



BizIntellect Powered by Middelink
SalesForce Integrated App for Business Identification
Customization Guide



1. Introduction

This document outlines steps for customizing standard Account object's Lightning record page. These steps must be performed by a Salesforce admin or a developer. If you need assistance with configuration and/or customization, please contact us at support@datacraim.com

2. Scope/Intent

BizIntellect creates custom fields and actions on the out-of-the-box Account object. Since every client may have their own customization of standard objects' lightning record pages and page layouts, this document will explain how to integrate BizIntellect components onto their existing Account record's Page Layout and Lightning record pages.

3. Customizing Page Layout

1. Open Account objects Page layout that you intend to use for BizIntellect.
2. Drag and drop the fields 'Tax Identification Number' and 'BI Request status' on to the Details section.
3. From the Related Lists section drag and drop these related lists – Businesses, TinRetriedResponses, BICallAPIHistories and ExceptionLogs.

4. Customizing Account Record Page

1. Open the Account object's Lightning record page on which you intend to integrate BizIntellect's components. Open the page to edit. (From account record page, select the gear icon > Edit Page)
2. Select Highlight Panel
3. Under Actions section, add the following actions - 'Verify Business' and 'Request Documents'
4. Add filter to the action 'Verify Business'. Set Visibility filter based on this criterion.
 - i. Field 'BI Request Status' equals 'Ready'
5. Add filter to the action 'Request Documents'. Set Visibility filter based on these criteria
 - i. Field 'BI Request Status' equals 'Ready'
 - ii. Field 'Articles of Incorporation' equals 'true'
 - iii. Field 'Certificate of Good Standing' equals 'true'
 - iv. Set filter logic to '1 AND NOT (2 AND 3)'
6. Drag the 'Related Lists' component from the left panel to the page.
7. Save the changes.
8. Activate the lightning record page if it is not activated yet.