

Moody's Orbis for Salesforce

Release Notes: Version 3.45

June' 2026

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Release Summary

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New Enhancements

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Bug Fixes

Version 3.45 of the Salesforce Orbis Connector delivers targeted enhancements and important bug fixes. The headline feature of this release is the Insights Dashboard — a three-panel analytics experience embedded directly in Salesforce that gives users real-time visibility into Orbis linkage health and batch update outcomes.

New Enhancements

The table below summarizes all new features introduced in version 3.45.

Feature	Description	Use Case
Insights Dashboard ★ MAIN FEATURE	A new three-panel analytics dashboard embedded in Salesforce. Provides Orbis Linkage Insights (bar + donut charts), Update Batch Insights (clickable bar graph with drill-down), and a Records Updated table. Includes in-app Salesforce notifications when a batch run completes.	Users can monitor linkage health, track batch outcomes, and investigate enrichment failures - all without leaving Salesforce.
External Permission Set for Partner Community License	A new permission set introduced for external users accessing CRM via Salesforce Experience Cloud. Addresses connector access limitations specific to partner/community license types.	External/partner users can now access and use the Orbis connector without requiring elevated internal Salesforce licenses.
UI Simplification - Import Settings & Batch Configuration	Simplified the connector import settings section. Removed the 'Improved Processing' toggle (now always on by default). Added contextual 'i' info buttons explaining each batch job, run order, batch size, and look-back period.	Admins experience a cleaner, lower-friction setup with in-context guidance throughout the batch configuration screen.

Insights Dashboard - Feature Details

★ Main Feature of Release v3.45

The Insights Dashboard is divided into three sections:

1. Orbis Linkage Insights

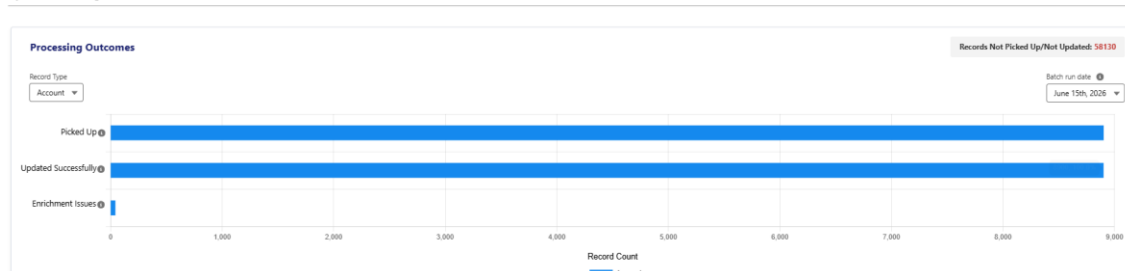
- Bar graph displaying CRM records that are linked or unlinked to Orbis (i.e. linked to a BvDId), generated for all objects in the org (Account, Lead, Custom Object).
- Bars are clickable and open a list of matching records showing Record ID and Record Name; clicking a record navigates directly to it in Salesforce.
- Donut chart shows what proportion of linked records are included in the current record set (portfolio).
- If linked records are absent from the record set, a 'Schedule Bulk Add Job' button lets users queue a batch to add them back.

Orbis Linkage Insights



2. Update Batch Insights

Update Batch Insights



- Bar graph showing outcomes of the Update batch: records picked up, records updated, and records that failed.
- Top-left 'i' icon provides contextual help explaining the graph.

Update batch processes only those records that are part of the recordset

Update Batch Insights

- Top-right counter shows records excluded from the batch because they did not meet the update criteria.

Records Not Picked Up/Not Updated: 58130

Records not matching the update criteria were not enriched.

- Batch run date dropdown filters results to dates on which the batch ran within the last 7 days.

Graph is retained for 1 week post batch run (Until June 22nd, 2026)

Batch run date

June 15th, 2026

- Graphs are clickable and surface a record list with Record ID, Record Name, and BvDId. To download the full list, click 'How to Download' > 'Copy Query', then run it in the Salesforce Inspector.

[illegible]

- Enrichment Issues sub-panel explains why individual records failed enrichment, showing status, failure reason, and error details where available.

List of Records					How to download?
Record Name	BvidId	Status	Failure Reason	Error Details	
	AE000400033	Processed	Record Not Found		
					< Page 1 of 1 >

3. Records Updated Table

- Lists all records updated by the batch and the exact field-level changes: old value and new value.
- Five columns: BvDId, Record Name, Field Name, Old Value, New Value.
- Includes a search bar to filter by BvDId, Record Name, or Field Name.

Records Updated @

[How to download](#)

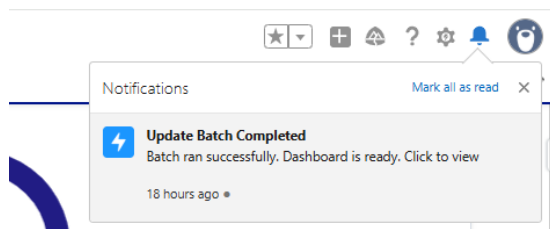
B+D Id ▾	Record Name ▾	Field Name ▾	Old Value	New Value
US942404110	APPLE INC.	Country ISO CODE		US
US942404110	APPLE INC.	Annual Revenue	416161000000	416161000000.0
US911144442	MICROSOFT CORPORATION	Annual Revenue	281724000000	281724000000.0
US201665019	META PLATFORMS, INC.	Annual Revenue	200966000000	200966000000.0
US232259884	VERIZON COMMUNICATIONS INC	Country ISO CODE		US
US232259884	VERIZON COMMUNICATIONS INC	Annual Revenue	138191000000	138191000000.0
US431301083	AT&T INC.	Moody's PD	0.03	0.04
US431301083	AT&T INC.	Country ISO CODE		US
US431301083	AT&T INC.	Annual Revenue	125648000000	125648000000.0

Showing 30 of 50747 records (scroll for more)

Batch Completion Notification

Once a batch run completes, the user receives a Salesforce in-app notification:

Field	Value
Title	Update Batch Completed
Message	Batch ran successfully. Dashboard is ready. Click to view.
Action	Clicking the notification redirects the user to the Insights Dashboard.

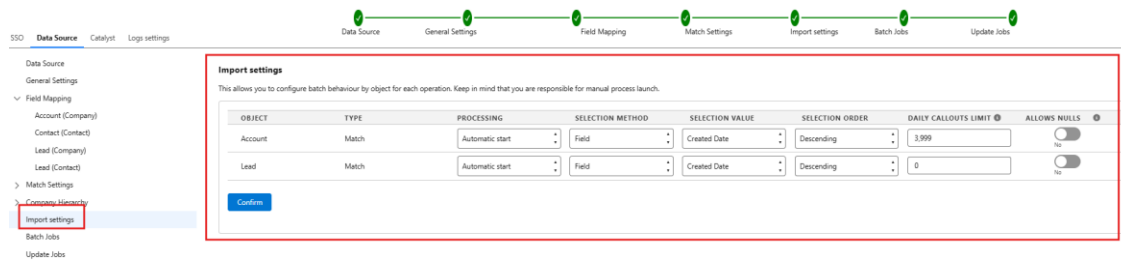


UI Simplification - Import Settings & Batch Configuration

Configuration Simplification

- Reduced overall complexity in the Connector setup and configuration process.
- Streamlined options to focus only on essential settings.

Updated Import Settings (New UI)

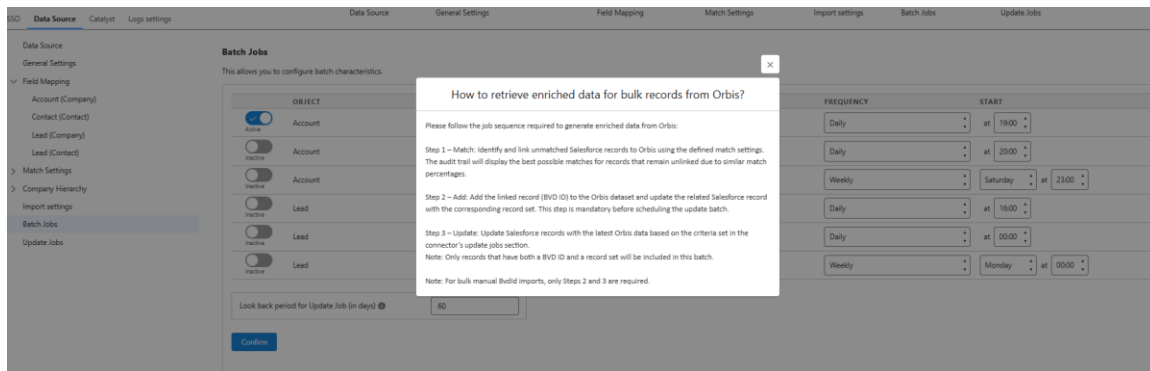


- Retained only the **Match Batch** configuration, as it supports two selection methods:
 - Default selection: **Field**
- Removed the **Improved Processing** option:
 - This is now enabled by default at the backend and no longer requires user configuration.

Batch Job Section Improvements

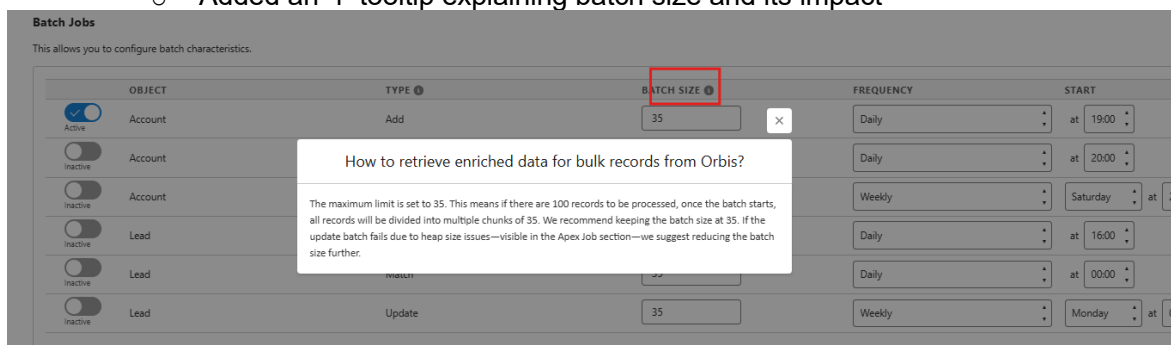
To enhance usability and clarity:

- Added an “i” icon to explain:
 - Purpose of each batch job
 - Recommended execution sequence



Batch Size Information

- Added an “i” tooltip explaining batch size and its impact



Contacts Object

- Removed the Contacts toggle option:
 - Batch jobs are not compatible with the Contacts object
 - Contacts are therefore excluded from the batch configuration section

OBJECT	TYPE	BATCH SIZE	FREQUENCY	START
☒ Active Account	Add	35	Daily	at 15:00
☐ Inactive Account	Insert	35		
☐ Inactive Account	Manual Update	35	Daily	at 00:00
☒ Active Account	Match	35	Daily	at 15:00
☐ Inactive Account	Remove	35		
☒ Active Account	Update	35	Weekly	Wednesday at 16:00
☐ Inactive Contact	Insert	35		
☐ Inactive Contact	Update	35	Weekly	Monday at 00:00
☐ Inactive Lead	Add	35	Daily	at 00:00

Lookback Period

- Added an “i” tooltip explaining:
 - Definition of lookback period
 - Its role in batch processing



Look back period for Update Job (in days) 60

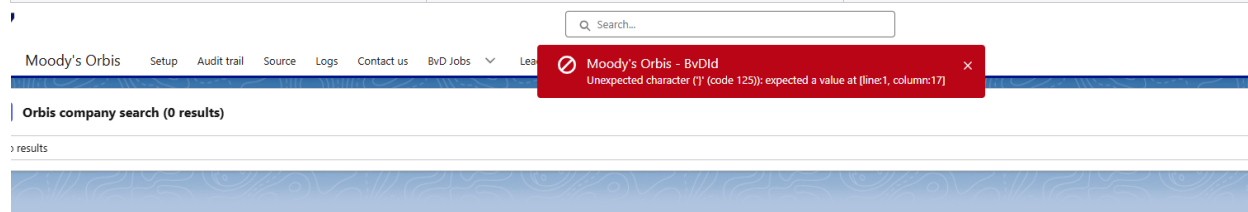
Max: 60 days; default: 14 days.

Bug Fixes

The following issues have been resolved in version 3.45. Each entry describes the issue encountered, the resolution applied, and the resulting use case.

Fix 1 - Orbis Search Component: URL Copy/Paste in New Tab

Issue	Resolution	Use Case
Copying the URL after performing a company search in the Orbis Search component and opening it in a new tab or browser window caused the search results to error out and fail to load.	Resolved the URL state management issue in the Orbis Search component. Search context is now correctly preserved and rehydrated when the URL is opened in a new tab or browser.	Users can share or bookmark Orbis company search result URLs. Opening a copied URL in a new tab now reproduces the expected search results without errors.

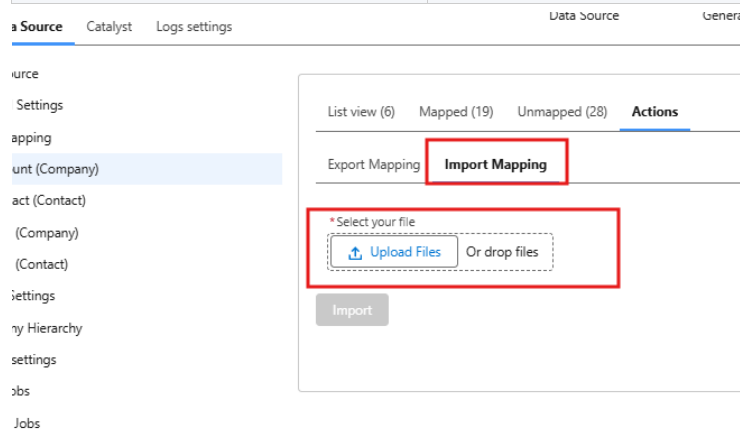


Fix 2 - Orbis Variable (UDV) Custom Fields Not Available in SF Field Mapping

Issue	Resolution	Use Case
When a new custom variable (UDV) was created in Orbis, it did not appear in the Salesforce field mapping section unless the user unlinked the object - which wiped all existing field mappings and required full remapping from scratch.	Newly created Orbis variables are now available in the Salesforce list view after a simple page refresh. They appear in the unmapped fields section without affecting any existing mappings.	Admins can add new Orbis UDV fields and map them in Salesforce immediately after creation. All existing field mappings are preserved throughout the process.

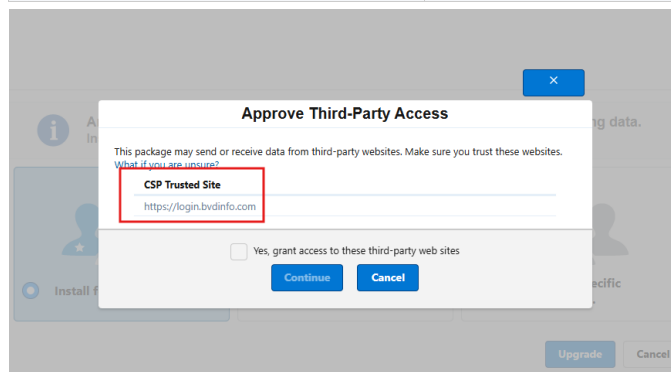
Fix 3 - Field Mapping Import/Export Across Orgs

Issue	Resolution	Use Case
There was no way to transfer field mappings between Salesforce orgs. Admins managing multiple orgs had to recreate every mapping manually in each environment.	Users can now export field mappings from one org and import them into another. Mappings where the Salesforce Field API Name matches exactly are applied automatically; non-matching fields are skipped gracefully.	Admins managing multiple Salesforce orgs can reuse field mapping configurations, drastically reducing setup time. Note: Both orgs must share identical Salesforce Field API Names for mappings to transfer correctly.



Fix 4 - CSP Directive Checkbox Requirement Removed (Orbis iFrame)

Issue	Resolution	Use Case
Users were required to manually uncheck session settings in Salesforce to allow the Orbis iFrame to load.	As part of the v3.45 installation/upgrade, the required Content Security Policy (CSP) directive is now automatically added by configuring the trusted site. No manual session settings changes are needed.	Administrators installing or upgrading to v3.45 no longer need to modify Salesforce session settings - the Orbis iFrame loads correctly out of the box.



Fix 5 - 'Record Not Found' Missing Error Detail Message in insights Dashboard/Audit Trail

Issue	Resolution	Use Case
When a batch job processed a record whose ID no longer existed in Salesforce but was still present in the Record Set (portfolio), the Error_Details field was blank, giving administrators no actionable context for the failure.	For any work item where Failure_Reason equals 'Record Not Found', the Error_Details field now displays: "The record does not exist in Salesforce; however, it is still part of the portfolio (Record Set), which is why it was picked up for processing."	Administrators can immediately understand why a record failed processing without needing to manually investigate inconsistencies between Salesforce and the Record Set.

Upgrade Notes & Considerations

- CSP Trusted Site is automatically configured during v3.45 installation. No manual session settings changes are required.
- The 'Improved Processing' toggle in Import Settings has been removed from the UI. It is now enabled by default at the backend — existing configurations are unaffected.
- The Contacts toggle in the Batch Jobs section has been removed. As Contact objects are not compatible with the connector batch jobs.
- Field Mapping Import: Both source and destination orgs must have identical Salesforce Field API Names. Fields that do not match are skipped silently during import.
- The Insights Dashboard is accessible from the connector home page and refreshes automatically after each completed batch run.

For support or questions regarding this release, please raise a ticket via the Client Services