Company.info for Salesforce

INSTALLATION AND CONFIGURATION GUIDE

The admin guide to setup the Company.info for Salesforce app

Release 5.11

Table of Contents

1. Introduction

The most up-to-date and complete data on your customers with just a few clicks? That's what the Company.info for Salesforce app is all about. Seamlessly integrated with the Salesforce platform, it helps you identify opportunities and potential risks by providing you with real-time client information from trustworthy sources. A powerful instrument for admins and end users alike in both their risk and compliance as well as marketing and sales efforts.

Hey, admins!
Did you know the app contains various admin-specific advantages as well? This is what Company.info for Salesforce has in store for you:

Adoption rate

Your adoption rate increases rapidly – the app requires a one-time installation for a set-it-and-forget-it workflow.

Highly configurable

The app is highly configurable to your users' needs. Adding a declarative interface to the mix, ad-hoc product training becomes obsolete.

Data hygiene

Data hygiene is on-point, which means that you allow the end user the ability to rely on up-to-date, clean data regarding prospects.

Configure the app to your needs

The app is developed with maximum flexibility in mind, allowing you to configure the app in such a way that it fully supports your organization's business processes. Also, you can use components of the app in your own customizations.

This guide describes the installation and the basic configuration of the app and provides some best practices:

- Create Accounts via the Company.info for Salesforce app and enrich existing accounts with data of Company.info.
- Fetch Business Positions, CoC Extracts and Creditsafe Reports
- Create contacts from Business Positions
- Set up the Account Lightning Page and assign Page Layouts
- Enabling Dutch Lead Management

The Customization Guide, which you can download from the AppExchange, gives you an overview of some of the customizations that can be done:

- Update Template Flows to your organization's needs
- Set a default Country for accounts created via the app
- Populate the Account with data, when enriching it with Business Data.
- Set default values when creating an Account, or when searching for Businesses
- Make it required to always create a new Account via the app

All customizations can be realized on top of the default configuration as described in this Installation and Configuration guide.

Upgrades

In our quest to offer you a seamless and complete user experience, all future releases of the Company.info for Salesforce app will be delivered via push upgrades. This is a similar process to the platform releases that Salesforce makes every year (Spring, Summer, Winter). We will take both release schedules into consideration to help ensure there are no issues.

What does this mean to you? We will continue to improve and enhance the app by making several major releases per year. On the announced release date, the latest version will be automatically pushed to any available sandbox environment(s), from which you can test the newest features for a certain number of weeks. A subsequent push upgrade to your production environment will then take place.

Patches and Bug fixes will also be automatically pushed to your environments but will not be accompanied by an announcement. You will find the latest information on the AppExchange listing: Company.info for Salesforce. Should the need arise that requires a manual upgrade, this will be communicated separately.

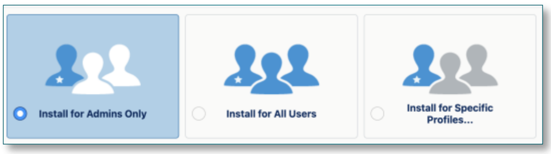
We got your back

If you have any questions or are experiencing any issues, please visit the FAQ page on the Company.info website for more information and to contact us.

2. Installation

The Company.info App for Salesforce app can be found on Salesforce's AppExchange. Follow the instructions below to download and install Company.info App for Salesforce into your production instance or sandbox.

1. Click the link below to install the app from your Salesforce environment
   https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FR4nwUAD
2. Log in to the AppExchange using your Salesforce credentials.
3. Select the appropriate option, depending on whether you wish to install Company.info App for Salesforce in your production or sandbox instance.
4. Read and agree to the terms and conditions, then click Install.
5. Enter your Salesforce Username and Password
6. Choose 'Install for Admins Only' as a security level.



7. Click Install to start the installation.

- In Setup - Deployment Status you can check the progress of the installation.
- Once the installation is finished you can start configuring the app.

3. After you've been upgraded

Salesforce has been making significant improvements to the functionality of Flow, urging users to transition away from Process Builder. To follow Salesforce's advice, we have replaced the Error Log Process Builder with the Error Log Flow.

The Error Log Flow is activated by Default and will create an Error Log record in case of any user or system issue.

By default, the Process Builder is also activated, resulting in duplicate error logs being created. Therefore, we advise your Administrator to immediately de-activate the Error Log Process Builder after you upgraded to version 5.7

Deprecated Error Log Process Builder						
Version 3: Deprecated Error Log Process Buil...	Deprecated Process Builder for the Error Log objec...	Error Log	Record Change	06-03-2023	Inactive	Activate
Version 2: Error Log Process Builder	Process Builder for the Error Log object. Sends an ...	Error Log	Record Change	14-03-2023	Inactive	Activate
Version 1: Error Log Process Builder	Process Builder for the Error Log object. Sends an ...	Error Log	Record Change	10-05-2021	Inactive	Activate

4. General Configuration for new installations

This chapter outlines the general settings that must be configured to use the app after the first installation. Additional configuration per module is described in subsequent chapters.

Step 1: My domain

To use the Company.info app it is required to have 'My Domain' enabled within your Org. More information on how to set up 'My Domain' can be found here:
https://help.salesforce.com/articleView?id=domain_name_overview.htm&type=5

Step 2: Assign permission set for configuration

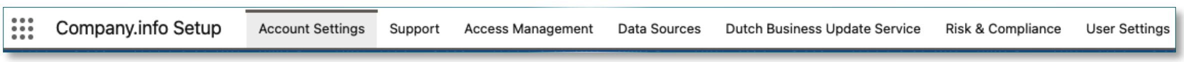
To configure the app, the admin user must be assigned to the permission set 'Company.info Administrator'.

1. Open Setup
2. Click Users and select Permission Sets
3. Open Permission Set 'Company.info Administrator'
4. Click Manage Assignments
5. Click Add Assignments
6. Select the admin user
7. Click Assign
8. Click Done

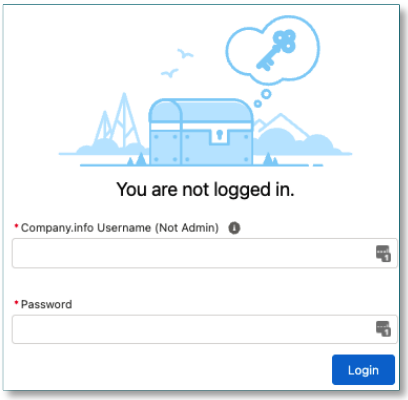
Step 3: Connect to Company.info

Via the Company.info Setup app, amongst other settings, the connection with the Company.info data sources must be established. *This app only is available for users assigned to the Company.info Administrator permission set.*

1. From the App Launcher open the Company.info Setup app.

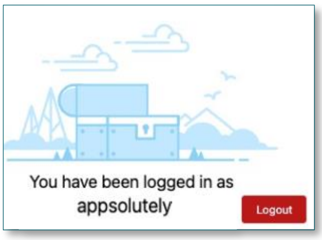


2. In tab 'Account Settings' enter the username and password Company.info has provided you to access their API's.



You must login with the *<u>User Account</u>* *Company.info provided. You* *<u>cannot</u>* *login with the provided admin account.*

3. Click Login.
4. A success message is shown once the app is successfully logged in.

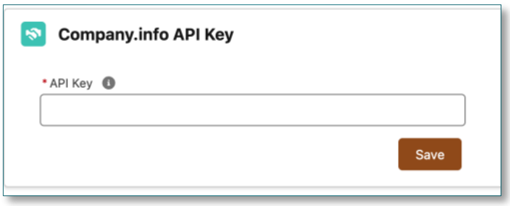


5. Step 4: Login to the REST API Services

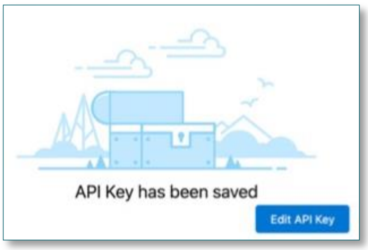
Only if your organization has a contract with Company.info to use the Risk & Compliance Module, the token that you have received from Company.info to connect to the REST API Services must be added.

1. Click tab Access Management
2. An overview of all available modules is shown
3. Add your user(s) to one of the Risk & Compliance modules via the Assign Licenses button
4. Click tab Account Settings
5. Refresh your browser screen

6. The section ‘Company.info API Key’ is now shown



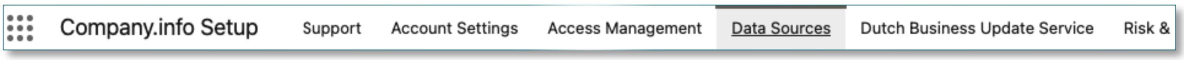
7. In field ‘API Key’ add the API key you have received from Company.info
8. Click save to store the API key



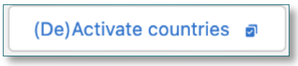
Step 5: Activate countries

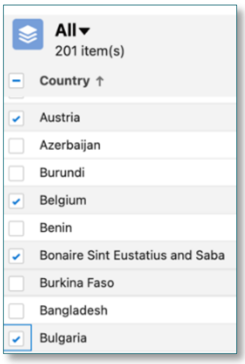
For the Business Data you can select which countries to make available for your users, so the users can only choose from the list of activated countries.

1. From the App Launcher open the Company.info Setup app.

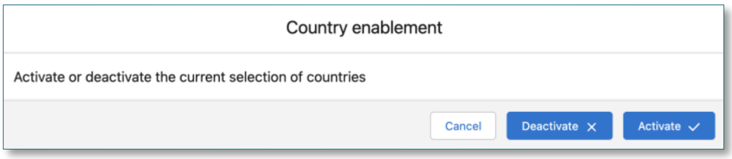


2. Select tab ‘Data Sources’
3. Select the countries you want to make available for your users by setting the checkbox in front of the country
4. Click (De)Activate Countries





5. In the screen ‘Country Enablement’ click ‘Activate’



6. All selected countries are now activated and are being available for your users when creating an account via the app, or when enriching an existing account with a Business Dossier.

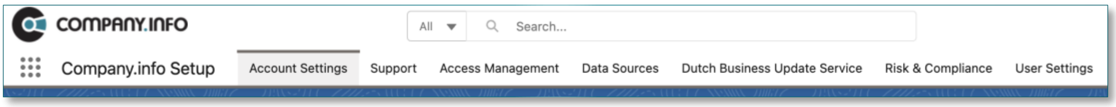
Step 6: Set the country's data source

For the Business Data you can also determine what data source is being used per country. The data sources depends on the modules your organization has a contract for. The following data sources are available:

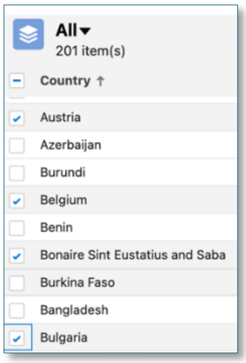
- Company.info The Netherlands
- Company.info Belgium
- Creditsafe

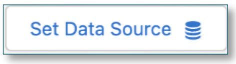
Only one data source can be selected per country. The assigned data source determines the kind of data that is being retrieved from Company.info. Contact Company.info to learn more about the offered data.

1. From the App Launcher open the Company.info Setup app.

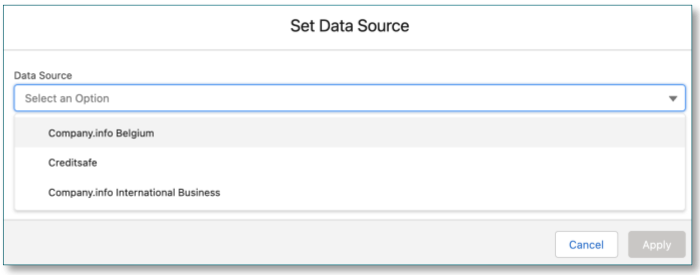


2. Select tab 'Data Sources'
3. Select the countries you want to make available to your users by setting the checkbox in front of the country





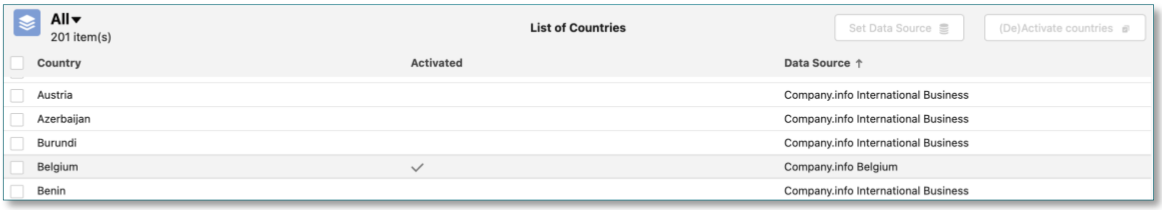
4. In the screen 'Set Data Source' select the data source you want to apply for the selected countries.



5. Click Apply

It may take several minutes before any changes made become active.

6. All selected countries now have the selected data source assigned

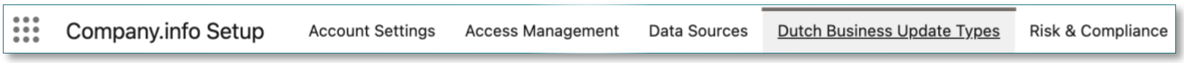


Step 7: Schedule the Dutch Update Service

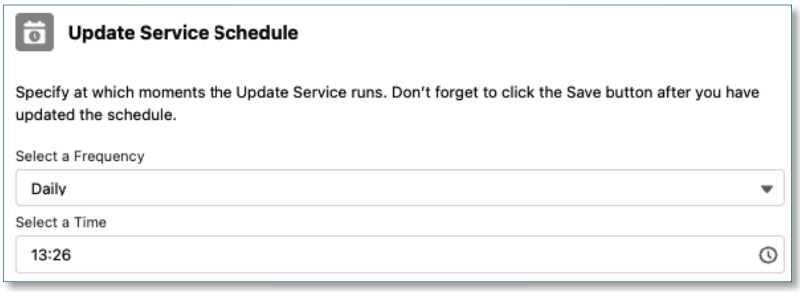
The Update Service will keep your **Dutch** Business Dossiers up to date with any updates available from the Dutch Chamber of Commerce.

You can determine at which moment(s) the Dutch Update Service must be executed to check if there are any changes available and to automatically update the Business Dossier. The Dutch Update Service can be scheduled to run once per day, twice per day or once per week.

1. In the Company.info Setup app click on tab 'Dutch Business Update Service



2. Click in field 'Select a Frequency' to determine if you want to run the Update Service weekly, daily or twice per day.



- Weekly
  - In field 'Select a Frequency' select Weekly
  - In field 'Select a Day' select the day on which you want to run the Update Service
  - In field 'Select a Time' select the time at which you want to run the Update Service
- Daily
  - In field 'Select a Frequency' select Daily
  - In field 'Select a Time' select the time at which you want to run the Update Service
- Twice per day
  - In field 'Select a Frequency' select Twice per day
    (the service will run at 11.30 AM and 4.30 PM)

3. Click Save

4. A success message is shown

See for extra configuration options chapter 'Dutch Business Update Service'

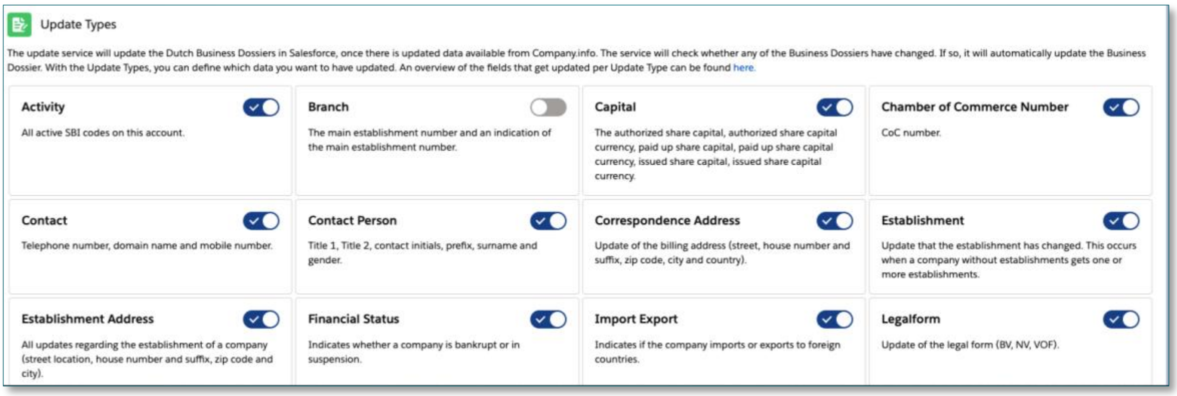
Step 8: Set the Update Types

As part of the Dutch Update Service, you can determine based on what criteria (Update Types) the Business Dossiers in your instance must be updated.

If an update is available for a certain update type (i.e., Correspondence Address or Financial Status) and you have a Business Dossier for that company in your org, all data on the Business Dossier will get updated.

An overview of the update types offered by Company.info can be found here:
https://webview.webservices.nl/documentation/files/service_dutchbusiness-php.html#Dutch_Business.Update_types

1. In the Company.info Setup app click on tab 'Dutch Business Update Service'
2. Scroll down to the section Update Types
3. Enable or disable any update type by clicking on the button



4. Click on Save at the bottom of the screen
5. A success message is shown

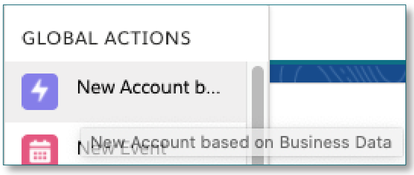
Step 9: Create new accounts via the app

The app delivers functionality to create accounts based on the data provided by Company.info. Via a custom global action, the user can create Accounts based on Company.info data. Based on the found data in the Company.info database an Account is being created and a related Business Dossier record.

The Business Dossier record contains business data of the company (CoC number, VAT number, Legal Form, etc.). The Account name is being populated from the Legal Name on the Business Dossier.

No other data is being copied to the account. If you require certain data of the Business Dossier to be available on the Account, you can configure this via one of our Template Flows. See the Customization Guide on how to configure.

1. In Setup open 'Publisher Layouts'
2. Click Edit next to the layout your org has assigned
3. Click on 'Mobile & Lightning Actions'
4. Add the global action 'New Account based on Business Data' to your Global layout
5. Click Save



Salesforce only show a limited number of characters in the Global Action menu. If you want to change the name of the Global Action, you can create a new global action, based on the lighting component 'createAccountBasedOnCompanyInfoAction'.

If you want your users to **always** create Accounts via the Company.info for Salesforce app, to increase data quality, you can override Salesforce's New Account button.
See chapter 'Update New Account button' in the Customization Guide.

Step 10: Assign Page Layouts

For the objects Business Dossier, International Address and Compliance Result there are multiple record types and page layouts. Because the assignment to a record type cannot be packaged, you must manually assign the correct page layout to the corresponding record type.

A. Object Business Dossier

For the object Business Dossier, the following page layouts must be assigned to the corresponding record type:

- Record Type Master
  Assign the page layout 'Business Dossier Layout' to the record type Master to have the correct page layout assigned when you created a Business Dossier record without a record type being set.
- Record Type Belgian Business
  Assign the page layout 'Belgian Business Dossier Layout' to the record type Belgian Business to have the correct page layout assigned when you have selected Company.info Belgium as a data source for Belgium.
- Record Type Creditsafe
  Assign the page layout 'Credit Safe Page Layout' to the record type Creditsafe to have the correct page layout assigned for countries where the data source is Creditsafe.
- Record Type Dutch Business
  Assign the page layout 'Dutch Business Dossier Layout' to the record type Dutch Business to have the correct page layout assigned when you have selected Dutch Chamber of Commerce as a data source for the Netherlands.

Record Types (1

Master	Belgian Business	Creditsafe	Dutch Business
Business Dossier Layout	Belgian Business Dossier Layout	Creditsafe Page Layout	Dutch Business Dossier Layout

B. Object International Address

For the object International Address, the following page layouts must be assigned to the corresponding record type:

- Record Type Master
  Assign the page layout 'International Address Layout' to the record type Master to have the correct page layout assigned when you created an International Address record without a record type being set.
- Record Type Dutch address
  Assign the page layout 'Dutch Address Layout' to the record type Dutch Address to have the correct page layout assigned for International Address records when the country is The Netherlands.

- Record Type International address
  Assign the page layout 'International Address Layout' to the record type International Address to have the correct page layout assigned for International Address records when the country is not equal to The Netherlands.

Record Types		
Master	**Dutch Address**	**International Address**
International Address Layout	Dutch Address Layout	International Address Layout

C. Object Compliance Result

For the object Compliance Result, the following page layouts must be assigned to the corresponding record type:

- Record Type Master
  Assign the page layout 'Compliance Organization Result Layout' to the record type Master to have the correct page layout assigned when you created Compliance Result record without a record type being set.

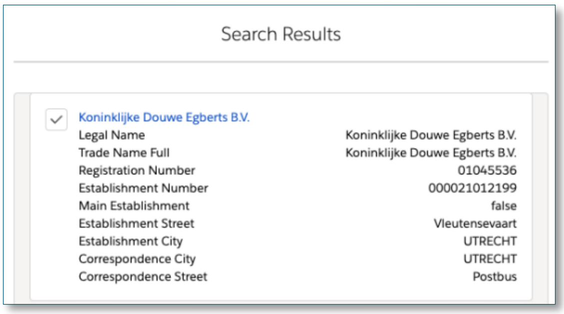
- Record Type Organization
  Assign the page layout 'Compliance Organization Result Layout' to the record type Organization to have the correct page layout assigned for Compliance Result records linked to an organization.
- Record Type Person
  Assign the page layout 'Compliance Person Result Layout' to the record type Person to have the correct page layout assigned for Compliance Result records linked to a person

Record Types

Master	Organization	Person
Compliance Organization Result Layout	Compliance Organization Result Layout	Compliance Person Result Layout

Step 11: Define search results

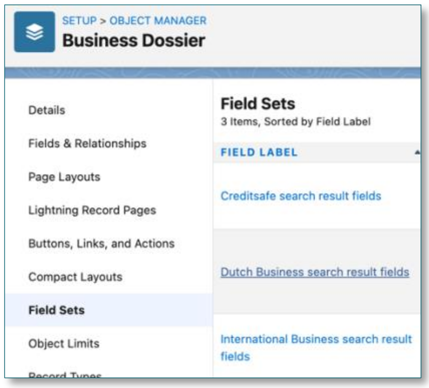
For your Org you can define which fields are shown in the Search Results form and in what order. This helps the user in selecting the correct company when multiple results have been found.



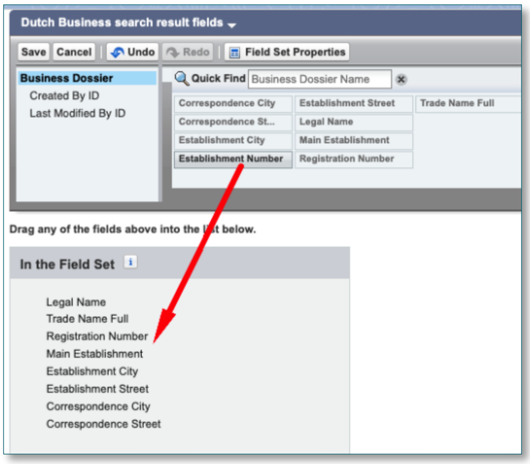
A limited number of fields are available to select from, as for some fields no result is received in the first call out to the Company.info webservices (i.e., House Number).

The app provides 3 different field sets on the Business Dossier object in which the search fields are available.

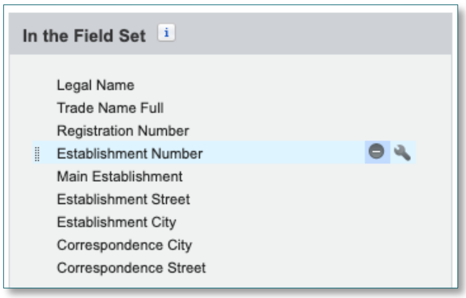
1. In Setup click Object manager
2. Open the object Business Dossier
3. In the menu choose Field sets
4. Select a field set (i.e., Dutch Business search result fields)



5. Drag a field into the section 'In the Field Set'



6. You can also remove fields from the layout by clicking the remove button.



7. The order or fields can be set by dragging the field to the desired position

8. Click Save to make the changes available to your users.

Step 12: Setup the Account Page Layout

To show related data from the Business Dossier available to your users, the field Business Data, which is the lookup to the Business Dossier, must be added to the Account Page Layout(s). If this field is not added, the data on the related lists (see step Configure the Account Lightning Page) will not be shown.

1. In Setup open the Account object
2. Open the Account Page Layout that has been assigned

3. Add the field 'Business Data' to the Page Layout
4. Save the changes
5. Repeat for any other Account Page Layout that is available in your org

Step 13: Configure the Account Lightning Page

To make the data available to the user, the Business Dossier record must be added to the Lightning Page of the Account object. The Business Dossier record contains all the data Company.info has provided.

An Account Lightning Page Template is provided called 'Account Record Page Company.info Template'. You can set this Account Lightning Page as the Organizational Default or use it as a reference for your own setup.

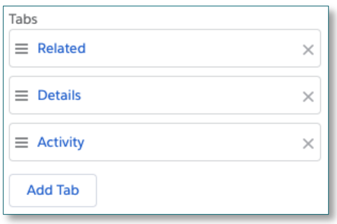
How to set up the Account Lightning Record Page is determined based on the modules your org has been assigned to:

- Business
- Sales
- Risk & Compliance

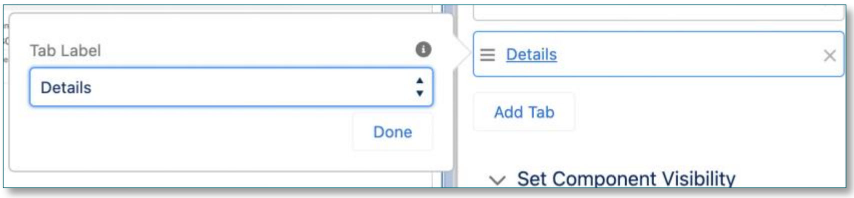
The following steps describe the Account Lightning Record Page setup per module, but at least the set up for the Business module must be configured, as this is the basis for the entire app (independent of the modules you have in use).

Step 13A: Business module

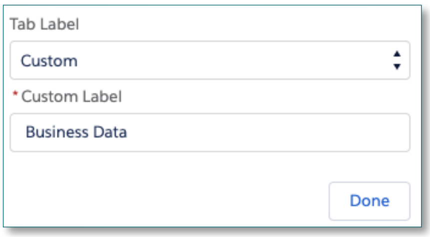
1. From Setup open the object Account
2. Click on Lightning Record Pages
3. Open the Lightning Record Page that you have set as organization default and to which you want to add the Company.info data.
4. Click Edit
5. Select the Tab component on the page
6. In the menu on the right click Add Tab



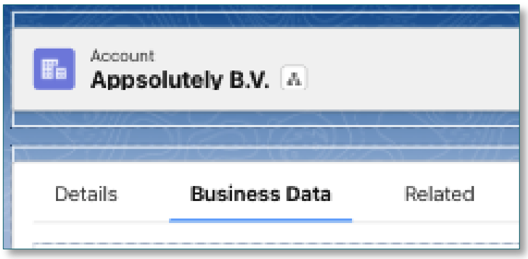
7. Click the added tab



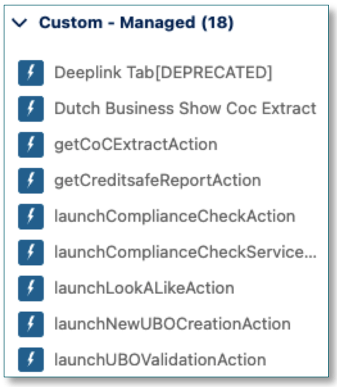
8. In the dropdown Tab Label select Custom
9. Name the tab 'Business Data' (or any name you prefer. In the Installation Guide and the Customization Guide we refer to '**Business Data**')



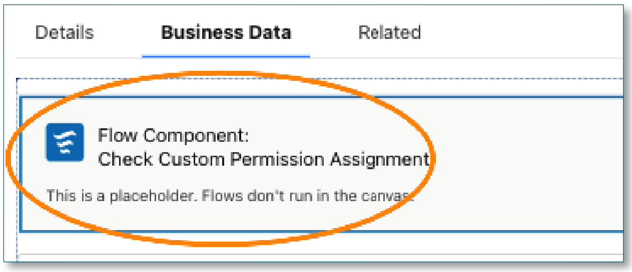
10. Click Done
11. The Business Data tab is shown on the Lightning Page



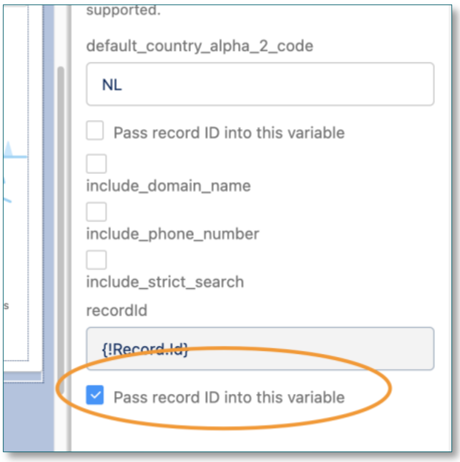
12. In the canvas select the tab Business Data
13. From the Components menu in section Custom, add the following components to the tab 'Business Data'. *These are the actions that users can perform from the Business Dossier record.*
    - getCreditsafeReportAction
    - getCoCExtractAction
    - launchLookAlikeAction
    - launchComplianceCheckAction



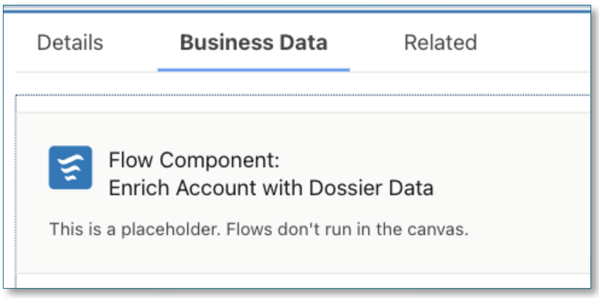
14. From the Components menu select Flow and add it to the tab ‘Business Data’.



15. From the menu on the right side of the screen click in field Flow and select the flow ‘Enrich Account with Dossier Data’
16. Tick the **2nd** checkbox ‘Pass record ID into this variable’

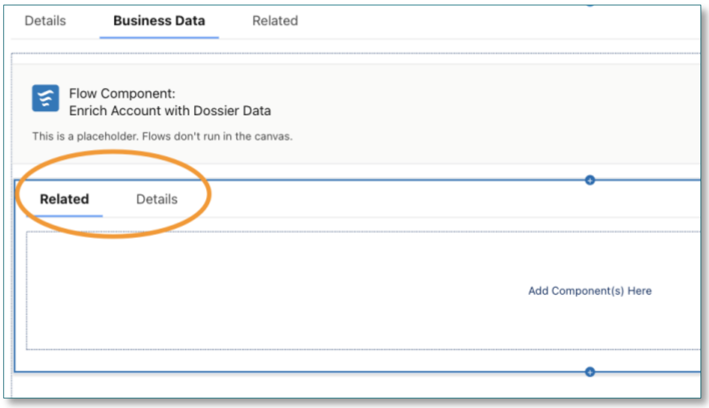


17. The tab Business Data should now look like this:



Next step is set up the layout for showing **Dutch data** based on the data **source 'Company.info The Netherlands'**.
First you must add the Flow 'Enrich Account with Dossier Data' to the page. This Flow will present the user the Search Business screen if no Business Dossier is linked to the account. If a Business Dossier is linked to the account, the Flow will show the data from the Business Dossier record.

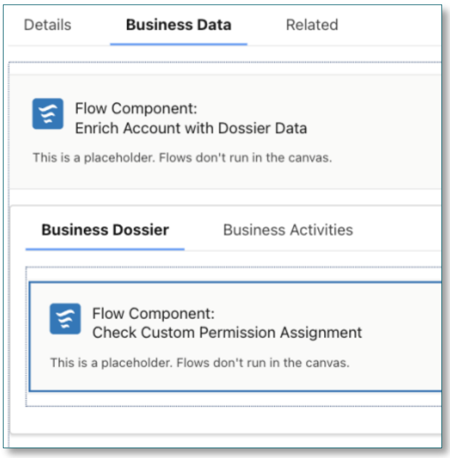
1. From the Components menu select Tab and add it to the tab 'Business Data'



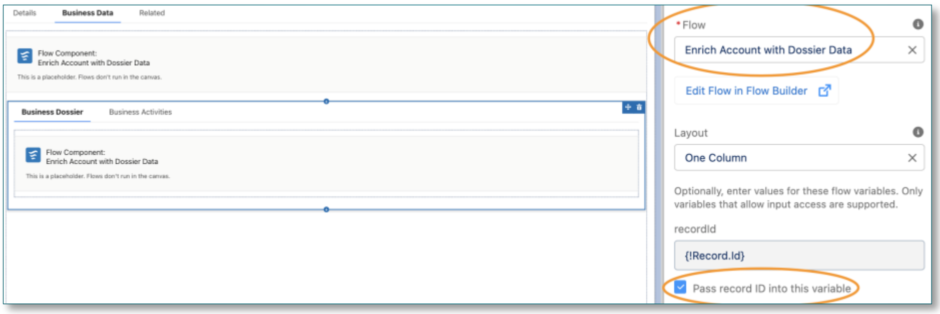
2. Select the new added Tab component on the page
3. From the menu on the right side of the screen add the following tabs
   a) Business Dossier
   b) Business Activities
4. Remove the following tabs
   - Related
   - Details

5. Select Tab 'Business Dossier'

6. From the Components menu select Flow and add it to the tab 'Business Dossier'

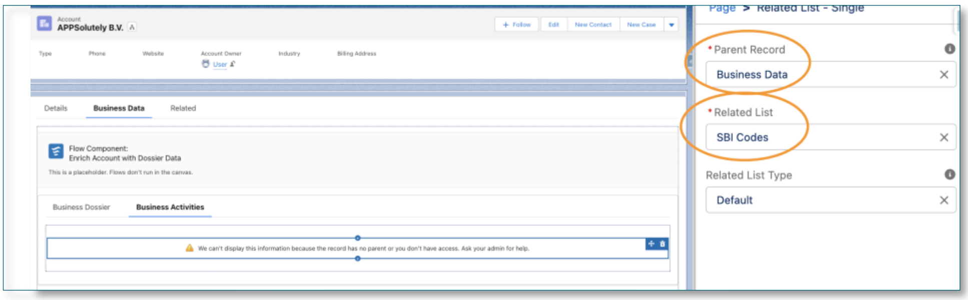


7. From the menu on the right side of the screen click in field Flow and select the flow 'Enrich Account with Dossier Data'
8. Tick the checkbox 'Pass record ID into this variable'



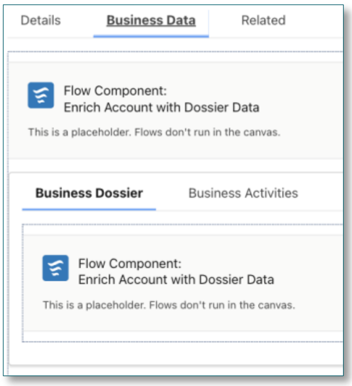
Now that the Flow, to show the data from the Business Dossier, has been added, the related lists 'Business Activities' must be added which shows the user SBI Codes from the Account. SBI stands for 'Standaard Bedrijfsindeling' and represent the Business Activities of a company.

1. Select Tab 'Business Activities'
2. From the Components menu select 'Related Lists - Single' and add it to the tab 'Business Activities'
3. On the right hand in field 'Parent record' select 'Business Data'
4. In field 'Related List' select 'SBI Codes'



5. The data from the related record 'SBI Codes' will be shown in this related list.

6. The tab Business Data should now look like this:



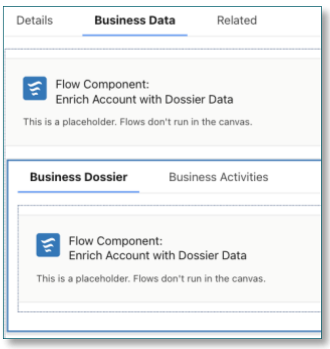
7. Click Save and activate when requested

You now have successfully set up the Account Lightning Record Page for the Company.info for Salesforce app. Depending on the modules your org has a in use (Sales and/or Risk & Compliance) you can add additional configuration to show the user the data that comes from those modules.

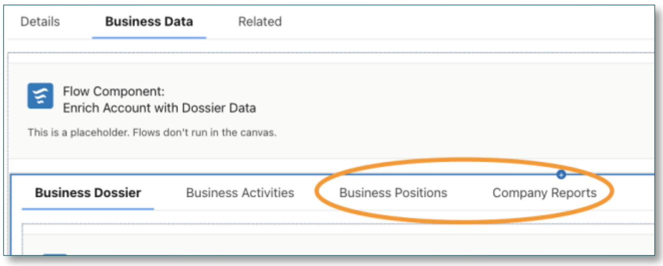
Step 13B: Sales module

The Sales module of the Company.info for Salesforce app offers additional features on top of the Business module (see previous step). When your organization has subscribed to the Sales module of the Company.info for Salesforce app, the tabs 'Business Positions' and 'Creditsafe Company Reports' must be added to the Account Lightning page.
The Business Positions shows the registered functionaries of the company, where the Creditsafe Company Reports shows the generated reports that contain detailed (financial) information of the company.

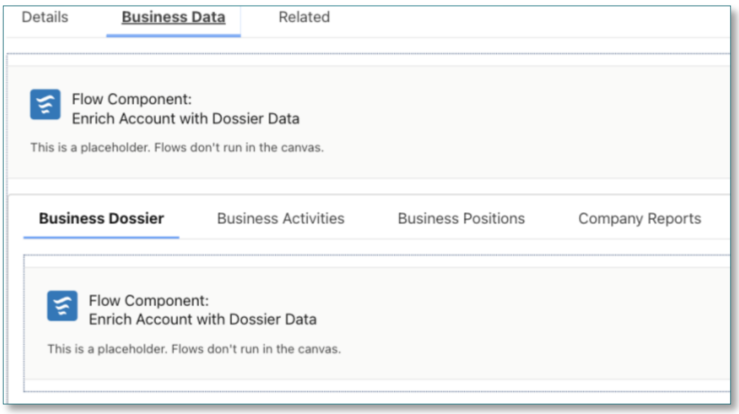
1. Open the Account Lightning Record Page
2. Select the Tab component that has the Business Dossier and Business Activities tabs:



3. From the menu on the right side of the screen add the following tabs:
   a) Business Positions
   b) Company Reports



4. Select Tab ‘Business Positions’
5. From the Components menu select ‘Related Lists - Single' and add it to the tab ‘Business Positions’
6. On the right hand in field ‘Parent record’ select ‘Business Data’
7. In field ‘Related List’ select ‘Business Positions’
8. The data from the related record ‘Business Positions’ will be shown in this related list.
9. Select Tab ‘Company Reports’
10. From the Components menu select ‘Related Lists - Single' and add it to the tab ‘Company Reports’
11. On the right hand in field ‘Parent record’ select ‘Business Data’
12. In field ‘Related List’ select ‘Creditsafe Company Reports’
13. The data from the related record ‘Creditsafe Company Report’ will be shown in this related list.
    - Make sure the Related List ‘Creditsafe Company Reports’ is added to the assigned page layout for the Business Dossier object.
14. The tab Business Data should now look like this:

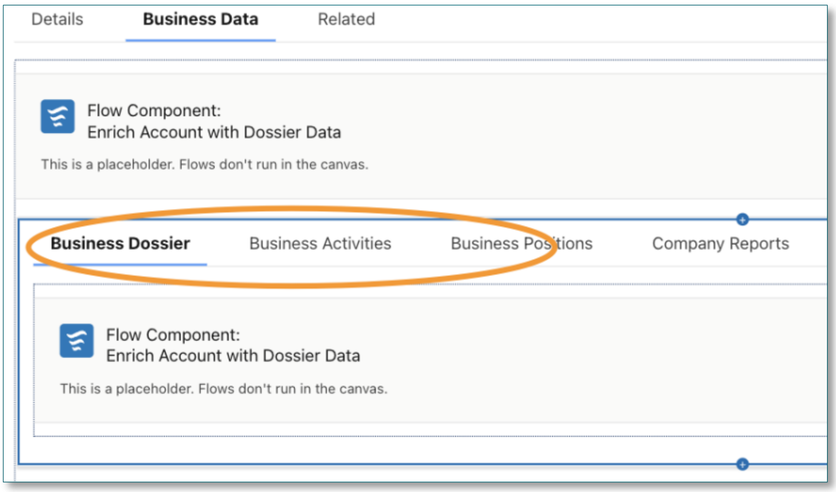


15. Click Save and activate when requested

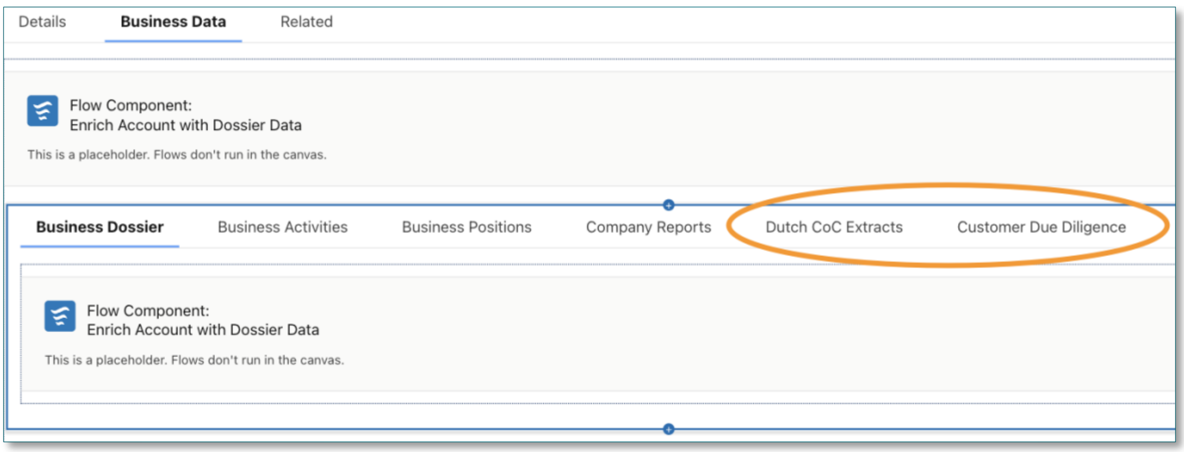
Step 13C: Risk & Compliance Module

The Risk & Compliance module of the Company.info for Salesforce app offers additional features on top of the Business module (see previous step). When your organization has subscribed to the Risk & Compliance module of the Company.info for Salesforce app, the tabs 'Dutch CoC Extract' and 'Customer Due Diligence' must be added to the Account Lightning page.
The Dutch CoC Extract shows the 'KvK Uittreksels' the users have downloaded via the app, where the Customer Due Diligence shows the overview of Customer Due Diligences that have been performed for this account.

1. Open the Account Lightning Record Page
2. Select the Tab component that has the Business Dossier and Business Activities tabs:

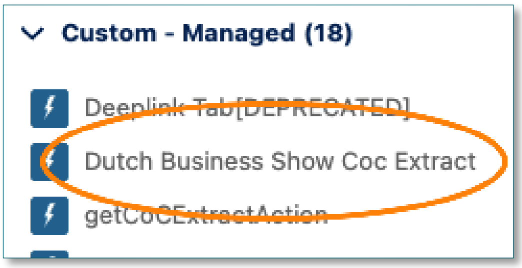


3. From the menu on the right side of the screen add the following tabs:
   a) Dutch CoC Extracts
   b) Customer Due Diligence

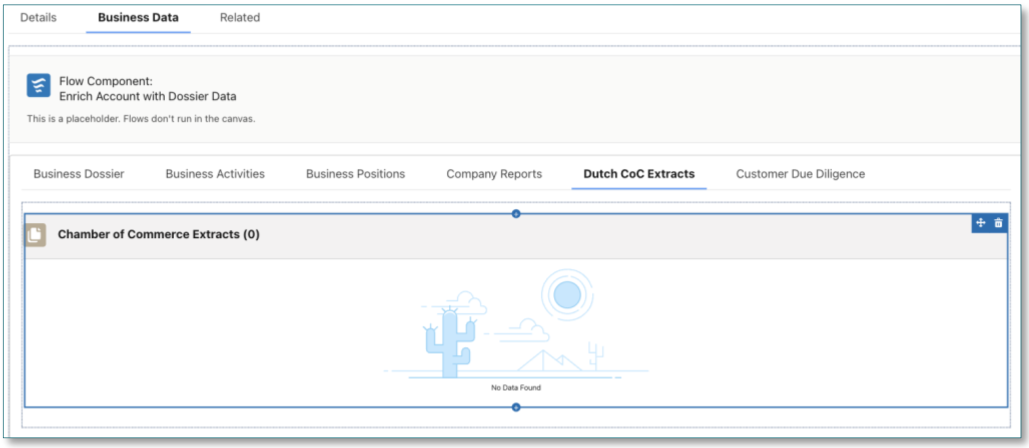


4. Select Tab 'Dutch CoC Extracts'

5. From the Components menu in section 'Custom - Managed' select component 'Dutch Business Show CoC Extract'

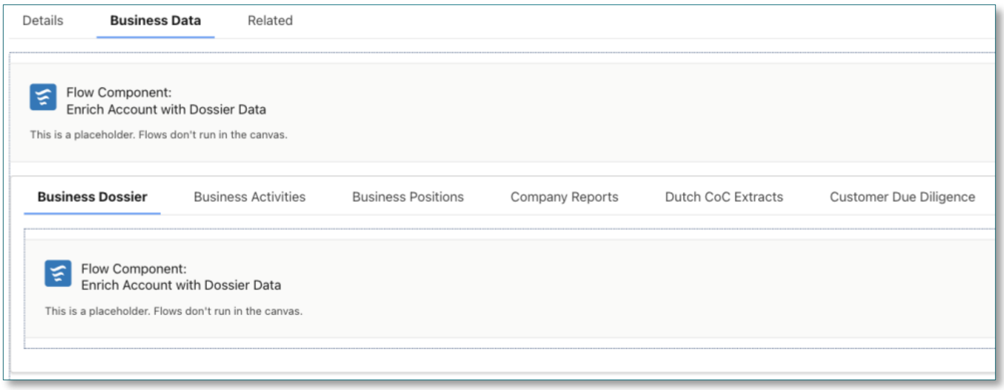


6. Add the component to the tab 'Dutch CoC Extracts'



7. The Dutch CoC Extracts the users have downloaded via the app, will be shown in this overview.
8. Select Tab 'Customer Due Diligence'
9. From the Components menu select 'Related Lists - Single' and add it to the tab 'Customer Due Diligence'
10. On the right hand in field 'Parent record' select 'Business Data'
11. In field 'Related List' select 'CDD Dossiers'
12. The data from the related record 'CDD Dossiers' will be shown in this related list.
13. Click Save and activate when requested

14. The tab Business Data should now look like this:

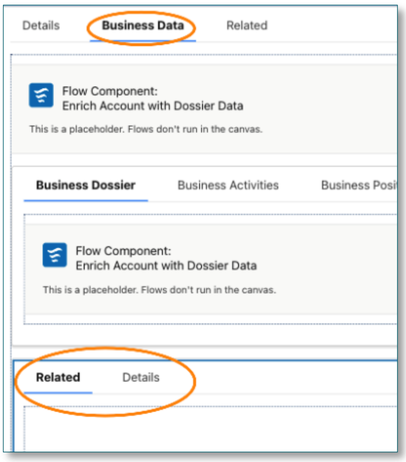


Step 13D: International data

If your organization is also using any of the International modules this data has to me made visible at the Account Lightning Record Page. Because there are different data sources multiple data components must be added to the Lightning Page.

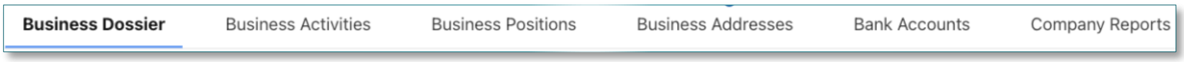
Belgium data

1. Open the Account Lightning Record Page
2. From the Components menu select Tab and add it to the tab 'Business Data'



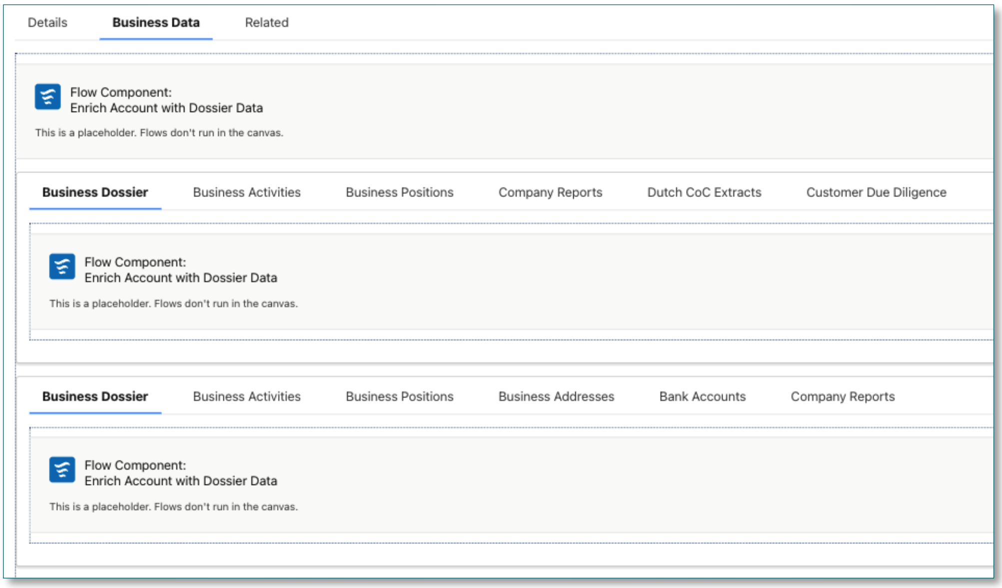
3. From the menu on the right side of the screen add the following tabs
   a) Business Dossier
   b) Business Activities
   c) Business Positions
   d) Business Addresses
   e) Bank Accounts
   f) Company Reports
4. Remove the following tabs

- Related
- Details



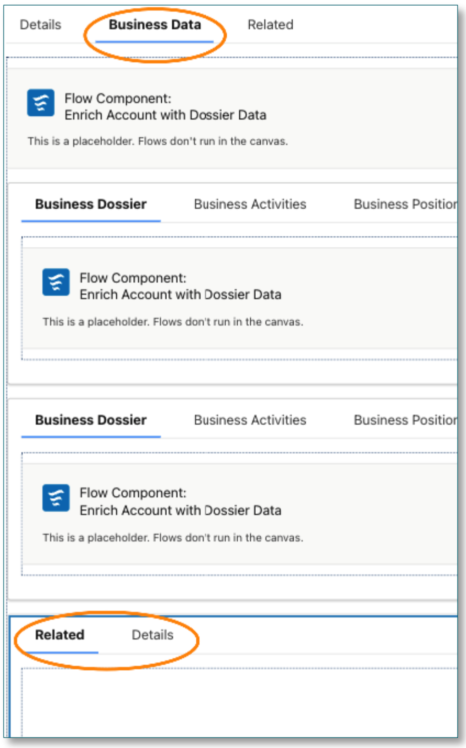
5. Select Tab ‘Business Dossier’
6. From the Components menu select Flow and add it to the tab ‘Business Dossier’
7. From the menu on the right side of the screen click in field Flow and select the flow ‘Enrich Account with Dossier Data’
8. Tick the checkbox ‘Pass record ID into this variable’
8. Select Tab ‘Business Activities’
9. From the Components menu select ‘Related Lists - Single' and add it to the tab ‘Business Activities’
10. On the right hand in field ‘Parent record’ select ‘Business Data’
11. In field ‘Related List’ select ‘Business Activities’
12. Select Tab ‘Business Positions
13. From the Components menu select ‘Related Lists - Single' and add it to the tab ‘Business Positions
14. On the right hand in field ‘Parent record’ select ‘Business Data’
15. In field ‘Related List’ select ‘Business Positions’
16. Select Tab ‘Business Addresses’
17. From the Components menu select ‘Related Lists - Single' and add it to the tab ‘Business Addresses’
18. On the right hand in field ‘Parent record’ select ‘Business Data’
19. In field ‘Related List’ select ‘Business Addresses’
20. Select Tab ‘Bank Accounts’
21. From the Components menu select ‘Related Lists - Single' and add it to the tab ‘Bank Accounts’
22. On the right hand in field ‘Parent record’ select ‘Business Data’
23. In field ‘Related List’ select ‘Business Bank Accounts’
24. Select Tab ‘Company Reports’
25. From the Components menu select ‘Related Lists - Single' and add it to the tab ‘Company Reports’
26. On the right hand in field ‘Parent record’ select ‘Creditsafe Company Reports’
    - Make sure the Related List ‘Creditsafe Company Reports’ is added to the assigned page layout for the Business Dossier object

27. The tab Business Data should now look like this:

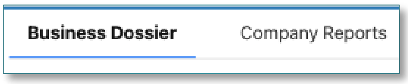


Creditsafe data

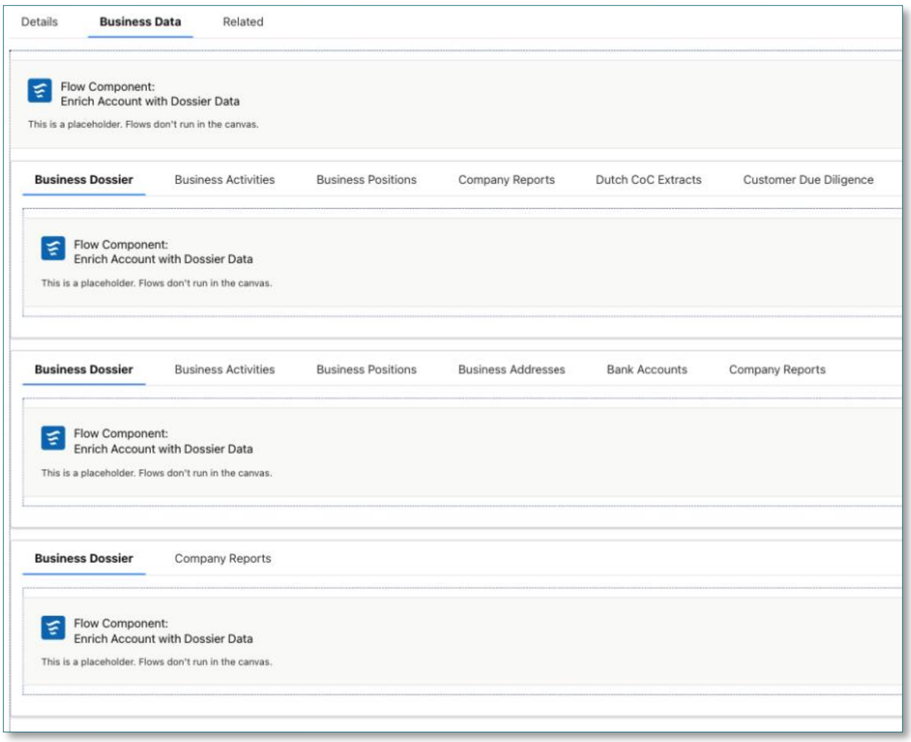
1. From the Components menu select Tab and add it to the tab 'Business Data'



2. From the menu on the right side of the screen add the following tabs
   a) Business Dossier
   b) Company Reports
3. Remove the following tabs
   - Related
   - Details

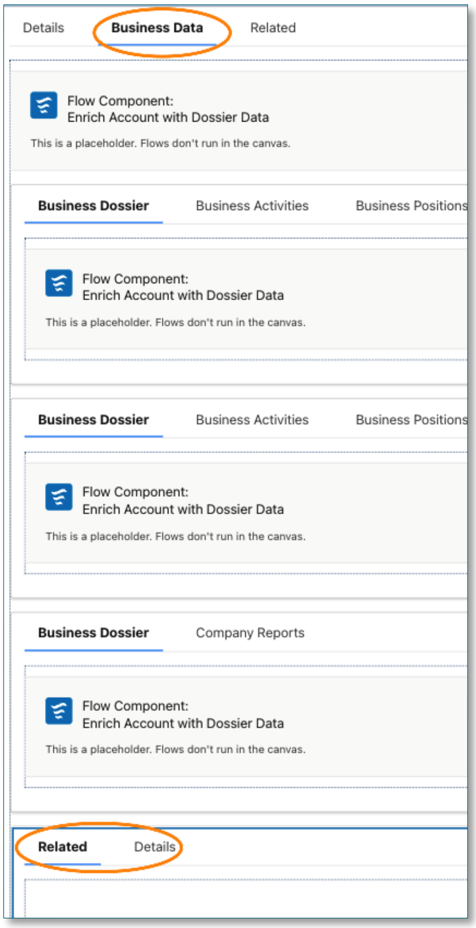


4. Select Tab 'Business Dossier'
5. From the Components menu select Flow and add it to the tab 'Business Dossier'
6. From the menu on the right side of the screen click in field Flow and select the flow 'Enrich Account with Dossier Data'
7. Tick the checkbox 'Pass record ID into this variable'
8. Select Tab 'Company Reports'
9. From the Components menu select 'Related Lists - Single' and add it to the tab 'Company Reports'
10. On the right hand in field 'Parent record' select 'Creditsafe Company Reports'
    - Make sure the Related List 'Creditsafe Company Reports' is added to the assigned page layout for the Business Dossier object
11. The tab Business Data should now look like this:

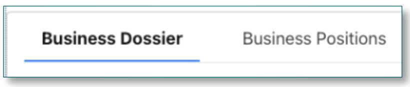


International Business data

1. From the Components menu select Tab and add it to the tab 'Business Data'



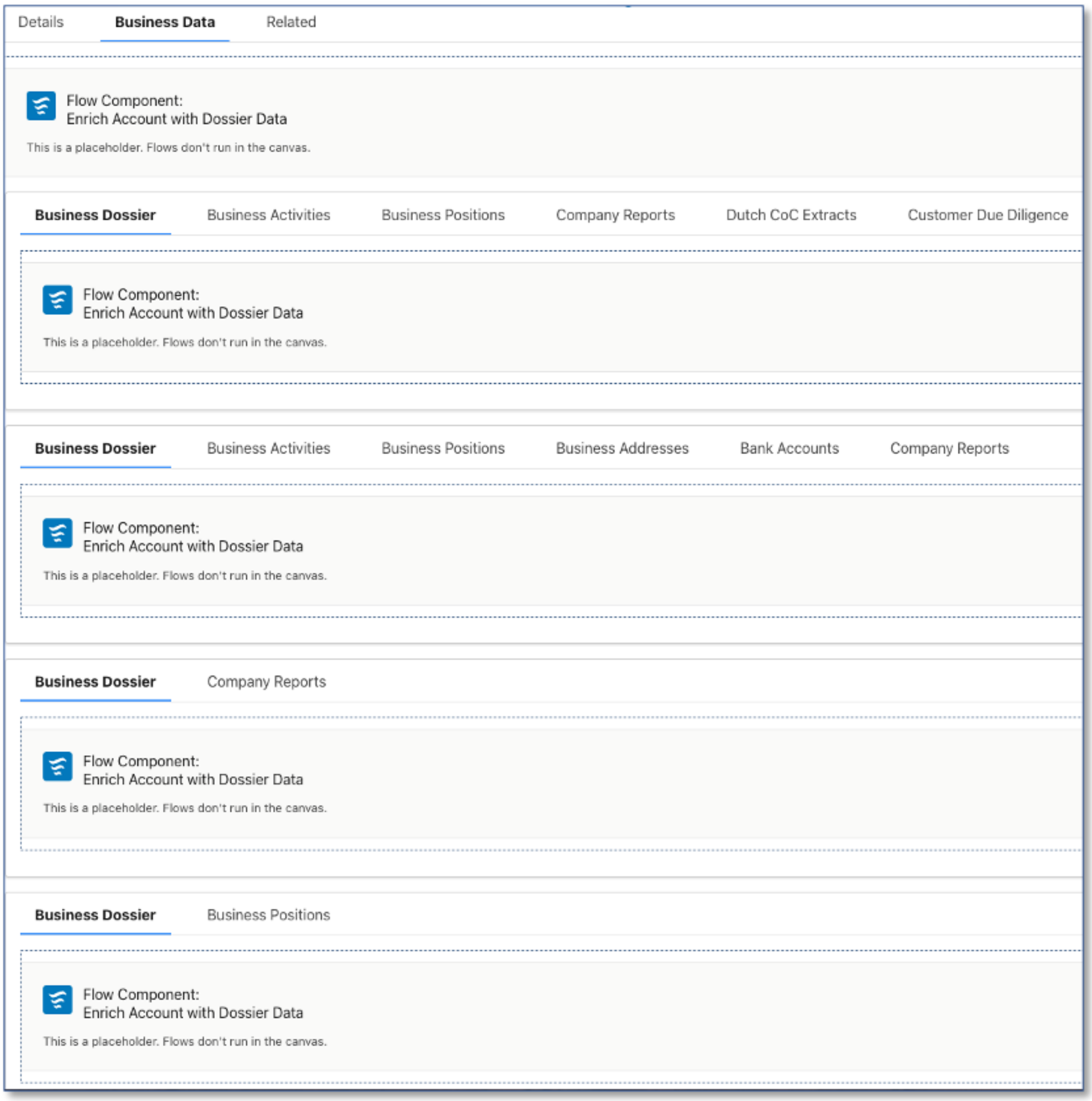
2. From the menu on the right side of the screen add the following tabs
   a) Business Dossier
   b) Business Positions
3. Remove the following tabs
   - Related
   - Details



4. Select Tab 'Business Dossier'
5. From the Components menu select Flow and add it to the tab 'Business Dossier'
6. From the menu on the right side of the screen click in field Flow and select the flow 'Enrich Account with Dossier Data'
7. Tick the checkbox 'Pass record ID into this variable'
8. Select Tab 'Business Positions'
9. From the Components menu select 'Related Lists - Single' and add it to the tab 'Business Positions'

10. On the right hand in field ‘Parent record’ select ‘Business Positions’

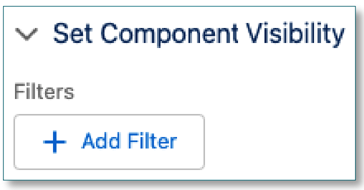
11. The tab Business Data should now look like this:



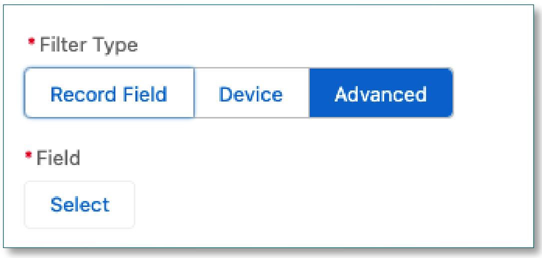
Step 13E: Set filters to show the relevant data

To make sure that only the relevant tab sections are shown based on the country of the Account, filters must be set on the different components you added.

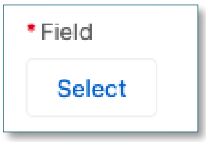
1. Select Component 1. This component will show the **Search Business Screen** when the Account does not have a Business Dossier.
2. On the right side click Add Filter



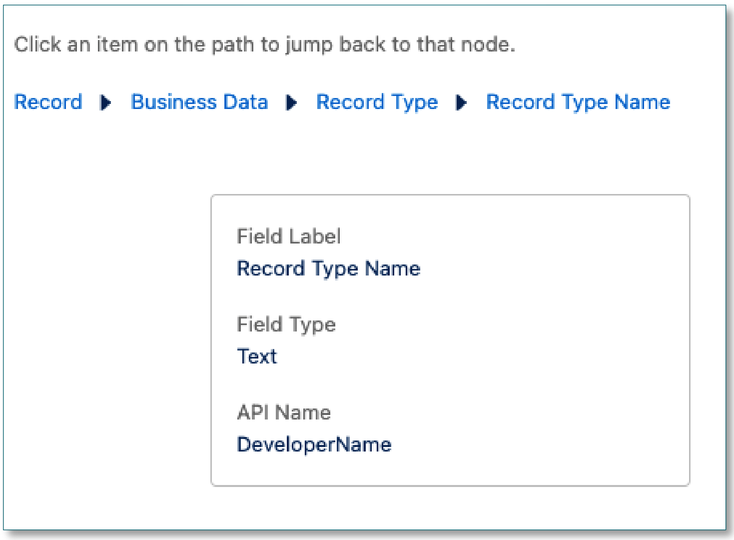
3. In the menu that is shown, click Advanced



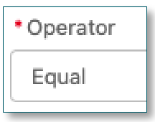
4. Click Select



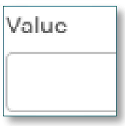
5. In screen Select Field choose the following:
   'Record → Business Data → Record Type → Record Type Name'



6. Click Done
7. Select 'Equal' as Operator

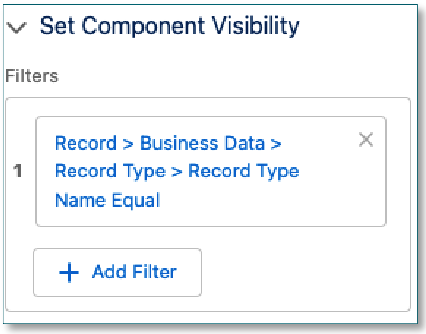


8. Leave the field Value blank

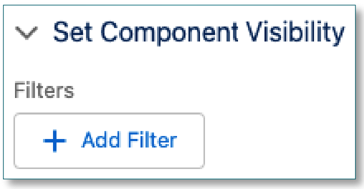


9. Click Done

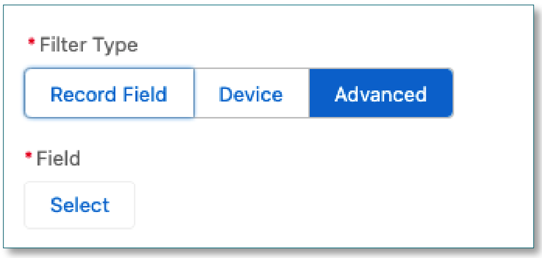
10. The filter should look like this



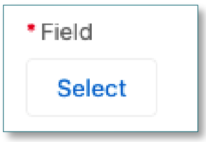
11. Select Component 2. This component will show the **Dutch Data** when the Account has a Dutch Business Dossier.
12. On the right side click Add Filter



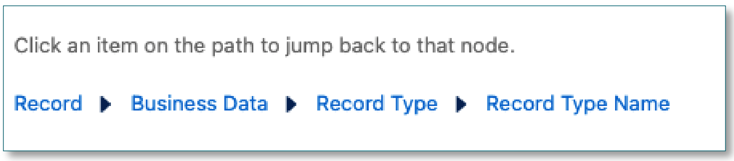
13. In the menu that is shown, click Advanced



14. Click Select

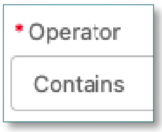


15. In screen Select Field choose the following:
‘Record → Business Data → Record Type → Record Type Name’



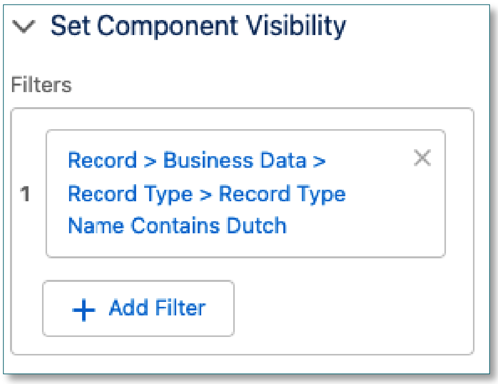
16. Click Done

17. Select ‘Contains’ as Operator

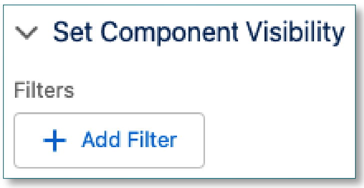


18. Add ‘Dutch’ as Value

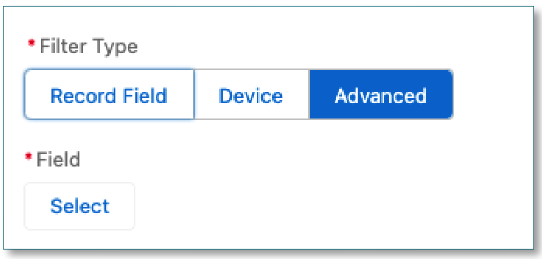
19. Click Done
20. The filter should look like this



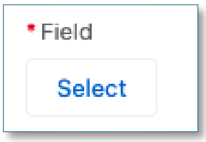
21. Select Component 3. This component will show the **Belgium Data** when the Account has a Belgium Business Dossier.
22. On the right side click Add Filter



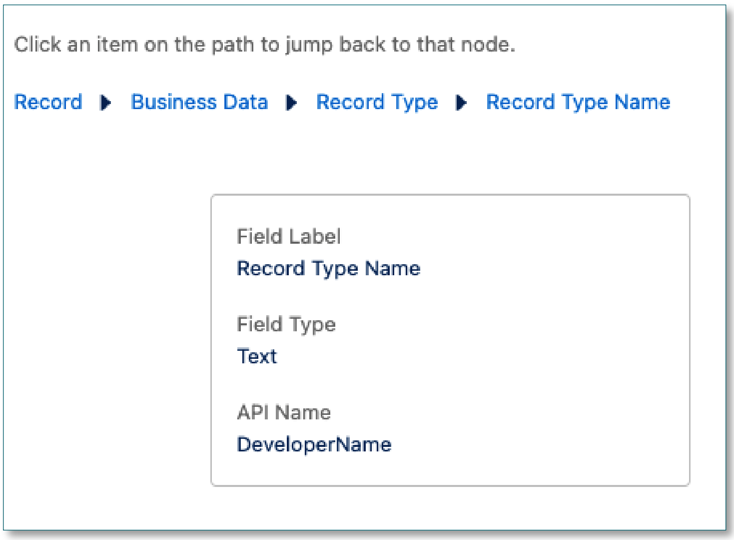
23. In the menu that is shown, click Advanced



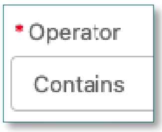
24. Click Select



25. In screen Select Field choose the following:
'Record → Business Data → Record Type → Record Type Name'



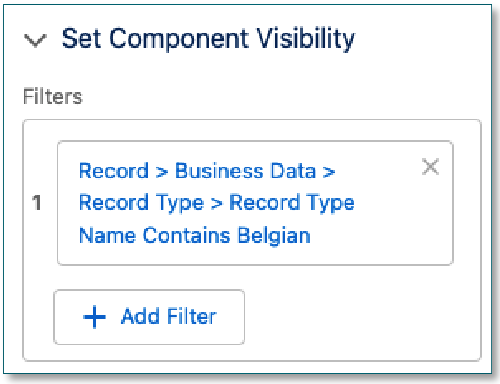
26. Click Done
27. Select 'Contains' as Operator



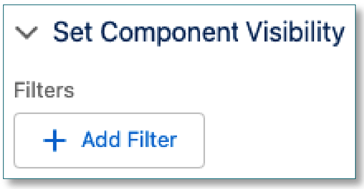
28. Add 'Belgian' as Value

29. Click Done

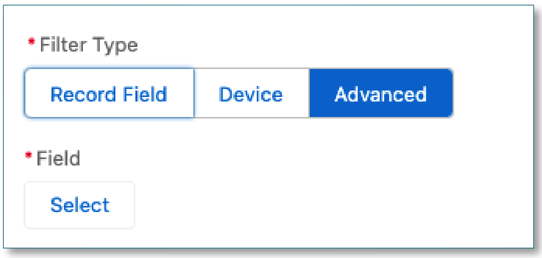
30. The filter should look like this



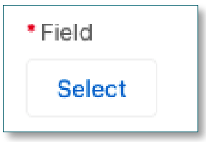
31. Select Component 4. This component will show the **Creditsafe Data** when the Account has a Creditsafe Business Dossier.
32. On the right side click Add Filter



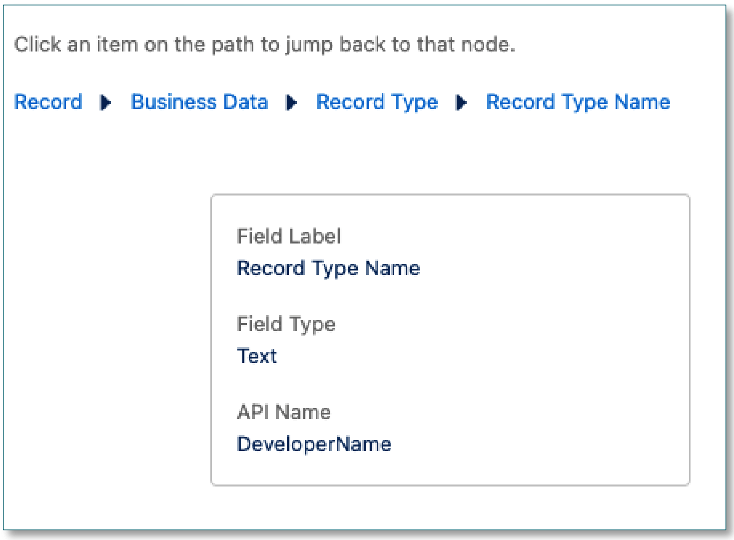
33. In the menu that is shown, click Advanced



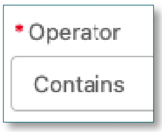
34. Click Select



35. In screen Select Field choose the following:
‘Record → Business Data → Record Type → Record Type Name’

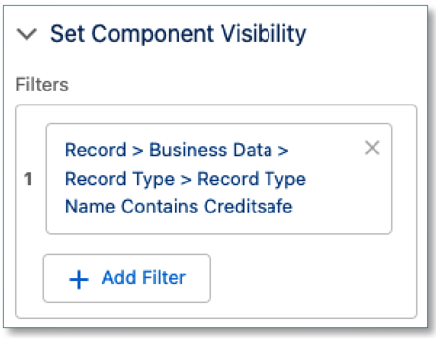


36. Click Done
37. Select ‘Contains’ as Operator



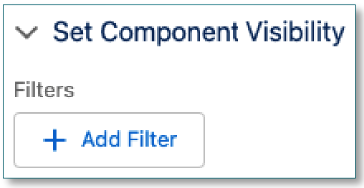
38. Add ‘Creditsafe’ as Value

39. Click Done
40. The filter should look like this

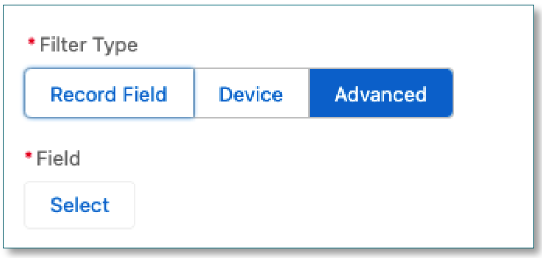


41. Select Component 4. This component will show the **International Business Data** when the Account has an ‘International Business’ Business Dossier.

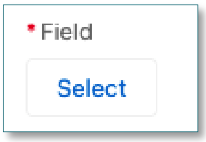
42. On the right side click Add Filter



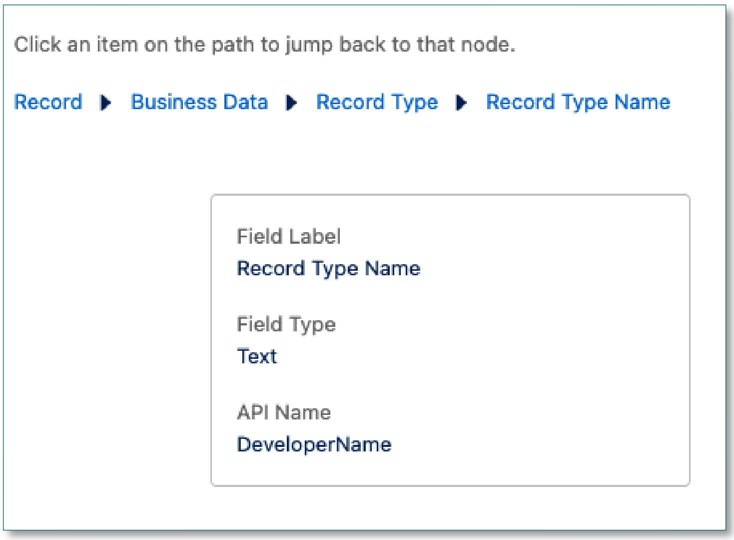
43. In the menu that is shown, click Advanced



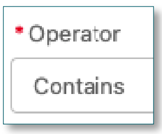
44. Click Select



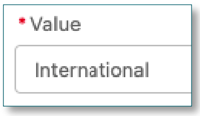
45. In screen Select Field choose the following:
'Record → Business Data → Record Type → Record Type Name'



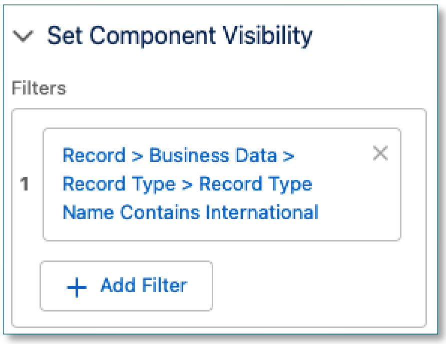
46. Click Done
47. Select 'Contains' as Operator



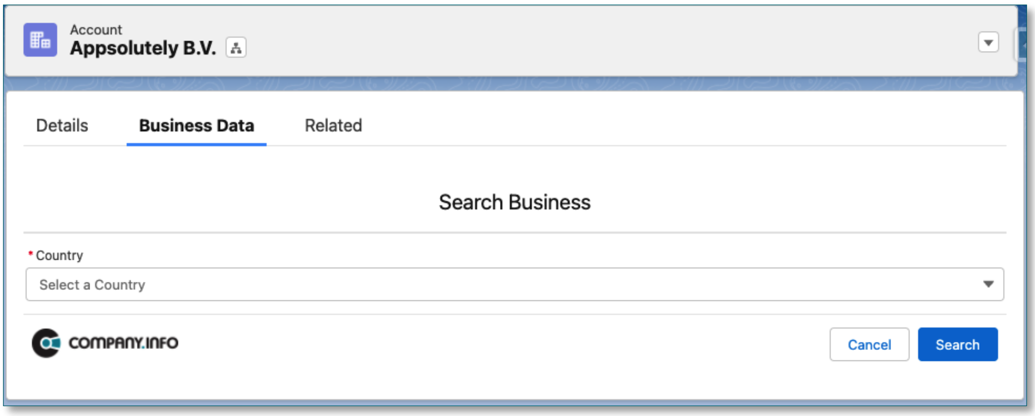
48. Add 'International' as Value



49. Click Done
50. The filter should look like this



51. Click Save and activate when requested
52. Click Back
53. The tab Business Data on the Account record page should look like this



You now have successfully set up the Account Lightning Record Page for the Company.info for Salesforce app. The user will now see the correct data screen based on the type of Business Dossier that is related to the account.

5. Assign users

Now that you have configured the basics of the Company.info App for Salesforce app, you can give your users access to the app.

Step 1: Flow user

As the app is using Flows within the Global Actions, Quick Actions and Search screens, the user should be able to run Flows.

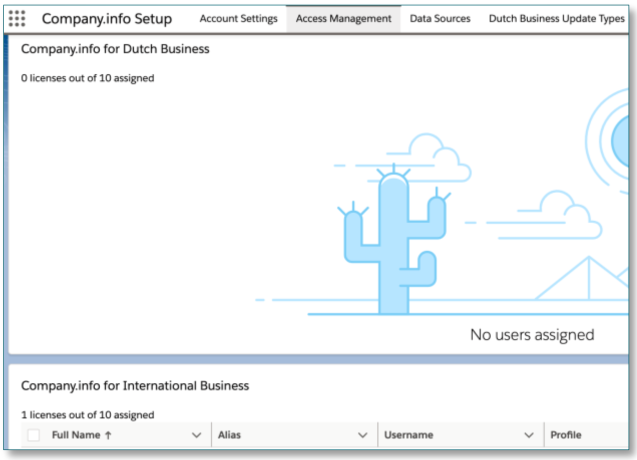
1. In Setup search for User and open Users
2. Click on a user who is going to use the Company.info app
3. Click Edit
4. Enable the feature 'Flow User'

5. Click Save

Step 2: Assign modules

Users need permission to the modules to have access to the functionality and data.

1. In App launcher open the app Company.info Setup
2. Click on the tab Access Management
3. An overview of the modules is shown



4. In the section of a module, click on Assign Licenses

5. An overview of users is shown, who are not yet assigned to a module

Assign Licenses

Full Name ↑	Alias	Username	Profile	Role	Active
User User	UUser	test-i0rww761opqr@example.com	System Administrator		✓

Assign Cancel

6. Select one or more users and click on Assign
7. The user(s) is(are) now assigned to the module
8. Click on Close to return to the overview screen
9. Check if the user(s) is(are) assigned to the module

Company.info for Dutch Business

1 Licenses out of 10 assigned

Full Name ↑	Alias	Username	Profile
User User	UUser	test-i0rww761opqr@example.com	System Administrator

Step 3: Deactivate Error Log Process Builder

Salesforce has been making significant improvements to the functionality of Flow, urging users to transition away from Process Builder. To follow Salesforce's advice, we have replaced the Error Log Process Builder with the Error Log Flow.

The Error Log Flow is activated by Default and will create an Error Log record in case of any user or system issue. By default, the Process Builder is also activated, resulting in duplicate error logs being created. Therefore, we advise your Administrator to de-activate the Error Log Process Builder.

1. From Setup open Process Builder
2. Collapse the Deprecated Error Log Process Builder

Deprecated Error Log Process Builder	
Version 3: Deprecated Error Log Process Buil...	Deprecated Process Builder for the Error Log objec...
Version 2: Error Log Process Builder	Process Builder for the Error Log object. Sends an ...
Version 1: Error Log Process Builder	Process Builder for the Error Log object. Sends an ...

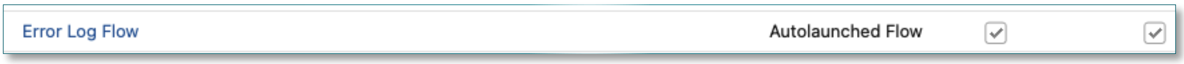
3. Deactivate the active version by clicking on Deactivate

Active	Deactivate
Inactive	Activate
Inactive	Activate

4. The Process Builder should now have status Inactive

Deprecated Error Log Process Builder	Deprecated Process Builder for the Error Log objec...	Error Log	Record Change	15-03-2023	Inactive

5. From Setup open Flows
6. Check if the Error Log Flow is Active, to make sure Error Logs are being created

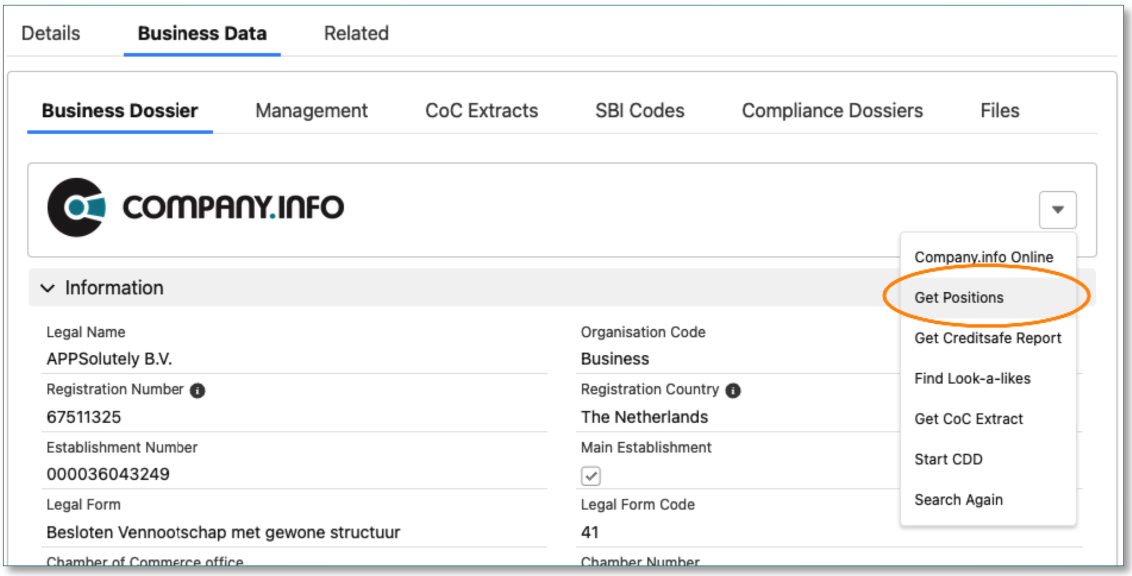


6. Sales module

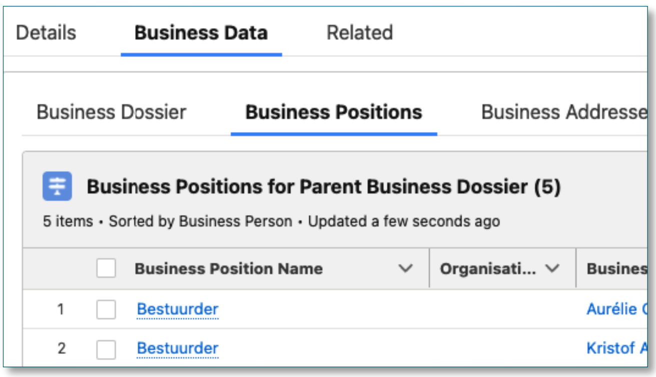
Besides the configuration described in the previous chapters, you can enable additional features that are being offered by the Sales module.

6.1 Business Positions

Business Positions are the registered functionaries of a company.
For the Dutch data source, the Business Positions have to been downloaded per Business Dossier, by clicking on the 'Get Business Positions' button in the action menu on the Business Data tab.



For the Belgium data source, the Business Positions come with the Business Dossier and are immediately presented to the user when downloading the Business Dossier.

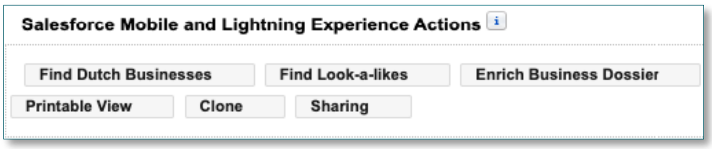


Step 1: Enrich Business Positions

When the Business Positions is an organization and not a person, the organization is being stored as a Business Dossier record. These type of Business Dossier records are at that moment not enriched with Company.info data. The user can enrich the Business Dossier record with a click on a button. To enable this feature for your users you must add the 'Enrich Business Dossier' button to the Business Dossier object.

The user can navigate to the Business Dossier record by clicking on the Organization Name.

1. In Setup open object 'Business Dossier'
2. Click Page Layout
3. Open page layout 'Business Dossier Layout'
4. Click 'Mobile & Lightning Actions'
5. Add the action 'Enrich Business Dossier' to the section 'Salesforce Mobile and Lightning Experience Actions'



6. Click Save
7. When the user now on the 'Enrich Business Dossier' button, the data for the Business Dossier is being retrieved, the account is being created, and the Business Dossier is being related to this account.

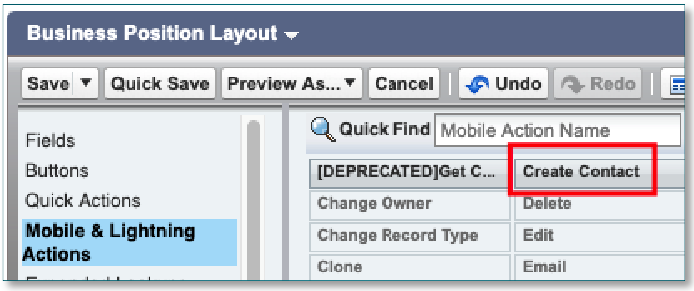
Step 2: Create contacts from Business Positions

You can offer the user has the possibility to create contacts from the retrieved Business Positions with a single click of a button.
When creating the contact, the **active** Contact Matching Rules of your organization will be applied.

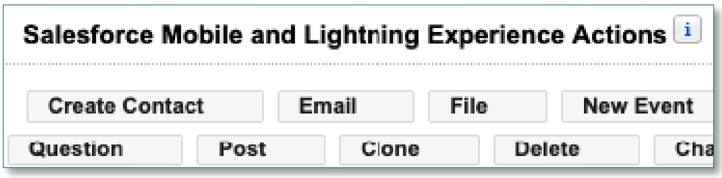
To enable this functionality a lightning action must be added to the page layout.

1. In Setup click on Object Manager
2. Open the object 'Business Positions'
3. Click on Page Layouts
4. Open the page layout 'Business Position Layout'

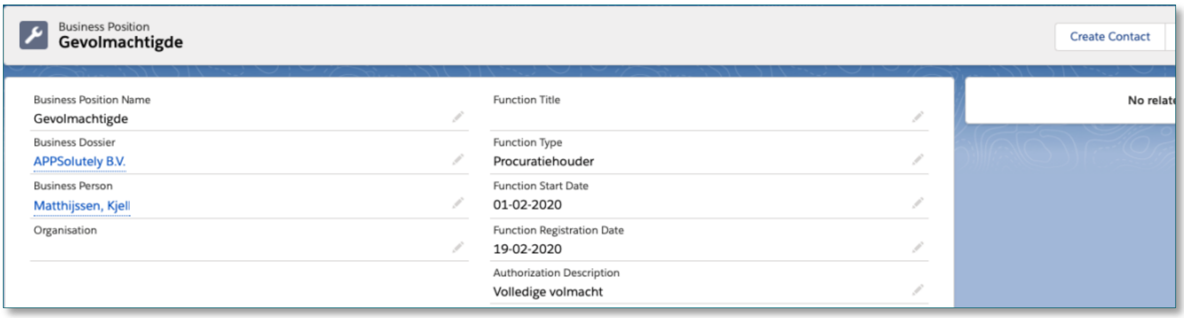
5. In ‘Mobile & Lightning Action click on the action ‘Create Contact’



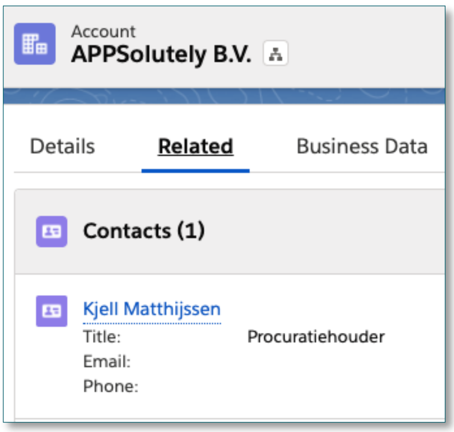
6. Add it to the section ‘Salesforce Mobile and Lightning Experience Actions’



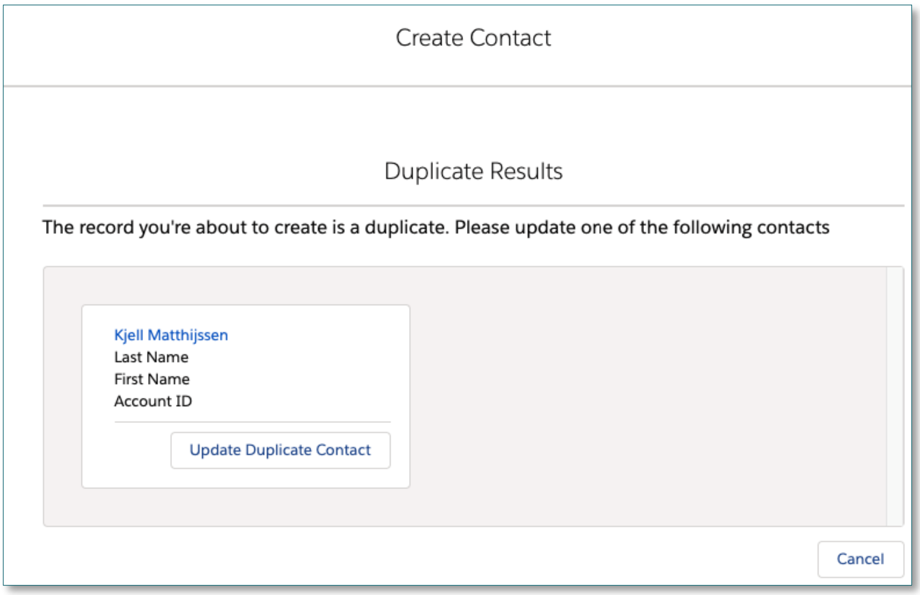
7. Click on Save.
8. The button is now available on the Business Position record:



9. When the user clicks on it a Contact record is created for the related Account



10. When creating the contact, the Contact Matching Rules of your organization will be applied. Once a duplicate record is found, the app will show the following message to the user:



A Contact Matching Rule must be active in your org, so the app can check for duplicate contacts.

11. The user can choose to update the current contact with the latest Business Position information or can cancel the update.

6.2 Dutch Lead Management

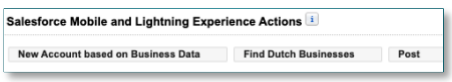
With the lead management functionality of the app, you can search for companies in the Netherlands based on several criteria. The companies found can then be created as an Account including the Business Dossiers.

Step 1: Find Dutch Businesses

With the Find Dutch Business functionality the user can search for Dutch Businesses based on several criteria, and let the system create Business Dossiers and Accounts.

The functionality can be made available via the Global Actions.

1. In Setup search 'Publisher Layouts'
2. Click Edit next to the layout your org has assigned
3. Click on 'Mobile & Lightning Actions'
4. Add the global action 'Find Dutch Businesses' to your Global layout



5. Click Save

By default, the app creates Accounts out of the found Dutch Business. If your Salesforce Org is using Sales Cloud, then you can also choose to create Leads instead of Accounts. You can do this by updating the flow 'Find Business Account Mapping'.

Step 2: Set parameters

As an Admin you can also set some parameters on how both features should act. These parameters can influence the performance of the Find Dutch Businesses functionality and can influence the amount or data being created in your org.

1. Set Maximum number of search results

   When the user is searching for businesses a maximum number of records are being retrieved. As an Admin you can set the maximum number of records for all users. The default set by the app is 1000 and you can update it to a maximum of 5000.

   For both features the user can overwrite the maximum number of results, but not higher as the number you have set.

2. Creation of Accounts

   After the user has searched for businesses the user can decide to only create the Business Dossier or to create Business Dossiers with Accounts. As an Admin you disable the option for all users to also create the Accounts.

These parameters can be set by updating the flow 'Find Businesses Global Action' See chapter 'Dutch Lead Management' in the Customization Guide.

7. Risk & Compliance module

7.1 Customer Due Diligence

The Risk & Compliance module contains functionality for Customer Due Diligence supporting your onboarding process. The Customer Due Diligence functionality consists of a Ultimate Beneficial Owner (UBO) Investigation, validation of the UBO and performing worldwide Compliance Checks on the UBO and on its organization.

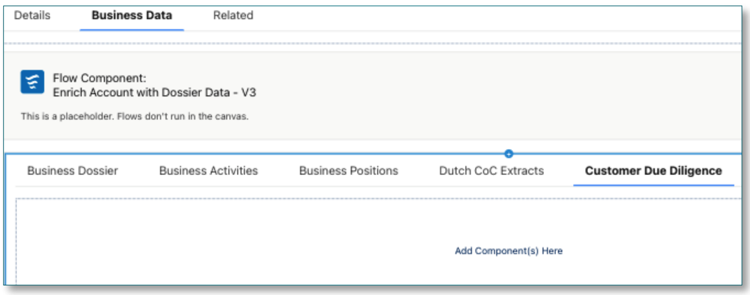
From the Business Dossier users assigned to the Risk & Compliance module can start a Customer Due Diligence (CDD) for Dutch Companies. It will create a CDD Dossier and automatically starts a UBO Investigation at Company.info. When the UBO Investigation is finished, the CDD Dossier will show the found UBO. The user can then validate the UBO and perform a Compliance Check on the UBO Person and on its company.

Some configurations must be done to use the functionality and to show the data to the users.

Step 1: Lightning Page

To enable the user to start a Customer Due Diligence the Account Lightning Page must be updated.

1. From Setup open the object Account
2. Open the Lightning Record Page that you have set as organization default.
3. Click Edit
4. Select the tab Customer Due Diligence



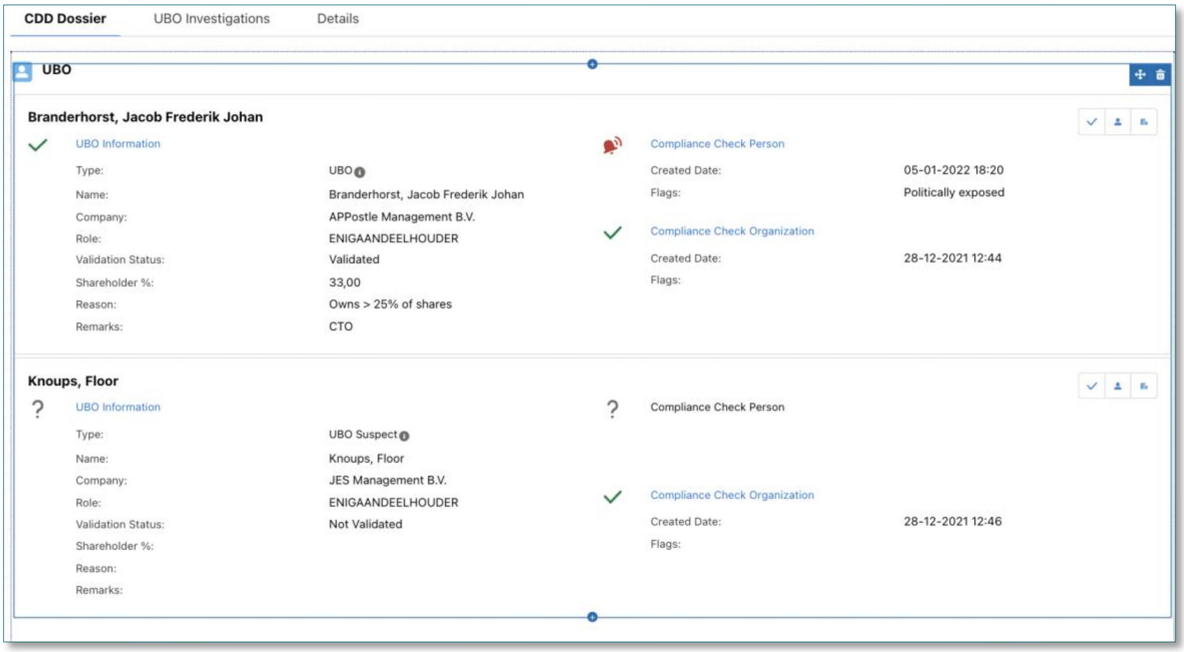
5. Select Tab 'Customer Due Diligence'
6. From the Components menu select 'Related Lists - Single' and add it to the tab 'Business Activities'
7. On the right hand in field 'Parent record' select 'Business Data'
8. In field 'Related List' select 'CDD Dossiers'
9. The data from the related record 'CDD Dossiers' will be shown in this related list.
10. Click Save and activate when requested

11. Click Back to see the result.

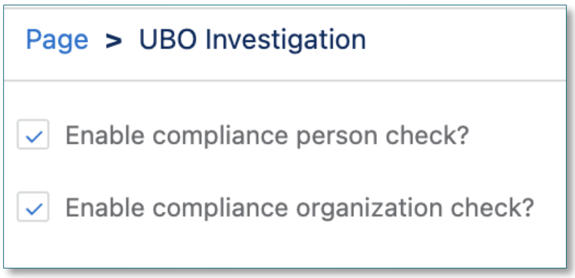
Step 2: Enable/Disable R&C functionality

On the CDD Dossier an overview of the found UBO persons are shown. From this component the user can validate the UBO and perform a Compliance check on the person and on its organization. This data is shown via a LWC Component. On the component you can configure if you want to your users be able to perform Compliance Check. By default, the functionality is enabled.

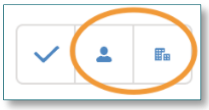
1. In Setup open object CDD Dossier
2. Select Lighting Record Pages
3. Open 'Compliance Dossier Record Page'
4. Click Edit
5. On the CDD Dossier tab select the Component



6. On the right you can determine if you allow your user to perform a Compliance Check on the UBO Person and on the organization of the UBO.



7. When disabled the according buttons are not shown on the Lightning Page:



Step 3: Set Parameters

The Risk & Compliance capability consists of the Company.info services mentioned below. Per service, several parameters can be set to support your organisation's demands.

- Dutch UBO Investigation

  The ultimate beneficial owner of a company is the UBO. This is the ultimate owner or the one with ultimate control. According to the Wwft, this is generally the person who has more than 25% of the shares or voting rights, who holds an economic interest or who has actual control.

  To determine the Dutch UBO, Company.info is using CoC Extracts from the Dutch Chamber of Commerce. You can set parameters regarding the to be used CoC Extracts:

  - Oldest CoC Extract Date

    The maximum number of days that a Chamber of Commerce extract may be old to be used in the UBO investigation. If the Chamber of Commerce Extract is older than this date, a new extract will be generated and used in the research.
  - Include Source

    To determine if you want the original source to be added to the UBO Investigation in XML format.
  - Use CoC Extract Updates

    Determine if a real-time extract is being used if an update has occurred between the oldest extract date and now, meaning a possible cached extract at Company.info is not up to date anymore.

  Please be aware that the values you set for the parameters determines the cost per UBO Investigation. The shorter the CoC Extract date is, the newer CoC Extracts are being used in the UBO Investigation, resulting in an increasement of the cost.

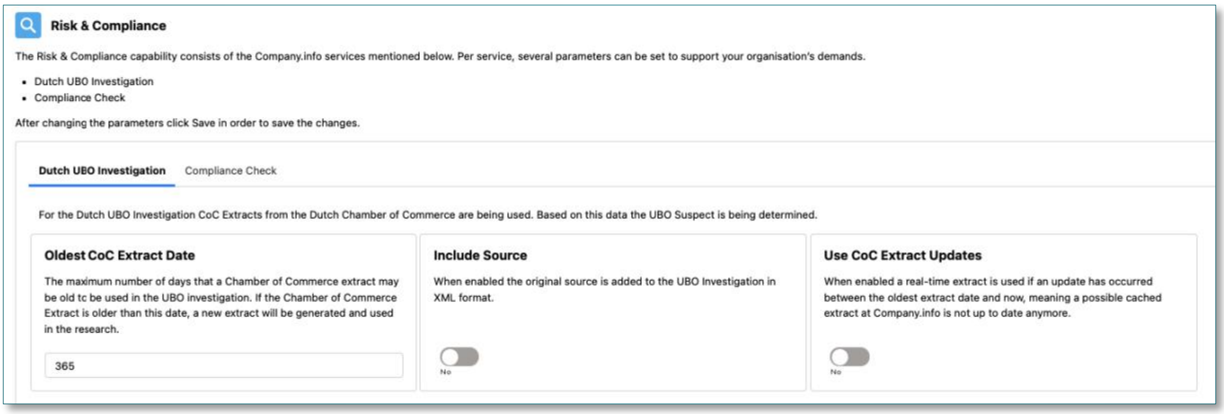
- Compliance Check

  The Compliance Check Service provides compliance and adverse media information related to persons and businesses.

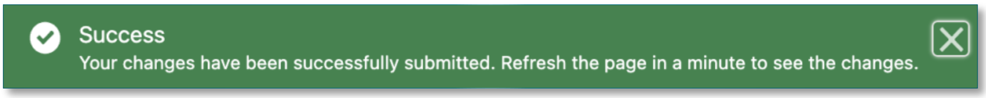
  For performing Compliance Checks on Persons and Organizations, the Match Score parameter can be set that will be used when starting a Compliance Check at Company.info.

The Match Score is based on how well the person found in the reference data matches with the data being searched.The score goes from 80 to 100, with 100 being considered a full match.

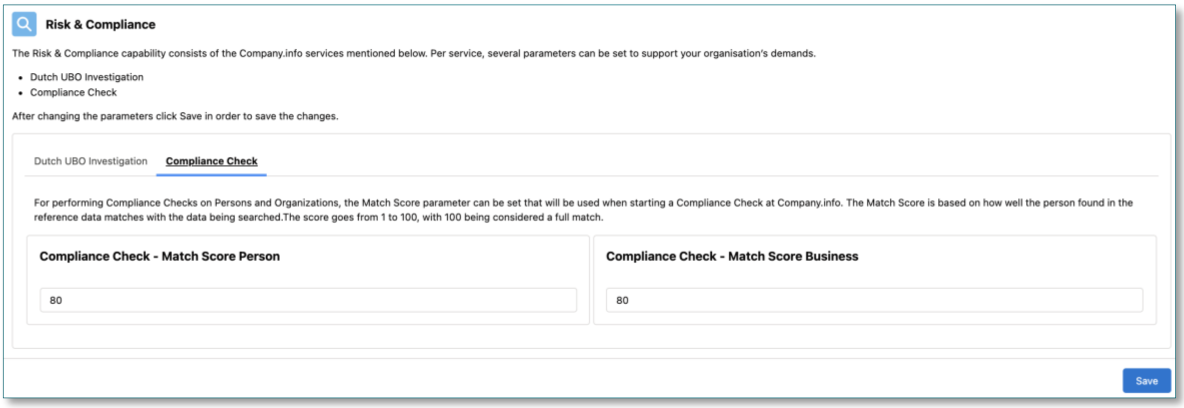
1. Click on the tab Risk & Compliance
2. Click sub-tab Dutch UBO Investigation



3. Change any of the parameters (see above for an explanation of the parameter)
4. Click Save and wait for the Success Message

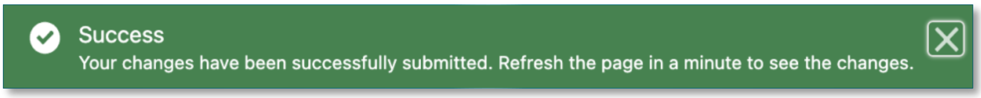


5. Click on the sub-tab Compliance Check

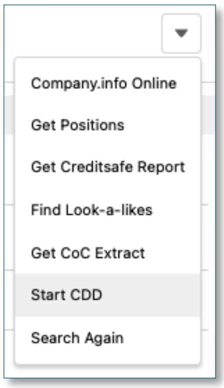


6. Change any of the parameters (see above for an explanation of the parameter)

7. Click Save and wait for the Success Message



8. Users assigned to the Risk & Compliance module can now start a Customer Due Diligence from the Business Data tab on the Account, by clicking on 'Start CDD".



Step 5: Demo it

Now that you have configured the app, you can show your users how to use the functionality. In this short video, we show you how a user can conduct a Customer Due Diligence from a Business Dossier, validate the found UBO Persons and run Compliance Checks on the UBO Person and on its organization.

7.2 Dutch CoC Extract

Users assigned to the Risk & Compliance module can download Dutch CoC Extract. They have access to this functionality via the Business Data tab on the Account.
The admin can set some parameters for retrieving Historical and new versions of the CoC Extract, and the validation date of the CoC Extracts.

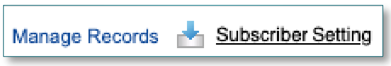
The functionality can be made available via a button on the Business Data tab (on Account) and on the Business Dossier object.

Step 1: Set Parameters

The app offers two parameters that you can set for your users, and which defines what type of CoC Extracts your users can retrieve and what the maximum validity date of an CoC Extract is.

- New or Historical CoC Extracts
  With this parameter you can decide if your users can only download new extracts (latest version directly generated at the Dutch CoC) or could also download Historical extracts (stored at Company.info).
  You only must update this parameter if you want your users to always download a new version of an extract.

  1. In Setup search 'Custom Metadata Types'
  2. Click on the link 'Manage Records' in front of the value 'Subscriber Settings'

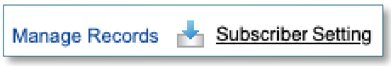
  

  3. Click Edit in front of the value 'COC extract Allow Caching'
  4. Change the value to 'false'
  5. Click Save
  6. As of now your users cannot download Historical versions of an extract anymore.

- Validation date

  With this parameter you can determine the maximum validity date of a downloaded CoC Extract. Meaning that if a user wants to download a CoC Extract that has passed the validity date (the current date minus the downloaded date exceeds the number of validity days) then the user can only download a new version of the CoC Extract.

1. In Setup search ‘Custom Metadata Types’
2. Click on the link ‘Manage Records’ in front of the value ‘Subscriber Settings’



3. Click Edit in front of the value ‘In Setup search 'Custom Metadata Types'
4. Click on the link 'Manage Records' in front of the value 'Subscriber Settings'
5. Click Edit in front of the value 'COC extract Allow Caching'
6. Change the value to the desired number of days
7. Click Save
8. As of now your users cannot download historical versions of an extract anymore that have passed the validity date.

8. Dutch Business Update Service

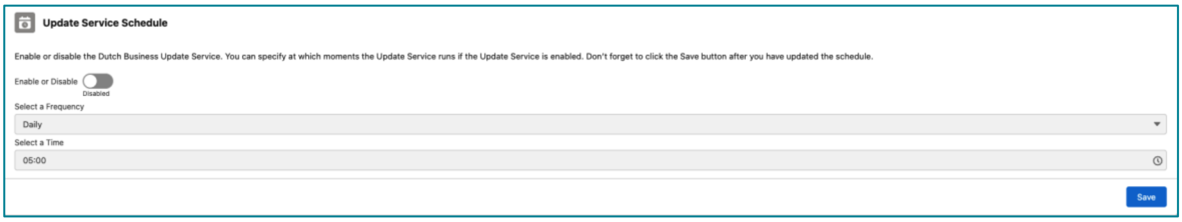
As described in chapter 'General Configuration' the Dutch Business Update Service will keep your **Dutch** Business Dossiers up to date with any updates available from the Dutch Chamber of Commerce.

Besides the Frequency of when the Update Service runs and the Update Types to be checked, you can also add additional configuration.

a. Enable or Disable the Update Service

If for some reason your organization does not want to keep Dutch Business Dossiers up to date at all (*which we do not recommend*), it is now possible to disable the Dutch Business Update Service. Via the Company.info Setup app your Administrator can disable (and enable) the service. When disabled all your Dutch Business Dossiers will no longer be updated with changes from the Dutch Chamber of Commerce.

1. From the AppLauncher open the Company.info Setup app
2. Click tab Dutch Business Update Service
3. Disable (or Enable) the Update Service by setting the toggle
4. Click Save to disable (or enable) the Dutch Business Update Service



By default, the Dutch Business Update Service is enabled within the app.

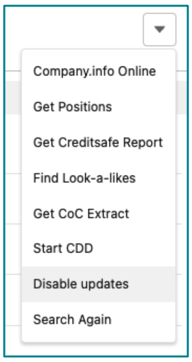
b. Exclude Dutch Business Dossiers from the Update Service

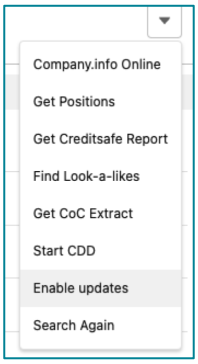
Your organization wants to keep all data up to date, but not every Business Dossier has to be up to date with changes from the Dutch Chamber of Commerce. For this you can let your users decide per Business Dossier if it needs to be updated or not (for example after a customer contract has finished). Once Disabled the user can Enable the Update Service for the Business Dossier again.

From the Business Dossier menu (on the tab Business Data) the user can enable or disable the Update Service from a single Business Dossier. Only users assigned to the Company.info Update Service permission set, will be able to update the Update Service per Business Dossier.

1. From Setup select Permission Sets

2. Open Permission Set ‘Company.info - Update Service’
3. Click ‘Manage Assignments’
4. Click ‘Add Assignments’ and assign the users that you want to give access to this feature
5. Click Done
6. The assigned users now have the option available.



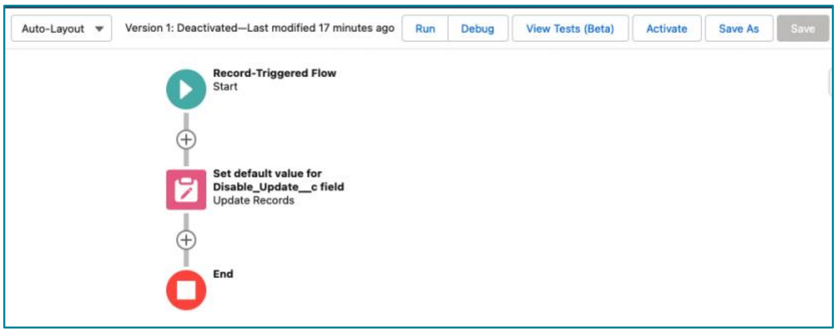


c. *Default value per new Business Dossier*

When your organization wants to let the users decide per Business Dossier if it needs to be updated by the Update Service, you can set a default update value per new created Business Dossier. Your Admin can determine what the default value is for each new Business Dossier that is going to be created by a user (Update Service enabled or disabled).

Out-of-the box the Update Service per Business Dossier is enabled, meaning that each Business Dossier is included in the Update Service. If you would like each new Business Dossier is being excluded from the Update Service, the Admin can configure it via the Template Flow ‘Set Default Value for Disable Update Field’.

1. From Setup select Flows
2. Open the Flow ‘Set Default Value for Disable Update Field’
3. Activate the Flow

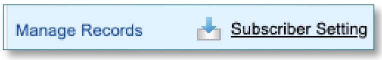


Now every Business Dossier that is being created will be excluded from the Update Service, until the user manually includes it (see ‘Exclude Dutch Business Dossiers from the Update Service’).

9. Retrieving Dutch VAT number

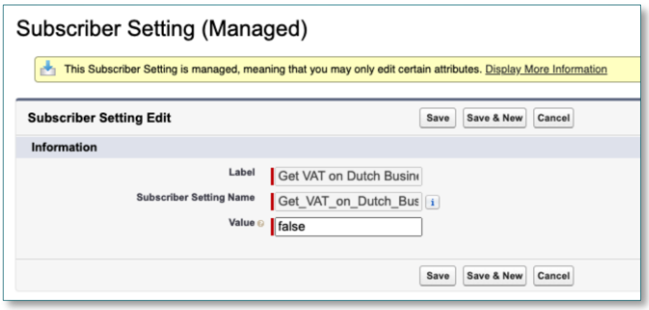
When enriching an account with Dutch business data, the VAT number is also being retrieved. For some organizations, this data is unnecessary to retrieve and store in Salesforce. For the retrieval of the VAT number for Dutch Business Dossiers via the data source ‘Company.info The Netherlands’ can be disabled.

1. From Setup select Custom Metadata Types
2. Click ‘Manage Records’ for the ‘Subscriber Setting’



3. Click ‘Edit” for the Subscriber setting ‘Get VAT on Dutch Business Dossier create’

4. In the field ‘Value’ update ‘true’ to ‘false’



5. Click Save

That’s it!

Thank you for using the Company.info for Salesforce app. This guide covers all steps for installation and configuration. If you have any questions or encounter any issues, please refer to the FAQ page on the Company.info website for additional information and to reach out to our support team.