MOODY'S

Moody's Orbis for Salesforce

Quick Guide: Installation & Configuration

July' 2025

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I. Install the package

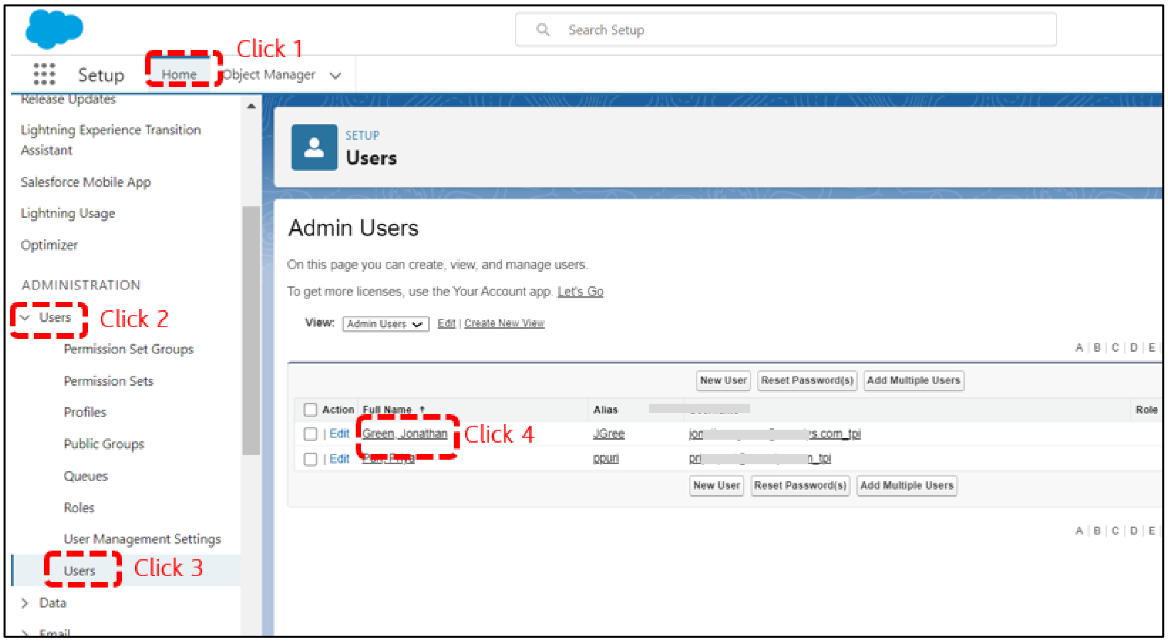
» How to Install the Moody's Orbis for Salesforce from AppExchange:

1. **Open the AppExchange link:**
   [Click here to open the AppExchange page]
2. **Choose your environment:**
   - Click **"Get It Now"** if you're installing in **Production**
   - Click **"Try It"** if you're installing in a **Sandbox**
3. **Log in to Salesforce:**
   Click the **Log In** button and sign in to your Salesforce account.
   (If you're already logged in, you'll skip this step.)
4. **Start the installation:**
   Click **"Install in Production."**
5. **Accept terms and confirm:**
   - Read the terms and conditions
   - Check the box
   - Click **"Confirm and Install"**
6. **Choose who gets access:**
   - Select **"Install for Admins Only"**
   - Click **"Install"**
     (For more about other options, see the full Installation & Configuration Guide.)
7. **Allow third-party access:**
   Check the box to give access and click **Continue.**
8. **Wait for confirmation:**
   The installation will begin. You'll get an email once it's finished.
9. **Verify the installation:**
   - In Salesforce, click the **Setup gear icon** (top-right corner)
   - Search for **"Installed Packages"**
   - You should see the app listed there

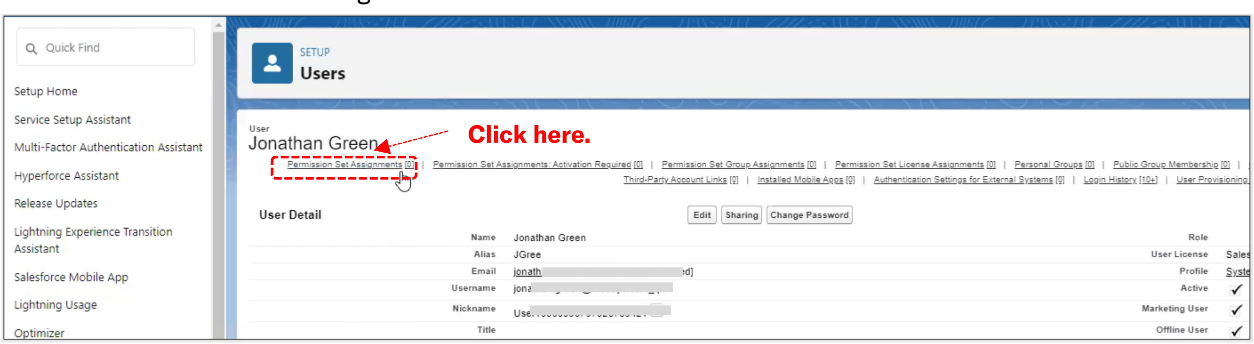
II. Configure the connector setup

1. Configure permissions to access the connector

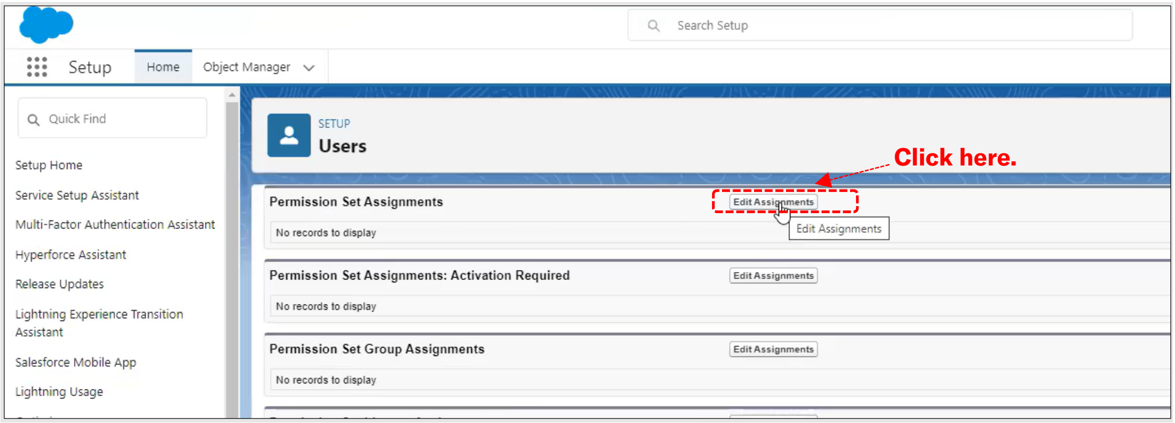
» Navigate to Home >> Users >> Users >> Click on Username (refer below screen)



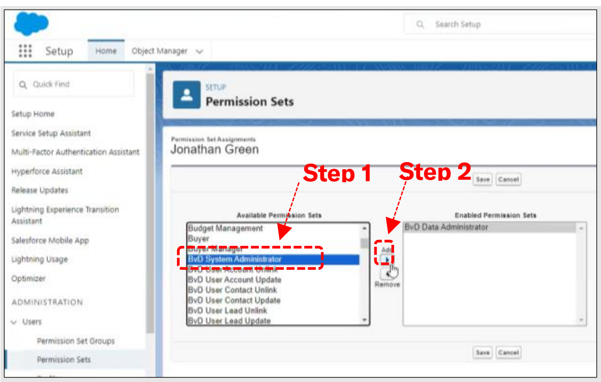
» Click Permission Set Assignments

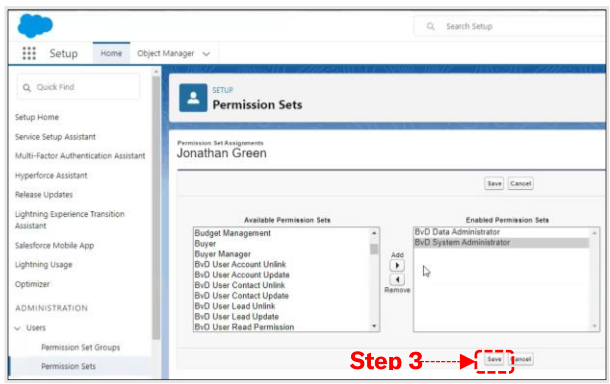


» Click Edit Assignments under Permission set Assignments.



» Follow below steps to give required permissions:
- Step 1: Select the permission sets from right box (list of available permissions)
- Step 2: Click Add chevron to move it left box (list of permissions enabled for the user)
- Step 3: Click Save, to save the permissions for this user.





» Note: The permission sets will differ based on the type of user (Admin, all users, or users with specific roles).

» For Admin users, only two permission sets are needed:

1. BvD System Administrator
2. BvD Data Administrator

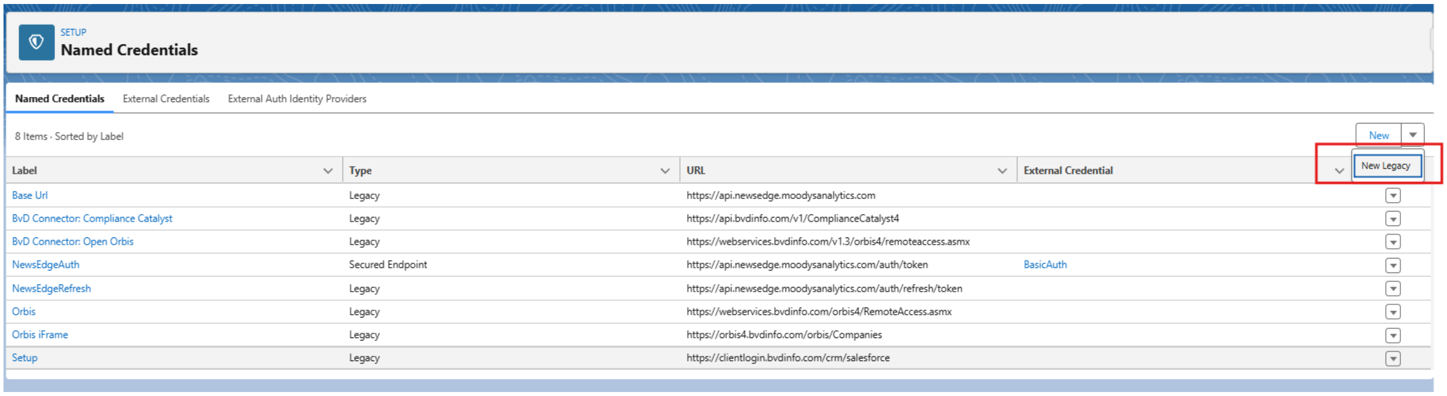
» These permissions are applied immediately, allowing you to start setting up the connector.

» Only users with the BvD System Administrator or BvD Data Administrator permission sets have full access (Create, Read, Update, Delete – CRUD) and can make changes to the application settings.

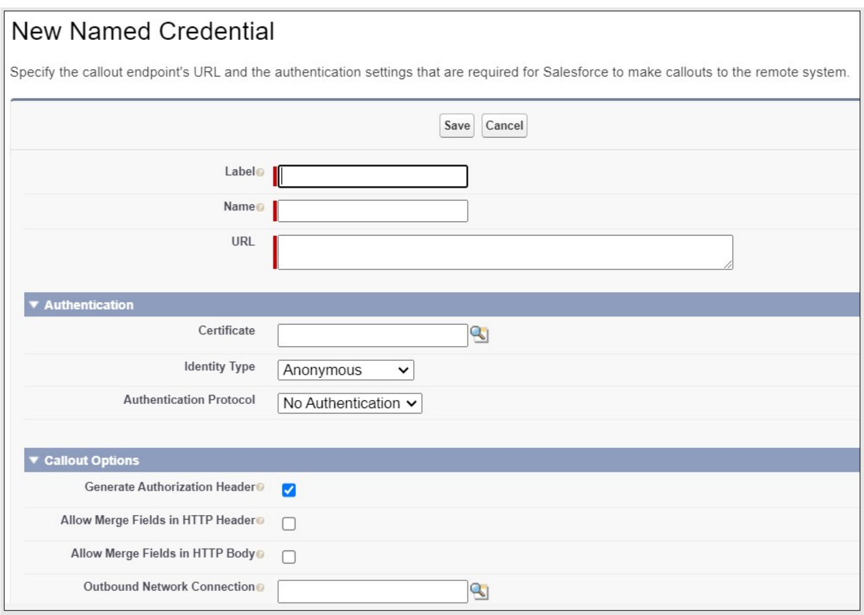
2. Setup Data source for Connector

A) CONFIGURE NAMED CREDENTIALS:

- Obtain BvD's webservice username & password from **Moody's Solution Delivery team.**
- Once you have the BvD's admin user credentials, complete the following steps:
- Home >> Security >> Named Credentials >> Click on New Legacy



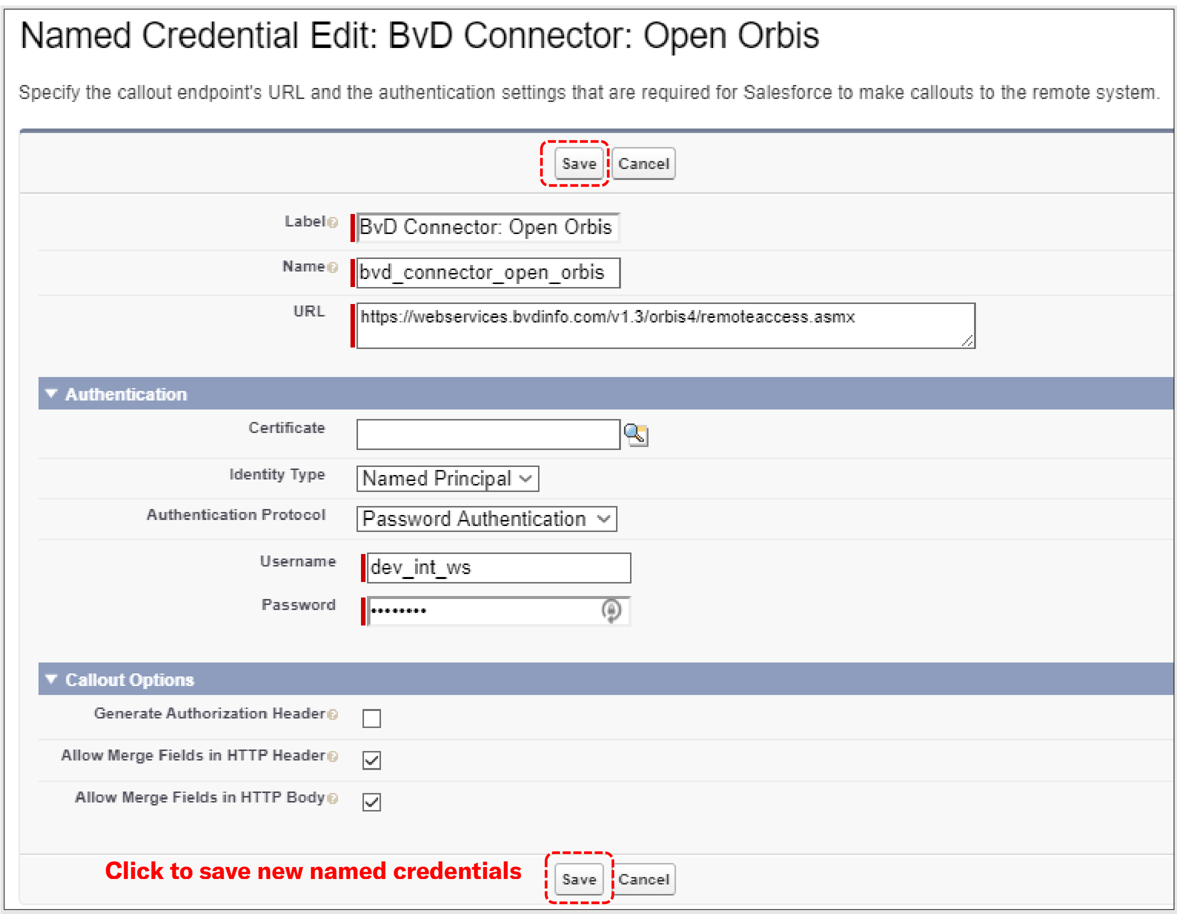
- To set up a new Named Credential:
  - Fill in the required fields based on the data source you are connecting to.
- Note: These fields are case sensitive. If your browser auto-fills any of them, please retype the values manually using the details provided in the next step.



- In the empty fields, Copy & paste the value from below list depending upon your data source:
- **Note:** Orbis, Fame, Orbis Europe, Orbis Asia Pacific, Orbis Americans are all names of data sources

	ORBIS
LABEL	BvD Connector: Open Orbis
NAME (LOWER-CASE ONLY)	bvd_connector_open_orbis
URL	https://webservices.bvdinfo.com/v1.3/orbis4/remoteaccess.asmx

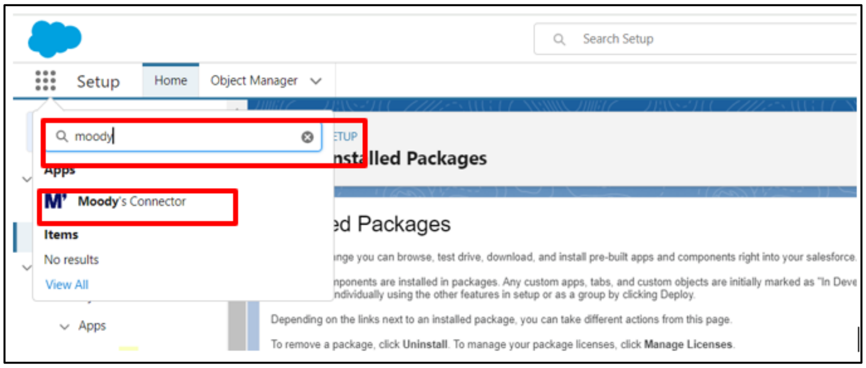
- Following fields remain same irrespective of data source:
- Identity Type: Named Principal
- Authentication Protocol: Password Authentication
- **Username:** BvD's webservice username (to be obtained from Moody analytics team)
- **Password**: BvD's webservice password (to be obtained from Moody analytics team)
- Allow Merge Fields in HTTP Header: Checked
- Allow Merge Fields in HTTP Body: Checked
- Once done, Click save.



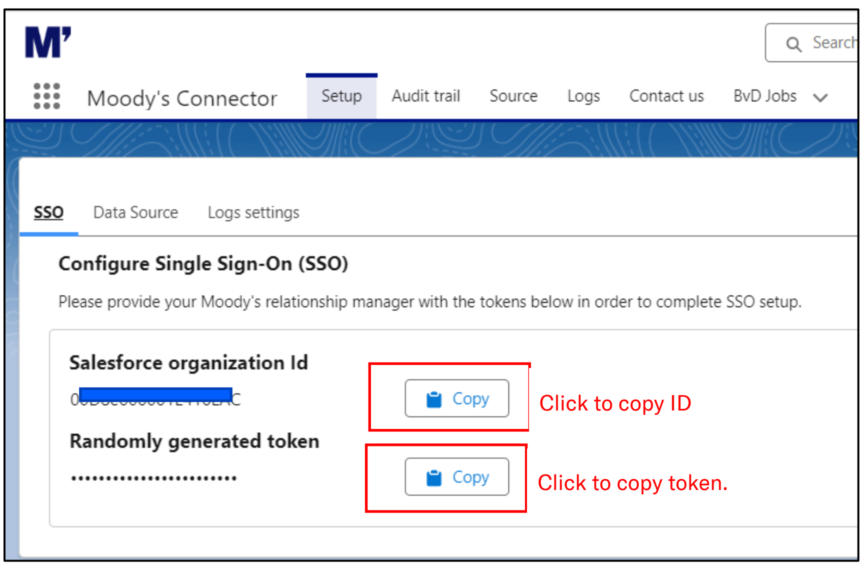
3. Complete Single Sign On (SSO)

» On Salesforce, Navigate to App Launcher >> View All (refer screenshot)

» On Salesforce, Navigate to App Launcher and Type Moody's Connector on 'Search Bar' or Click View All (refer screenshot)



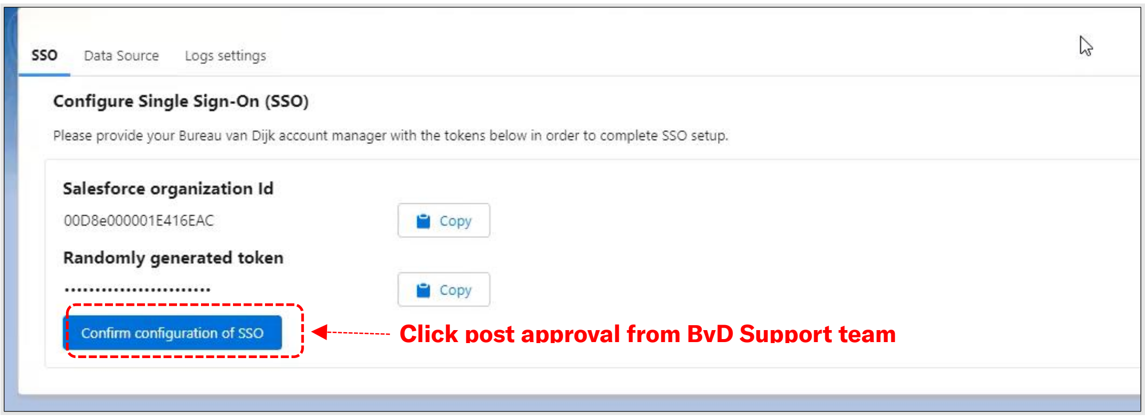
» Once Moody's Connector opens, below would be the homepage for the user.



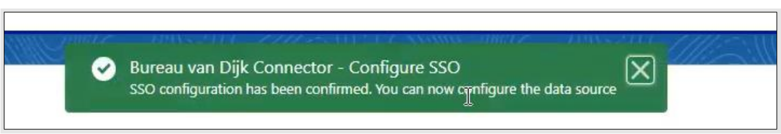
» To complete SSO, please follow these steps:

1. Copy and share the following two details with the **Moody's Analytics Solution Delivery Team**:
   a) Your Salesforce Organization ID
   b) A randomly generated token
2. To copy the token, click the Copy button (as shown in the screenshot above) and paste it into an email or notepad.

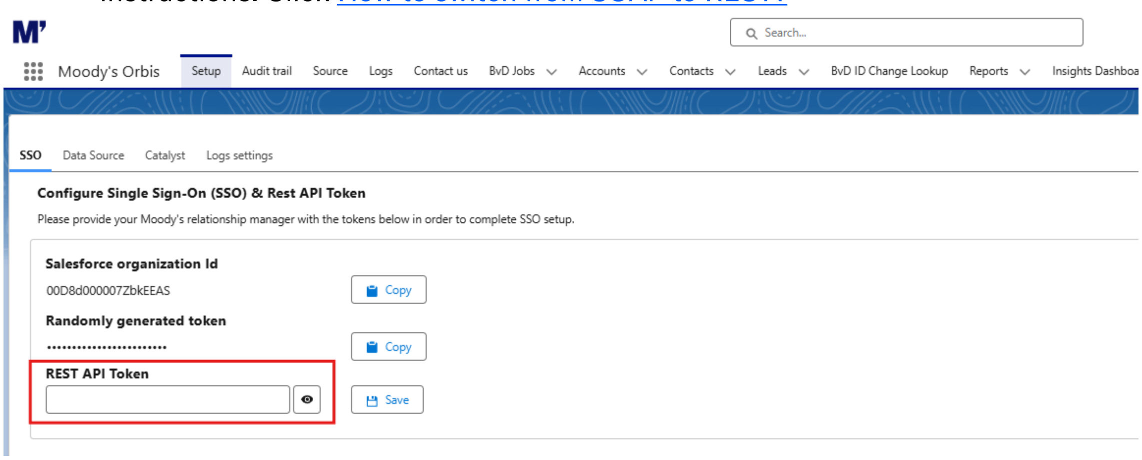
- Important:
  a) SSO setup is mandatory, you won't be able to use the connector until this is done.
  b) After the Moody's Analytics Solution Delivery Team confirms that the setup is complete (via call or email), click Confirm Configuration of SSO to proceed. (DO NOT CLICK ON THIS UNTIL SSO IS CONFIRMED FROM THE BACKEND)



- If Configuration is confirmed, a green pop-up appears on the screen (highlighted in below screenshot)
- Note: At this stage, you don't have access to database yet. Follow next step to enable your database.

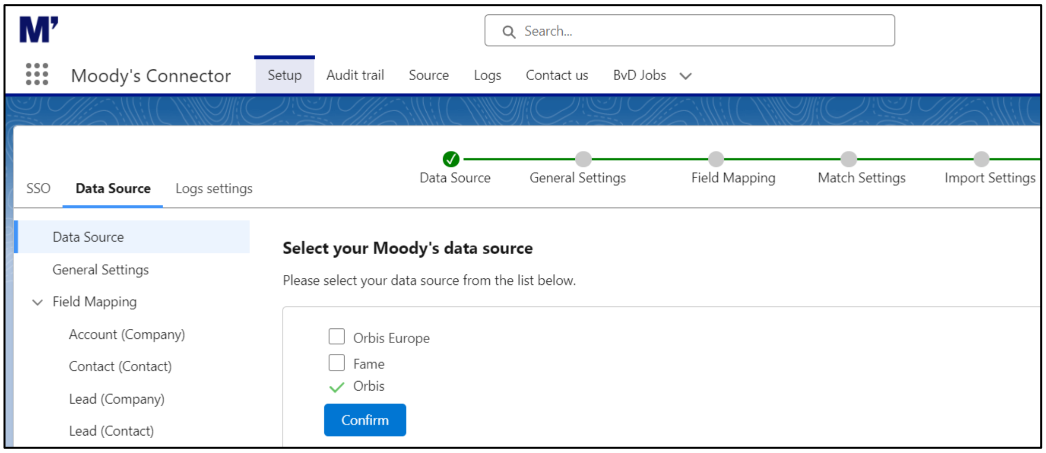


  c) Filling in the REST API token is a mandatory step. Please refer to Section III on page 17 for detailed instructions. Click [How to switch from SOAP to REST?]



d) SELECT DATA SOURCE FOR CONNECTOR

» Once the SSO is confirmed and REST APIs are saved, User needs to navigate to Moody's Connector >> Setup >> Data Source tab >> Data Source >> select the Data Source you have subscribed for and click Confirm button:



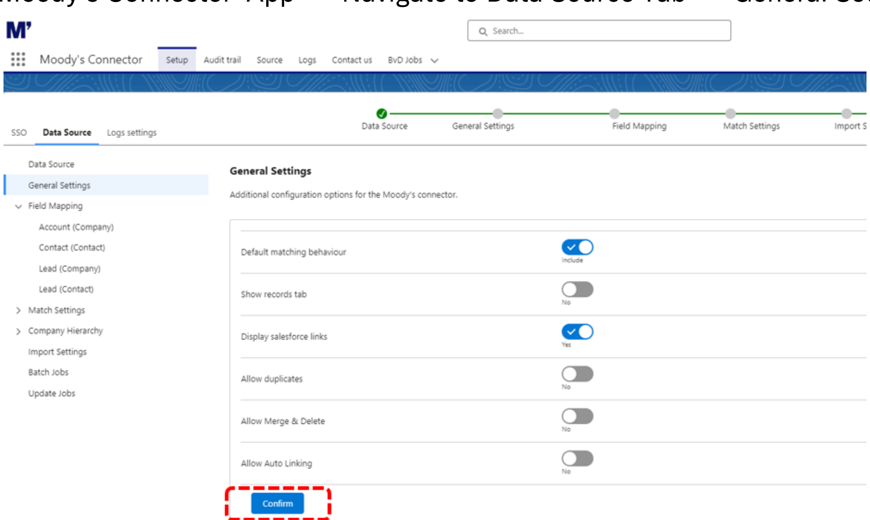
» As soon as 'Confirm' is clicked the 'Steps Wizard' at the top of the screen will mark 'Data Source' Step Complete with green tick (refer above screenshot)

» If the Named Credential has been created properly for the selected Data Source, then User should see following message:

Note: Once above step is successfully completed, only then User can navigate to Field Mappings tab to configure Fields Mappings.

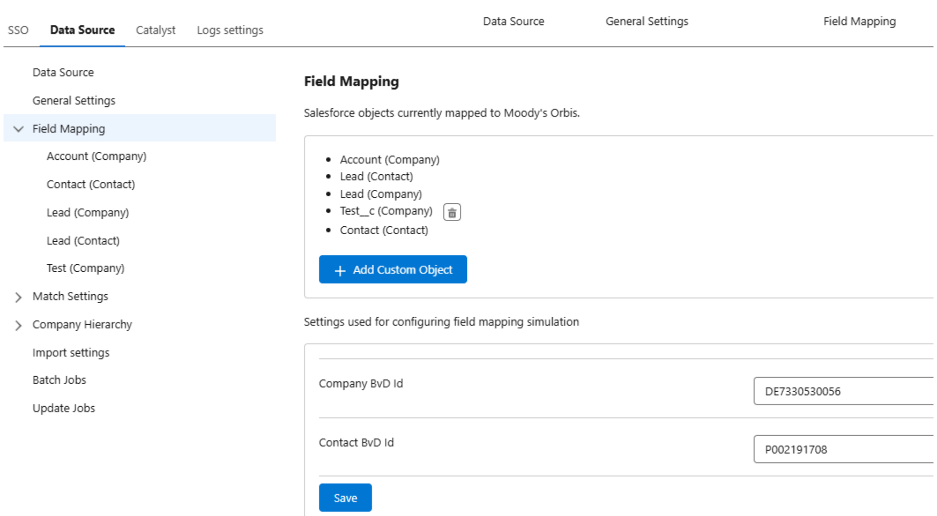
4. Setup General Settings

» On Moody's Connector App >> Navigate to Data Source Tab >> General Settings >> Confirm



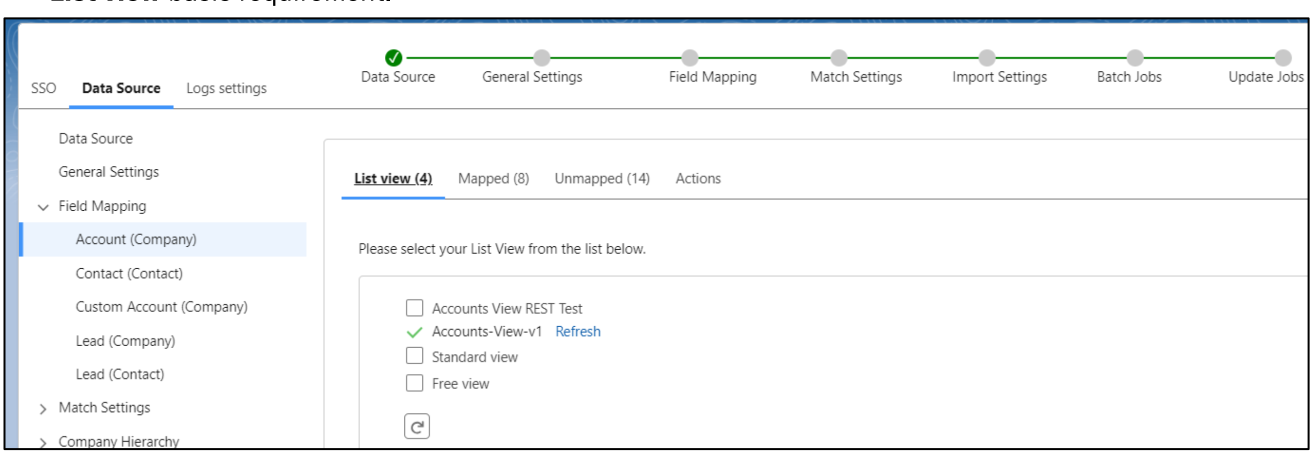
5. Setup Field Mapping

- After the Data Source has been successfully selected in above step, User can start configuring Fields Mappings by navigating to Field Mappings tab.
- Under field mapping, User can see standard objects: Account (Company), Contact (Contact), Lead (Company), Lead (Contact)
- Note: Only the standard objects enabled in General Settings will be visible here. If you want to enable/disable any standard object refer to General settings step
- User can also create a new Custom Object for themselves basis the requirement. (refer page 20 – 23 from the detailed guide)



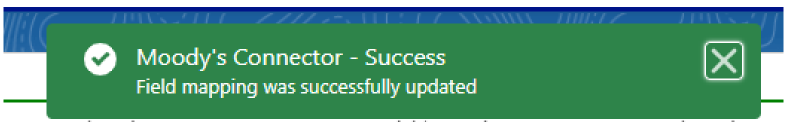
A) SELECT A LIST VIEW FOR AN OBJECT

- **On Moody's Connector APP, List view** for each **standard object** can be configured by selecting the object from left panel (e.g.: Account (company))
- By default, each **standard object** has **access to standard view & free view**. You can also **create a new custom List view** basis requirement.



Setting up a new List View:

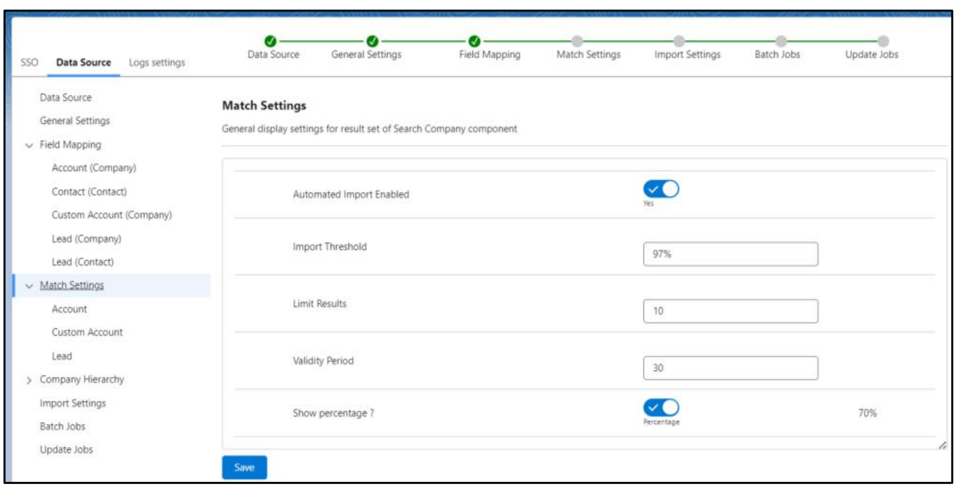
- **User** needs to log in to the selected **Data Source's** user interface and create his/her own **List View** per **Company** and **Contact** entities.
- **User** needs to be logged in to selected **Data Source** using **BvD's admin user** credentials. Only then, the configured List Views will be visible inside Salesforce.
- Please contact Moody's Solution Delivery Team for BvD's admin user credentials
- Note: You may request Moody's Solution Delivery Team to create a new list view basis your requirement & move to next part. Refer page: 24-27 from Detailed guide
- **To save the change click 'CONFIRM.'**
  - This is a very important step. As soon as changes gets saved. You will receive a success pop-up message.



6. Setup Match Settings

A) CONFIGURE FIELDS FOR MATCHING DATA

- On Moody's Connector APP>> Navigate to Setup >> Data source >> Match Settings . (To know more about the fields in this section, Refer page 33 from detailed guide)

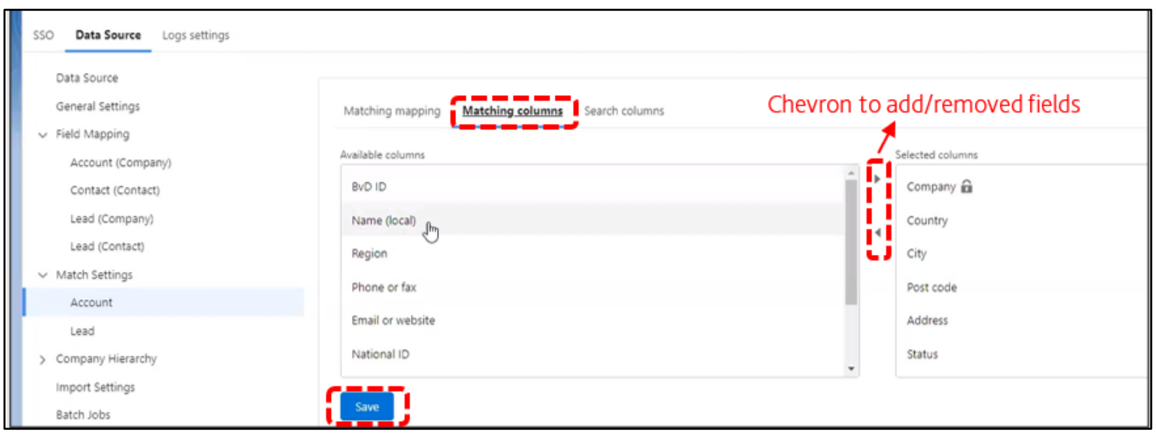


B) ORBIS & SALESFORCE FIELD CONFIGURATIONS (CREATE/VIEW/EDIT)

- This option helps you create view & edit field configurations for Orbis fields with Salesforce (SFDC fields)
- Navigate to Setup >> Data source >> Match Setting >> Object (e.g.: Account)
- For each object (E.g.: Account), you can choose which Orbis fields are mapped to the Salesforce fields provided inside the dropdowns.
- Click Save to submit the changes.
- Note: To have more precise mapping, have more number of fields configured.
- We suggest to map at least either Company + Country or National ID + Country.

C) CONFIGURE MATCHING RESULTS FIELDS.

- These setting will decide what fields will be shown on Matching Table results.
- Navigate to Setup >> Data Source >> Match Settings >> Object (e.g., Account) >> Matching Columns
- Left Box is Available fields & Right column is Select fields.
- Required fields can be added or removed by selecting the field and using the chevron button (highlighted in screenshot)
- Click Save to submit the changes.



CONFIGURE ORBIS QUICK SEARCH TOOL BAR RESULTS FIELDS.

- These setting will decide what fields will be shown on Orbis search Tool bar results table.
- Navigate to Setup >> Data Source >> Match Settings >> Object (e.g., Account) >> Search Columns
- Left Box is Available fields & Right column is Select fields.

- Required fields can be added or removed by selecting the field and using the chevron button (highlighted in screenshot)
- Click Save to submit the changes.

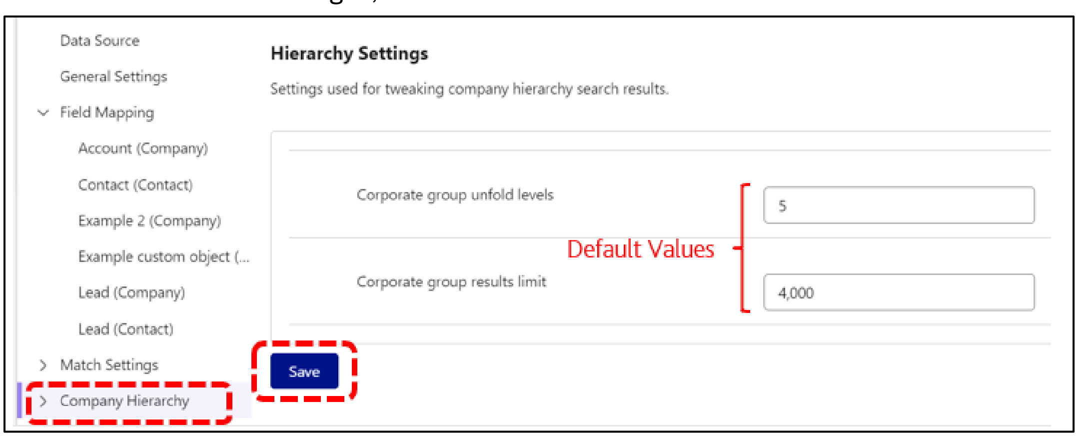
7. Setup Company Hierarchy

A) CONFIGURE COMPANY HIERARCHY SEARCH RESULTS

- Company Hierarchy Search results can be tweaked basis the level of details required.
- Following 2 fields are configurable:

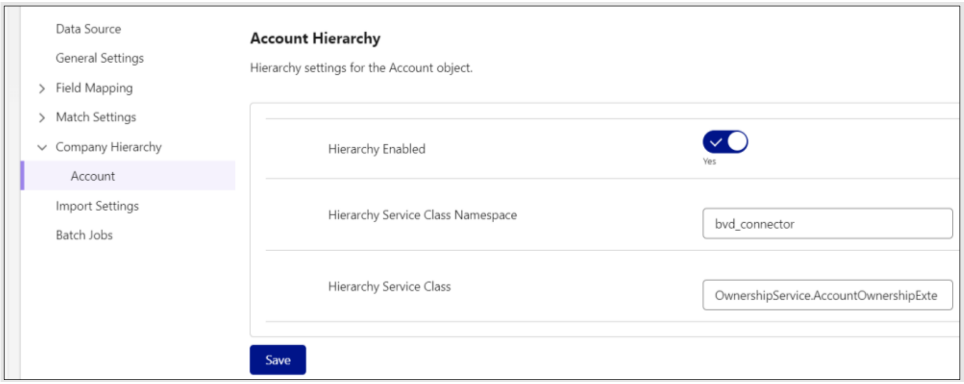
FIELD NAME	DEFAULT VALUE	PURPOSE
CORPORATE GROUP UNFOLDS LEVELS	5	Represents how many levels of the hierarchy are going to be shown from source system.
CORPORATE GROUP RESULTS LIMIT	4,000	represents how many records (at maximum) are going to be shown from source system

- To view/change the settings, Navigate to Setup >> Data Source>> Company Hierarchy
- To submit the changes, Click Save



B) ENABLE ACCOUNT HIERARCHY IN SALESFORCE

- Navigate to Data source >> Company hierarchy >> Object (e.g., Account)
- Enable the hierarchy for the Object (e.g.: Account) by using the toggle button.

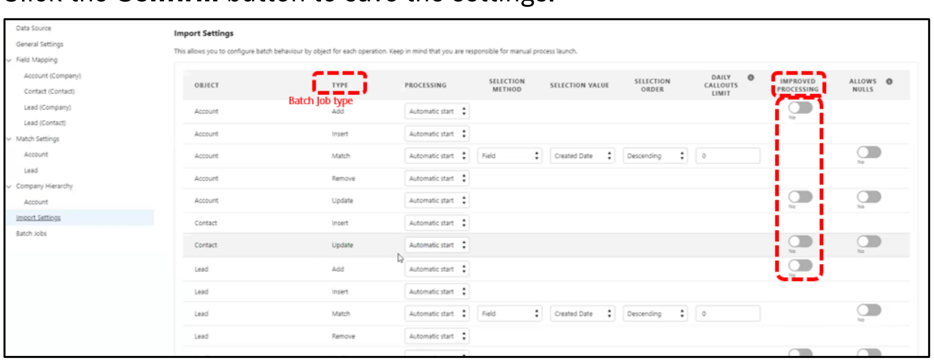


8. Setup Automatic Batch Jobs

- You can set up automated matching for records that haven't yet been linked with the latest Orbis data. Users can schedule a Match Batch Job to run daily in the background. This job will try to match existing records with Orbis Companies.
- Note: Currently, this feature only works for Accounts and Leads, and only for Orbis Companies.
- Steps to configure:
  - Part 1: Set up Import Settings
  - Part 2: Set up Batch Update Settings
  - Part 3: Run Batch Update (available from version 3.41 onwards)

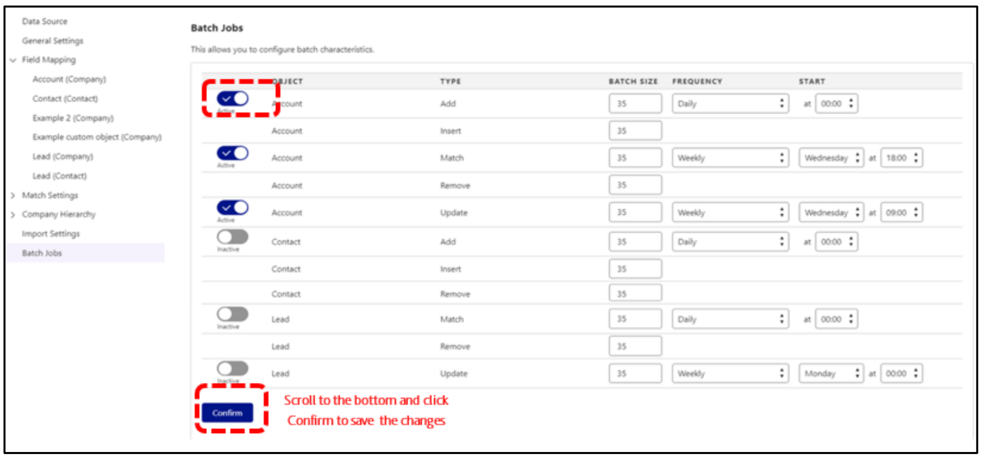
A) SETUP IMPORT SETTINGS

- Go to **Setup > Data Source > Import Settings**
- Here, you can set how each batch job should behave for different objects (like Account or Lead).
- **Note:** If the setting is set to **'Manual Start'**, the data administrator will need to start the process manually.
- Set the **daily callout limit** to **3,999** for objects like **Account**, **Lead**, etc.
- Click the **Confirm** button to save the settings.



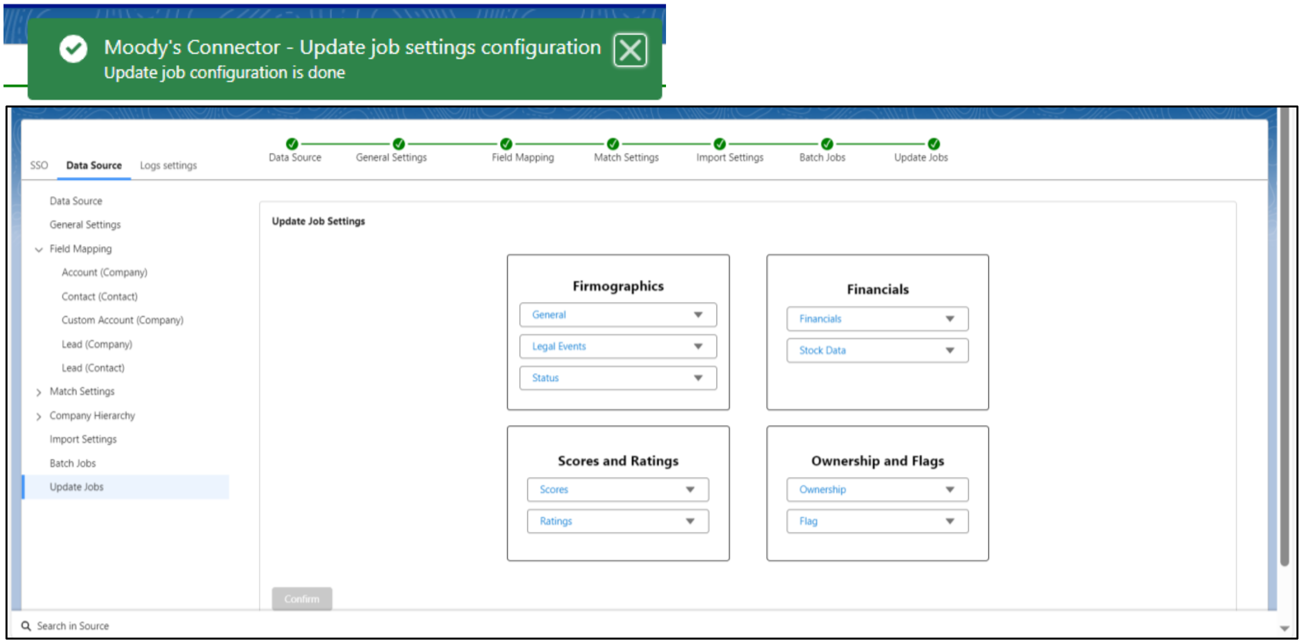
B) SET UP BATCH UPDATE SETTINGS

- Go to **Setup > Data Source > Batch Jobs**
- This section lets you **enable, disable, and configure** batch job settings.
- **Note:** The **batch size limit** is **35 records.**
- You can set the **frequency**, **start day**, and **start time** for each object and its batch job.
- To turn a batch job on or off, use the **toggle switch** next to the object name.
- After making changes, **scroll to the bottom** and click the **Confirm** button to save.



C) BATCH UPDATE (AVAILABLE VERSION 3.41 ONWARDS)

- In the Moody's Connector app, go to **Data Source > Update Jobs**
- This lets you pick which parameters to watch for changes using the 'Update' job.
- The parameters are split into 4 groups:
    - Firmographics
    - Financials
    - Scores & Ratings
    - Ownership & Contacts
- Click Confirm to start using this feature for the first time. This will also mark the step as complete in the setup wizard and show a success message.

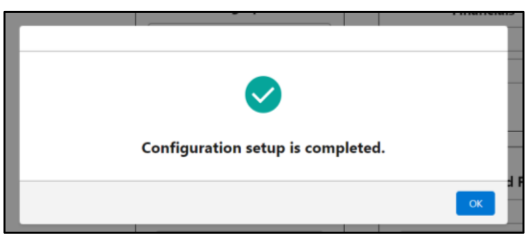


» User can use the dropdown within each bucket to check/change the parameters and click 'Done' to save the change.

Final Configuration Confirmation Message.

» As soon as user complete all the steps, following confirmation message will be shown on screen.

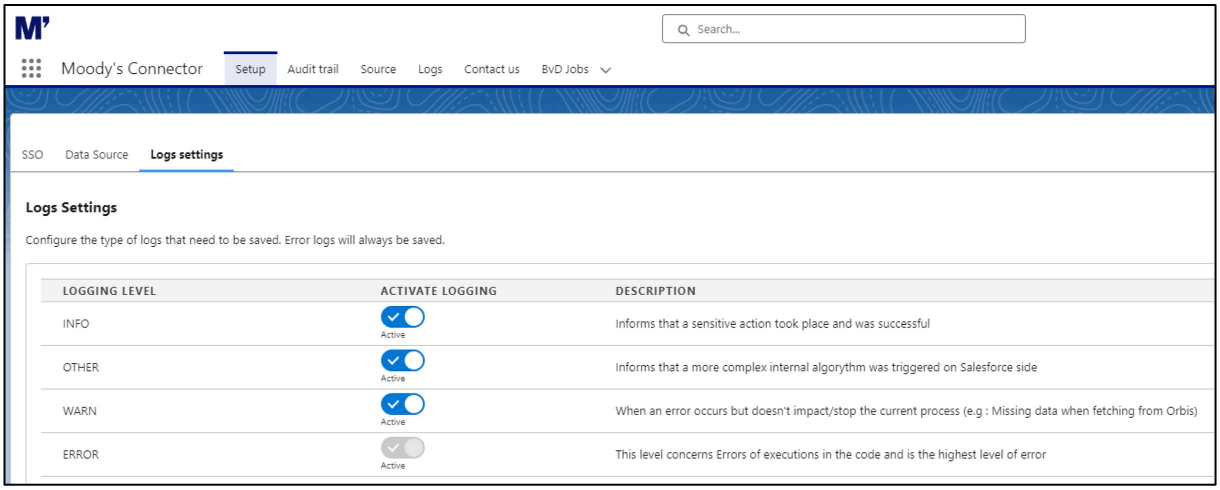
» Click OK to continue.



9. Logs Settings

» Here you can define the level of logging due to application events.

» To consult the logs, activate the levels on Moody's Connector App >> Navigate to **Setup >> Logs Settings**



Now that the connector is set up, import or link a Salesforce record to Orbis to verify that the setup is complete and the import or link functionality is working correctly.

III. How to switch from SOAP to REST?

Valid for version 3.42 and Onwards

For any new client:

- After installing 3.42 version , save Connector Data Source settings in SOAP first
- Then follow below mentioned steps for REST migration
- **Reason** : Since features still work on SOAP, client needs to save connector settings for both SOAP/REST

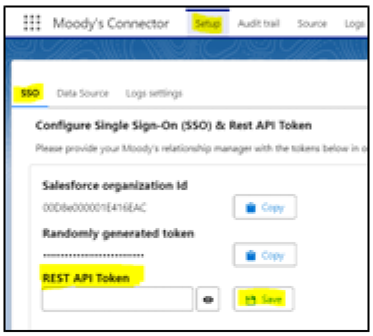
How to switch on REST ?

There are 4 steps to switch on REST API for your Connector application: (to be followed in same order)

1. Enter 'REST token' on SSO page
2. Enter 'REST API URL' on Custom Settings of Connector
3. 'Activate REST' from Custom Settings of Connector
4. Save all Connector settings again for REST

A) REST API TOKEN:

- This Token will be provided to user by Moody's Solution Delivery Team from Moody's admin site.
- Note for Moody's team : This API token is same as Password used in Compliance Catalyst ADD ON Named credentials. In case for any reason new token is being created, make sure to change it in CC named credentials as well.
- Where to enter this ? : On your Salesforce Org, Open Moody's Orbis APP (previously Bureau Van Dijk Connector) >> Setup >> SSO >> Enter the REST API Token >> Click SAVE



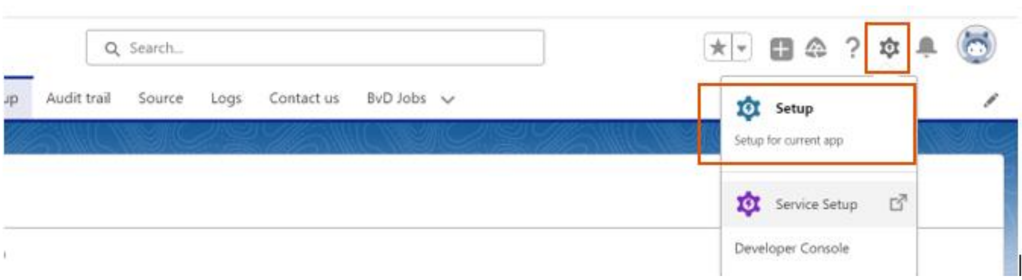
- Once TOKEN is saved, it won't be available on this screen.

NOTE: If at a later stage, this REST API TOKEN needs to be amended, follow below steps to make the changes:

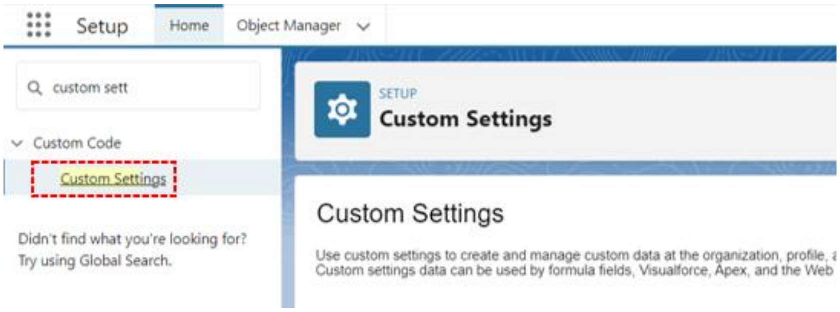
- Go to Setup of Salesforce >> Custom Settings >> On Custom settings page, For Label 'BvD setup' , click 'Manage' >> Click Edit>> Uncheck the 'IsRestTokenAvailable' >> & Click SAVE
- This would ensure, You can again enter new/correct REST OPEN on SSO page and SAVE it once done.

B) ENTER REST API URL

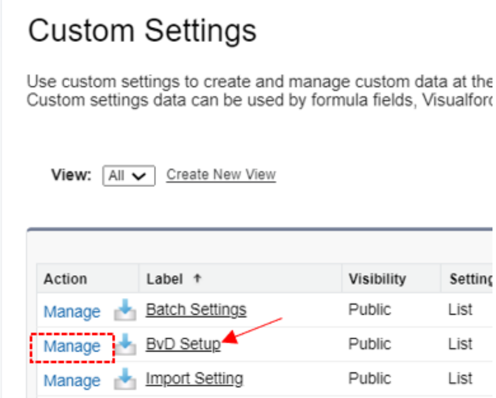
- On your Salesforce , On Top right Navigate to : Setup >> Setup for Current App



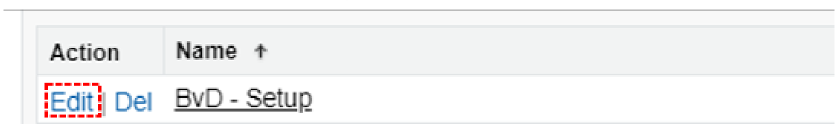
- On Home tab >> On quick find bar Search 'Custom settings' >> and Click to open it



» On Custom settings page, For Label 'BvD setup' , click 'Manage'



» Click 'Edit' for BvD-Setup

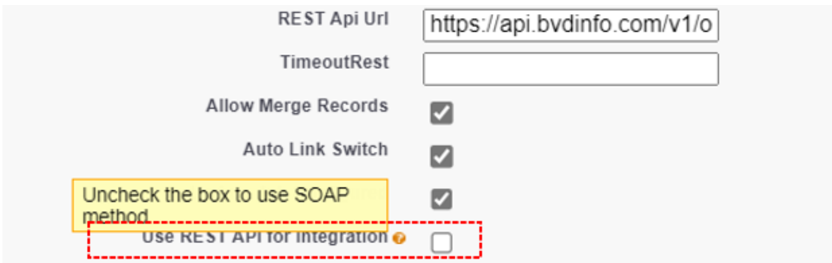


» Scroll down to the bottom of the page and you will find below setting for 'Use REST API for Integration'

C) ACTIVATE REST :

» Check the field 'Use REST API for Integration'

» FYI, Uncheck 'Use REST API for Integration' , if you want to move back to SOAP (refer below screenshot)



» Look for REST API URL Field (refer below screenshot)

» Refer to below table and depending upon your data source – copy and paste URL against REST API URL field

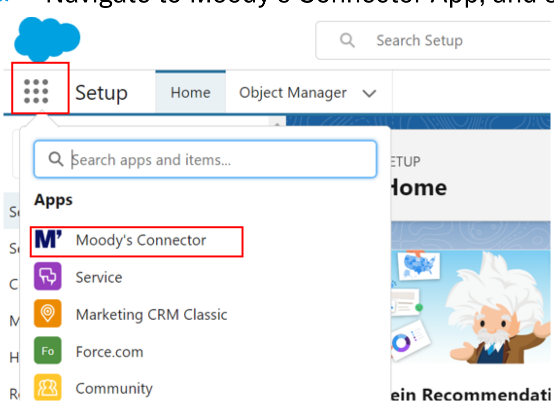
Datasourcename	REST API URL =
Orbis	https://api.bvdinfo.com/v1/orbis/Companies

» Generic URL template is https://api.bvdinfo.com/v1/Datasourcename/Companies

» Click SAVE button (at the top of the page) when URL has been entered

D) SAVE ALL CONNECTOR SETTINGS AGAIN FOR REST

» Navigate to Moody's Connector App, and save all the configuration steps again as shown below:



» Note : All the mappings and settings of SOAP still exists but since user has switched to REST. So, You need to save and confirm all the configurations for REST to perform smoothly.

IV. How to create a Custom object?

PHASE 1: CREATE YOUR CUSTOM OBJECT IN SALESFORCE:

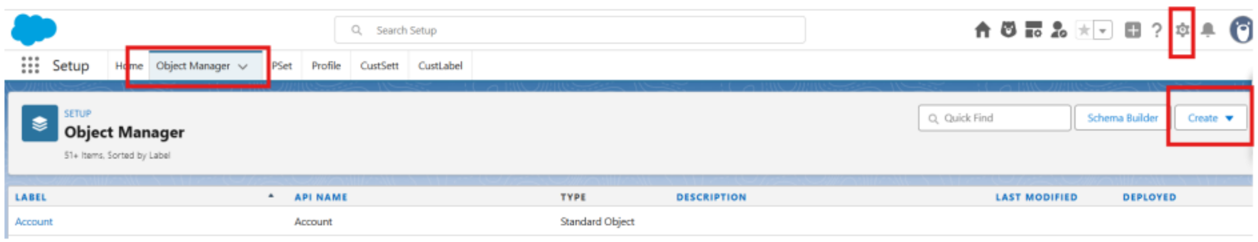
Before you can map fields, you must first create the custom object in Salesforce with all the fields you want to populate from Moody's data.

Step 1: Go to Object Manager

1. Click the Gear Icon in the top right corner
2. Select Setup
3. Click Object Manager

Step 2: Create New Custom Object

1. Click Create → Custom Object



2. Fill in the details:
    a. Label: e.g., "Supplier" or "Vendor"
    b. Plural Label: e.g., "Suppliers" or "Vendors"
    c. Object Name: Auto-generated (e.g., Supplier__c)

3. Configure settings as needed
4. Click Save

Step 3: Add Fields to Your Custom Object

Add all the fields you want to receive data from Moody's. Mandatory fields to create:

Moody's Field	Purpose	Recommended SF Field Type
ORBIS_ID	Unique Moody's company identifier	Text (50)
BVD_ID	Legacy identifier	Text (50)
BVD_RECORD_SET	Data set reference	Text (255)
BVD_LAST_UPDATE	Last sync timestamp	Date/Time
BVD_UNLINKED	Unlink status flag	Checkbox
BVD_UNLINK_REASON	Reason for unlinking	Text Area
SF_NAME	Salesforce record name	Text (80)
COM_CAT_BVD_ID	Compliance Catalyst ID	Text (50)
COM_CAT_PORTFOLIO_ID	Portfolio reference	Text (50)

PHASE 2: CONFIGURE FIELD MAPPING IN MOODY'S APP

Step 4: Navigate to Data Source Tab

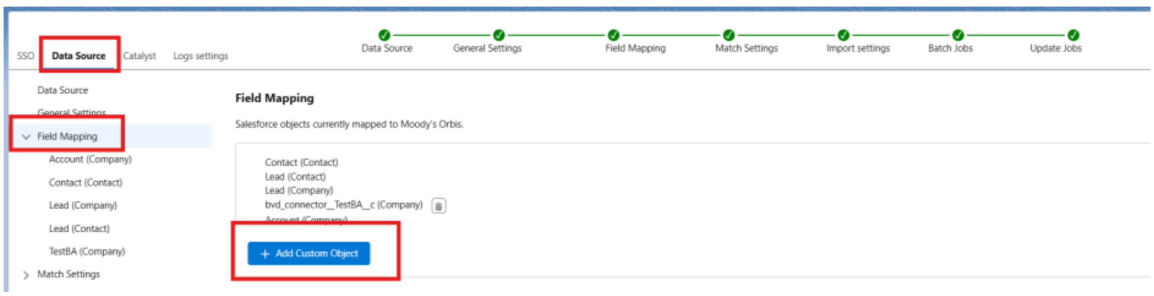
1. Open the Moody's App in Salesforce
2. Go to the Setup section
3. Click on the Data Source tab

Step 5: Open Field Mapping

1. In the Data Source section, locate Field Mapping
2. Click to open the Field Mapping configuration screen

Step 6: Add Your Custom Object

1. Look for the "Add Custom Object" button (usually a + icon or button)

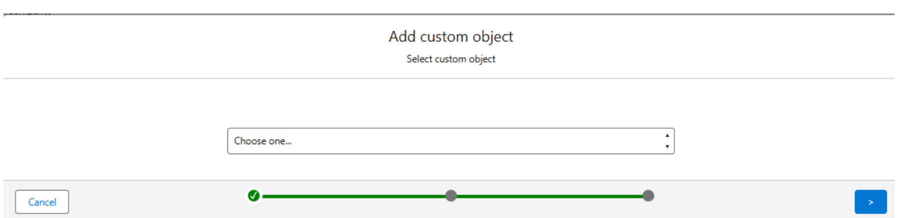


2. Click it to launch the Custom Object Wizard

PHASE 3: CUSTOM OBJECT WIZARD (3 STEPS)

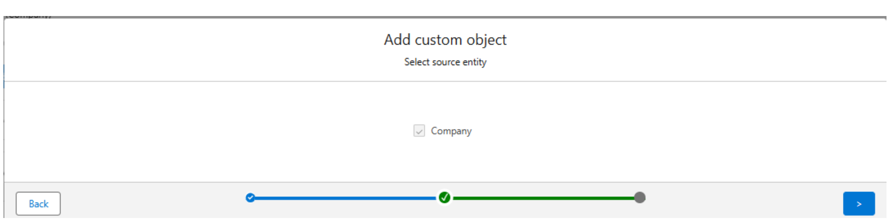
Wizard Step 1: Select Your Custom Object

1. A dropdown will show all available custom objects
2. Find and select the custom object you created (e.g., "Xaccount")
3. Click Next



Wizard Step 2: Select Moody's Entity Type

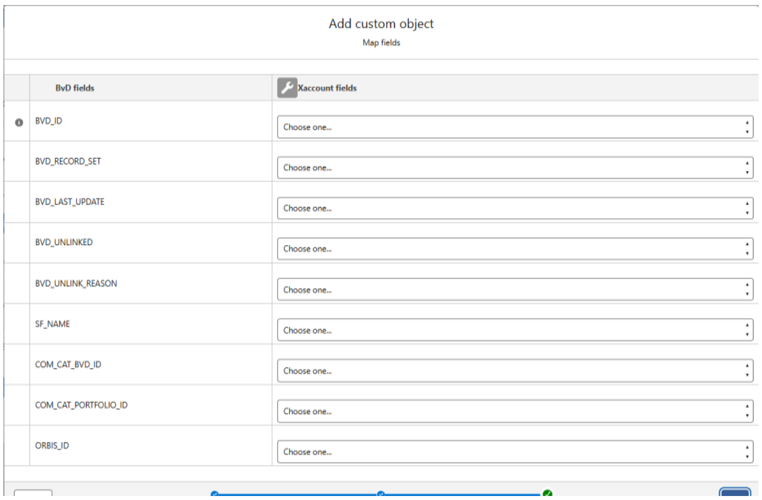
1. Choose the type of Moody's data you want to map.
2. Click Next



Wizard Step 3: Map Your Fields

This is where you connect each Moody's field to your Salesforce field: You will see all fields in the drop down which were created in step 3 of Phase 1.

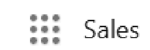
The dropdown only shows Salesforce fields that are compatible with each of the Moody's field type. For example, a Moody's number field will only show Salesforce number/currency fields.

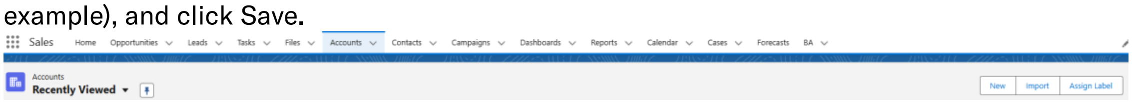


Save Your Configuration and select list view and field mapping - exactly how it was mapped for others Objects like Account/lead etc.

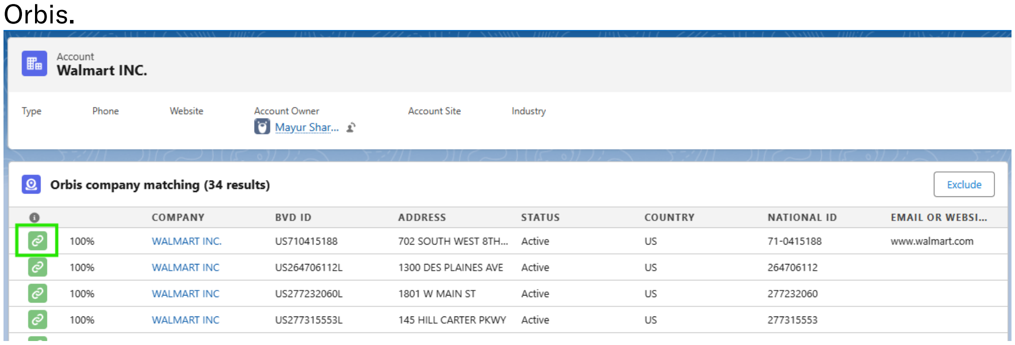
V. How to Link a Salesforce account to Orbis?

Before proceeding, ensure that the account page includes all the necessary components to verify whether an account gets successfully linked to Orbis. (Refer Appendix point 4)

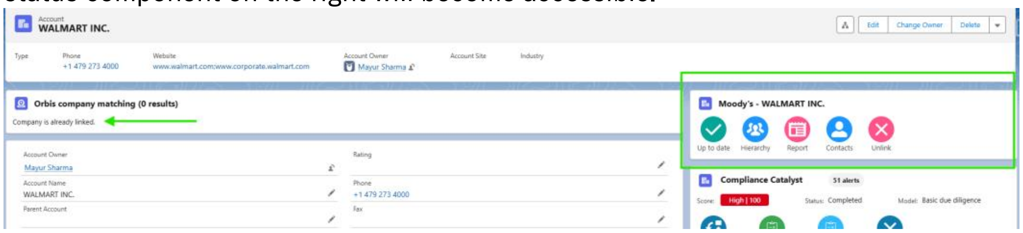
1. From the app launcher, select Sales  . Go to Accounts, add a new account by typing 'Walmart' (for example), and click Save.



2. The matching component will open as shown below, displaying the highest percentage match according to the matching criteria set up in the connector. Click the green highlighted link button to connect the account with Orbis.



3. The company will then be linked to Orbis, and the mapped data will be displayed on the UI. Additionally, the status component on the right will become accessible.

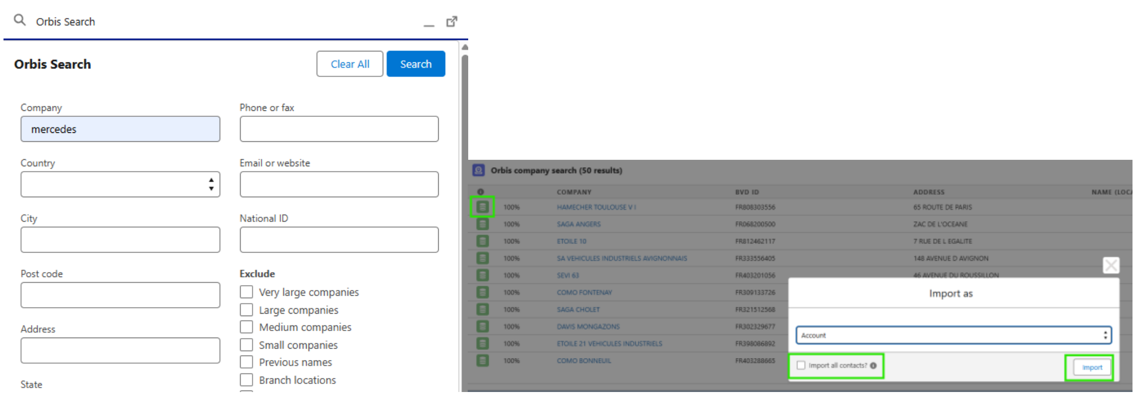


Note: Completing the above steps ensures the connector is operating as intended and configured successfully.

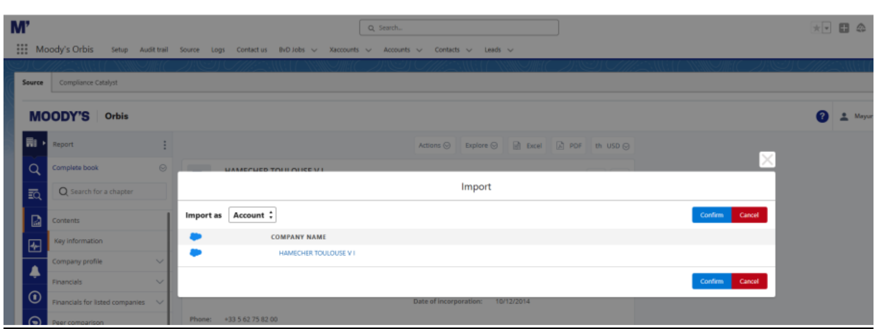
VI. How to Import and link an account?

1. Import from Search tool component
2. Import from Iframe
3. Import from hierarchy button on the status component widget

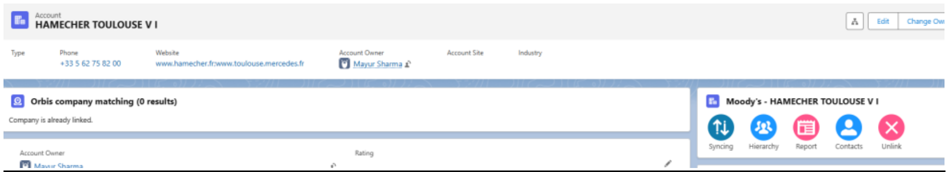
<u>Search tool:</u> Search for a company, then click the import icon followed by the import button.

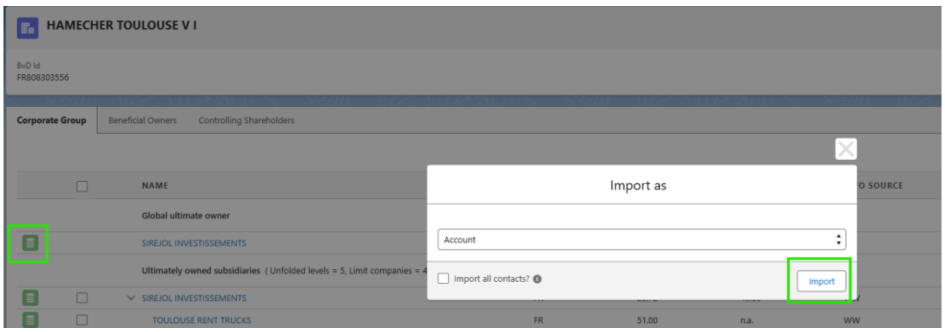


<u>Iframe:</u> Click the Source tab, the Report button on the status widget, or the company name to be redirected to the iframe click on action -> update crm -> click confirm



Hierarchy button: Click the hierarchy button on the status widget to be redirected to the corporate hierarchy page. From there, you can import and link any account within the hierarchy by clicking the import icon followed by the import button.

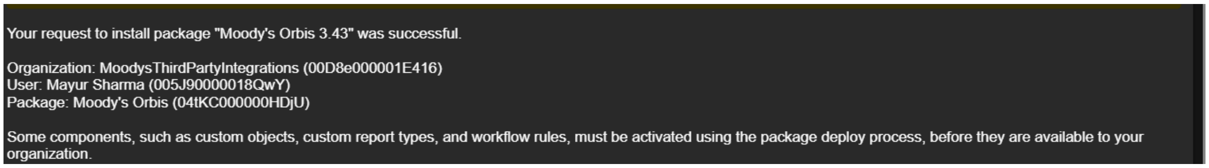




VII. How to upgrade the package from AppExchange?

1. **Open the AppExchange link:**
   Click here to open the AppExchange page
2. Click on "Get it now"
3. When the following screen appears, click the "Upgrade" button.

4. The upgrade process will begin, and a confirmation email will be sent to the user upon successful completion (see screenshot for reference).



Your request to install package "Moody's Orbis 3.43" was successful.

Organization: MoodysThirdPartyIntegrations (00D8e000001E416)
User: Mayur Sharma (005J90000018QwY)
Package: Moody's Orbis (04tKC000000HDjU)

Some components, such as custom objects, custom report types, and workflow rules, must be activated using the package deploy process, before they are available to your organization.

5. Users can begin using the new version of the package without making any changes to the existing connector setup.
6. Note - Ensure that all settings in the connector setup are saved and confirmed again before interacting with the connector to ensure smooth functioning.

VIII. When should a user contact the Moody's Solutions Delivery team?

Ask the Solution Delivery Team to complete the mentioned items.	Refer Section (Clickable link)
Set up Single Sign-On (SSO)	Complete Single sign on
Set up the data source for the connector – Get BvD's web service username and password from Moody's Solution Delivery team	Setup for Data source for Connector
Create a new list view in Orbis	Setup Field Mapping
Get a REST API token – needed when switching from SOAP to REST API	How to switch from SOAP to REST?

IX. Appendix:

Please refer to the detailed guide for an explanation of the following features and glossary terms.

Moody's Orbis for SFDC_Install & Config Detailed Guide for Orbis connector - Configuration and Installation

1) Step-by-step guide to installing the Orbis connector package (Page 4-8)
2) Merge and Delete Feature (Page 42-43)
3) Details on Company Hierarchy (Page 43-45)
4) Permission for mass data import at Hierarchy tab (Page 45-46)
5) How to add components to the Account/Lead Page of Salesforce (Page 46-50)
6) Schedule automated Contacts import while importing an Account (Page 51-52)
7) How to convert Lead to Account? How to keep the mapped BvDID (Page 52-53)
8) Complete list permissions sets and their access on the connector and the Salesforce component? (Page 53-57)