PeerSpot

PeerIntent Delivery via Salesforce: Version 1.25

Contents:

Overview of the Integration

PeerSpot can send PeerIntent Data directly into your Salesforce Instance via API. This makes the data immediately actionable to different teams at your company, by integrating into existing workflows. The data sits in a custom PeerSpot Activity object and is mapped to the Account by Domain.

We’ll be sending you the PeerIntent Data in a very flexible format. You’ll be able to display, export, analyze and take action off of it, in any way you’d like.

Some Frequently Asked Questions:

1. Is there any data transfer back to PeerSpot from Salesforce?
   No, this is a one-way API, data is sent, but not received. No data is transferred to PeerSpot at any point.
2. Does PeerSpot handle any data from Salesforce to enhance their services?
   We have no access to anything in your SFDC instance
3. What personal data is transferred to Salesforce?
   We do not transfer any PII through the API. The data you will receive includes: company name, domain, location and partial IP address.
4. How is the connection secured/encrypted?
   Data is transferred using an https endpoint, meaning all data being sent to you is encrypted. The API call uses API Key Authentication.

Included in the integration are sample reports to help you get started.

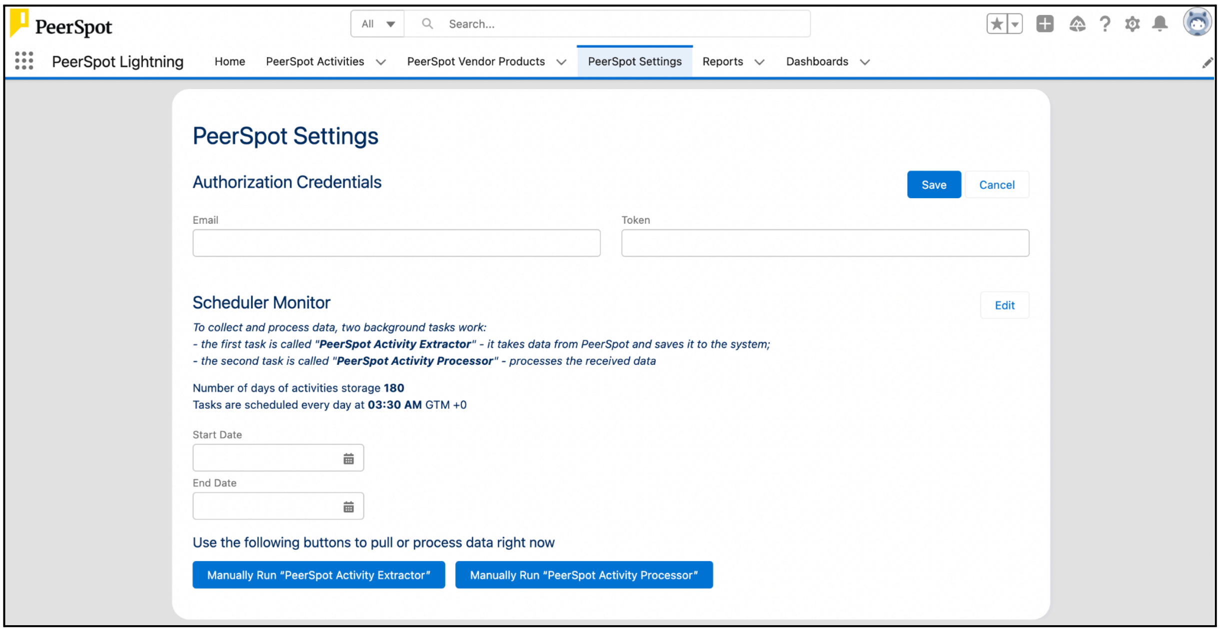
Here are some of the benefits of integrating our PeerIntent Data with Salesforce:

- **Automatic Churn Alerts to Customer Success** when existing customers are researching competition.
- **Generate Prospecting Lists** for SDR/BDR teams based on companies researching you or a specific competitor.

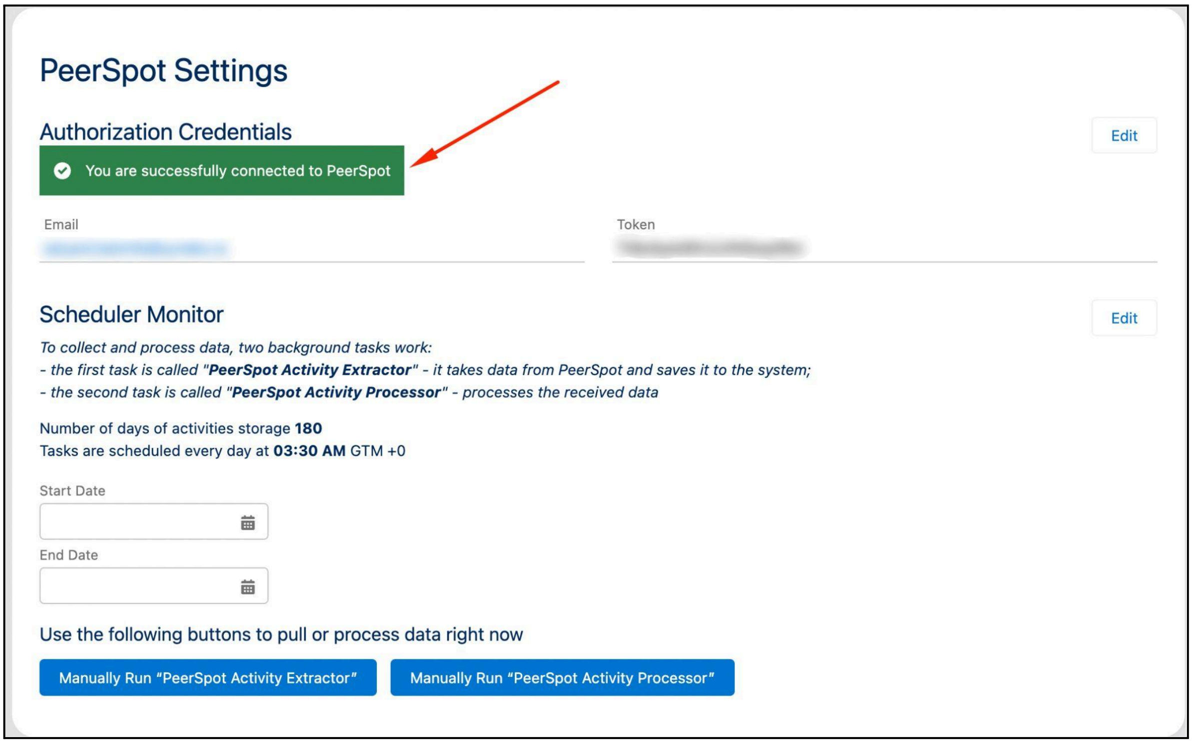
- **Validate Open Opportunities** for sales when prospective customers in the pipeline research you as well as giving added insight into existing opportunities.
- **Run Nurture Campaigns** for dormant leads in Salesforce associated with companies researching you or your competition.
- **Win back Opportunities** - open tasks on closed lost opportunities when prospects are researching in your space.
- **And much much more....**

Getting Started

1. Identify a Salesforce Administrator who can partner with us on this project and ensure they are a signed-up user on www.peerspot.com using your company email address. Contact your Customer Success Manager for assistance if necessary.
2. Your Customer Success Manager will then generate and share a token with you. You will need this when installing the integration.
3. Install PeerSpot: Integrating PeerIntent Data into Salesforce Package. It is recommended to install it to the Sandbox first and test it. For more information read Install a Package.
4. Navigate to the *PeerSpot Settings* tab and next to "Authorization Credentials" and click the "Edit" button. Fill in the "Email" and "Token" that was provided by PeerSpot. Complete the Authorization by clicking "Save". This step is necessary if you are installing PeerSpot for the first time or already have a previous version of the package.



5. "You are successfully connected to PeerSpot" text will be displayed.

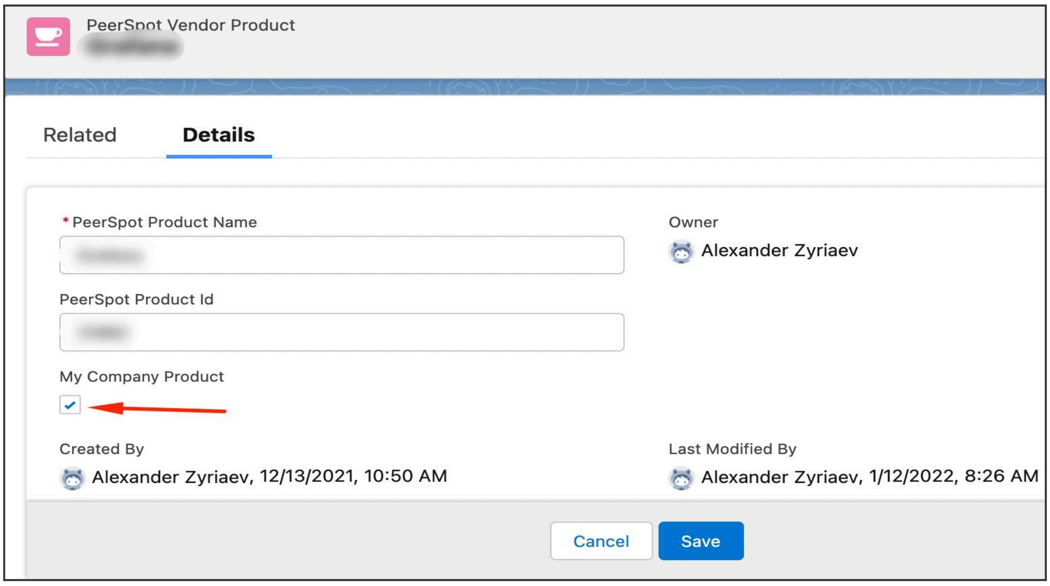


6. To make PeerSpot Activity records appear in your Salesforce org click Manually Run “PeerSpot Activity Extractor” button, go to the “PeerSpot Activities” tab and check that there are records for the day before yesterday. Then come back to the “PeerSpot Settings” page and click Manually Run “PeerSpot Activity Processor” button to create new Vendor Products. At the end of the flow, the PeerSpot Activity records are marked as “Processed”.
7. By default the execution of the ‘PeerSpot Activity Extractor’ and ‘PeerSpot Activity Processor’ tasks are scheduled for every day with the interval between 01:00 AM and 04:45 AM with a 15 minutes step.
8. At the scheduled time PeerSpot records will be pulled from https://www.peerspot.com/ for the day before yesterday.
9. If you need PeerSpot Activity records for some previous period you can choose Start Date and End Date and click Manually Run “PeerSpot Activity Extractor” button. Go to the “PeerSpot Activities” tab and check that there are records for the chosen period. Then come back to the “PeerSpot Settings” page and click Manually Run “PeerSpot Activity Processor” button to create new Vendor Products. At the end of the flow, the PeerSpot Activity records are marked as “Processed”.
10. By default, PeerSpot Activity records are stored in your Salesforce org for 180 days. Activity Cleaner Scheduler job runs every day at midnight and deletes PeerSpot Activity records whose “Date Visited” field has value more than 180 days. In order to change “Number of days of activities storage” click the “Edit” button next to “Scheduler Monitor” text. Minimum value is 1 day, maximum value is 999 days.

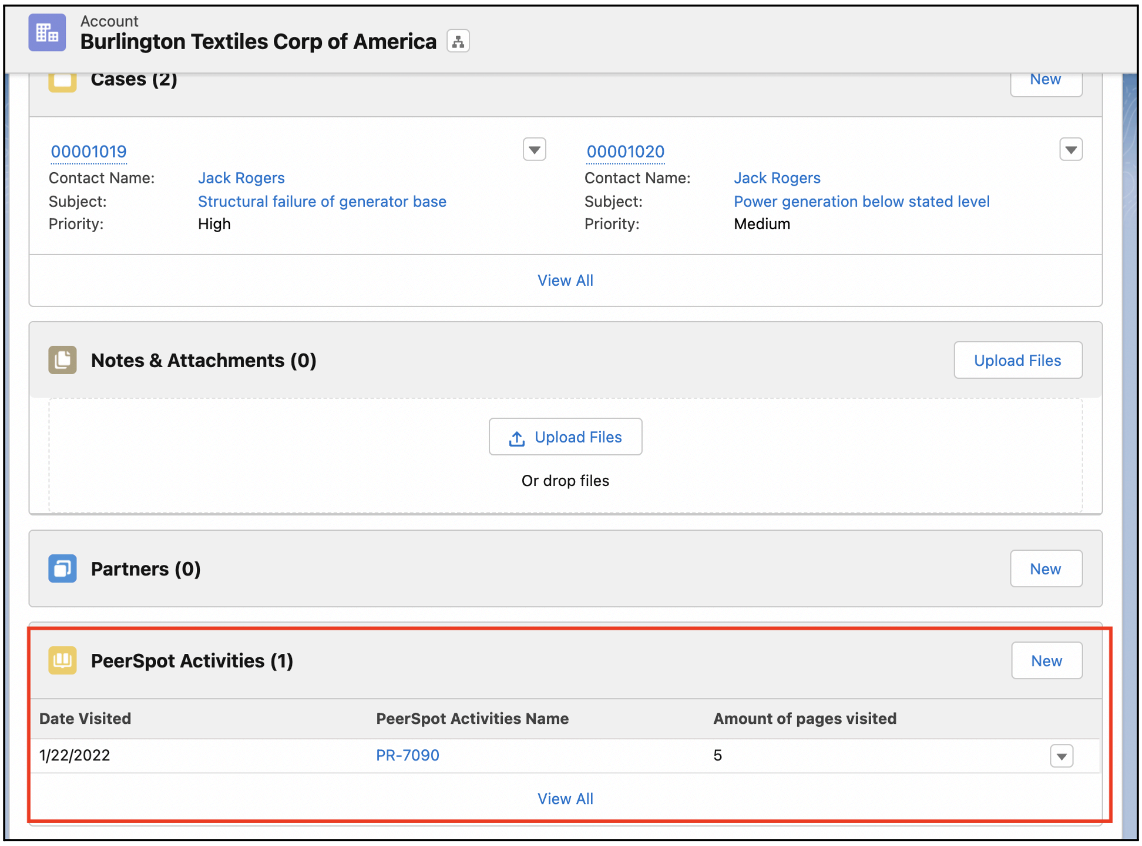
PeerSpot

Post installation Steps

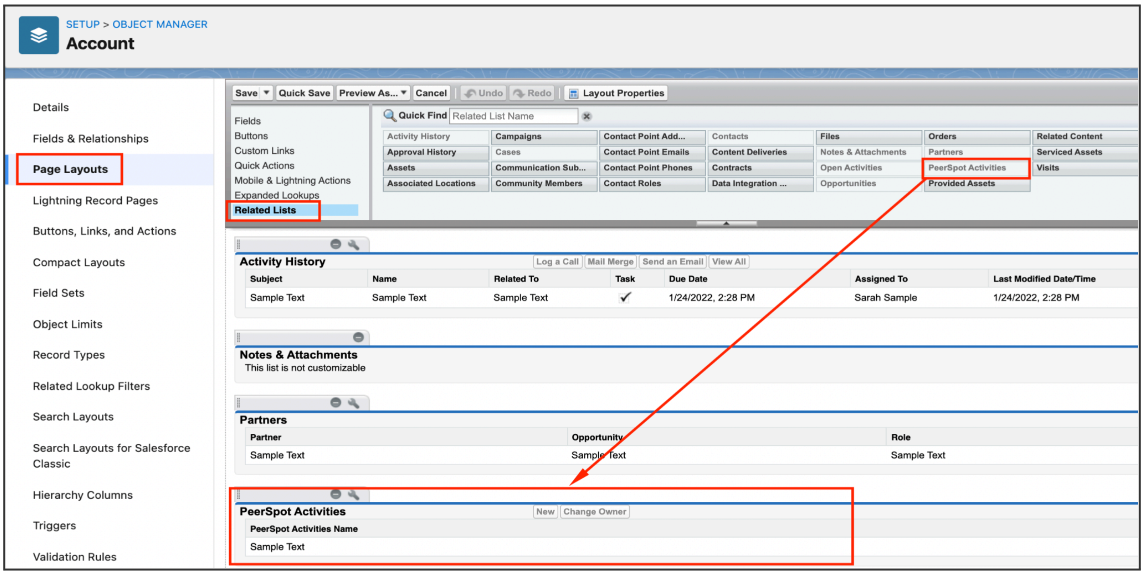
1. Go to PeerSpot Vendor Product object records and check your company Vendor Products.



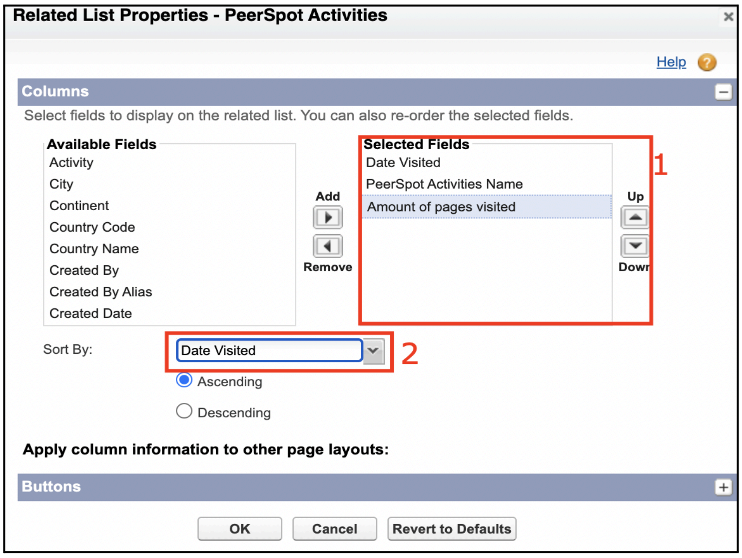
2. Add PeerSpot Activities related list to the Account layout.



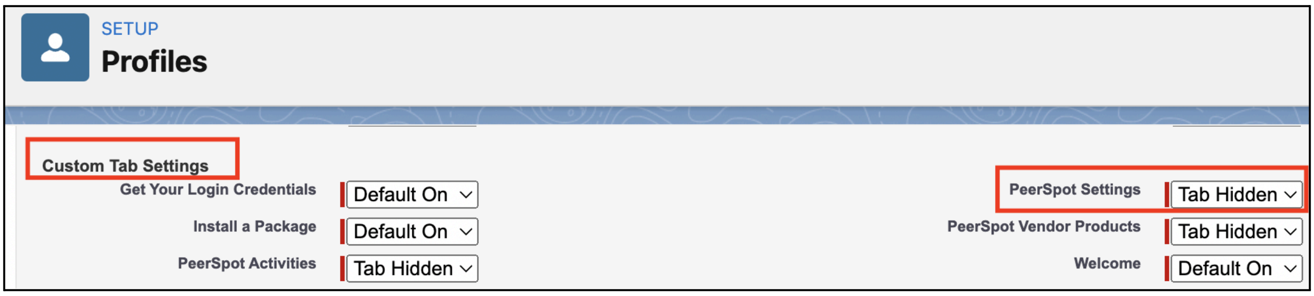
3. Set up -> Object Manager -> Account -> Page Layouts -> Select Account Layout -> Drag and drop PeerSpot Activities related to the Account layout.



4. Click gear icon to configure PeerSpot Activities Related list

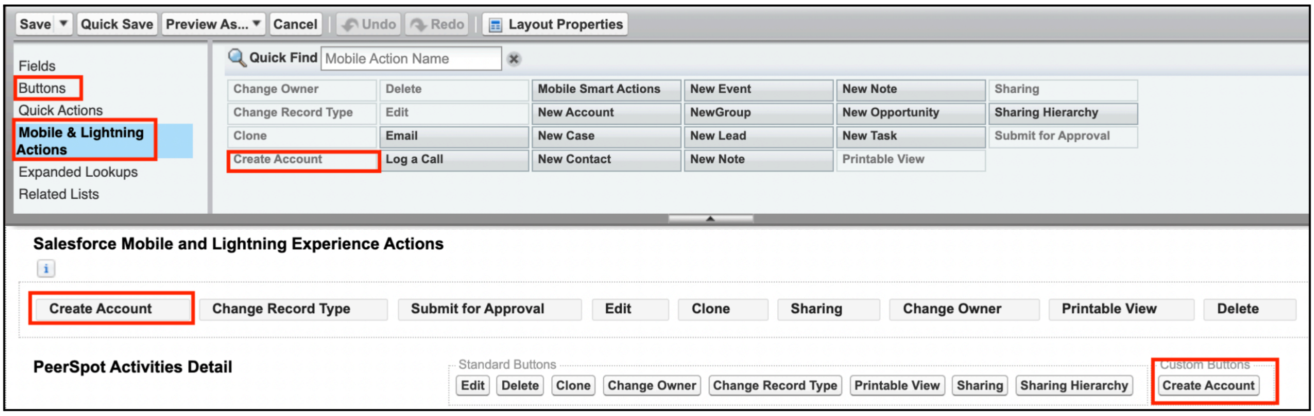


5. You may want to restrict user access to the Settings Tab since it contains sensitive data (e.g. token). In order to do it, navigate to Setup -> Profiles -> choose a specific profile for editing, and under the Custom Tab Settings section select "Tab Hidden" for PeerSpot Settings.

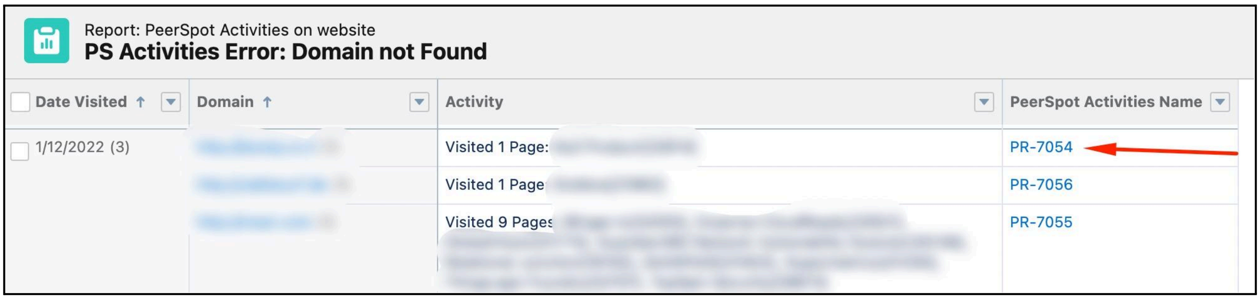


Create an Account directly from the Report or PeerSpot Activity record

1. Users can create a new Account directly from “PS Activities Error: Domain not Found” Report or from the PeerSpot Activities record.
2. Before performing the steps below add “Create Account” Mobile and Lightning Experience Action to the “PeerSpot Activities” object layout or “Create Account” button if you are using Salesforce Classic.



3. Go to “PS Activities Error: Domain not Found” Report and click on “PeerSpot Activity Name”.



4. On the PeerSpot Activity record page click on “Create Account”. The standard “Create Account” window will be shown with a populated “Website” field.

“PeerSpot” Permission Set description

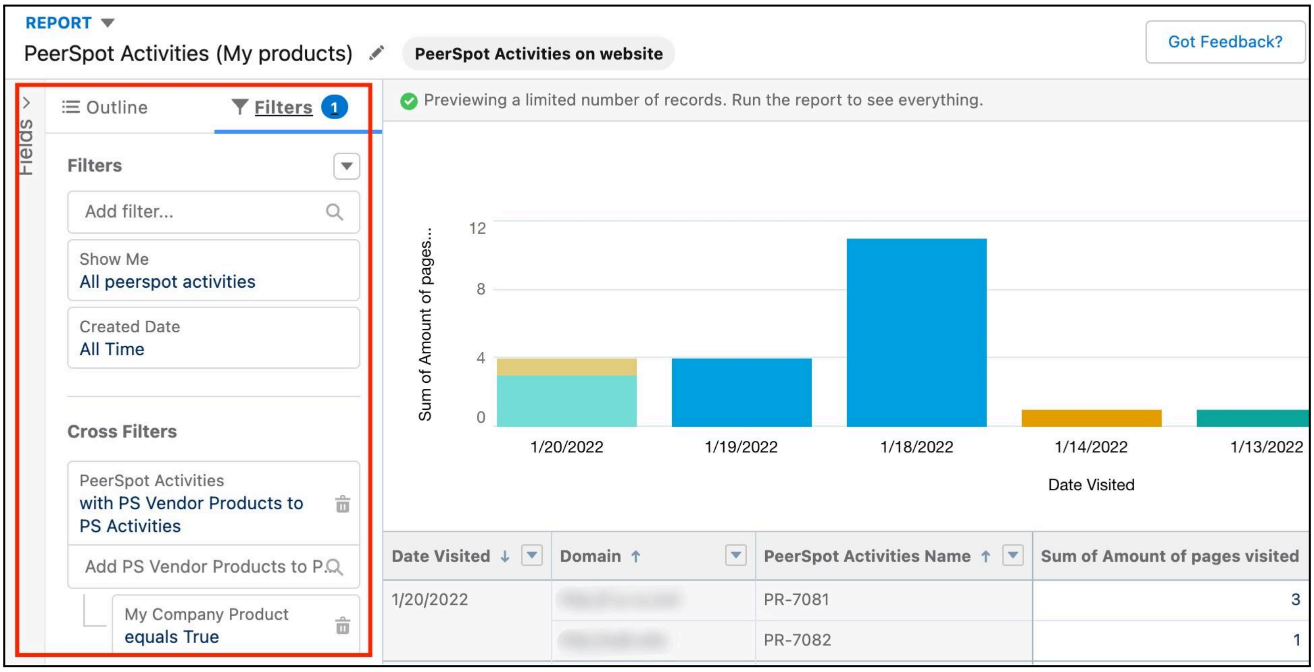
1. PeerSpot Permission Set has been added to the package. To allow users to see the PeerSpot application and PeerSpot custom objects, assign to the users this permission set.
2. “PeerSpot” Permission Set and “PeerSpot Activities on website” Report Type deployed status is included in the package starting from v.1.15.
3. Deployment Status won’t be changed with package upgrade. Customers with earlier versions of the product (up to 1.14) should switch PeerSpot Activities on website Report Type Status manually.

PeerSpot Reports and Dashboards

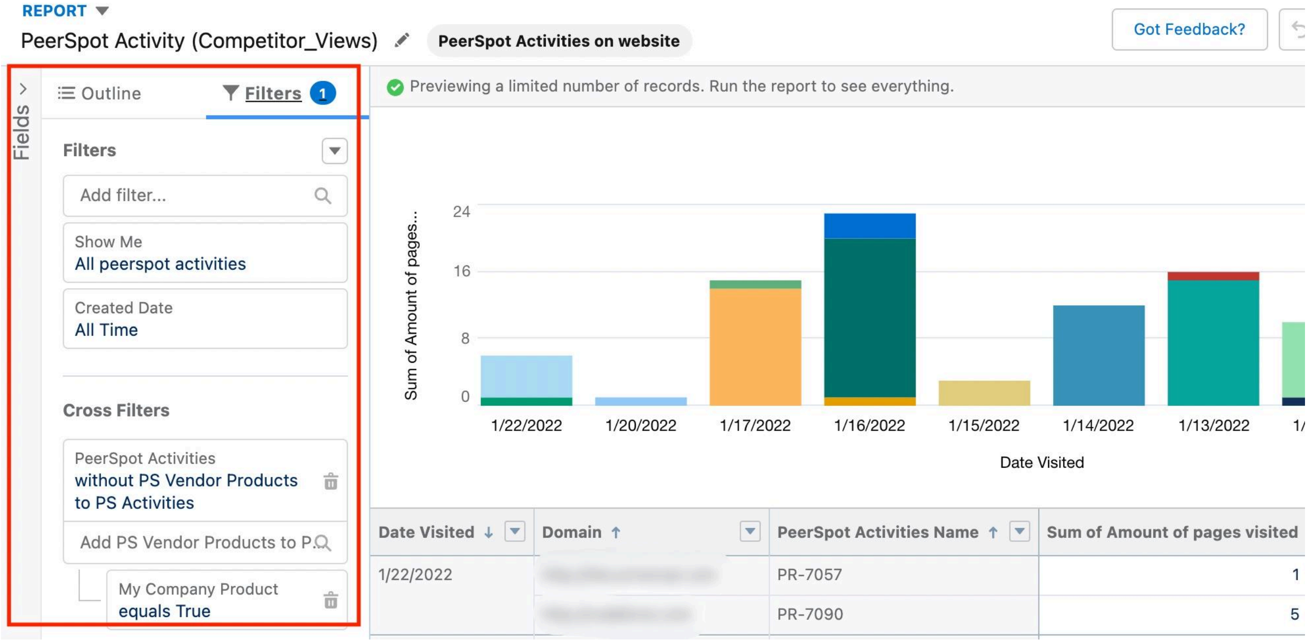
Name	Type	Folder
PeerSpot - PeerIntent Prospecting Dashboard	Dashboard	PeerSpot Activities
PeerSpot - PeerIntent Prospecting Report	Report	PeerSpot Activities
Companies last 14d visited My Product	Report	PeerSpot Activities
Companies last 14d NOT visited MyProduct	Report	PeerSpot Activities
Active companies last 14 days by country	Report	PeerSpot Activities
Companies related to open opps	Report	PeerSpot Activities
Companies with > 4 activities last 60d	Report	PeerSpot Activities
Account visiting Competitor in last 30d	Report	PeerSpot Activities
PeerSpot Activities (My Products)	Report	PeerSpot Activities
PeerSpot Activities (Competitor_Views)	Report	PeerSpot Activities
PS Activities Error: Domain not Found	Report	PeerSpot Activities

Reports' Default Filters

PeerSpot Activities (My products) Report



PeerSpot Activity (Competitor_Views)



PS Activities Error: Domain not Found