Major Release Update - June 2023

- Improved enrichment tracking and reporting [at the record level](#), including [pre-defined reports](#) for your team
- Access to the entire SalesIntel web application, [directly in Salesforce](#)
- [Improved enrichment scheduling options](#)
- Introduction of an optional [SalesIntel Salesforce app layout](#) for workflow efficiency
- Bug fixes and improvements across the product