Salesforce Managed Package Installation & Configuration Guide

Last update: 4 May 2026

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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

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Major Release Update - May 2026

[Technographic fields for enrichment](#) are now available for all users. Add tech stack details to companies and leads for prioritization and better conversations.

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 Now 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 or your CS/AM team to set your CRM Admin and any additional OpsAdmins.

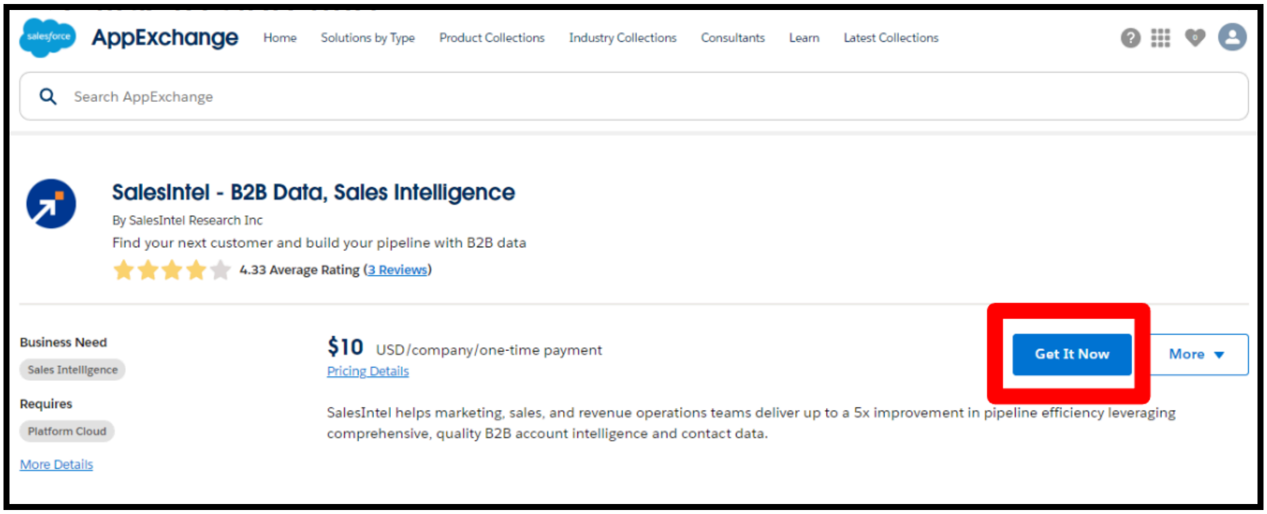
SalesIntel-Salesforce Connector

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.

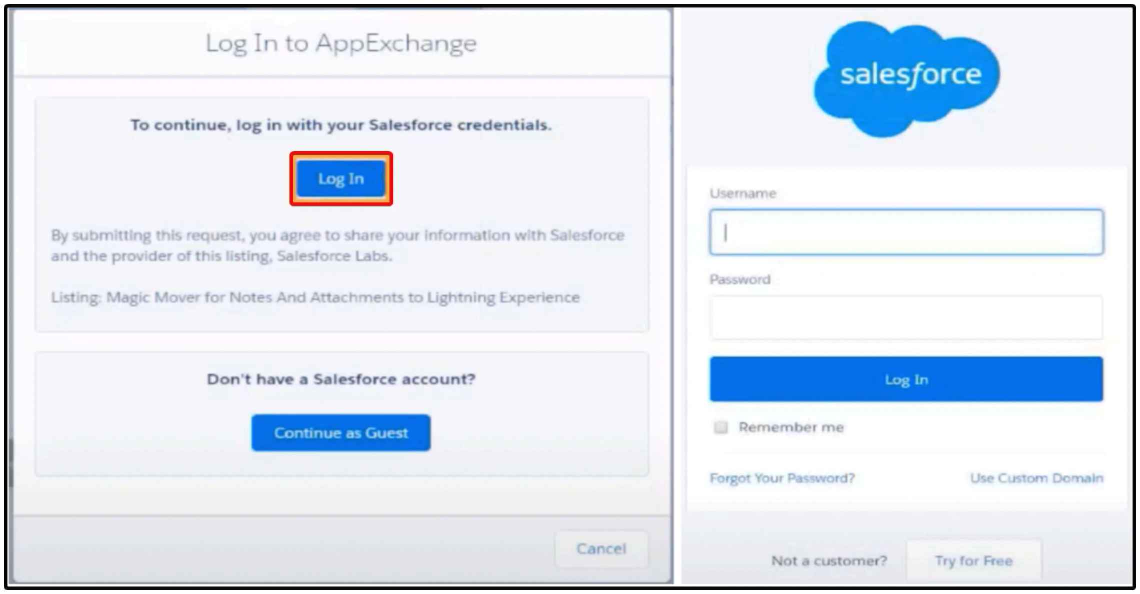
If you intend to use Buying Center enrichment, it is recommended that you review the mappings in use in the connector, as well, as those mappings will be used to create new buying center contacts.

Install Managed Package

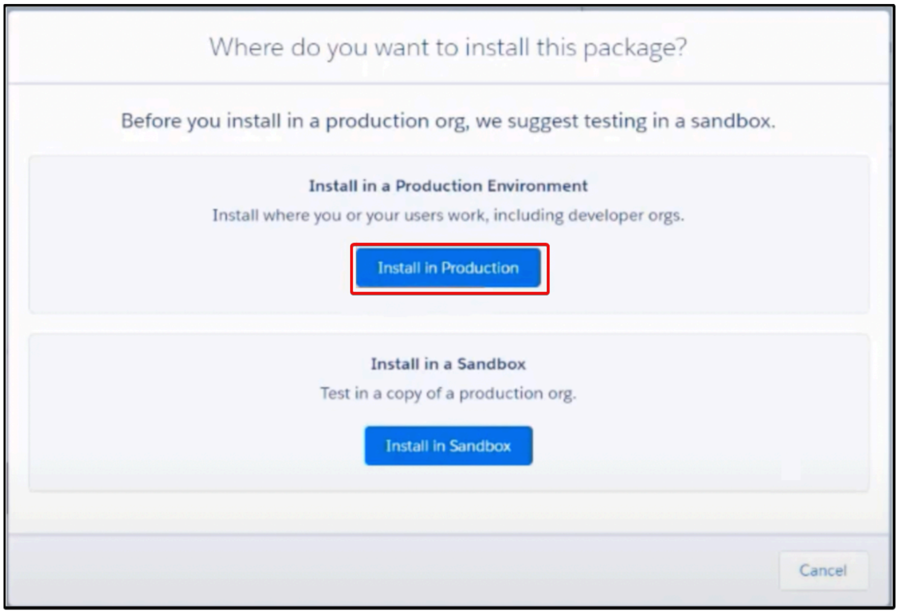
1. Go to AppExchange from the webpage or Salesforce app
2. Search '**SalesIntel'** and access the app in the listing.
3. Click '**Get It Now**' from SalesIntel's application information page (or **Try It Free** if you wish to install in a sandbox environment first).



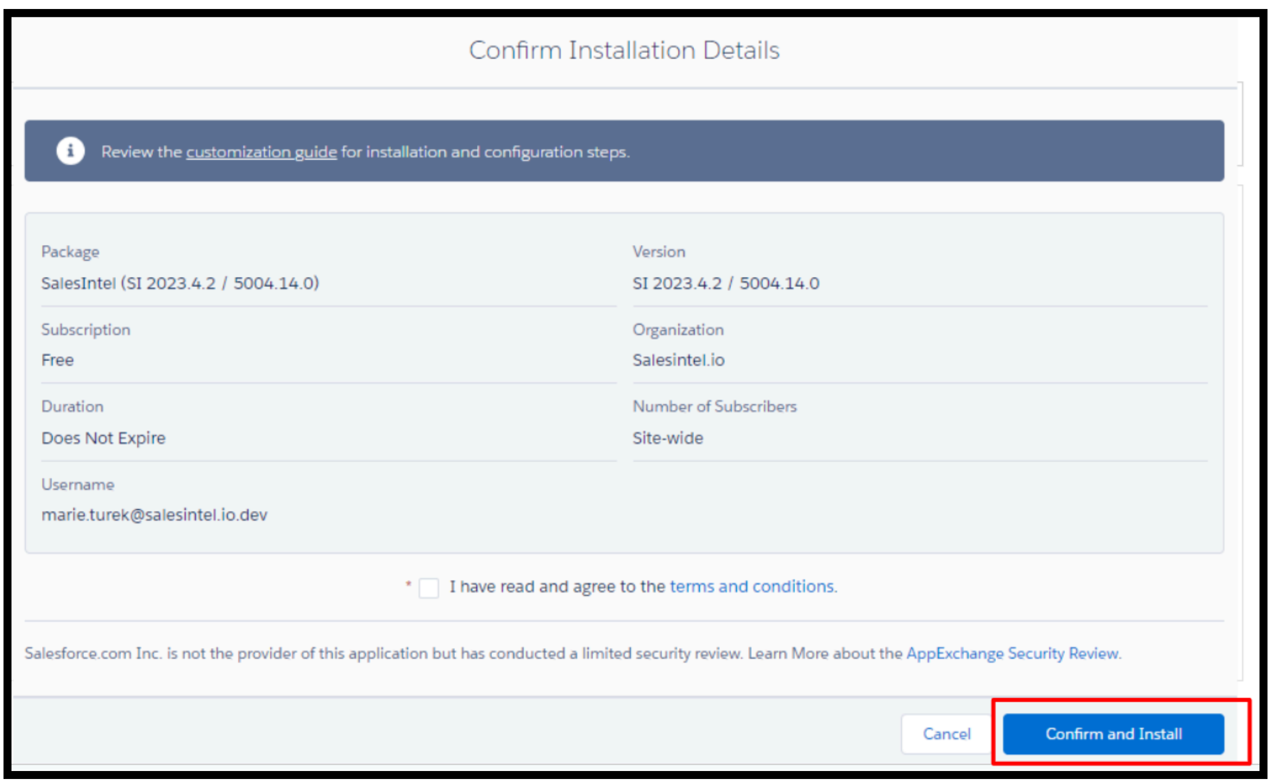
4. Log in to the Salesforce org where the application will be installed, and enter your Admin credentials.



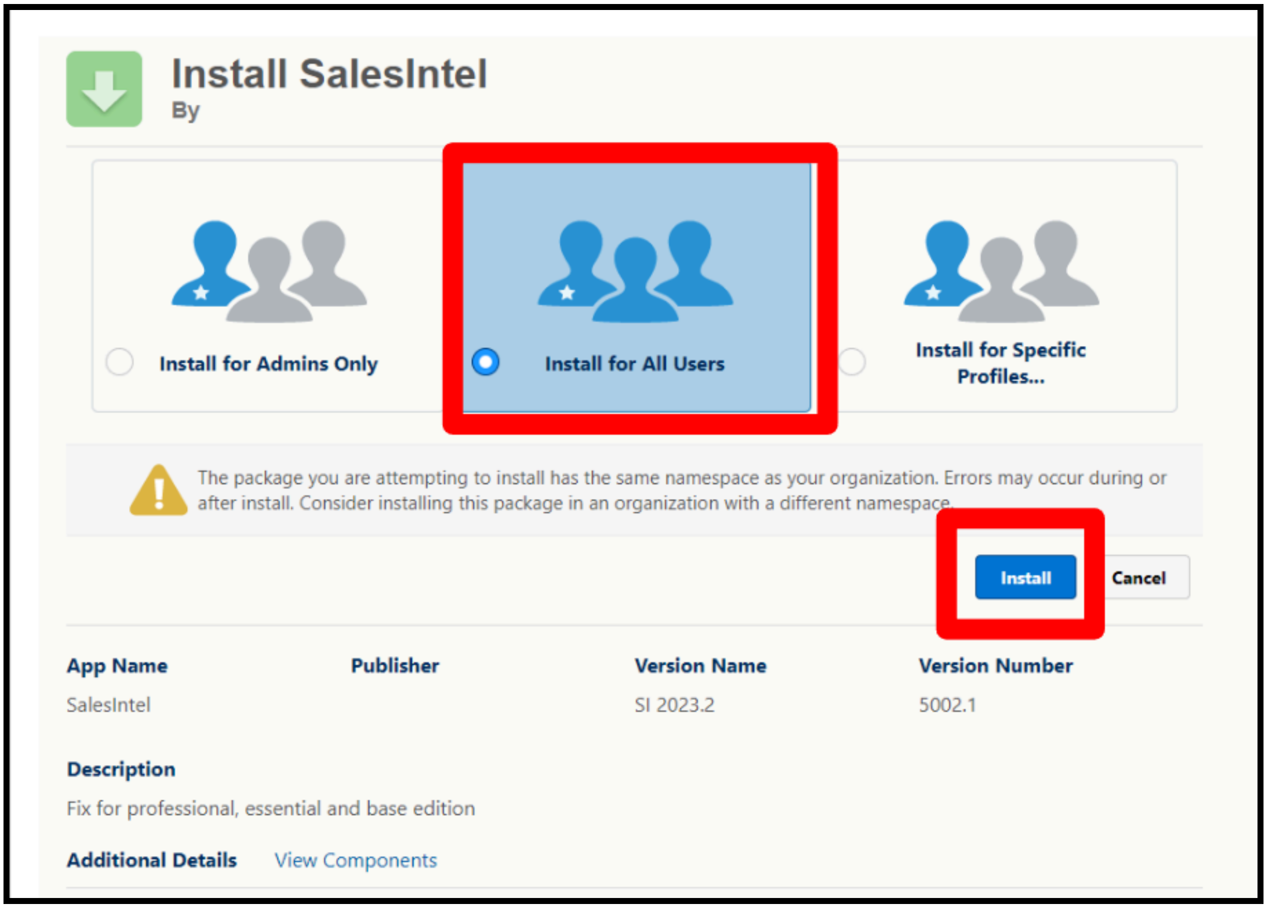
5. Choose to install either in the production environment or sandbox.



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



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.



8. 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.

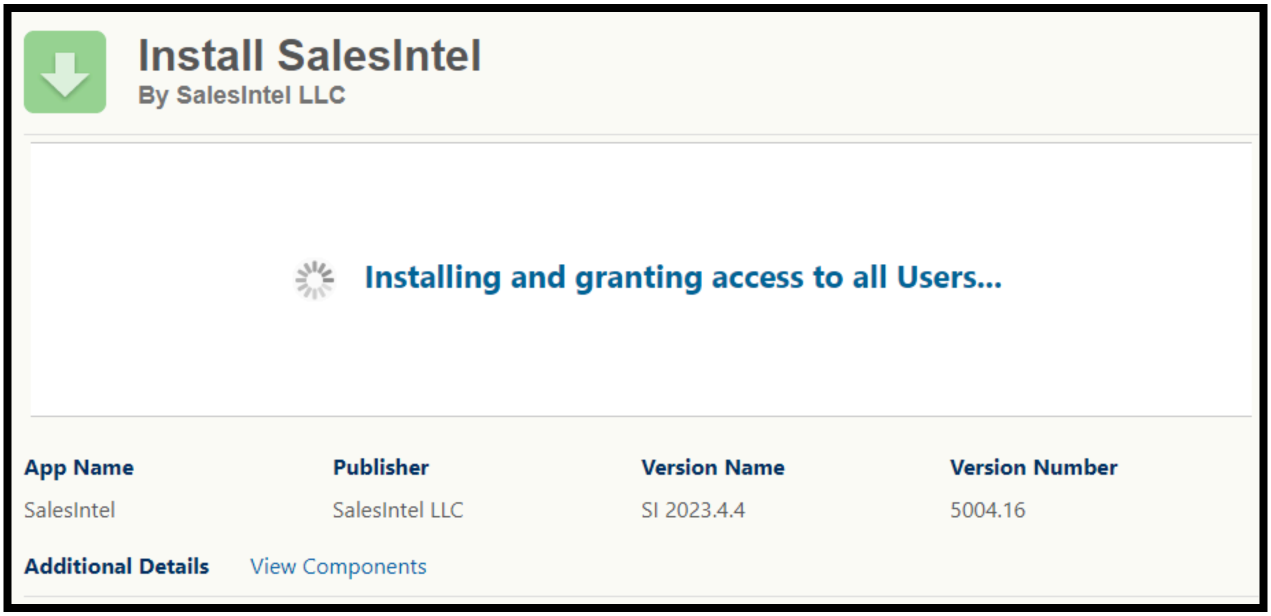
9. Provide access to third party websites by clicking the checkbox next to Yes, grant access to these third-party web sites from Popup and clicking Continue.

   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.kinde.com - Identity management for SSO users; this third party is disabled by default and can be activated when [using SSO]

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. It may take a few minutes for the entire

installation to complete.



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 six components, plus a permission set:

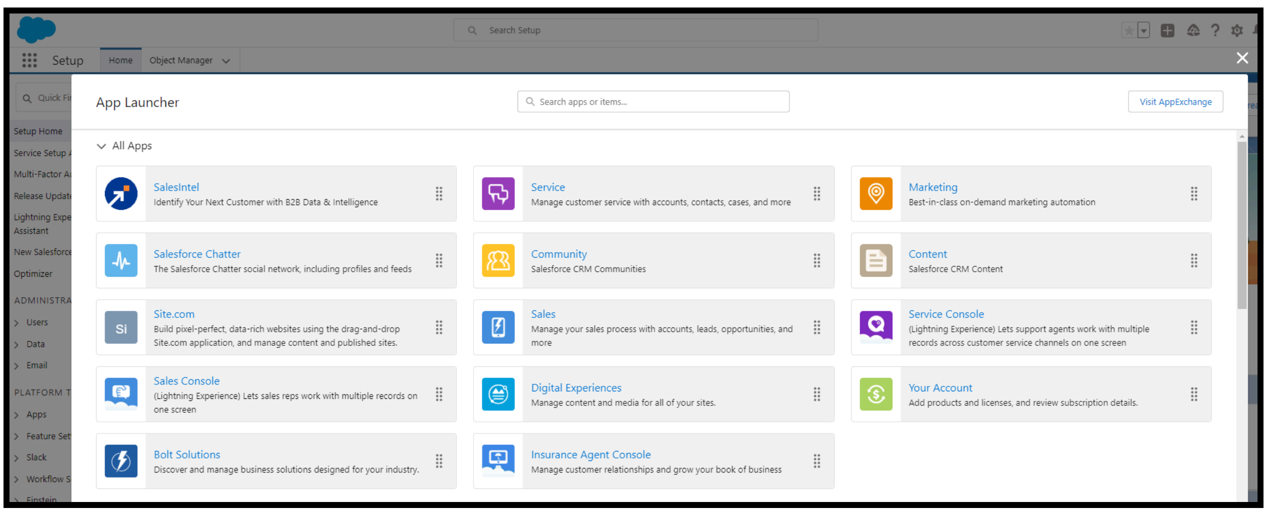
- SalesIntel Application (SalesIntel Tab)
  - SalesIntel prospecting search and other web application functionality. This functionality is identical to the standalone web application. Find web app training here.
- SalesIntel EnrichIntel (SalesIntel EnrichIntel Tab)
  - Settings and configurations for 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.

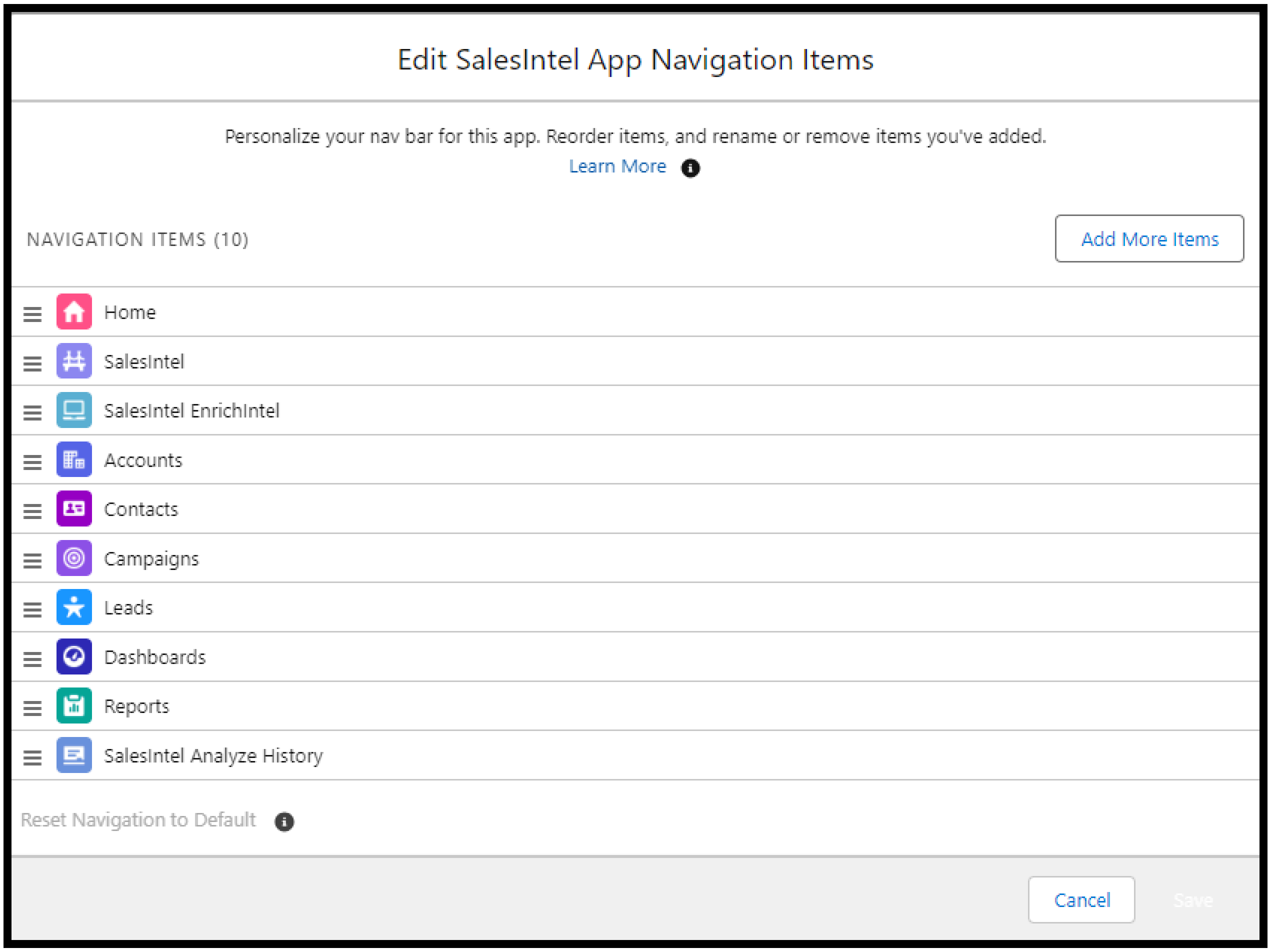


Navigation Bar Configuration

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 Items. Drag and Drop the tabs to your desired location.



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.

Start by going to the SalesIntel EnrichIntel tab and selecting Enrichment Settings from the Welcome menu (or select the object of interest from the Quick Action Menu). For each object you'd like to enrich, the process will be the same.

Field Mappings

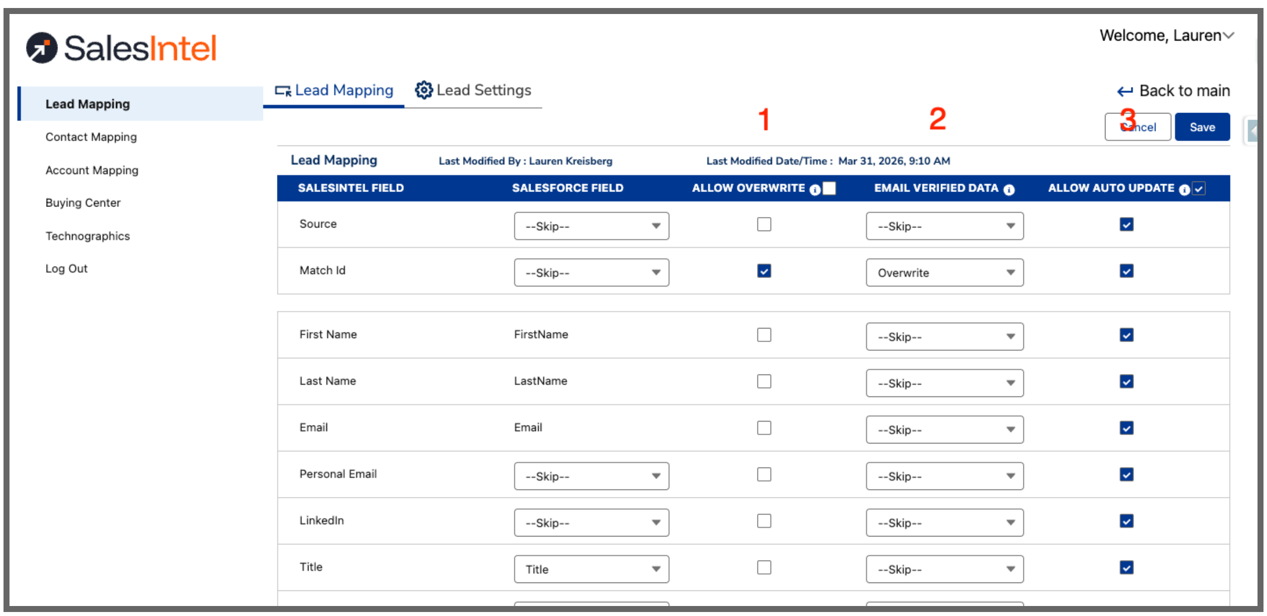
First, scroll down to map the fields in your Salesforce instance to the SalesIntel fields. For each field, you will also be able to set an Overwrite directive (1). If this value is unchecked, your original data will be preserved. If this value is checked, SalesIntel will overwrite your data with updates 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.



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

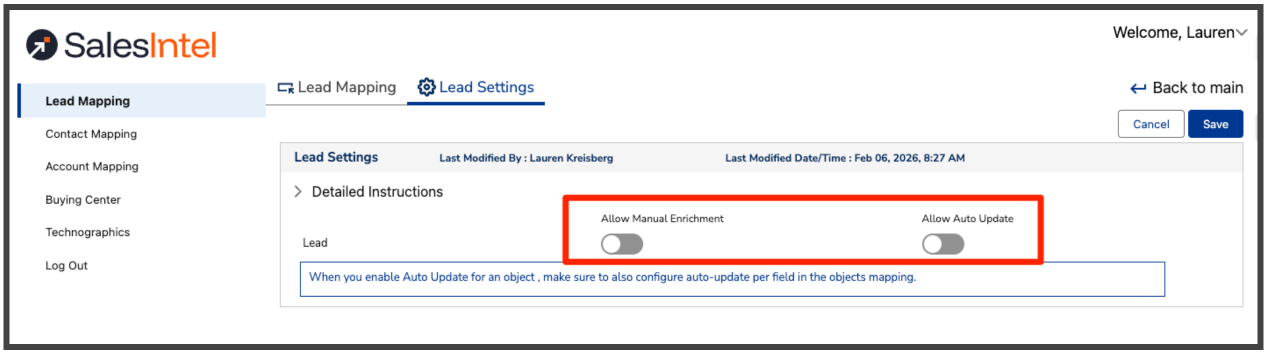
Starting with package version:

- Version Name: SI 2023.4.2
- Version Number: 5004.14

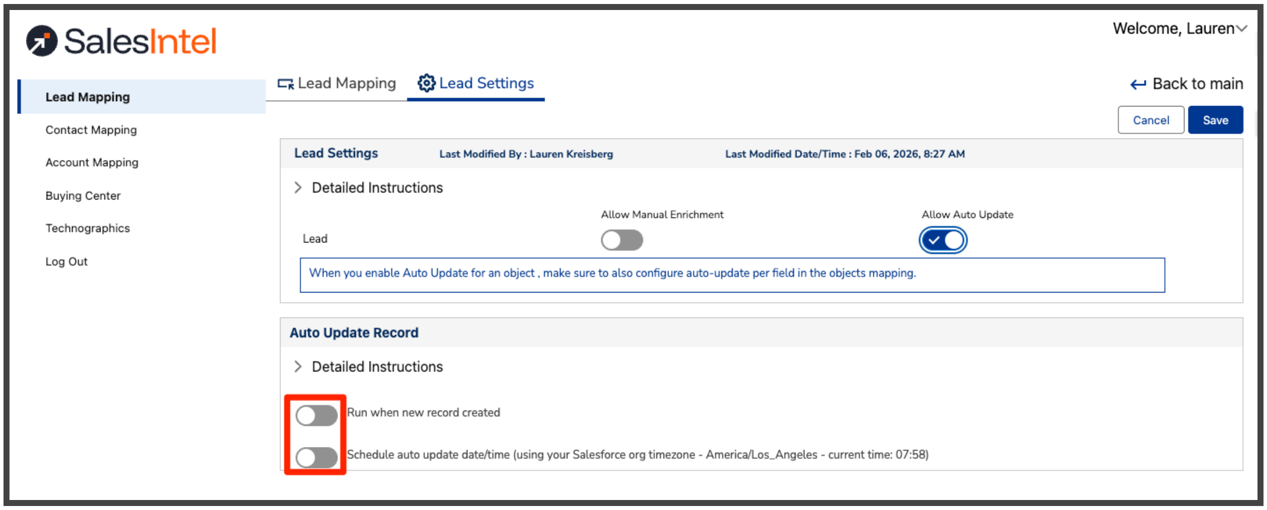
SalesIntel supports Custom Address fields. Please note these limitations.

Enrichment Job Settings

Next, 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.



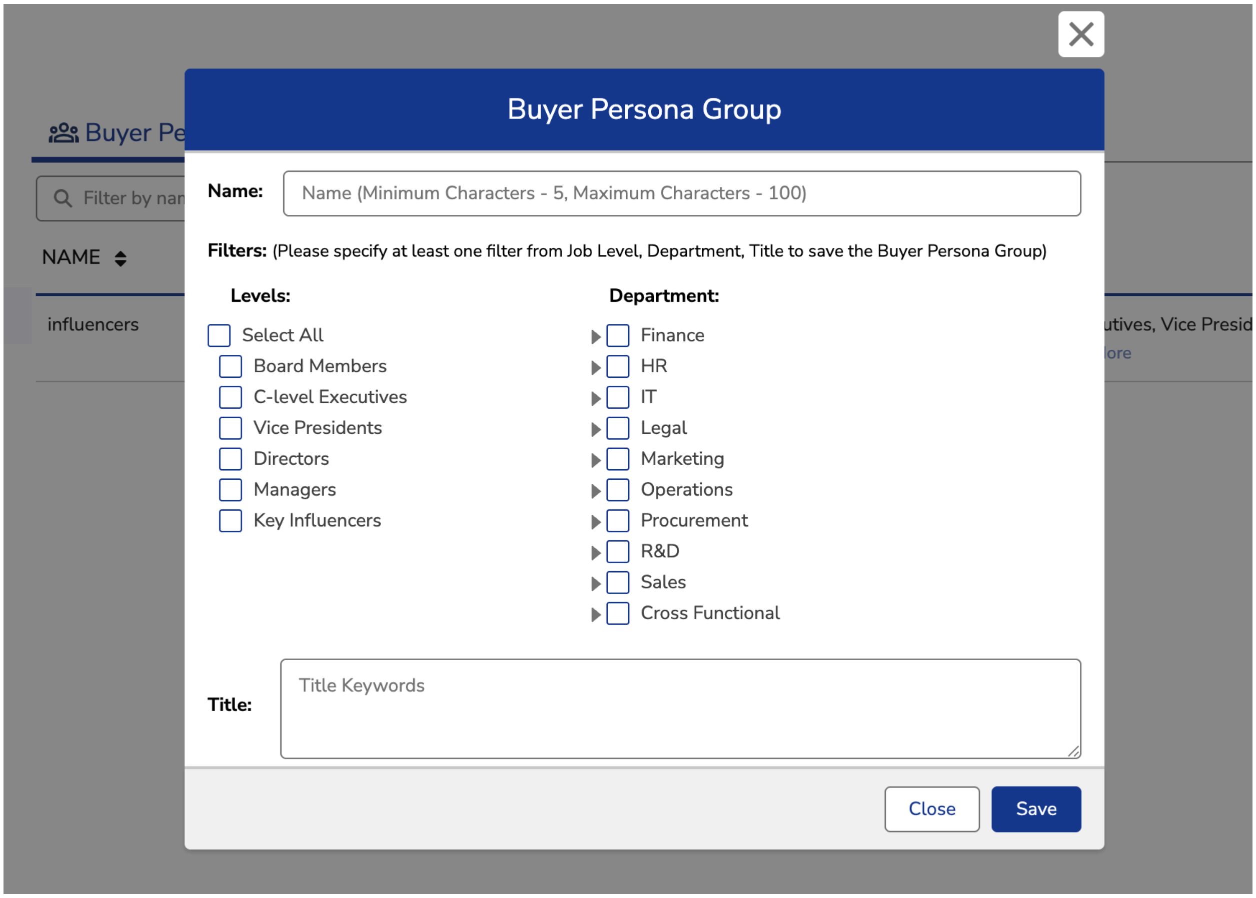
If you turn on Auto Update, additional settings will appear to configure your auto enrichment. These details will be covered later. While these toggles remain off, no auto enrichment will be run.



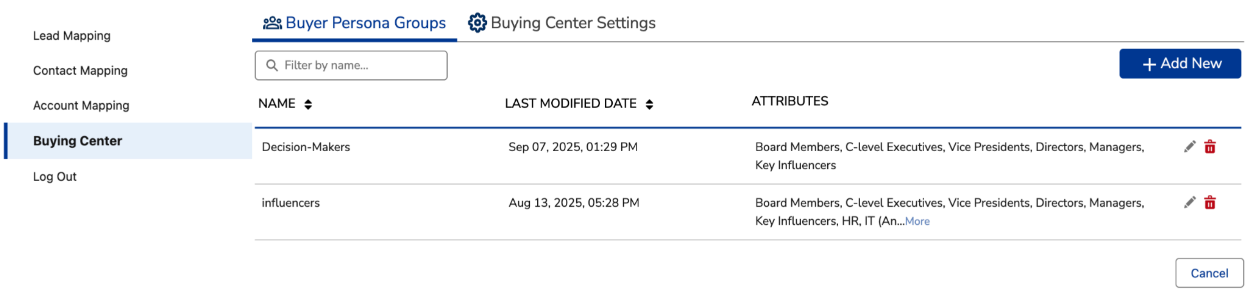
Buyer Persona Groups

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.



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



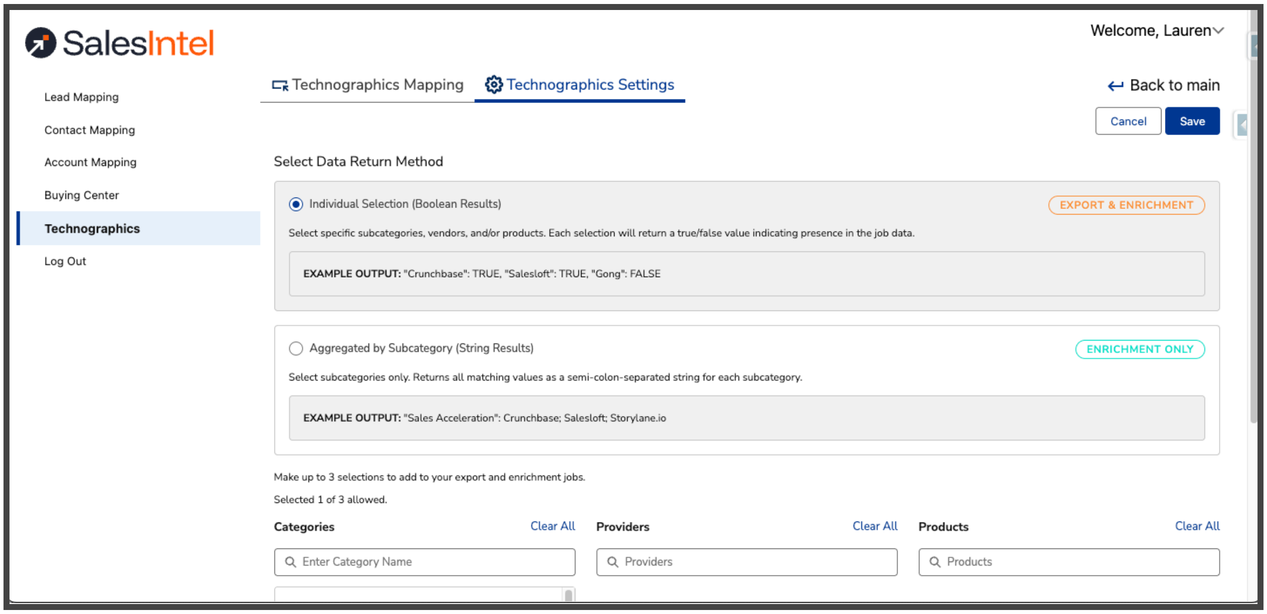
Please note that buyer persona groups are mandatory for creating buying center enrichment jobs. Once they are linked to asynchronous jobs (scheduled or triggered), they can't be edited or deleted unless you first remove them from those job settings.

Adding Technographics

Tech stack details can be included in company and lead enrichment jobs. To select technologies, go to *Settings > Technographics*.

There are two ways to add technographic details:

1. **Individual selection** allows you to choose products, vendors, or subcategories individually. Each selection will be written back to your file as a true/false (yes/no) value. This option is best if you have a small set of very specific products of interest. This option can also be used to include technographics when you export data from searches.
   Answers the question: “Does this company use HubSpot?”
2. **Aggregated by Subcategory** allows you to choose a specific type of product. Each selection will be written back to your file as a text value. One or more products for each subcategory will be written back, depending on the company’s usage of that technology. This option is not available for exports at this time.
   Answers the question: “What CRM does this company use?”



Once you have selected the technographics of interest, you must map these to their designated fields in Salesforce, one field per selection. When using Individual Selection, you will map to a checkbox (Boolean) field. When using Aggregated by Subcategory, you will map to a text field. To map your selections, select the Technographics Mapping tab.

If you have already selected and mapped technographics in the SalesIntel web app, these settings carry over to enrichment without further work. You can modify them in either place.

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)

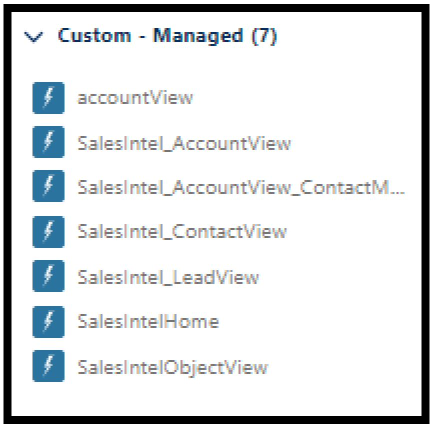
To install the components on your page views, follow these steps:

- 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:

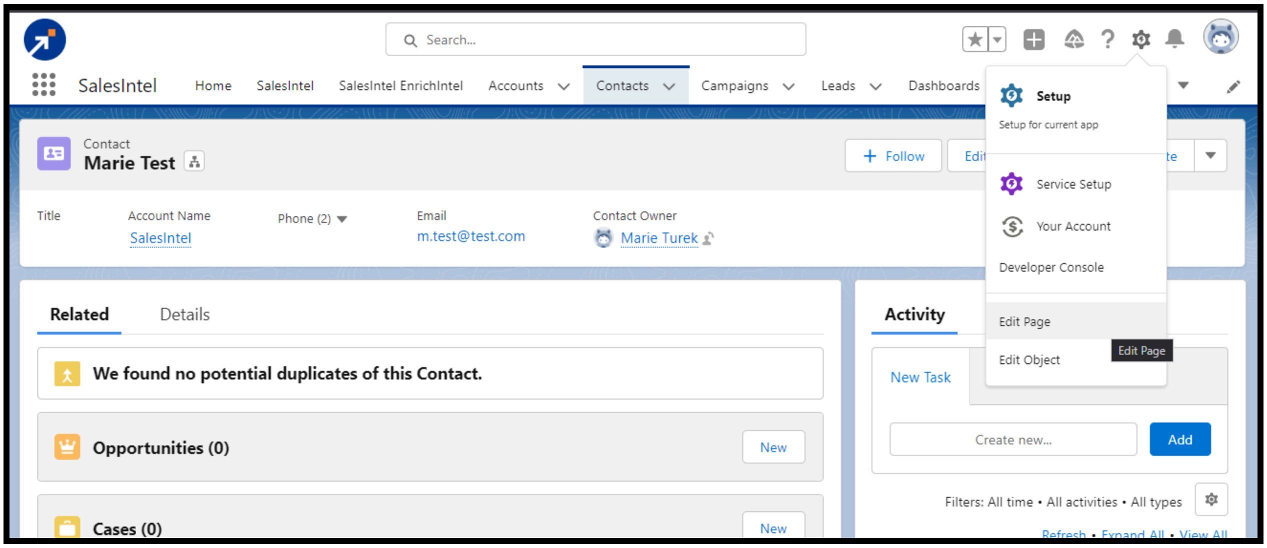
- SalesIntel_AccountView - Account Object
- SalesIntel_ContactView - Contact Object
- SalesIntel_LeadView - Lead Object



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.

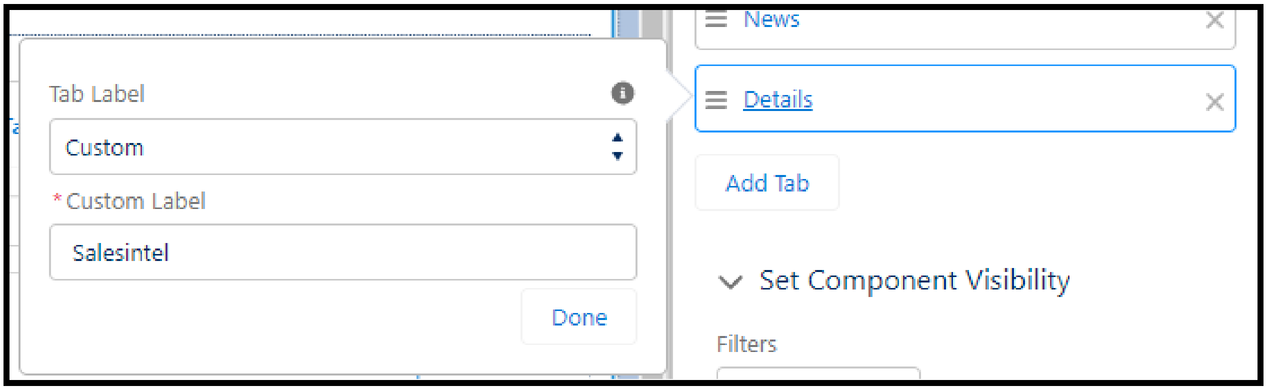
For more specific instructions, follow this step by step install, using the Contact object as an example. The same process can be followed for Lead or Account objects.

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

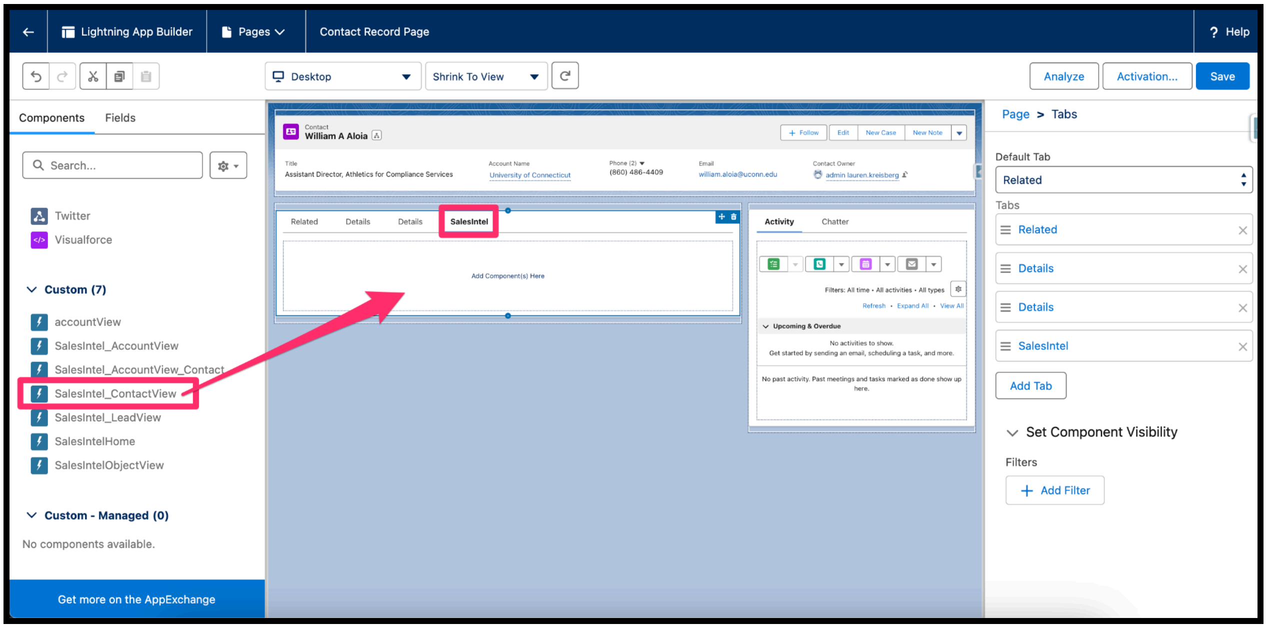


2. Highlight the section where you wish to place the Salesintel tab. This will activate the tabs table customization panel on the left of the screen.

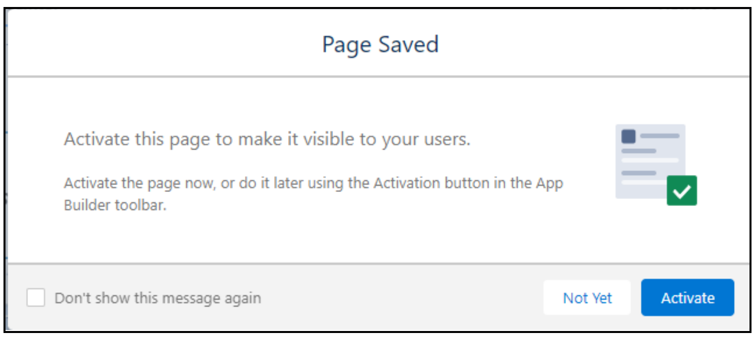
3. Add tab from right palette as click to add tab > Click details > Select custom from drop down > Give label as SalesIntel > Click Done

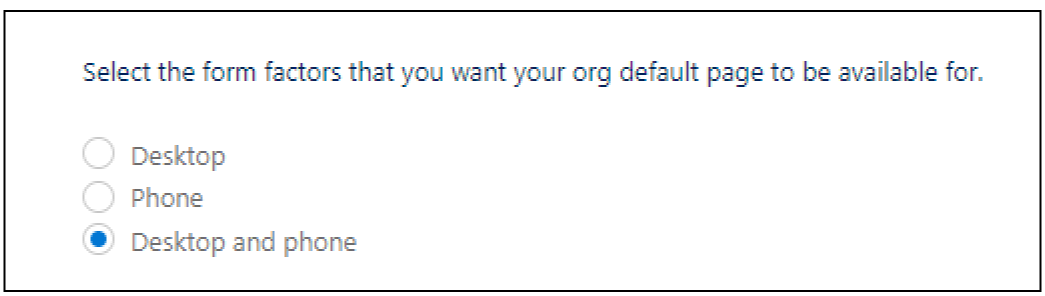


4. Now we will drop the custom component into the tab we have just created. First, select the Salesintel tab we have just created. This will highlight the components list on the left of the screen. Scroll to the bottom under Custom - Managed. Choose **SalesIntel_ContactView** and drag it to the "Add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

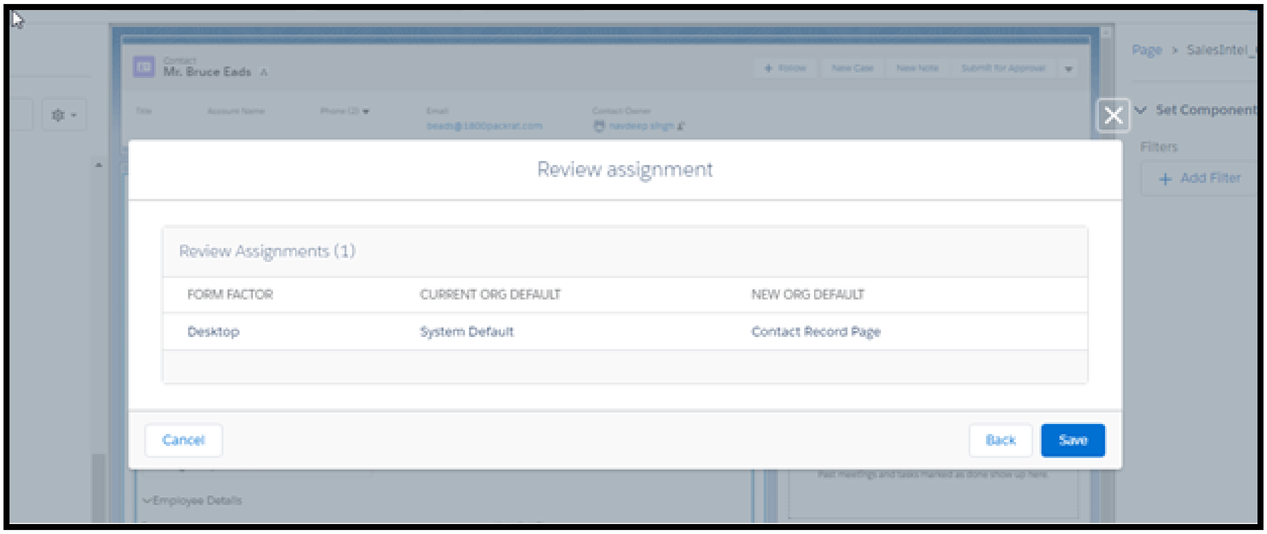


5. Click Save. You may need to Activate the page and Assign it as the Org Default as shown below, if prompted.





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:

First Enriched Date	Date that data was added to the record for the first time.
Last Enriched Date	If the record has produced a positive Enrichment, then the date that Enrichment was made will populate. Each Enrichment event will update the field
SalesIntel Enriched?	If SalesIntel has added data to a record with the checkbox will be marked TRUE
Attempted Enrichment	SalesIntel has read the record and has attempted to enrich the data
Attempted Enrichment Disposition	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)
Last Attempted Enrichment	Last date that SalesIntel attempted to add data to the record.
Last Matched Date	Matched Date would indicate that the record has matched to a record in the SalesIntel database, whether the data has enriched or not.
SalesIntel Up-To-Date	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.
SalesIntel Machine Verified (deprecated)	If an enrichment was attempted but the record is marked as Machine verified in the SalesIntel database then the box will be checked TRUE. As of March 2025, this field is no longer in use or updated. Please reference the SalesIntel Enrichment Accuracy Tier field instead.
SalesIntel Enrichment Accuracy Tier	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.
SalesIntel Changed Job (contacts only)	For contacts only, if the person is found to be at another organization now, this checkbox will be marked TRUE
SalesIntel Job Change Date (contacts only)	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.
Buying Center Enriched (contacts only, when Buying Center Enrichment is enabled)	The value will be ‘Created’ for contacts exported during buying center enrichment jobs.

Enrichment Jobs

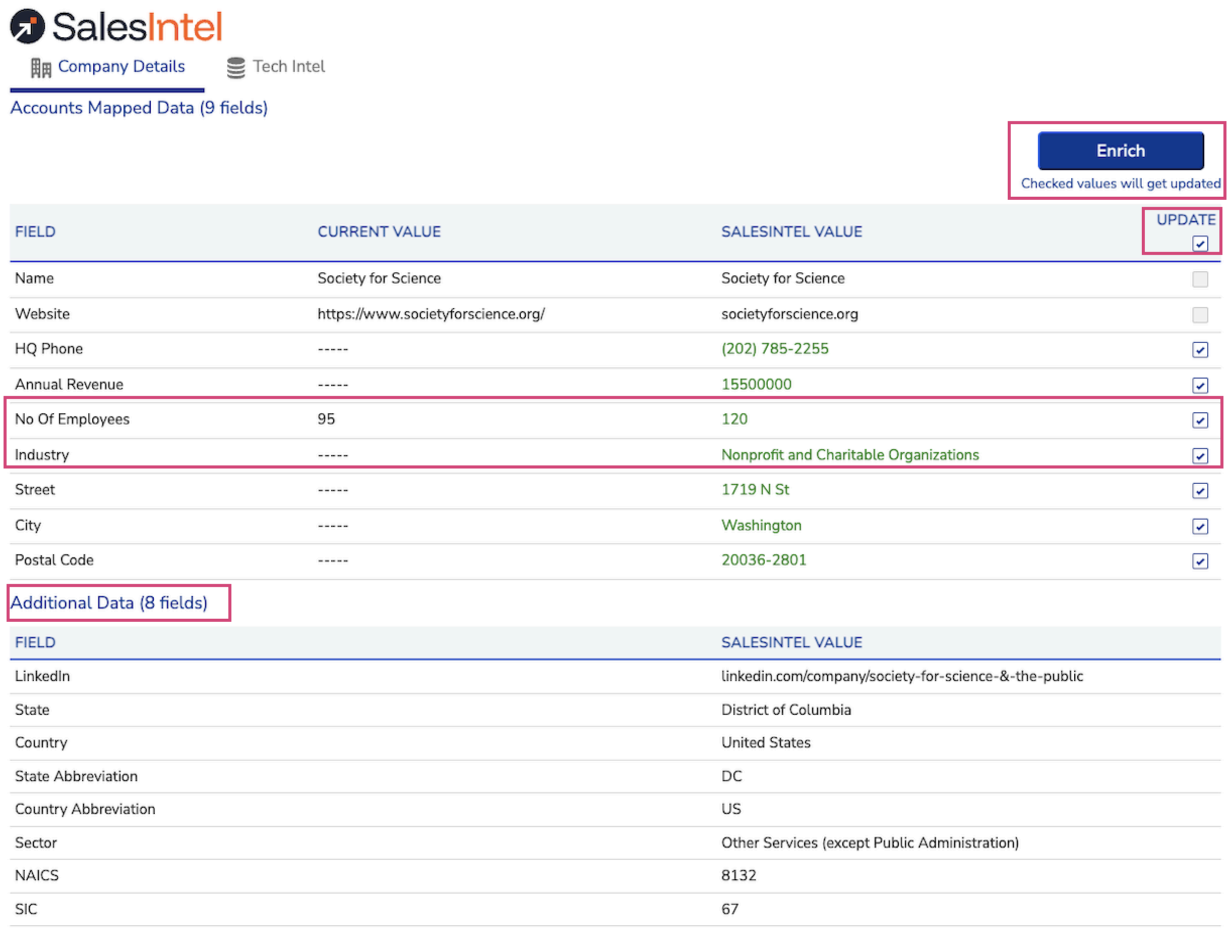
Contact and Company Enrichment

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.


SalesIntel

Company Details | Tech Intel

Accounts Mapped Data (9 fields)

Enrich
Checked values will get updated

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

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

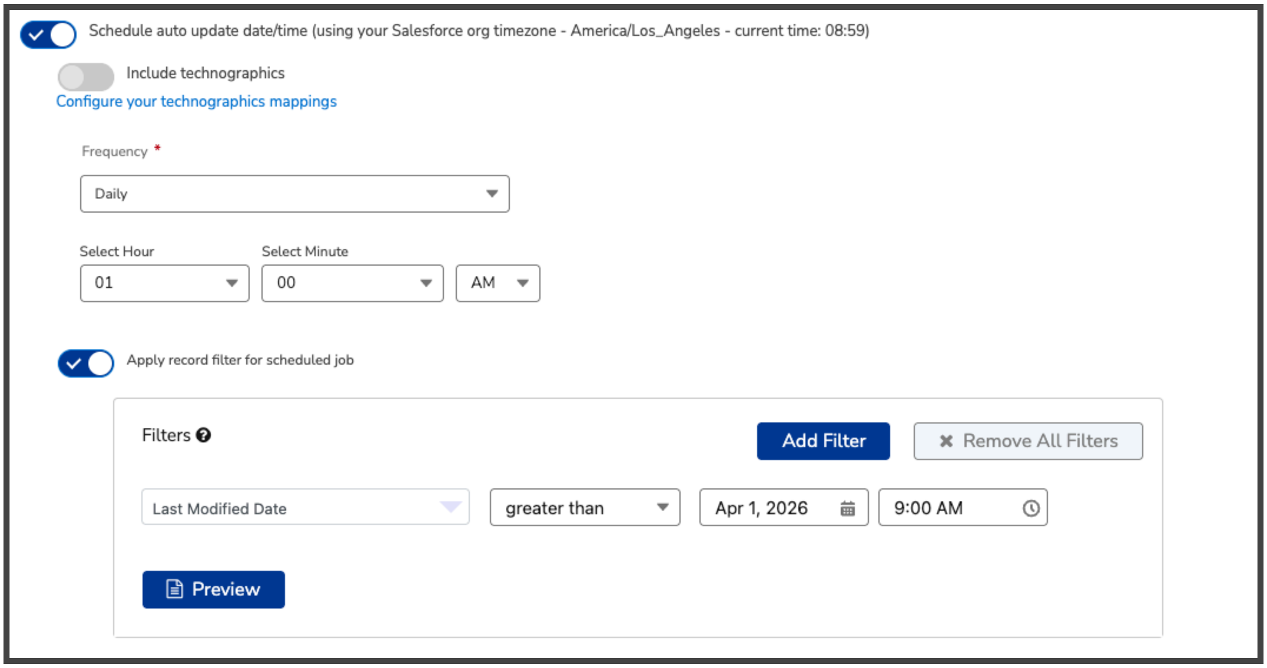
Note: For scheduled auto-enrichment, SalesIntel recommends using non-operational hours, such as evenings and weekends, to avoid any potential disruption to workflows, as Salesforce will need to re-index updated data.

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, technographic option, 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.



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.

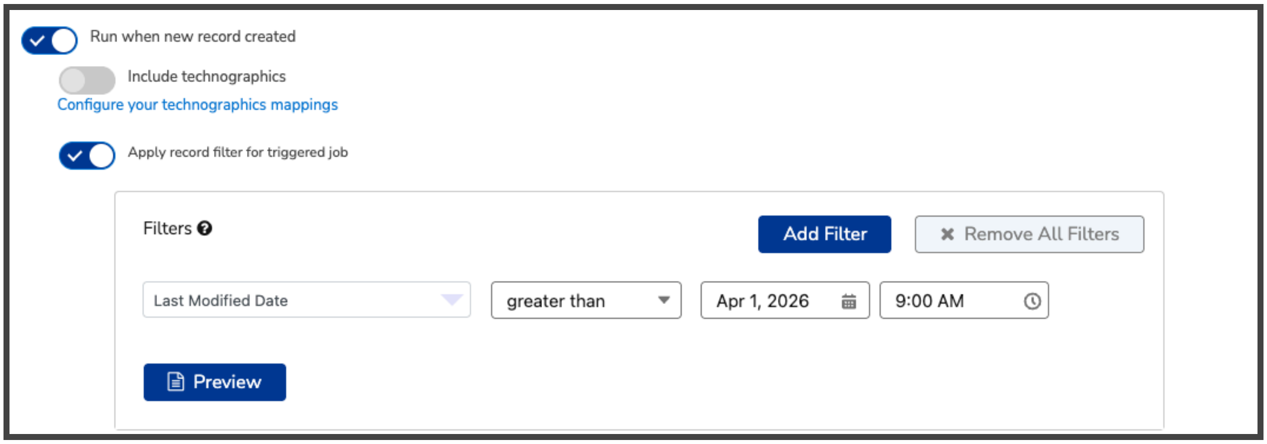
Triggered Enrichment

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, the technographic option 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 (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.



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

Manual Enrichment

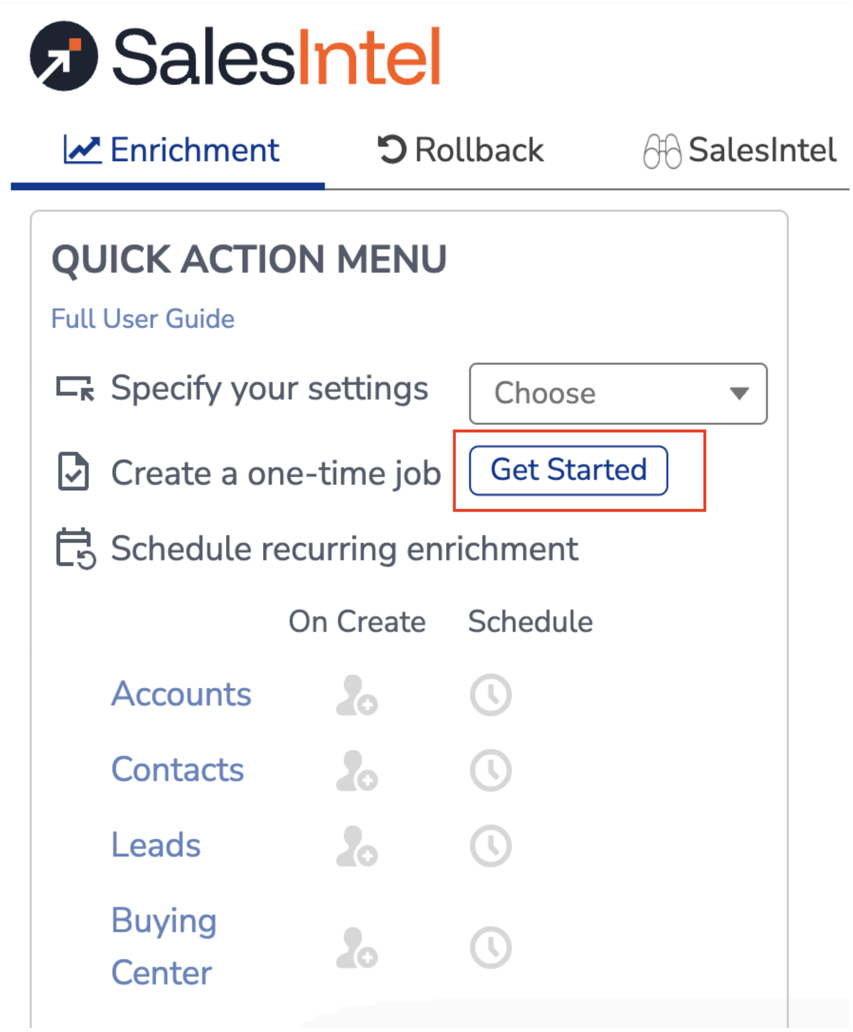
Manual enrichment is a one-off task based on defined criteria, to enrich a set of records for Account, Contact, or Lead objects. Only the integration admin or operations admin can create these jobs. Manual enrichment is the only type of asynchronous enrichment that requires manual intervention to complete 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:

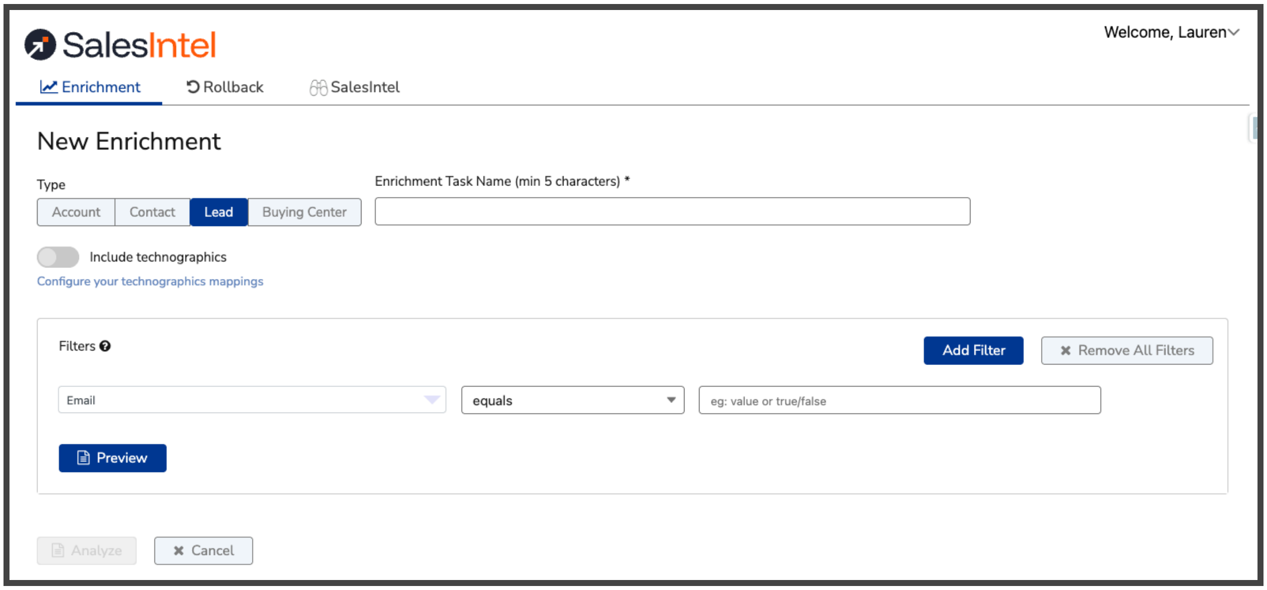
- Analyzing - Opportunities and associated accounts are being analysed to estimate the number of contacts which can be exported based on the buying center and other export criteria.You'll be notified once analysis is complete.
- Report Ready - The analysis is complete and the job report is ready for 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.



2. Choose an Object to enrich (account, contact or lead records).
3. Enter the enrichment task name (minimum 5 characters).
4. Choose whether to include technographics (for Account or Lead enrichment only).
5. 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



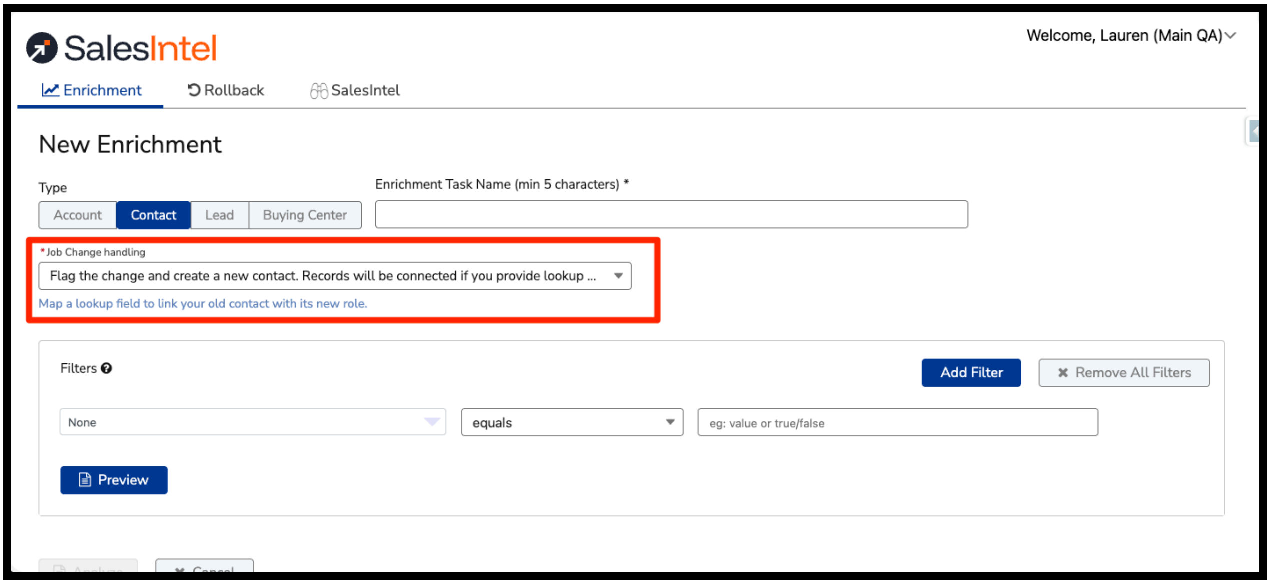
6. Select ‘**Analyze**’ to prepare Enrichment Task.

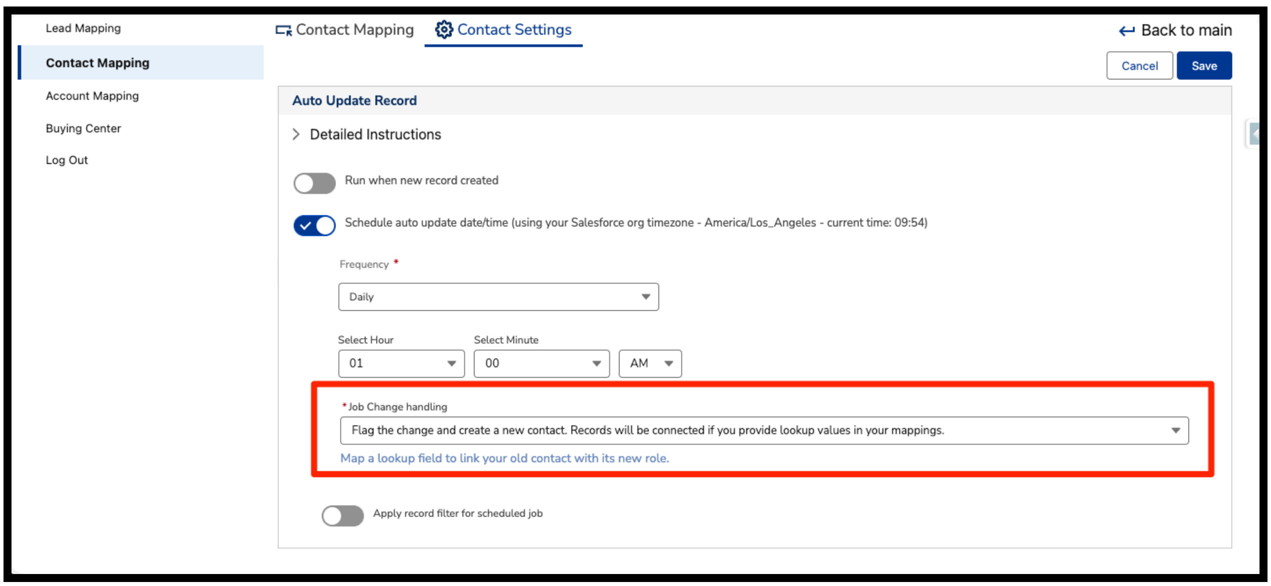
7. The new enrichment task will enter the queue in the Analyzing state. Depending on queue traffic and the size of your batch, this may take anywhere from a few minutes to several hours to complete. You will need to come back to this view to start the enrichment process after reviewing the results.

Identifying Job Changes

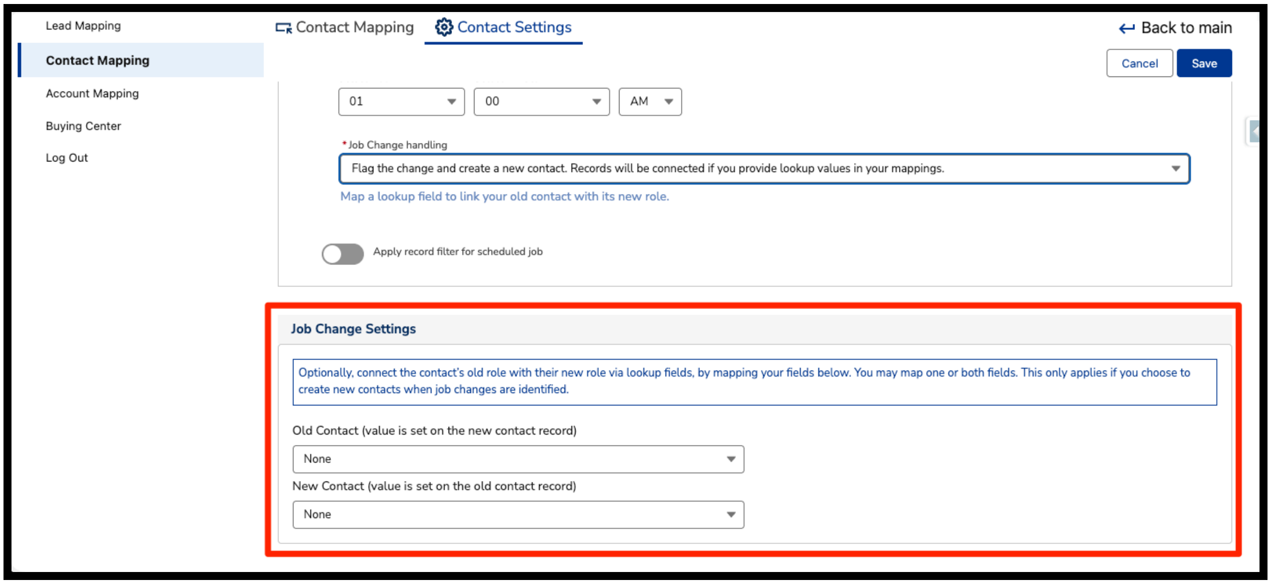
When a contact changes jobs, it’s important to understand that movement and keep your CRM up-to-date. By default, SalesIntel will mark the Changed Jobs disposition field and indicate the date when that change was identified in your CRM. However, you can also set up your manual or scheduled job to create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





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.



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:

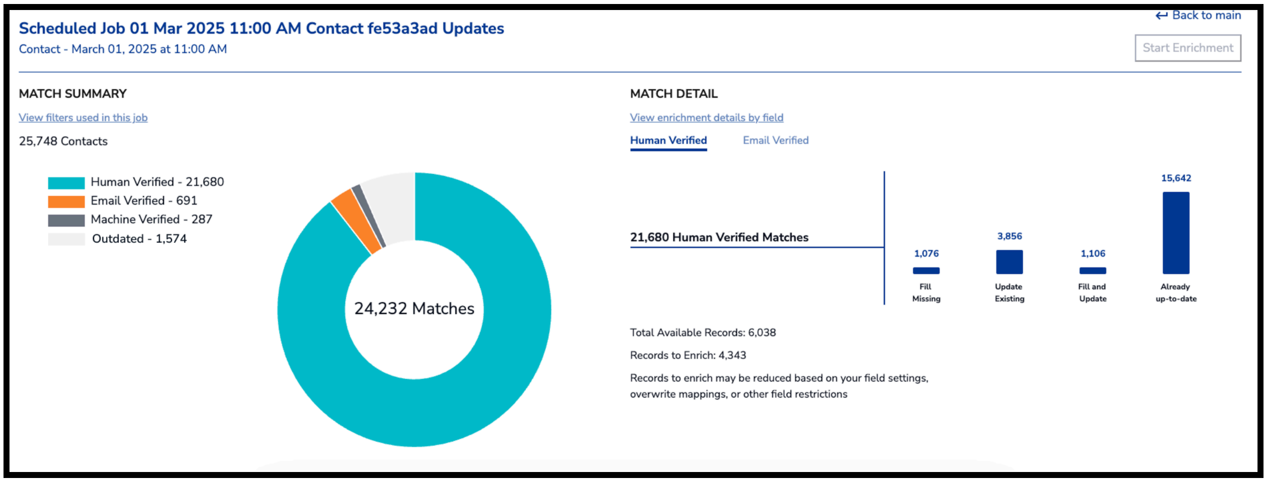
1. Go to Setup > Object Manager > Contact > Fields & Relationships > New
2. Set the field type as Lookup Relationship
3. Set the related object to Contact (two contacts will be related to each other)
4. Set the field label to Old Job (or any name you'd like - as long as it's clear to you that, when you 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

Human Verified   Email Verified

Filled Fields 621 | Updated Fields 365 | Also Available 1,872

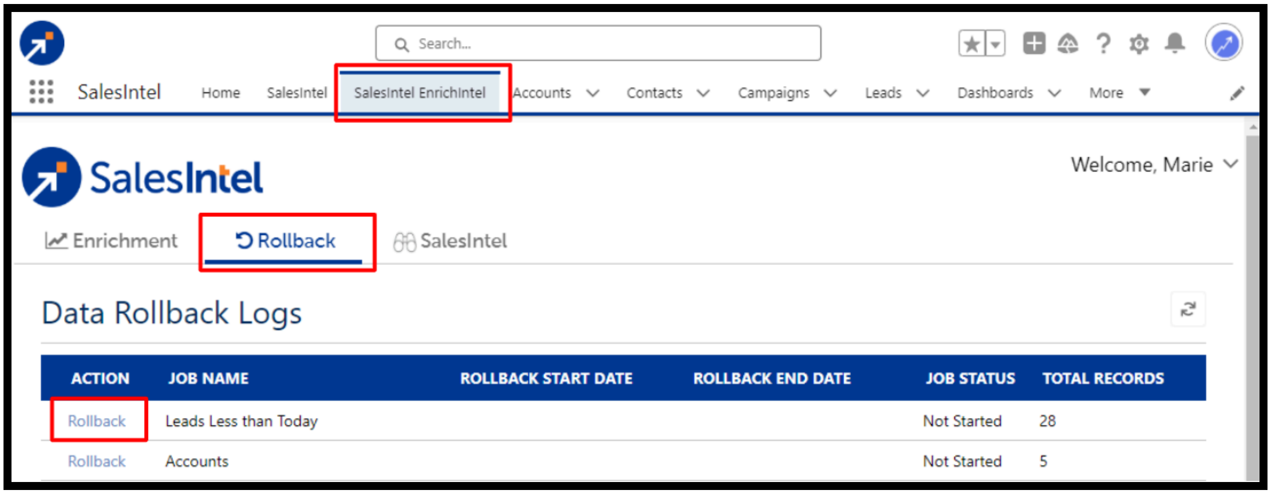
SALESINTEL FIELD	SALESFORCE FIELD	FILL DATA	UPDATE DATA	ALLOW UPDATE	ALSO AVAILABLE
First Name	FirstName	0	0	✓	
Last Name	LastName	0	0	✓	
Email	Email	0	0	✓	
Title	Title	0	365	✓	
Job Department	Department	0	0	✓	
Work Phone	Phone	0	0	✓	
Mobile	MobilePhone	0	0	✓	
Street	MailingStreet	0	0	✓	
City	MailingCity	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

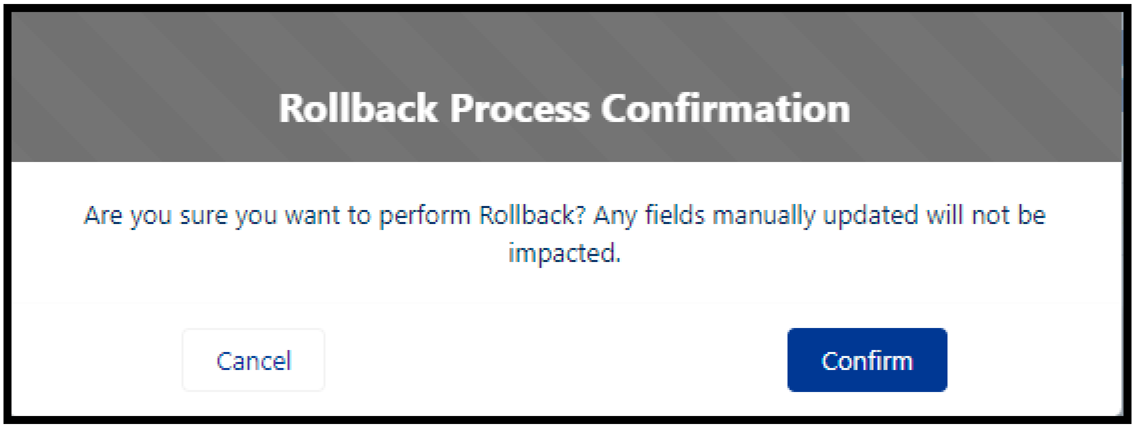
Occasionally, you may find it necessary to roll back an enrichment due to mistakes in mapping fields or applying settings. You have 15 days to roll back a job. Rolling back a job will reset any fields updated by that job back to their status before the job started. Any further changes made to these fields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



3. **Confirm** Rollback to continue.



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.

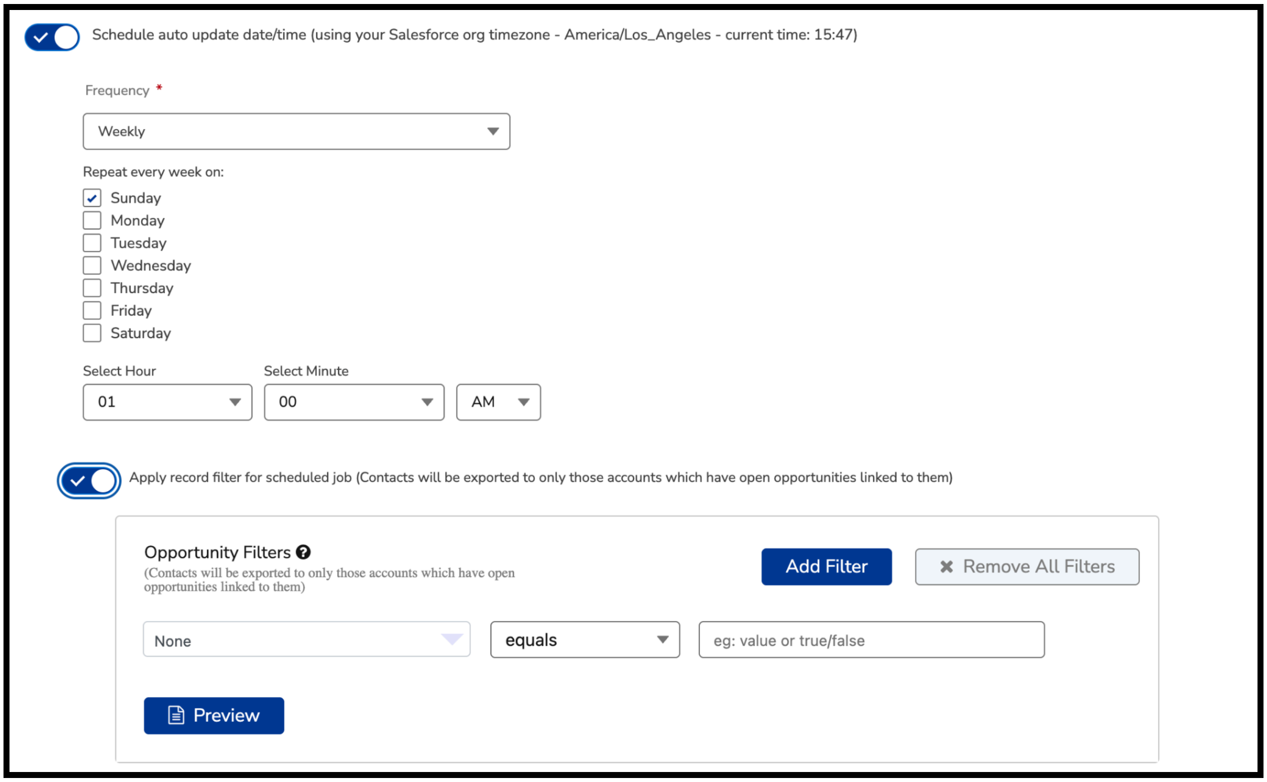
A snapshot of the CRM Admin's export mappings at the start of the job can be seen from "View Export Settings" in the job report.

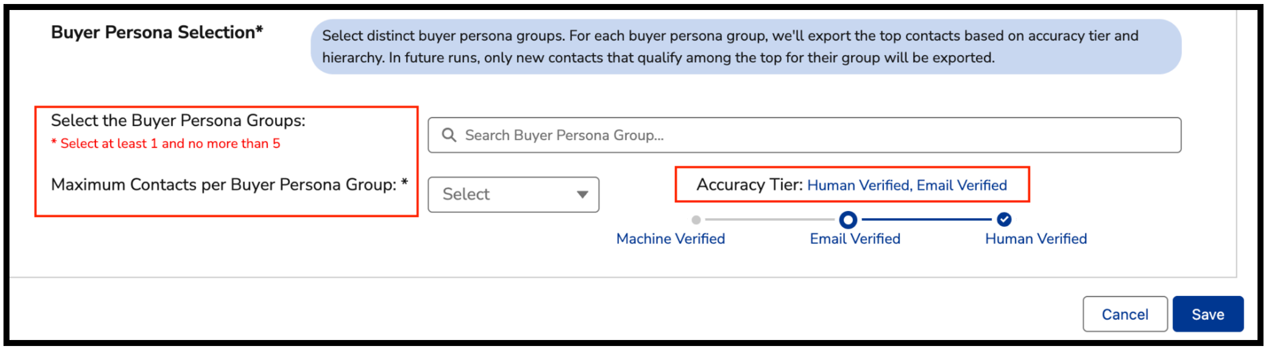
Scheduled Buying Center Enrichment

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.





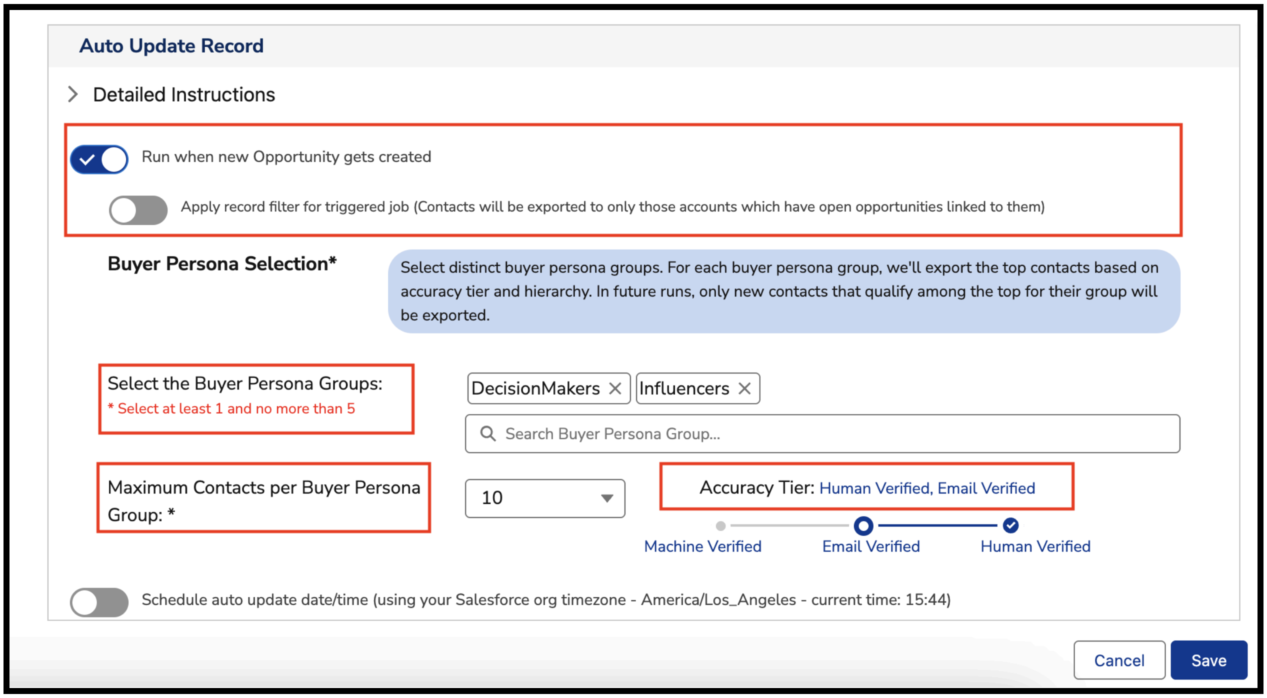
Triggered Buying Center Enrichment

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.



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.

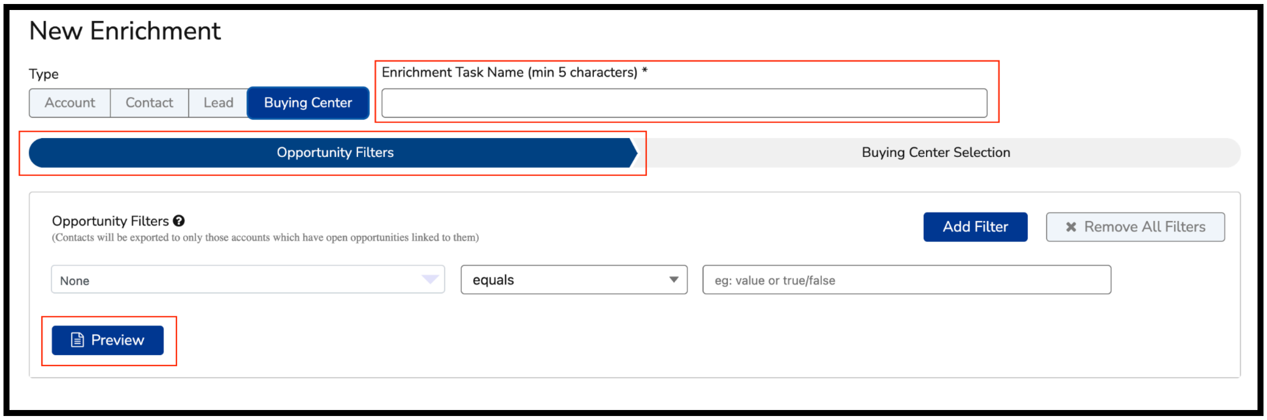
The stages in a manual enrichment job are as follows:

- 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.

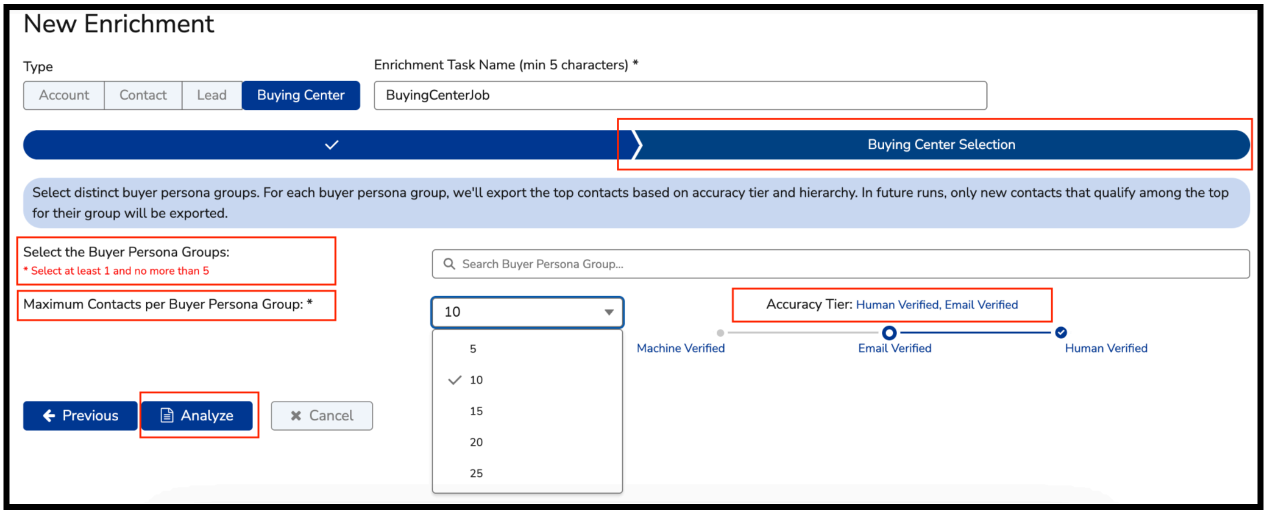
Step 1: Opportunity Filters
Select the opportunities which you want to enrich by applying optional filters. You can click on "Preview" to view the number of opportunities meeting the filter criteria. Buying Center

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.

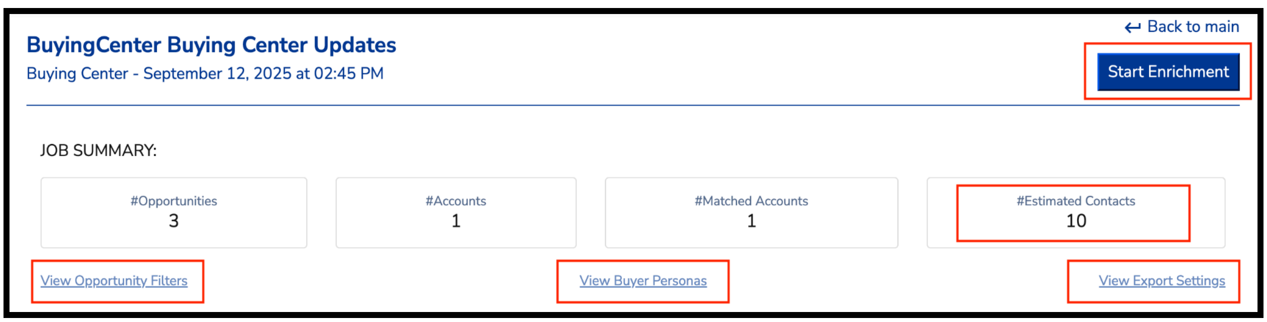
Buying Center Enrichment Reporting & Analytics

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.

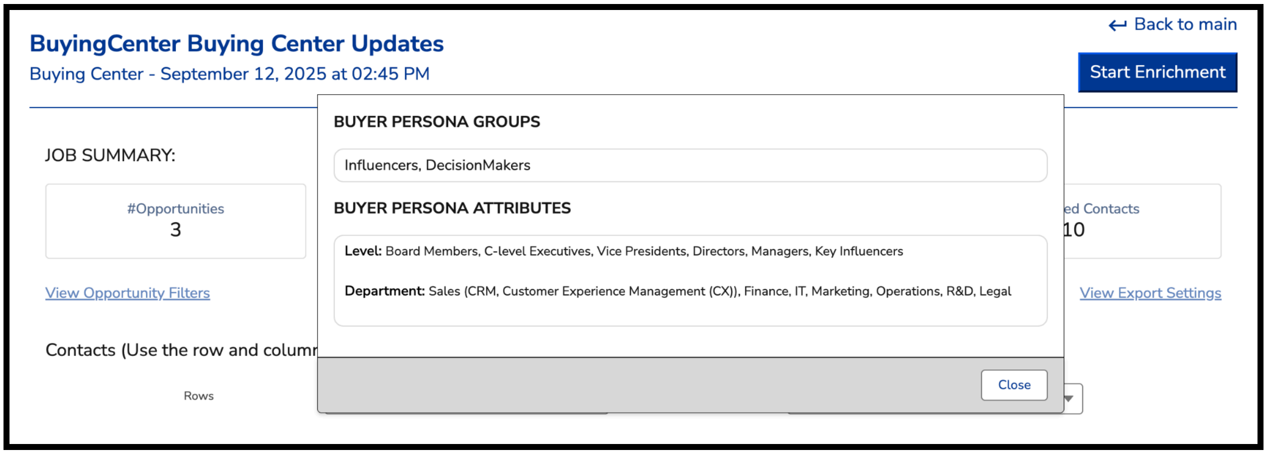
The pre-enrichment and post-enrichment reports are slightly different in terms of job summary.

The pre-enrichment report has below major highlights:

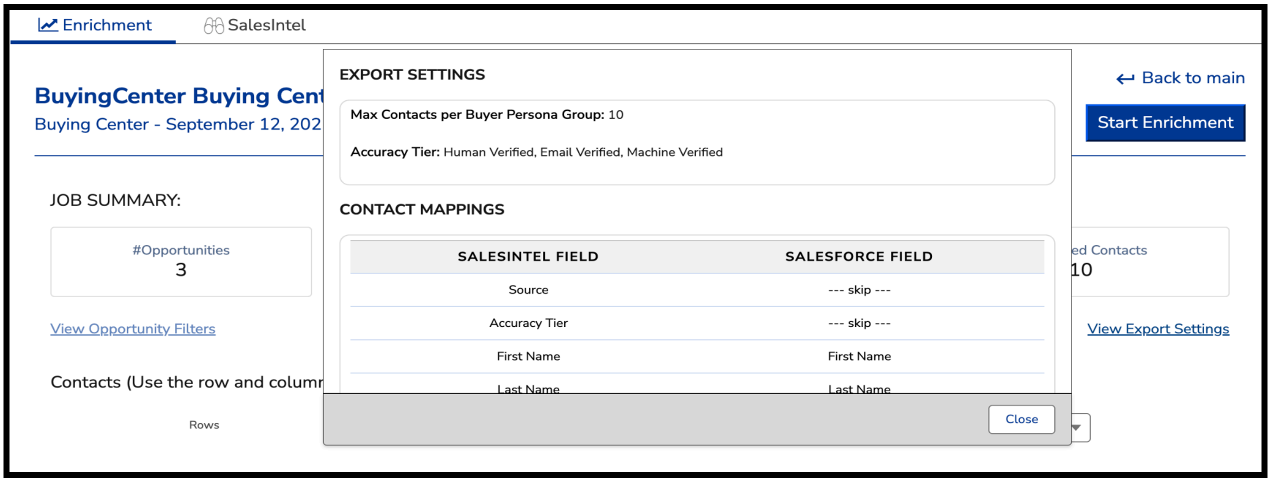
1. Job Summary - This includes number of deals analyzed, total companies associated with the open deals, matched companies against the SalesIntel records and total number of estimated contacts to be exported.
    a. Opportunities - These are the number of open opportunities with associated accounts in 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.



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.



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: Job Level — Columns: Department

	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.

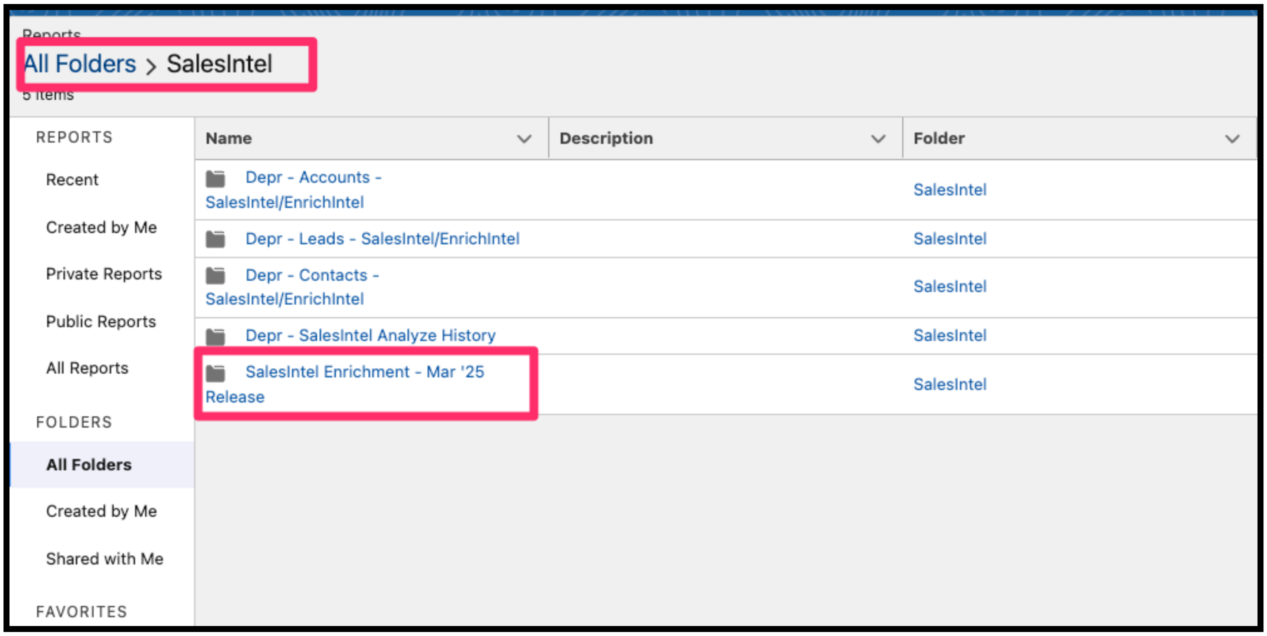
Roll Back

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:



Report List:

<u>**Report**</u>	Description
Accounts - SalesIntel Enriched	Which accounts have been enriched by SalesIntel? All SI Tracking Fields.
Accounts - Up-To-Date	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.
Contacts - SalesIntel Enriched	Which contacts have been enriched by SalesIntel? All SI Tracking Fields.
Contacts - Up-To-Date	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.
Leads - SalesIntel Enriched	Which leads have been enriched by SalesIntel? All SI Tracking Fields.
Leads - Up-To-Date	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.
Opportunities - SalesIntel Enriched	Which Opportunities have been enriched by SalesIntel? All SI Tracking Fields.
Opportunities - Up-To-Date	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.
BCE - Contacts	Which Contacts have been created as part of Buying Center Enrichment?

Admin Data Confirmation Exercises

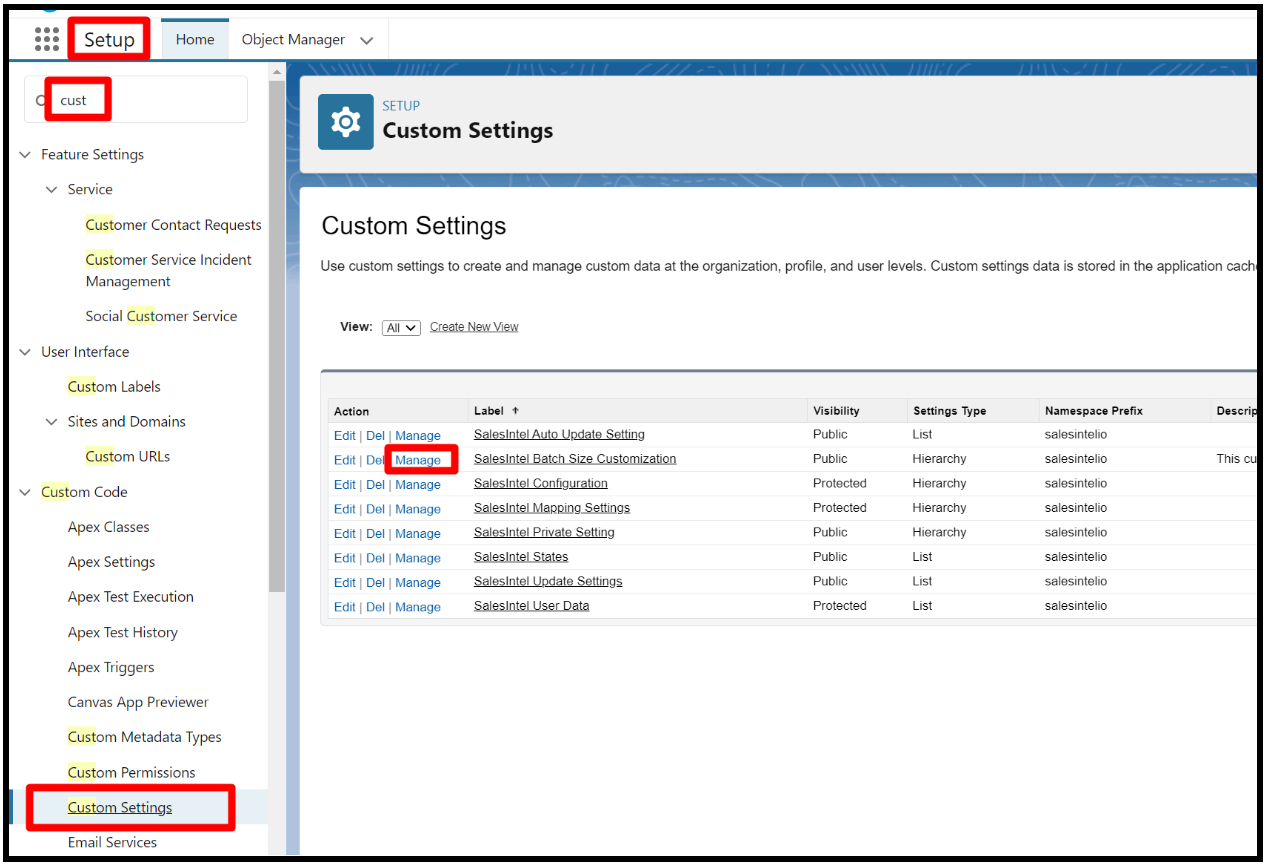
After the following tests, you will be able to confirm field mapping and how enrichment is reported.

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.

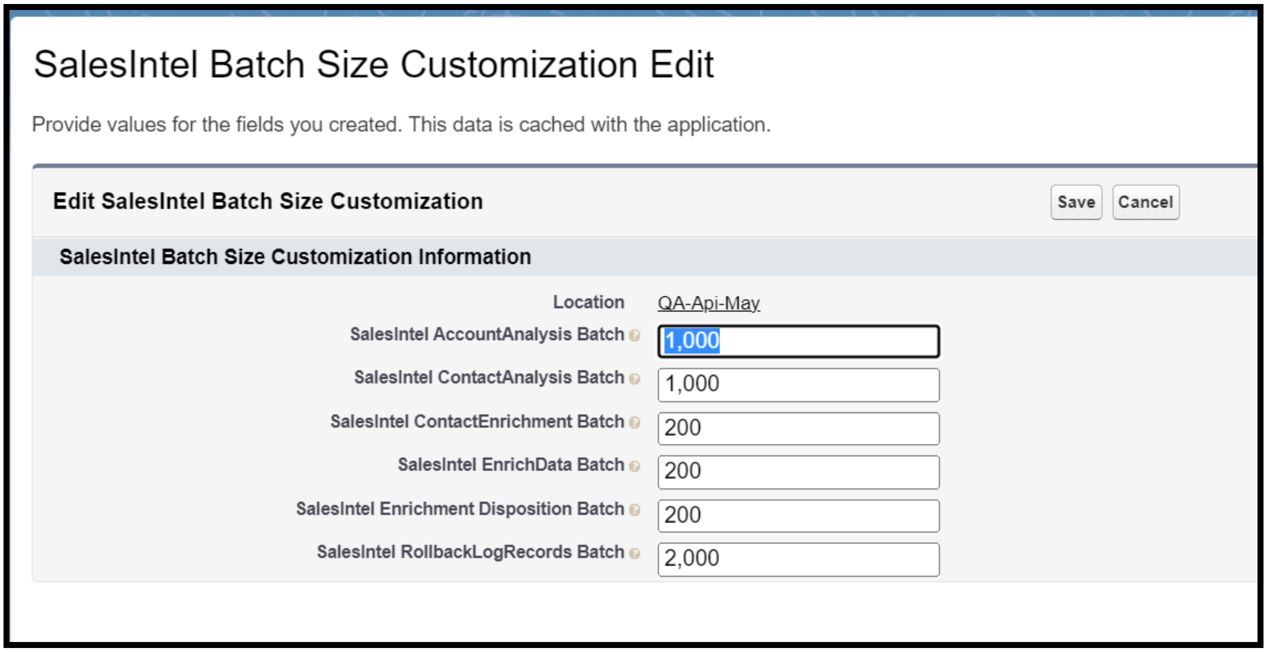
Technical Support & FAQ

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.



From there you can edit the Heap Batch Size Configuration.



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.

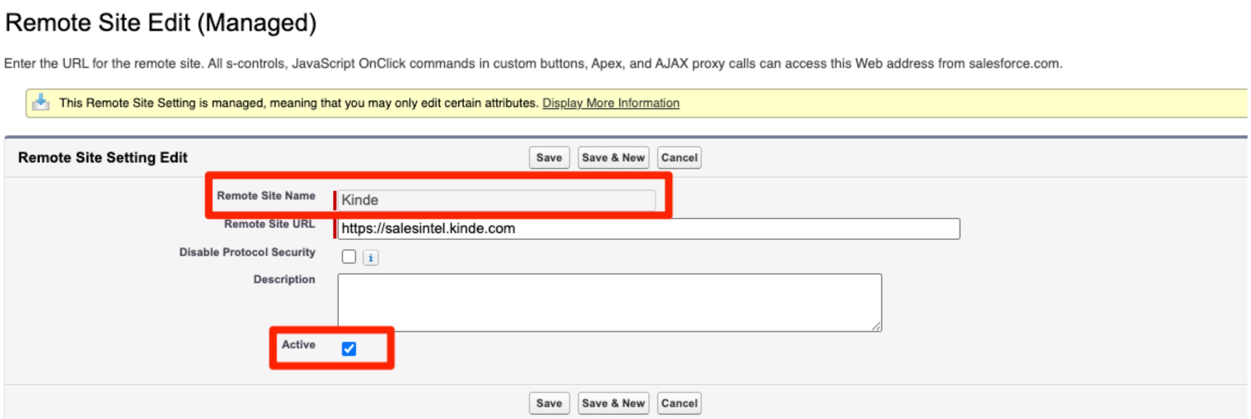
Currently, we do not support roll back of enrichment jobs run for Person Accounts if they are run as contact enrichment jobs. Rollback is supported for account enrichment jobs.

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.



Support

If you have any questions, please contact us at 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
- 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