

LexisNexis® Prospect Portfolio v2.1 For Salesforce® CRM



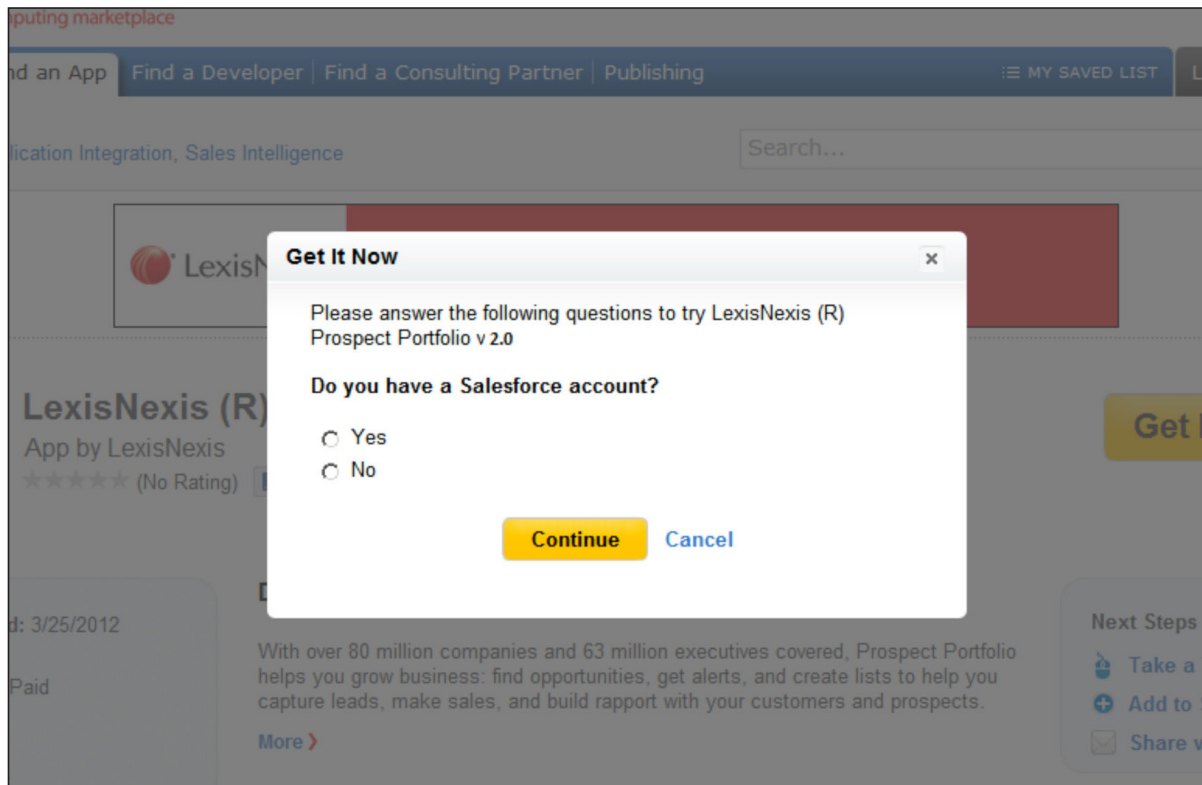
Installation Guide

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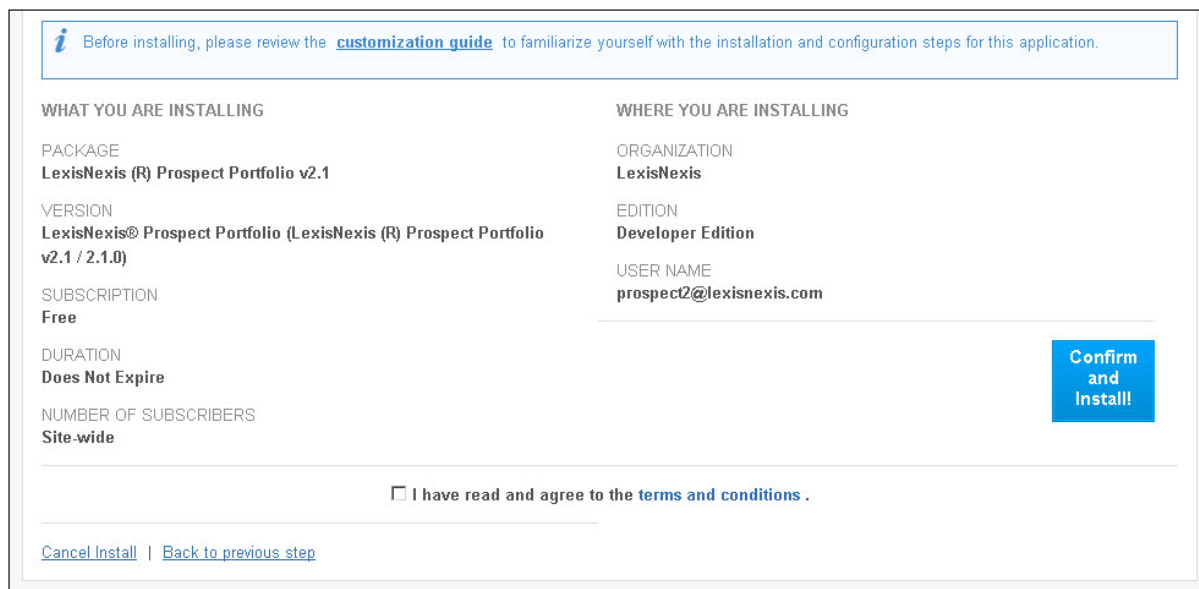
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Install LexisNexis® Prospect Portfolio v2.1

1. Go to <http://appexchange.salesforce.com>, enter LexisNexis in the search box in the upper-left section of the home screen, and click the search icon.
2. When your results appear, click on **LexisNexis® Prospect Portfolio v2.1**.
3. When the full description appears, click **Get It Now**.
4. In the pop-up window, indicate whether you have a Salesforce.com® account and click **Continue**.



5. Review instructions and terms and conditions, click the checkbox to agree to terms and conditions, and click **Install**.



6. When prompted, enter your Salesforce administrator password.
7. When the installation screen appears, click **Continue**.
8. Approve Package API Access and click **Next**. (NOTE: You can make changes to these options after installation as well.)

Step 1. Approve Package API Access
Step 1 of 2

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Solutions	✓	✓	✓	✓
Documents	✓	✓	✓	✓					

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next
Cancel

9. Choose your desired security level and click **Next**.

Step 2. Choose security level

Select security settings:

- Grant access to admins only Users with your profile get full access (best for limited deployments)
- Grant access to all users All internal custom profiles get full access
- Select security settings User access set by profile (recommended for most packages)

10. The package is ready to be installed. Click **Install** to continue.
11. When the installation is complete, you'll see this screen:

Package Details
Help for this Page ?

LexisNexis® Prospect Portfolio (Managed)

✓

Install Complete

Follow any remaining steps in the app install guide to complete deployment.

Installed Package Detail Uninstall View Components Manage Licenses View Dependencies

Package Name	LexisNexis® Prospect Portfolio	Version Number	2.1
Language	English	First Installed Version Number	2.1
Version Name	LexisNexis (R) Prospect Portfolio v2.1	Package Type	Managed
Namespace Prefix	LexisNexis_PP	Allowed Licenses	Unlimited
Publisher	LexisNexis	Used Licenses	0
Status	Active	API Access	Unrestricted [Enable Restrictions]
Expiration Date	Does not Expire	Modified By	Mary Frericks, 3/26/2013 12:11 PM
Description			
Installed By	Mary Frericks, 3/26/2013 12:11 PM		

If you'd like to see more details, click **View Package Contents**.

LexisNexis® Prospect Portfolio
Burt Corbin ▾ Help LexisNexis® Prospect Port... ▾

Home Accounts Leads Contacts LexisNexis Prospect Portfolio LexisNexis Admin +

Expand All | Collapse All

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
- Create
- Develop
- Deploy
- Schema Builder
- Installed Packages
- AppExchange Marketplace
- Critical Updates

Administration Setup

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- Data Management
- Monitoring
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps

Package Upgrade Details Help for this Page ▾

Package Name	LexisNexis® Prospect Portfolio
Version Name	LexisNexis (R) Prospect Portfolio v2.1
Version Number	2.1
Publisher	LexisNexis
Description	

Installed Version Information

Package Name	LexisNexis® Prospect Portfolio
Version Name	LexisNexis® Prospect Portfolio v2.0
Version Number	2.0
Description	

Continue
Cancel

Package Components

▼ **Fields (10)**

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Industry	Contact	Custom Field	This is a brand new component.
Create	Company Description	Contact	Custom Field	This is a brand new component.
Create	Company's Ownership	Contact	Custom Field	This is a brand new component.
Create	Number of employees in company	Contact	Custom Field	This is a brand new component.
Create	Company Name	Contact	Custom Field	This is a brand new component.
Create	Company SIC code	Contact	Custom Field	This is a brand new component.
Create	Company Website	Contact	Custom Field	This is a brand new component.
Create	Company's Annual Revenue	Contact	Custom Field	This is a brand new component.
Create	Company Ticker	Contact	Custom Field	This is a brand new component.
Create	Company Fax	Contact	Custom Field	This is a brand new component.

▼ **Permission Sets (3)**

Action	Component Name	Parent Object	Component Type	Installation Notes
Update	General Preferences table permission		Permission Set	This is an upgraded component. It will be updated to the new version.
Create	LexisNexis ProspectPortfolio 'Update Contacts' 'ViewModifyAll access		Permission Set	This is a brand new component.
Update	Custom mapping table permission		Permission Set	This is an upgraded component. It will be updated to the new version.

▼ **Resources (1)**

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Update Contact Details	Contact	Button or Link	This is a brand new component.

Remote Access

No records to display

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Upgrade to LexisNexis® Prospect Portfolio v2.1 from a previous version

Simply install v2.1 from the Salesforce app exchange, following the steps listed in “Basic steps to install the application” section beginning on page 1.

Give non-administrators permission to access Custom Mapping feature

An additional tab—**LexisNexis Admin**—is available and will be visible only to the administrator. The administrator has the option to edit profiles and allow this tab to appear for specific profile(s) or group(s). To give “read” permission to other users so they can access the custom mapping feature:

1. Use the **Salesforce Data Loader** to export all permission sets with their IDs and names. Select **Permissionset** object, select **User** object, and then create a CSV spreadsheet with these columns: **AssigneeID** (user ID) and **PermissionsetID** (ID of the “Custom mapping table permission”).
2. Use the **Salesforce Data Loader** to insert the CSV spreadsheet you’ve created into the **PermissionSet Assignment** object.
3. Go the **LexisNexis Admin** tab to choose custom mapping settings.

You can share data between LexisNexis and your CRM by mapping it. These fields will be used to retrieve data from Salesforce when users click either the Update Account Details link or the Update Leads Detail link (on their respective tabs). [View more information](#)

Map Account Fields **Map Lead Fields**

CRM Field	LexisNexis's Field	CRM Field	LexisNexis's Field
Master Record ID	<input type="text"/>	Industry	<input type="text"/>
Account Name	<input type="text"/>	Annual Revenue	<input type="text"/>
Account Type	<input type="text"/>	Employees	<input type="text"/>
Parent Account ID	<input type="text"/>	Ownership	<input type="text"/>
Billing Street	<input type="text"/>	Ticker Symbol	<input type="text"/>
Billing City	<input type="text"/>	Account Description	<input type="text"/>
Billing State/Province	<input type="text"/>	Account Rating	<input type="text"/>
Billing Zip/Postal Code	<input type="text"/>	Account Site	<input type="text"/>
Billing Country	<input type="text"/>	Last Activity	<input type="text"/>
Shipping Street	<input type="text"/>	Customer Priority	<input type="text"/>
Shipping City	<input type="text"/>	SLA	<input type="text"/>
Shipping State/Province	<input type="text"/>	Active	<input type="text"/>
Shipping Zip/Postal Code	<input type="text"/>	Number of Locations	<input type="text"/>
Shipping Country	<input type="text"/>	Upsell Opportunity	<input type="text"/>
Account Phone	<input type="text"/>	SLA Serial Number	<input type="text"/>
Account Fax	<input type="text"/>	SLA Expiration Date	<input type="text"/>
Account Number	<input type="text"/>	LNAccountId	<input type="text"/>
Website	<input type="text"/>	LNDossierId	<input type="text"/>
SIC Code	<input type="text"/>		

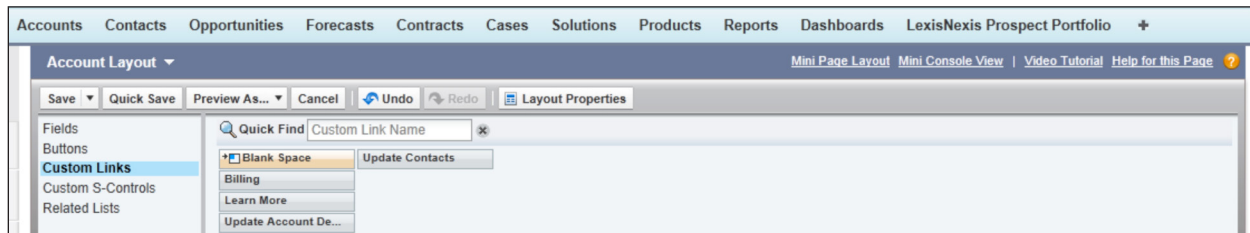
Update

Now the custom mapping settings will be applicable to all users to whom you gave Read permission.

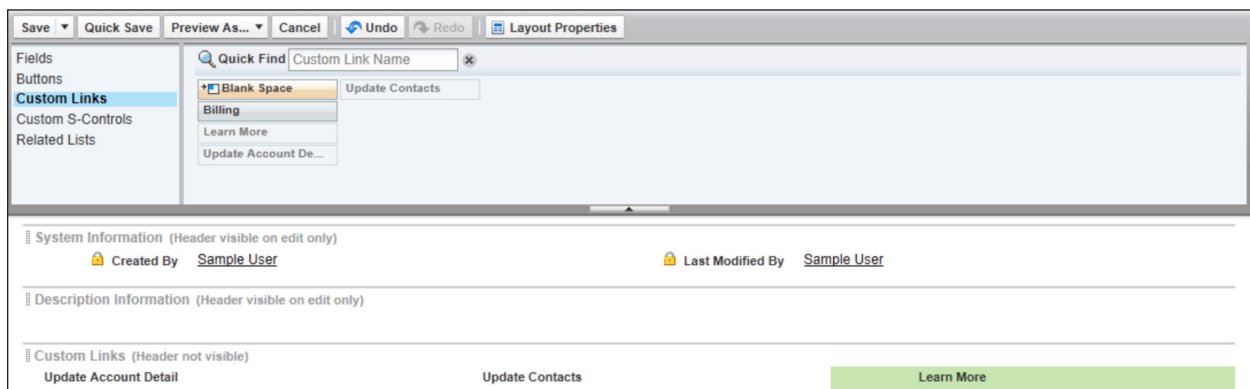
Create Custom Links for Accounts, Leads and Contacts

To add Custom Links to **accounts**:

1. Click the **Accounts** tab.
2. Select **Setup > Customize > Accounts > Page Layout > Edit**.
3. Click **Custom Links**. Within the Custom Links window, LexisNexis Prospect Portfolio Custom Links—including Update Account Detail, Learn More, and Update Contacts—will appear.



4. Drag each of these three links into the **Custom Links** field on the Page Layout and click **Save**.



To add Custom Links to **leads**:

1. Click the **Leads** tab.
2. Select **Setup > Customize > Leads > Page Layout > Edit**.
3. Click **Custom Links**. Within the Custom Links window, LexisNexis Prospect Portfolio Custom Links—including Update Leads Detail and Learn More—will appear.
4. Drag each of these two links into the **Custom Links** field on the Page Layout and click **Save**.

To add Custom Link to **contacts**:

Before any non-administrator Salesforce profiles can add the Update Contacts link to their contacts page, they need to have **View All/Modify All** access.

To give non-administrators permission to access Update Contact Details custom link:

1. Assign users to the permission set 'LexisNexis ProspectPortfolio Update Contacts ViewModify All access'.
2. Use the **Data Loader** of Salesforce to export all permission sets with their IDs and names.
3. Select **Permissionset** object > **User** object, and then create a .CSV spreadsheet with these columns; **AssigneeID** (user ID), and **PermissionsetID** (ID of the 'LexisNexis ProspectPortfolio Update Contacts ViewModifyAll access').
4. Use the **Data Loader** of Salesforce to insert the .CSV spreadsheet you've created into the **PermissionSet Assignment** object.

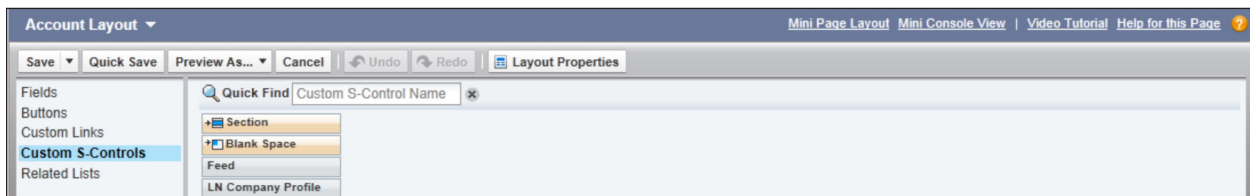
To add Custom Links to **contacts**:

1. Click the **Contacts** tab.
2. Select **Setup > Customize > Leads > Page Layout > Edit**.
3. Click **Custom Links**. Within the Custom Links window, LexisNexis Prospect Portfolio custom link—Update Contact Details link—will appear.
4. Drag the link into the **Custom Links** field on the Page Layout and click **Save**.

Add a Mini Profile

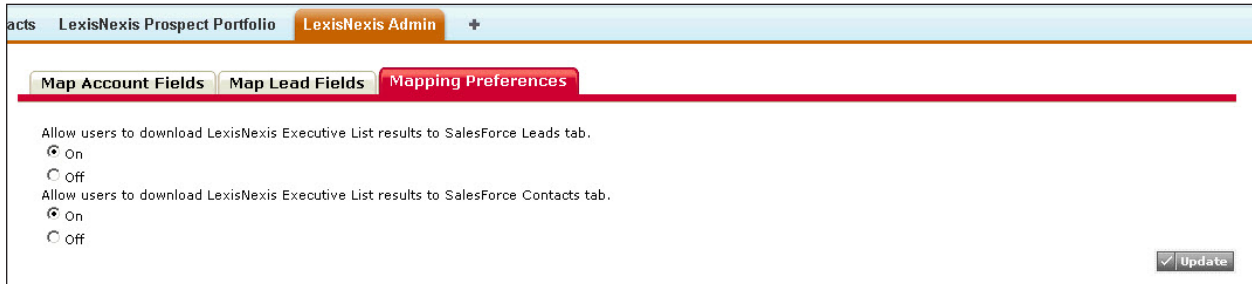
To add a Mini Profile to the accounts page:

1. Select **Setup > App Setup > Customize > Accounts > Page Layouts > Edit**.
2. Click **Custom S-Controls**. Within the Custom S-Controls window, LexisNexis Prospect Portfolio Custom S-Controls—including LexisNexis Company Profile—will appear.
3. Drag this link into the Page Layout and click **Save**.



Allow/Block users to download LexisNexis Executive List results to Salesforce Leads and Contacts tab

1. Go to the **LexisNexis Admin** tab to choose Mapping Preferences settings.
2. Select **On** to allow users to download, **Off** to not allow. By default “On” is selected.



The screenshot shows the LexisNexis Admin interface. At the top, there are tabs for 'LexisNexis Prospect Portfolio' and 'LexisNexis Admin'. Below these, there are three sub-tabs: 'Map Account Fields', 'Map Lead Fields', and 'Mapping Preferences', with 'Mapping Preferences' being the active tab. The main content area contains two sections, each with a radio button selection:

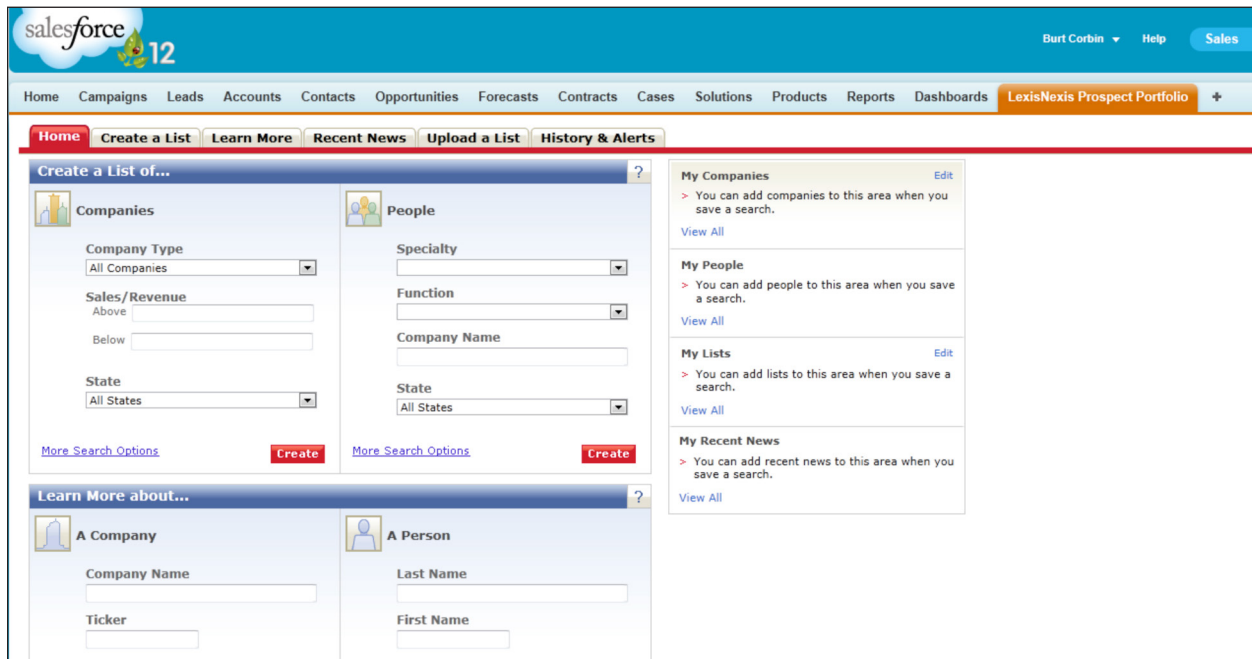
- Allow users to download LexisNexis Executive List results to Salesforce Leads tab.
 On
 Off
- Allow users to download LexisNexis Executive List results to Salesforce Contacts tab.
 On
 Off

An 'Update' button is located in the bottom right corner of the settings area.

Activate your LexisNexis® Prospect Portfolio subscription

Once you've installed and set up your LexisNexis Prospect Portfolio application, you'll need to activate your subscription. Contact your LexisNexis account representative and provide your salesforce.com Organization ID. If you don't have a subscription yet, please call **1.888.AT.LEXIS**.

Once your subscription is activated, you can test access opening the application and clicking on the **LexisNexis Prospect Portfolio** tab. This is what you'll see:



The screenshot displays the LexisNexis Prospect Portfolio interface within a Salesforce environment. The top navigation bar includes the Salesforce logo, the version number '12', and user information 'Burt Corbin' with 'Help' and 'Sales' links. Below the navigation bar, there are tabs for 'Home', 'Campaigns', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Forecasts', 'Contracts', 'Cases', 'Solutions', 'Products', 'Reports', 'Dashboards', and 'LexisNexis Prospect Portfolio'. The main content area is divided into several sections:

- Create a List of...**: This section is split into two columns. The left column is for 'Companies' and includes fields for 'Company Type' (set to 'All Companies'), 'Sales/Revenue' (with 'Above' and 'Below' input fields), and 'State' (set to 'All States'). The right column is for 'People' and includes fields for 'Specialty', 'Function', 'Company Name', and 'State' (set to 'All States'). Both columns have 'More Search Options' and 'Create' buttons.
- Learn More about...**: This section is also split into two columns. The left column is for 'A Company' and includes fields for 'Company Name' and 'Ticker'. The right column is for 'A Person' and includes fields for 'Last Name' and 'First Name'.
- My Companies**: A summary section with an 'Edit' link, a description, and a 'View All' link.
- My People**: A summary section with a description and a 'View All' link.
- My Lists**: A summary section with an 'Edit' link, a description, and a 'View All' link.
- My Recent News**: A summary section with a description and a 'View All' link.

Additional notes

1. You'll need to set up the rules for the way you want your users to access LexisNexis Prospect Portfolio data. See Step 9.
2. If you or another user downloads data into Leads and Accounts, it might duplicate data already there. We offer "stare and compare" functionality to help minimize the chance of duplication.
3. It's easy to add new contacts or edit existing ones. Contact information includes first name, last name, job title, email address, and phone number.
4. There are certain fields for Leads and Accounts that will automatically match up (see list below). Your Salesforce administrator can also change the mapping for custom fields.
 - Industry
 - Annual Revenue
 - Billing Address (street, city, state ZIP, country)
 - Phone
 - Fax
 - Website
 - Ticker Symbol
 - Ownership (company type)
 - Employees
 - SIC
 - Description
5. The following fields are mandatory for Leads:
 - Last name
 - First name
 - Job title
 - Email address
 - Company name