LexisNexis® Prospect Portfolio v2.1 For Salesforce® CRM

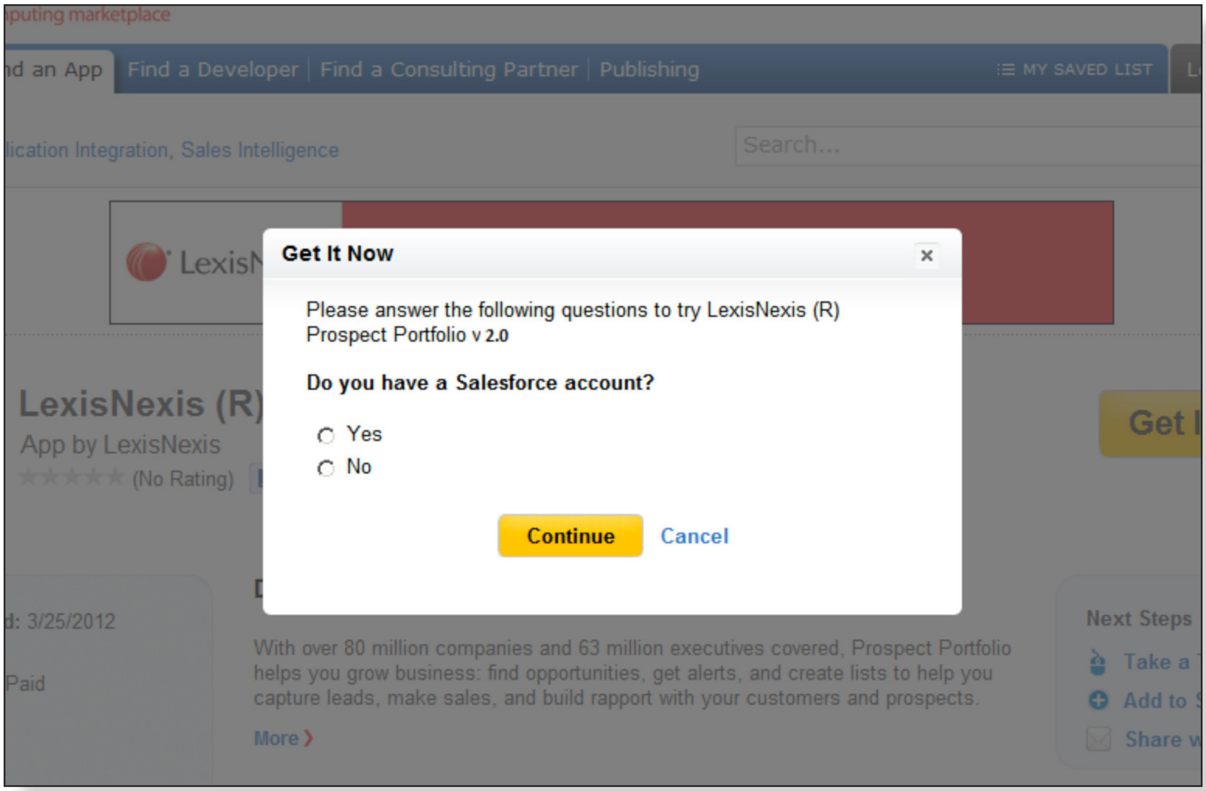
Installation Guide

Contents

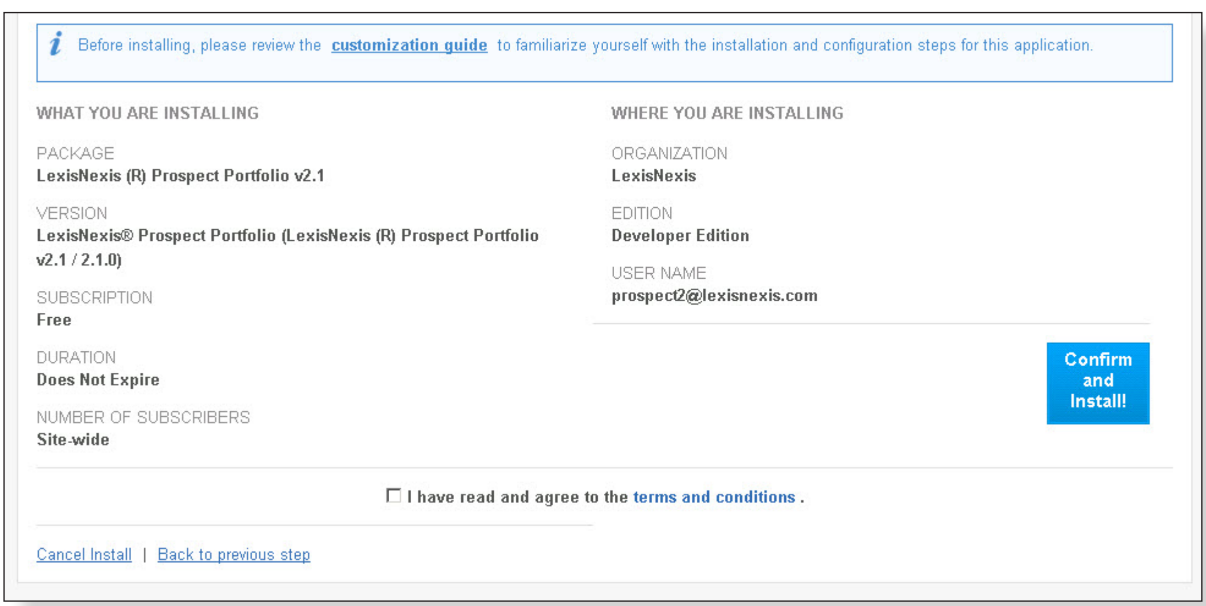
LexisNexis®

Install LexisNexis® Prospect Portfolio v2.1

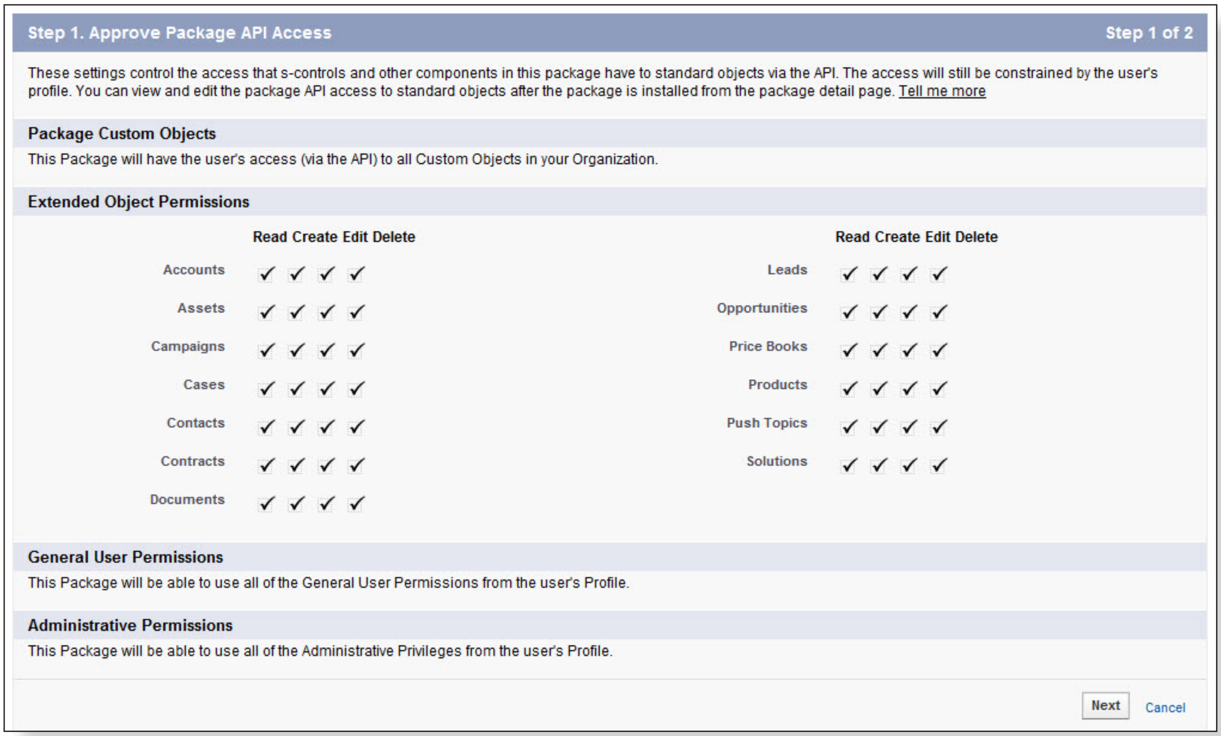
1. Go to http://appexchange.salesforce.com, enter LexisNexis in the search box in the upper-left section of the home screen, and click the search icon.
2. When your results appear, click on **LexisNexis® Prospect Portfolio v2.1**.
3. When the full description appears, click **Get It Now**.
4. In the 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**.

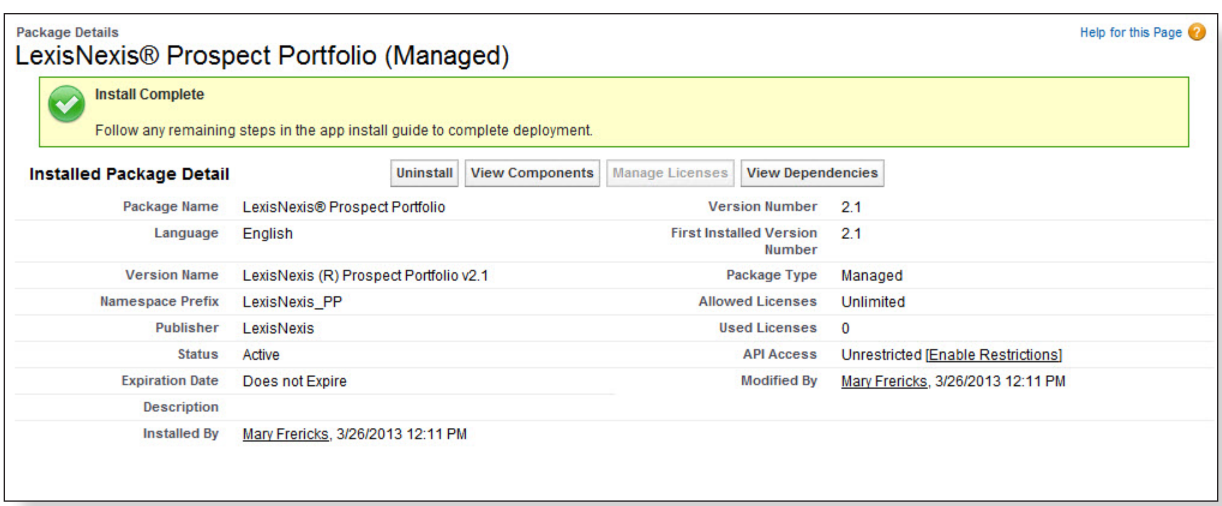


6. When prompted, enter your Salesforce administrator password.
7. When the installation screen appears, click **Continue**.
8. Approve Package API Access and click **Next**. *(NOTE: You can make changes to these options after installation as well.)*

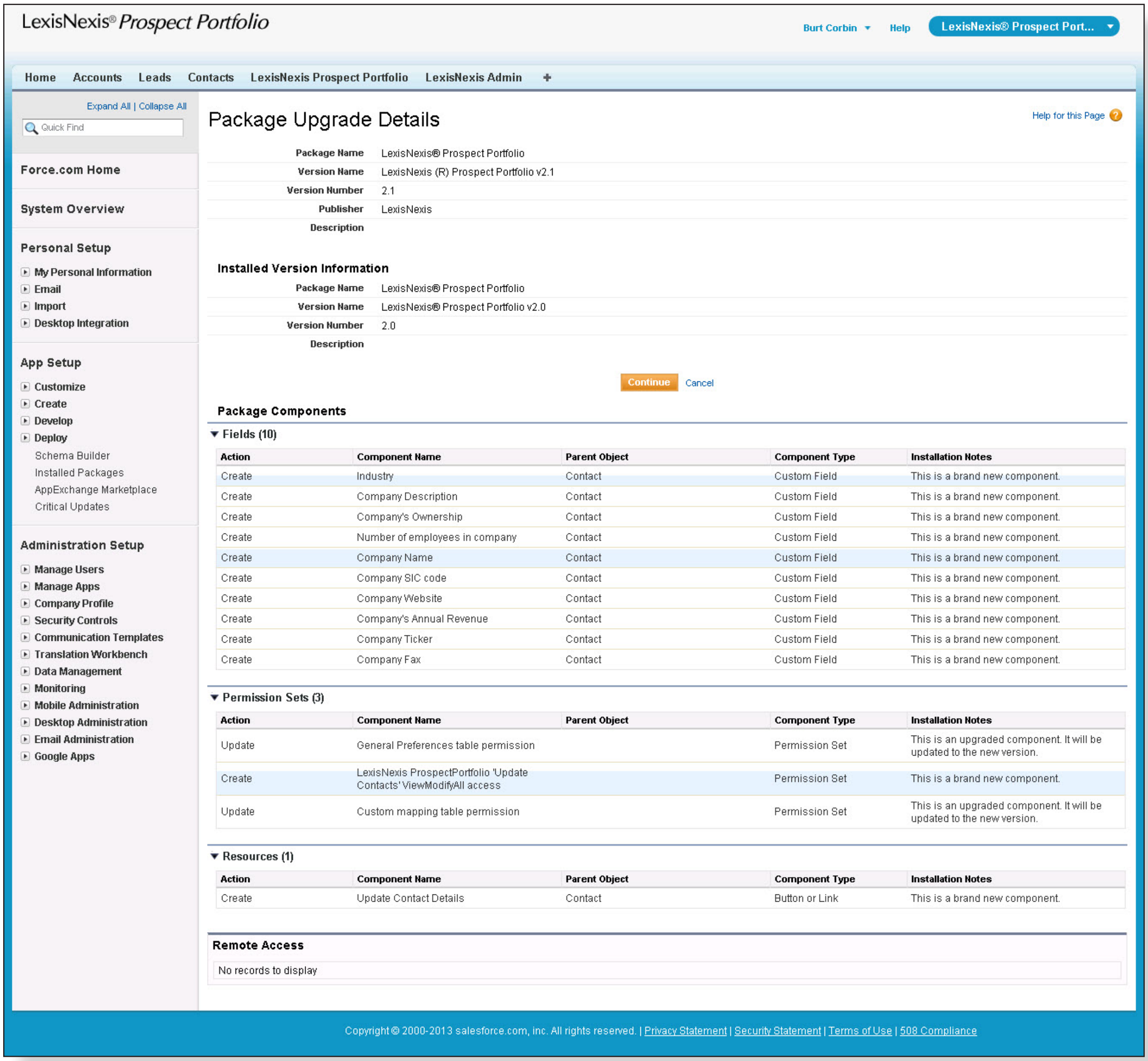


9. Choose your desired security level and click **Next.**

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



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



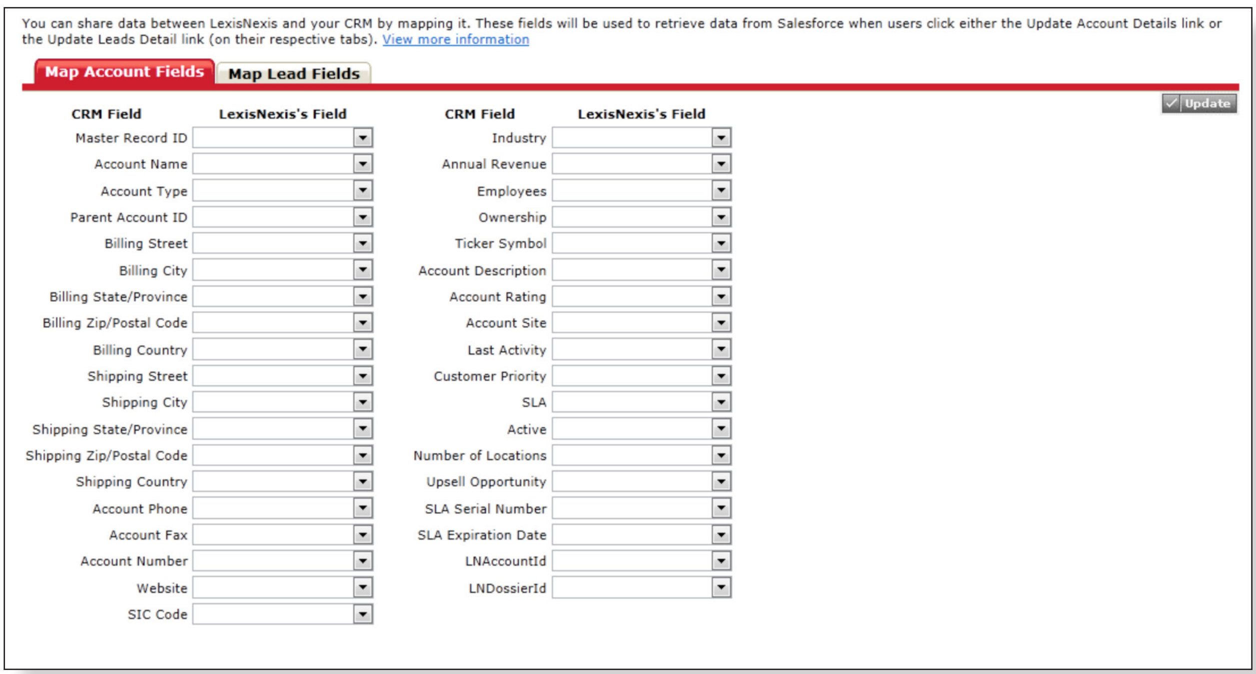
Upgrade to LexisNexis® Prospect Portfolio v2.1 from a previous version

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.

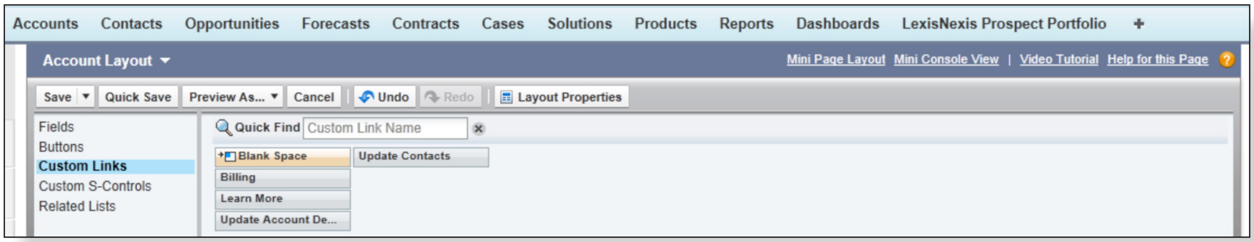


Now the custom mapping settings will be applicable to all users to whom you gave Read permission.

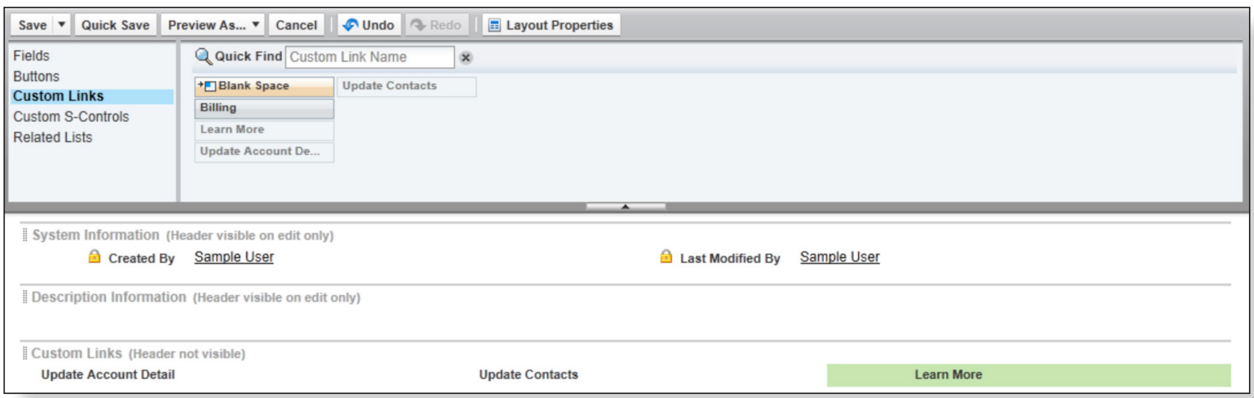
Create Custom Links for Accounts, Leads and Contacts

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**.

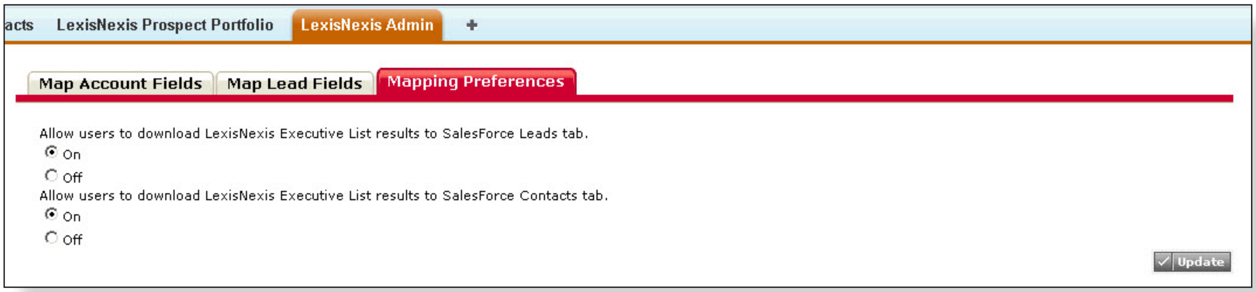
Add a Mini Profile

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

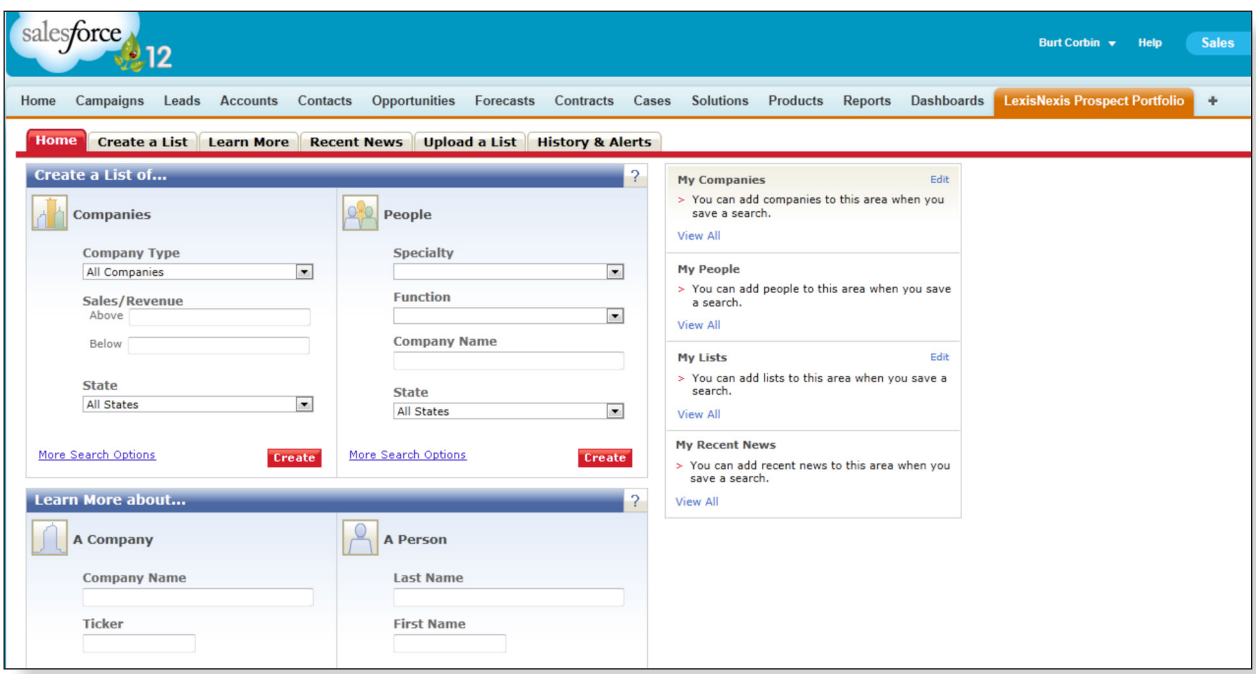
1. Go to the **LexisNexis Admin** tab to choose Mapping Preferences settings.
2. Select **On** to allow users to download, **Off** to not allow. By default "On" is selected.



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:



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

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