Company.info for Salesforce

CUSTOMIZATION GUIDE

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

Release 5.11

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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.

Customize the app to your needs

The app is developed with maximum flexibility in mind, allowing you to customize the app in such a way that it fully supports your organization's business processes.

In this guide we give 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

These customizations can be realized on top of the default configuration as described in Installation and Configuration guide and are only a summary of the limitless customizations that can be realized.

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 three 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 (approximately) four 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 four 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. Enrich Account fields with Company.info data

Within Salesforce, Flows are used for supporting business processes. Some of the Flows we have developed for the app are marked as Template, meaning you can clone the Flow and change it to your organization’s needs. In the following paragraphs we have described some uses cases.

An overview of all Template Flows is available and can be requested via the Company.info website: https://companyinfo.nl/plugins-en-integraties/salesforce-plugin/faq-salesforce-app/

All retrieved Business Data from Company.info is being registered on a Business Dossier record, which is related to an Account. When a Business Dossier is being created, only the Account name is being copied from the Business Dossier (Legal Name). If you want to update more fields on the Account like addresses, Chamber of Commerce number, VAT number etc. you can change the related Flow according to your organization’s requirements.

You can only open and update Flows that are marked as Template

Flow Label ↑	Process Type	Active	Template
Check Duplicate Business Dossiers	Screen Flow	☑	☐
Create Account based on Company.info data	Screen Flow	☑	☑

There are 2 types of Flows we provide as a Template:

- Create Flows → For creating a **new** account based on Company.info data
- Enrich Flows → For enriching an **existing** Account with Company.info data

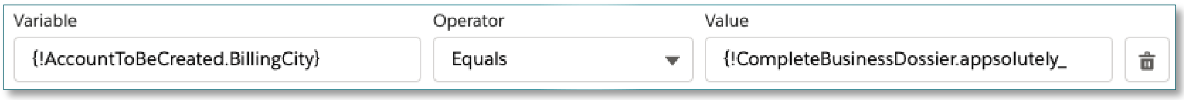
In this example we use the Creation Flow for creating an account based on Business Data.

Step 1: Assign the data to be copied

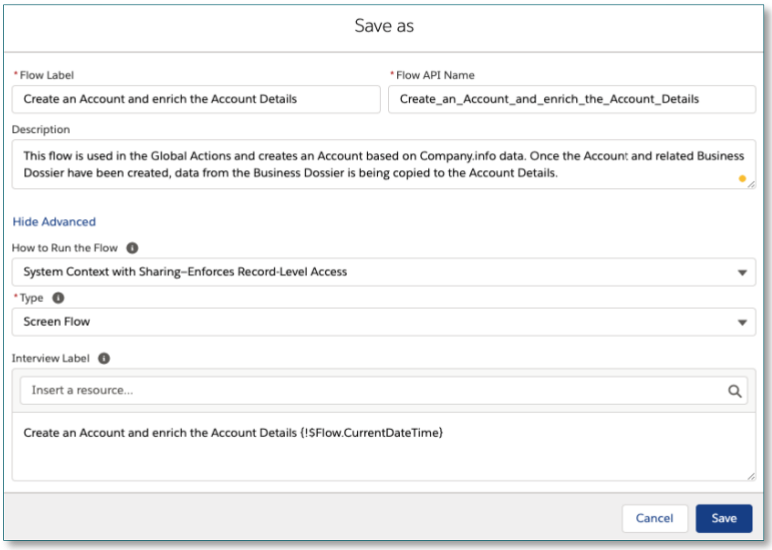
1. In Setup search for Flow and click on Flows
2. Open the Flow ‘Create Account based on Company.info data’
3. Open the Assignment element ‘Assign Account Fields Dutch CoC’

This Assignment element is used for Dutch Accounts based on the Chamber of Commerce source. If you want to update International Accounts, use the Assignment Element ‘Assign Account fields Creditsafe’ which is based on the Creditsafe data source or the Company.info Belgium data source.

4. Click on Add Assignment
5. Add the variable '{!AccountToBeCreated.BillingCity}', meaning we are going to enrich the field Billing City on the Account.
6. Add the value '{!CompleteBusinessDossier.appsolutely__Correspondence_City__c}', meaning the Correspondence City is being copied to the Billing City field on the Account.

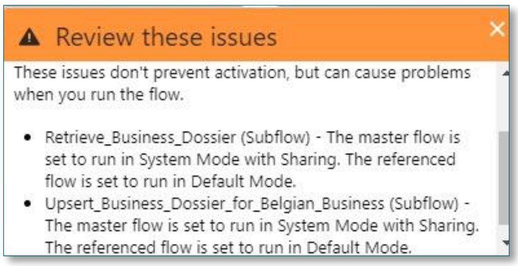


7. Click Done
8. Click Save As
9. Enter a Flow Label
10. Enter a Description
11. Click on Show Advanced
12. Make sure the Flow runs in 'System Context with Sharing—Enforces Record-Level Access'



13. Click Save

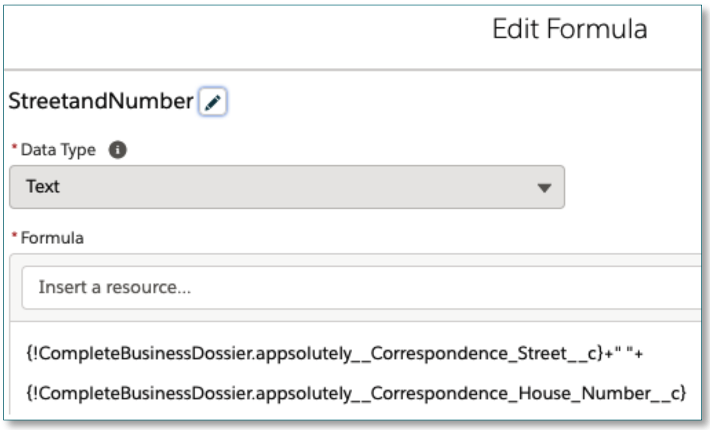
The following warning may occur when saving the Flow, which can be ignored as it won't impact the Flow.



14. Check any issues and solve if requested

15. Click Activate

If you want to copy the values 'Correspondence_Street_and_House_Number__c' and/or 'Establishment_Street_and_House_Number__c' you must create a new resource and use it in your Flow. The resource should look like this:



Step 2: Make the Flow available

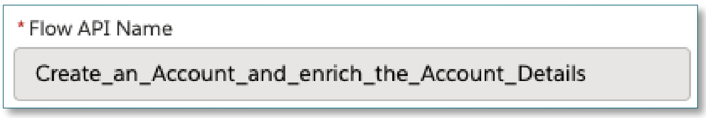
To make the Flow you have created available to your users, you must perform the following steps depending on the type of Flow you have created.

1. Create Flow
   After you have changed a 'Create Flow' you must add it to the Custom Metadata. See below Step 3.
2. Enrich Flow
   When you have changed an 'Enrich Flow' you must add it to the Lightning Page. See chapter 'Lighting Page' in the Installation and Configuration Guide.
3. Give Access
   Once you have cloned an 'Enrich Flow' you must give the User Profile access to the cloned Flow. You can do this on the User Profile in section 'Flow Access'.

Step 3: Custom Metadata Types

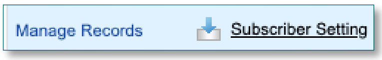
Global Actions are used for creating an account based on Company.info data (see paragraph Global Actions of the Installation and Configuration Guide). The 'Create Flows' which are used in the Global Actions are encapsulated in a lightning component in order to use them in Global Actions. The Flows' API names are provided in the custom metadata. If one of these Flows is cloned, the name of the cloned Flow needs to be added to the Custom Metadata Types.

1. Copy the API name of your Flow

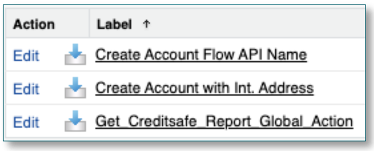


Make sure your Flow API Name __does not contain__ the namespace 'Appsolutely' anymore

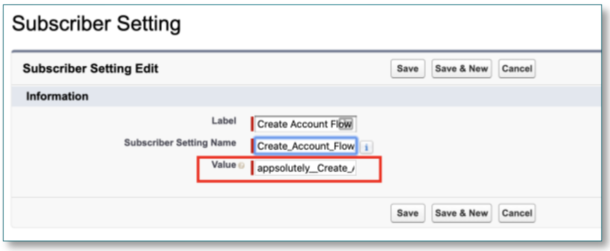
2. In Setup search for 'Custom Metadata' and select 'Custom Metadata Types'
3. Click 'Manage Records' for the 'Subscriber Setting'



4. Click 'Edit" for the Subscriber setting you have altered



5. Paste the API name of your Flow in the field 'Value'



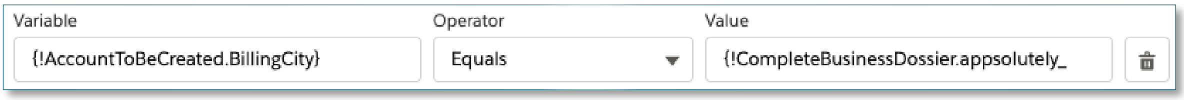
6. Click Save
7. As of now the Global Action will work with your Flow.

3. Copy data from Find Dutch Businesses

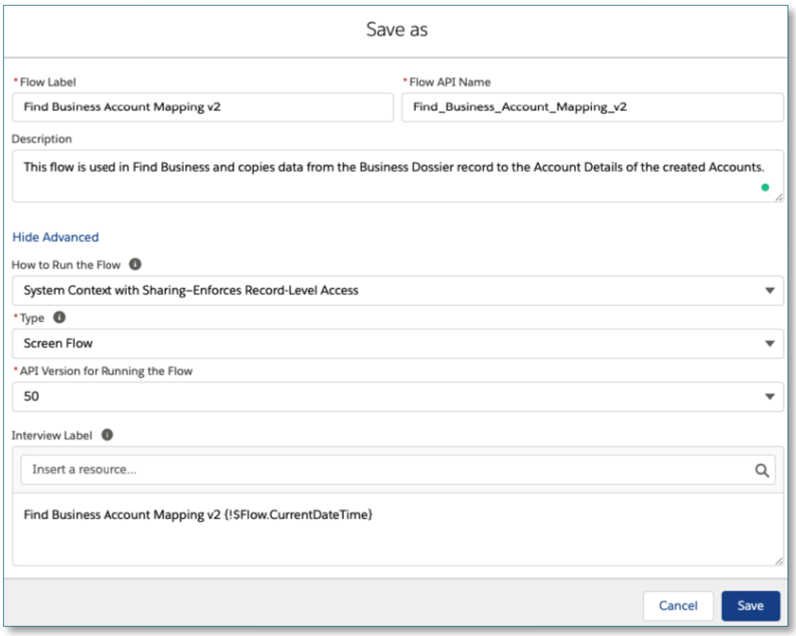
Via the Find Business functionality a user can create multiple Accounts and Business Dossiers in one single transaction. To make sure that the needed data is copied from the Business Dossier to the Account Details the following configuration must be set up.

Step 1: Update the Flow

1. Open the Flow 'Find Business Account Mapping'
2. Open the Assignment element 'Map Business Dossier To Account'
3. Click on Add Assignment
4. Add the variable {!AccountToMap.BillingCity}, meaning we are going to enrich the field Billing City on the Account.
5. Add the value {!Loop_Business_Dossiers.appsolutely__Correspondence_City__c}, meaning the Correspondence City is being copied to the Billing City field on the Account.



6. Click Done
7. Click Save As
8. Enter a Flow Label
9. Enter a Description
10. Click on Show Advanced
11. Make sure the Flow runs in 'System Context with Sharing—Enforces Record-Level Access'

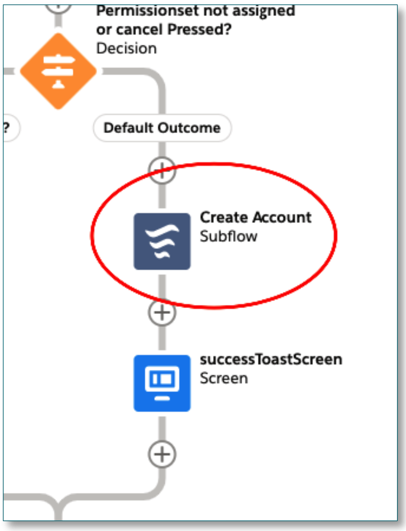


12. Click Save
13. Check any issues and solve if requested
14. Click Activate

Step 2: Link it to the Main Flow

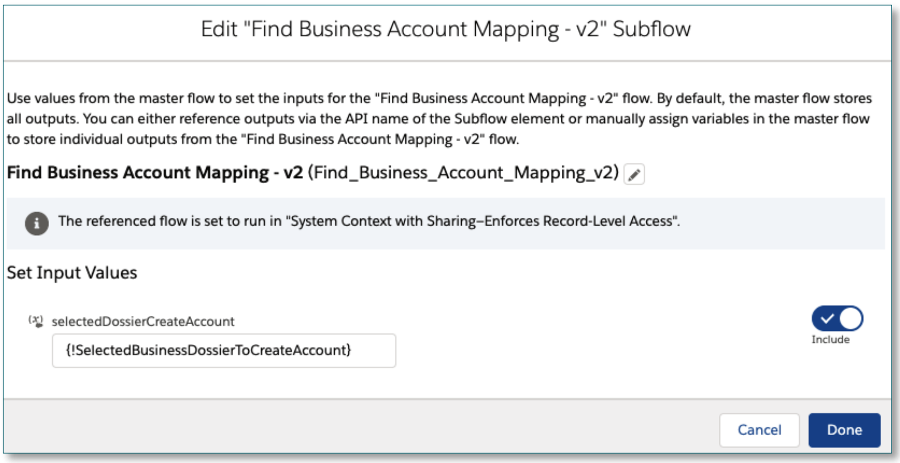
Now that we have defined what data we want to copy to the Account Details, we must link the functionality to the Flow which is used in the Global Action 'Find Dutch Businesses'

1. Open Flow 'Find Business Global Action'
2. Delete SubFlow element 'Create Account'

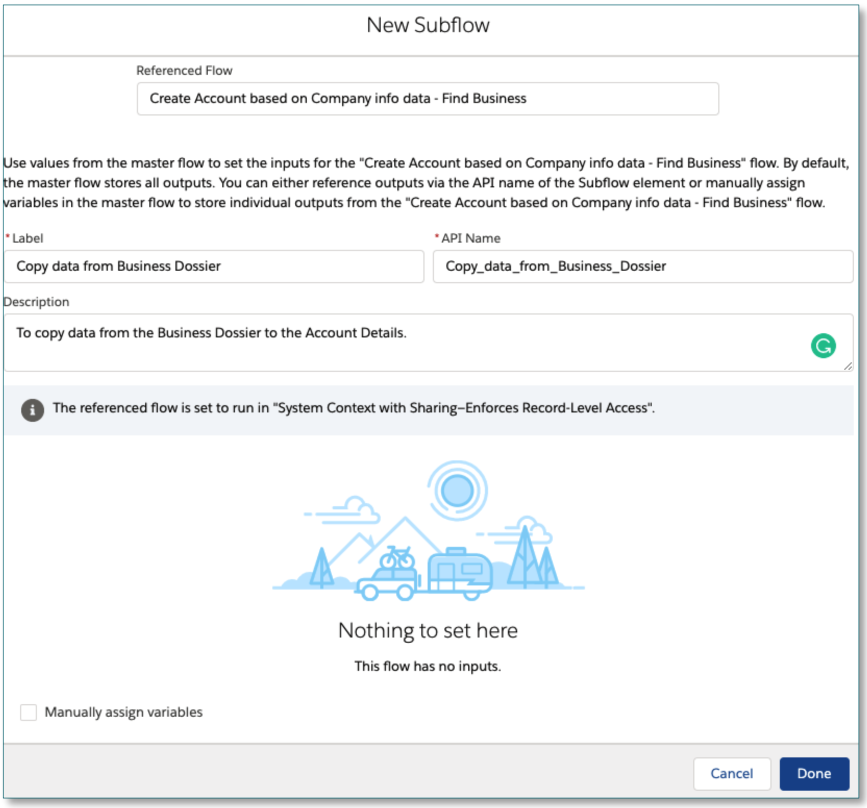


3. Add a new SubFlow element

4. In field 'Reference Flow' selected the Flow you cloned in the previous steps
5. Include Input Value 'selectedDossierCreateAccount'
6. Add value '{!SelectedBusinessDossierToCreateAccount}'



7. Click Done
8. Click Save
9. Add a Label and a description
10. Click Done



11. Click Save As
12. Enter a Flow Label

13. Enter a Description
14. Click on Show Advanced
15. Make sure the Flow runs in 'System Context with Sharing—Enforces Record-Level Access'
16. Copy the API name (you need this in the next step)
17. Click Save
18. Check any issues and solve if requested
19. Click Activate

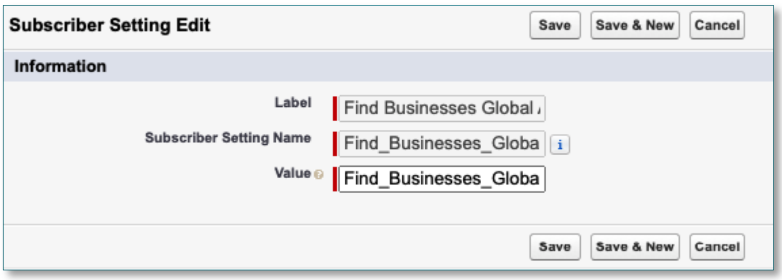
Step 3: Link it to the Global Action

Now that all Flows have been configured, you can link it to the Global Action.

1. In Setup search for 'Metadata' and select 'Custom Metadata Types'
2. Click 'Manage Records' for the 'Subscriber Setting'

3. Click 'Edit" for value 'Find Business Global Action'

4. Paste the API name of your Flow in the field 'Value'



5. Click Save
6. When you now create Accounts via Find Dutch Businesses data is being copied from the Business Dossier record to the Account Details.

4. Country Codes

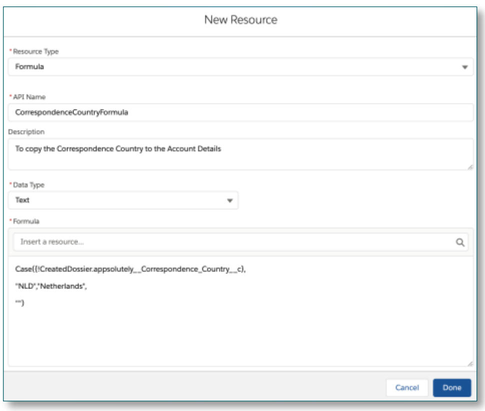
4.1. Copy Country from the Business Dossier

If you want to copy the country from the Business Dossier record to the Account Details, you can do this by copying the country code from the Business Dossier record. For this you have to adjust the two Flows we have provided.

Step 1: When enriching an existing account

Copy the Country Code when enriching an existing account with Business Dossier data.

1. In Setup search for Flow and open Flows
2. Clone the Flow 'Enrich Account with Dossier Data'
   See chapter [Flows](#) on how to clone a Flow.
3. Click tab Manager
4. Click New Resource
5. In Resource Type choose 'Formula'
6. To copy the Correspondence Country from the Business Dossier record, add the following data:
   A. API Name 'CorrespondenceCountryFormula'
   B. Data Type 'Text'
   C. Formula:
      Case({!CreatedDossier.appsolutely__Correspondence_Country__c},
      "NLD","Netherlands",
      "")
7. Click Done

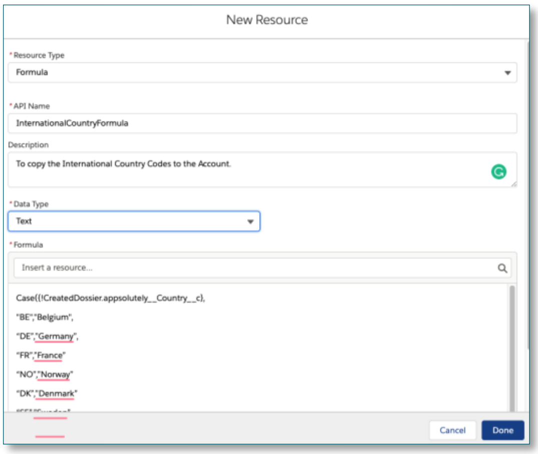


8. Add a new formula to copy the other countries (as they are stored in a different field as The Netherlands).
9. Click New Resource

10. In Resource Type choose 'Formula'
    A. API Name 'InternationalCountryFormula'
    B. Data Type 'Text'
    C. Formula:

Case({!CreatedDossier.appsolutely__Country__c},
"NO","Norway",
"SE","Sweden",
"DK","Denmark",
"BE","Belgium",
"LU","Luxembourg",
"DE","Germany",
"FR","France",
"GB","United Kingdom",
"IE","Ireland",
"")

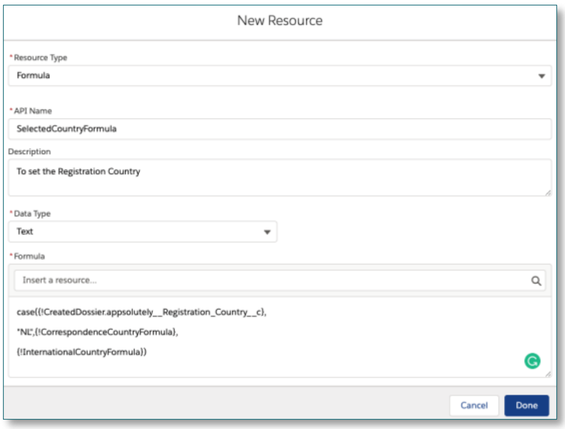
11. Click Done



12. Add another formula to set the Registration Country.
13. Click New Resource
14. In Resource Type choose 'Formula'
    A. API Name 'SelectedCountryFormula'
    B. Data Type 'Text'
    C. Formula:

case({!CreatedDossier.appsolutely__Registration_Country__c},
"NL",{!CorrespondenceCountryFormula},
{!InternationalCountryFormula})

15. Click Done



16. Now you have to set the mapping of the fields.
17. On the canvas open element 'Assign Account Fields Dutch CoC'

18. Delete Variable 'Billing Country':

19. Click Add Assignment
20. In Variable add the Account Country field to which you want to copy the data:
    - {!OpenedAccount.BillingCountry}
    - {!OpenedAccount.ShippingCountry}
21. In Value add '{!SelectedCountryFormula}'
22. Click Done
23. On the canvas open element 'Assign Account fields Creditsafe'
24. Click Add Assignment
25. In Variable add the Account Country field to which you want to copy the data:
    - {!OpenedAccount.BillingCountry}
    - {!OpenedAccount.ShippingCountry}
26. In Value add '{!SelectedCountryFormula}'
27. Click Done
28. Click Save
29. Add a Flow Label
30. Click Save
31. Click Activate
32. Add the new Flow to the Lightning Page. See chapter 'Lighting Page' in the Installation and Configuration Guide.

Step2: When creating a new account

Copy the Country Code when creating a new account via the global action 'Create account based on business data'

1. In Setup search for Flow and open Flows
2. Clone the Flow 'Create Account based on Company.info data'
   See chapter Flows on how to clone a Flow.
3. Click tab Manager
4. Click New Resource
5. In Resource Type choose 'Formula'
6. To copy the Correspondence Country from the Business Dossier record, add the following data:
   A. API Name 'CorrespondenceCountryFormula'
   B. Data Type 'Text'
   C. Formula:
      Case({!CompleteBusinessDossier.appsolutely__Correspondence_Country__c},
      "NLD","Netherlands",
      "")
7. Click Done
8. Add a new formula to copy the other countries (as they are stored in a different field as The Netherlands).
9. Click New Resource
10. In Resource Type choose 'Formula'
    A. API Name 'InternationalCountryFormula'
    B. Data Type 'Text'
    C. Formula:
       Case({!CompleteBusinessDossier.appsolutely__Country__c},
       "NO","Norway",
       "SE","Sweden",
       "DK","Denmark",
       "BE","Belgium",
       "LU","Luxembourg",
       "DE","Germany",
       "FR","France",
       "GB","United Kingdom",
       "IE","Ireland",
       "")
11. Click Done
12. Add another formula to set the Registration Country.
13. Click New Resource

14. In Resource Type choose 'Formula'
    A. API Name 'SelectedCountryFormula'
    B. Data Type 'Text'
    C. Formula:
    case({!CompleteBusinessDossier.appsolutely__Registration_Country__c}, "NL",{!CorrespondenceCountryFormula}, {!InternationalCountryFormula})
15. Click Done
16. Now you have to set the mapping of the fields.
17. On the canvas open element 'Assign Account Fields Dutch CoC'

18. Click Add Assignment
19. In Variable add the Account Country field to which you want to copy the data:
    - {!AccountToBeCreated.BillingCountry}
    - {!AccountToBeCreated.ShippingCountry}
20. In Value add '{!SelectedCountryFormula}'
21. Click Done
22. On the canvas open element 'Assign Account fields Creditsafe'
23. Click Add Assignment
24. In Variable add the Account Country field to which you want to copy the data:
    - {!AccountToBeCreated.BillingCountry}
    - {!AccountToBeCreated.ShippingCountry}
25. In Value add '{!SelectedCountryFormula}'
26. Click Done
27. Click Save
28. Add a Flow Label
29. Click Save
30. Click Activate
31. Add the new Flow to the Global Action. See paragraph Custom Metadata Types.

4.2. Set default country in the search screen

When a user wants to enrich an Account with Business Data, the user searches for a Business Dossier from the Account details page (tab Business Data). The Business Search form is shown, and the user must select a country first to search for a company.

This functionality only must be set up if your organization is using one of the following modules of the Company.info for Salesforce app:

- *Sales*
- *Risk & Compliance*

If you use one of the mentioned modules and you want to enable the automatic selection of the country in the Business Search form, the following must be realized:

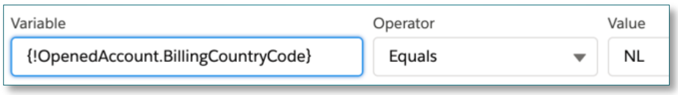
- Enabling the country code functionality in your Org.
- Updating the related Flows.

Step 1: Enable Country code

When the Country Code is not enabled within your Salesforce instance., you first must enable it. How to enable the country code is explained here: https://help.salesforce.com/articleView?id=admin_state_country_picklists_configure.htm&type=5

Step 2: Update of the Flow

1. In Setup search for Flow and open Flows
2. Clone the Flow 'Enrich Account with Dossier Data'
   See chapter Flows on how to clone a Flow.
3. Open Assignment element 'Empty Country'
4. Add the value of the country you want to set as a default (for all users).
   (NL, NO, SE, DK, BE, LU, DE, FR, GB or IR)



5. Click Done
6. Save and Activate the Flow
7. Add the Flow to the Lightning Page.
   See chapter 'Lighting Page' in the Installation and Configuration Guide.

5. Default field value when creating an Account

When your organization has the requirement to set default values when creating an account, you can update the ‘Create Flows’ we have provided, to meet the requirement.

Example

Your organization has the requirement that the Accounts created via the Global Action ‘New Account based on Business Data’ have a ***default*** *record type.*

The Global Action uses the Flow ‘Create Account based on Company.info data’ and allows the user to create an Account automatically from the Business Dossier search results. As the Flow is provided as a template, you can change it according to your requirements.

1. In Setup search for Flow and click on Flows
2. Open the Flow ‘Create Account based on Company.info data’
3. Open the Assignment element ‘Assign Account Fields Dutch CoC’

This Assignment element is used for Dutch Accounts based on the Chamber of Commerce source. If you want to also set values for Belgium or Creditsafe Accounts, update the appropriate Assignment that is related to the data source.

4. Click on Add Assignment
5. Add variable {!AccountToBeCreated.RecordTypeId}
6. Add the correct RecordTypeId value
7. Click Done
8. Click Save As
9. Save the Flow as a new version or a new Flow
10. Click Save
11. Check any issues and solve if requested
12. Click Activate
13. Update the Custom Metadata setting. See Make your Flow available.

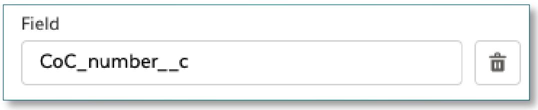
6. Default values for Business Search form

Like paragraph [Default field value when creating an Account](), you can take values from the Account fields and use those in the Search fields of the Business Search form.

By default, the Billing address is used as search value in address fields. However, if you want to map other address fields like shipping address or custom fields on the Account to search fields, these must be set as default.

1. In Setup search for Flow and select Flows
2. Clone the Flow ‘Enrich Account with Dossier Data’ or open your cloned Flow.
3. Open the Get Records element ‘Get Account’
4. Add or update any fields you have on the Account Details and want to user in the Business Search form.

   Example: Your company has registered the CoC Number on the Account record and want the app to use this value when searching for a Business Dossier:

5. Click Done
6. Open the SubFlow element " Organisation Search Flow Prefilled"
7. In the section ‘Set Input Values’, select the input values from the Account fields.

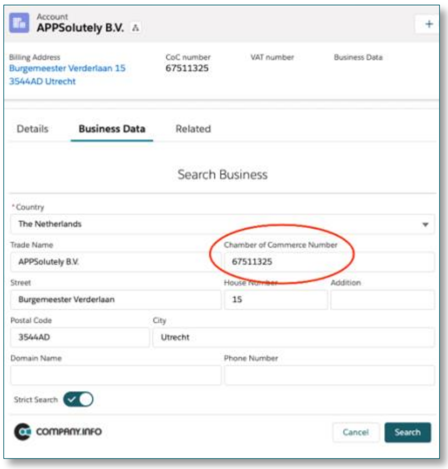
   Example: In the example give above replace the Input Value for ‘dossierNumber’ with the value for the ‘CoC number’

8. Make sure the input field is Included 

9. Click Done
10. Click Save As
11. Save the Flow as a new version or a new Flow
12. Click Save

13. Check any issues and solve if requested
14. Click Activate
15. Add the Flow to the Lightning Page
16. The CoC Number from the Account will now be filled in as search term in the Business Search form in field ‘Chamber of Commerce Number’.



7. Lead Management

As of version 3.0 we offer the following features as part of Lead Management:

- Find Dutch Businesses
- Look-a-like Businesses

Per feature you can set 2 parameters:

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.

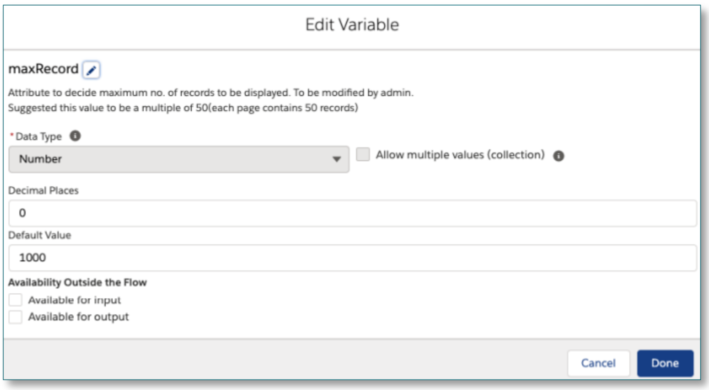
In the following paragraphs we have described how you can set the parameters for both features.

7.1. Set Maximum number of search results

Step 1: Find Dutch Businesses

1. In Setup search for Flow and select Flows
2. Clone the Flow 'Find Businesses Global Action'
3. Click on tab Manager and open Variable 'maxRecord'

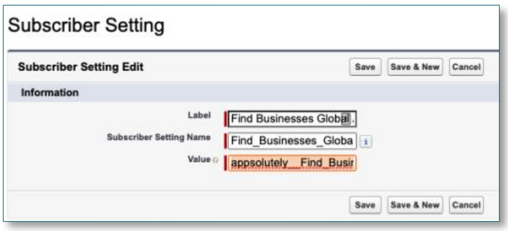
4. Update the ‘Default Value’



5. Click Done
6. Save and Activate the Flow
7. Copy the API Name of the Flow
8. In Setup search for ‘Custom Metadata’ and select ‘Custom Metadata Types’
9. Click ‘Manage Records’ for the ‘Subscriber Setting’

10. Click ‘Edit” for the Subscriber setting ‘Find Businesses Global Action’

11. Paste the API name of your Flow in the field ‘Value’

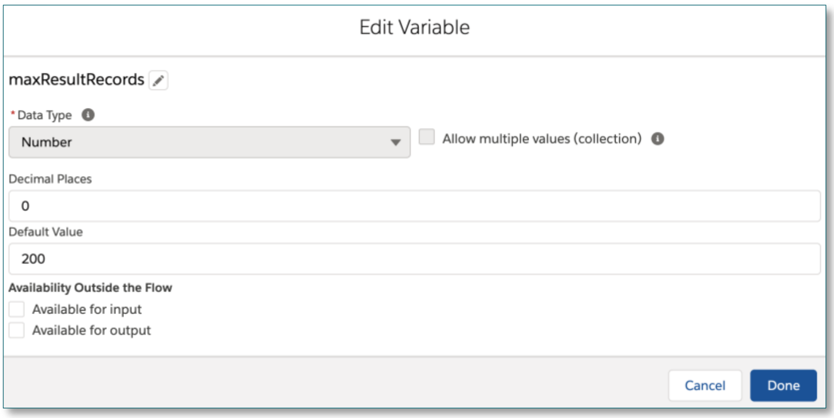


12. Click Save
13. As of now the Global Action will work with your Flow.

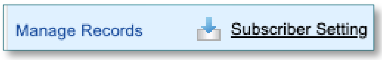
Step 2: Look-a-like businesses

1. In Setup search for Flow and select Flows
2. Clone the Flow ‘Look A Like Service’
3. Click on tab Manager and open Variable ‘maxResultsRecords’

4. Update the 'Default Value'



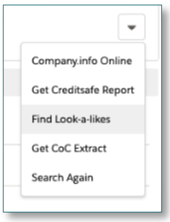
5. Click Done
6. Save and Activate the Flow
7. Copy the API Name of the Flow
8. In Setup search for 'Custom Metadata' and select 'Custom Metadata Types'
9. Click 'Manage Records' for the 'Subscriber Setting'



10. Click 'Edit" for the Subscriber setting 'Look A Like Service'

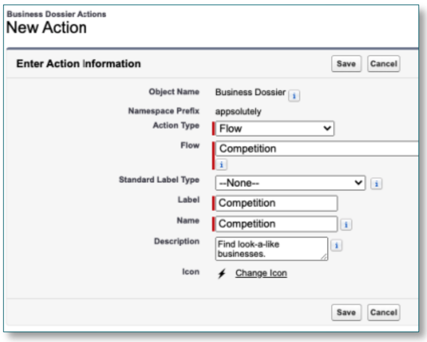
11. Paste the API name of your Flow in the field 'Value'

12. Click Save
13. As of now the 'Find Look-a-likes' button on the tab Business Data will work with your Flow.



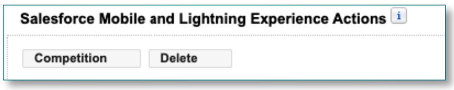
If you also want to update the Quick Action button on the Business Dossier, then add the following configuration.

1. In Setup open the object Business Dossier
2. Click ‘Buttons, Links, and Actions’
3. Click New Action
4. From Action Type select ‘Flow’
5. From Flow select the Flow you have created for Look-a-like businesses
6. Add a Label
7. Add a Description
8. Click Save



9. On the Business Dossier object open the Page Layout ‘Business Dossier Layout’.
10. Click ‘Mobile & Lightning Actions’
11. Add the button you just created to the section ‘Salesforce Mobile and Lightning Experience Actions’

12. From the section ‘Salesforce Mobile and Lightning Experience Actions’ remove the button ‘Find Look-a-likes’ (as this button is based on the Look-a-like Flow from the package).



13. Click Save
14. The button now is available on the Business Dossier record.

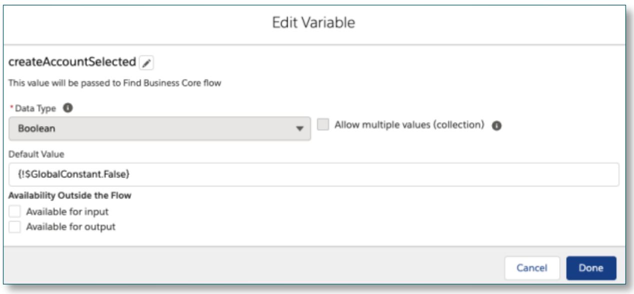
7.2. Disable Create Account function for your users

The Lead Management functionality ‘Find Dutch Businesses’ and ‘Look-alike Service’ provide user the functionality to search for new Dutch Businesses based on several criteria. From the Lead Management functionality, the user can let the app create the Business Dossiers or the Accounts including the Business Dossier. If for some reason you don’t want your users to create Accounts with Business Dossiers, but only the Business Dossiers (and thus not linked to any account), you can do so by updating the Flows.

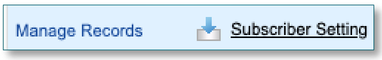
Step 1: Find Dutch Businesses

1. In Setup search for Flow and select Flows
2. Clone the Flow ‘Find Businesses Global Action’ or open the Flow you have cloned in the previous paragraph.
3. Click on tab Manager and open Variable ‘createAccountSelected’

4. Change the ‘Default Value’ to ‘{!$GlobalConstant.False}’

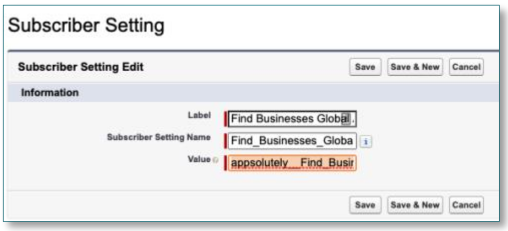


5. Click Done
6. Save and Activate the Flow
7. Copy the API Name of the Flow
8. In Setup search for ‘Custom Metadata’ and select ‘Custom Metadata Types’
9. Click ‘Manage Records’ for the ‘Subscriber Setting’



10. Click ‘Edit” for the Subscriber setting ‘Find Businesses Global Action’

11. Paste the API name of your Flow in the field ‘Value’

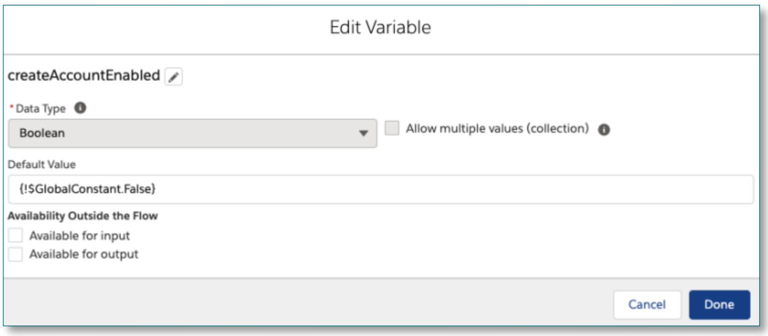


12. Click Save
13. As of now the users are not able to create Accounts from the feature ‘Find Dutch Businesses’

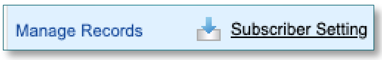
Step 2: Look-a-like businesses

1. In Setup search for Flow and select Flows
2. Clone the Flow ‘Look A Like Service’
3. Click on tab Manager and open Variable ‘createAccountEnabled’

4. Change the ‘Default Value’ to ‘{!$GlobalConstant.False}’



5. Click Done
6. Save and Activate the Flow
7. Copy the API Name of the Flow
8. In Setup search for ‘Custom Metadata’ and select ‘Custom Metadata Types’
9. Click ‘Manage Records’ for the ‘Subscriber Setting’



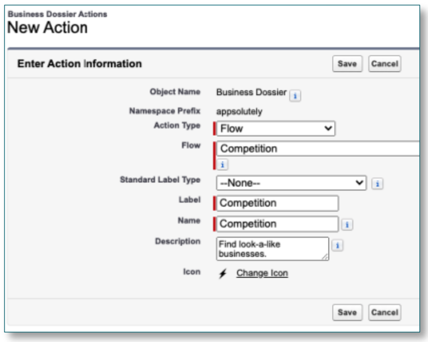
10. Click ‘Edit” for the Subscriber setting ‘Look A Like Service’

11. Paste the API name of your Flow in the field ‘Value’

12. Click Save
13. As of now the users are not able to create Accounts from the feature ‘Look-a-like Businesses’

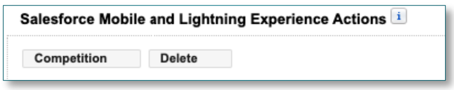
Step 3: Update Quick Action button

If you also want to update the Quick Action button on the Business Dossier, then add the following configuration.



1. In Setup open the object Business Dossier
2. Click 'Buttons, Links, and Actions'
3. Click New Action
4. From Action Type select 'Flow'
5. From Flow select the Flow you have created for Look-a-like businesses
6. Add a Label
7. Add a Description
8. Click Save
9. On the Business Dossier object open the Page Layout 'Business Dossier Layout'.
10. Click 'Mobile & Lightning Actions'
11. Add the button you just created to the section 'Salesforce Mobile and Lightning Experience Actions'

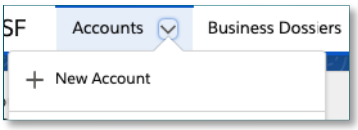
12. From the section 'Salesforce Mobile and Lightning Experience Actions' remove the button 'Find Look-a-likes' (as this button is based on the Look-a-like Flow from the package).

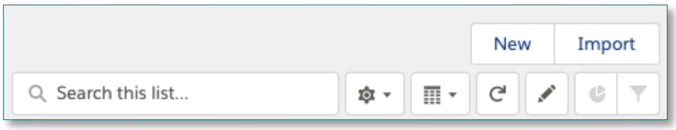


13. Click Save
14. The button now is available on the Business Dossier record.

8. Update New Account button

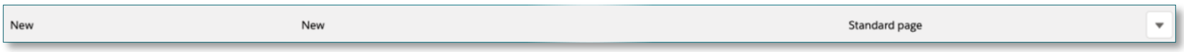
Salesforce offers the possibility to update the 'New Account' button on the Account object with your own build functionality. If you want your users to always create an Account via the Company.info for Salesforce app, to ensure that each new Account is enriched with Business Data, you can now assign the component to the app.



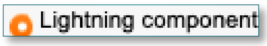


Step 1: Override New button

1. In Setup open object 'Account'
2. Click 'Buttons, Links, and Actions'
3. Search for Label 'New' and click on the dropdown



4. From 'Lightning Experience Override' check Lightning Component



5. Choose 'appsolutely:NewButtonAccountOverride'

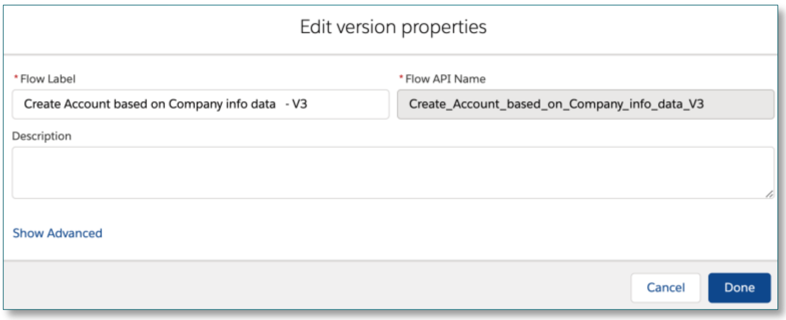
6. You can do the same for 'Mobile Override'
7. Click Save
8. As of now all Accounts which will be created manually, will be created via the Company.info for Salesforce app.

Step 2: Assign your Flow

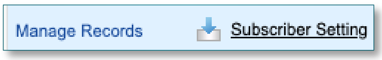
If you use a cloned Flow for creating accounts with Business Data, then you should also assign this Flow to the New Account button.

1. In Setup search for 'Flows' and open your cloned Flow
2. Click on the gear icon

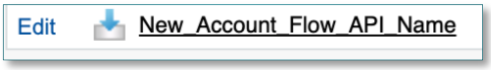
3. Copy the API value



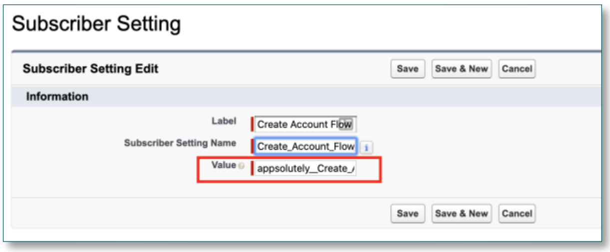
4. In Setup search for 'Custom Metadata' and select 'Custom Metadata Types'
5. Click 'Manage Records' for the 'Subscriber Setting'



6. Click 'Edit" for the Subscriber setting 'New_Account_Flow_API_Name'



7. Paste the API name of your Flow in the field 'Value'

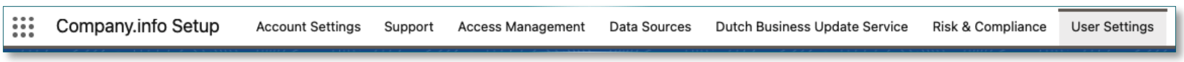


8. Click Save
9. As of now the 'New Account button' will work with your Flow.

Step 3: Skip the override option

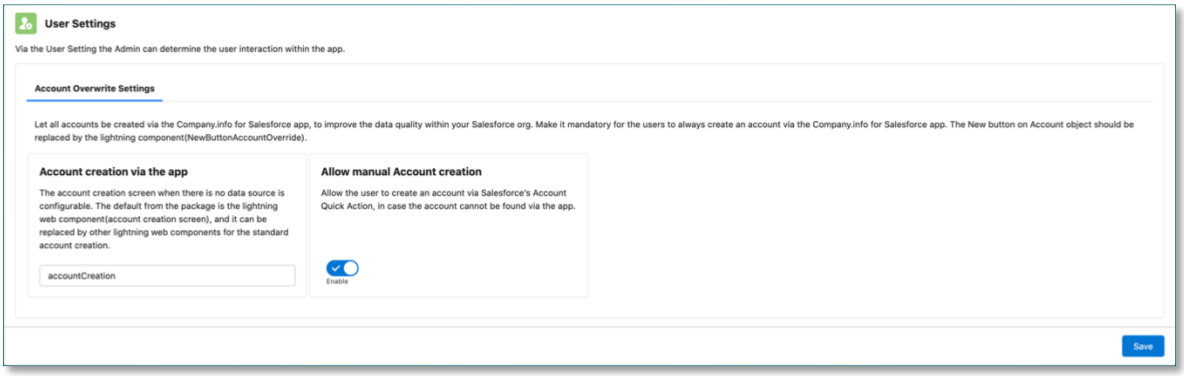
It might occur that a company cannot be found from the data source. In that case you might want the user to be redirected to another Account input screen.

1. Open the Company.info Setup app
2. Click tab User Settings



3. In section 'Allow manual Account creation' set the toggle to Enable, this allows the user to skip the Account creation via the app and redirects the user to another input screen.

4. In section ‘Account creation via the app’ set the component to which you want the user to be redirected, once the data could not be found via the Company.info for Salesforce app.



By default, the user is redirected to the standard New Account screen of Salesforce, but you can overwrite the value by your own developed input screen.

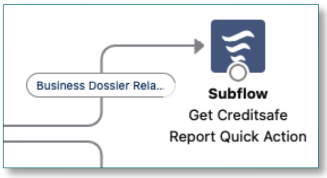
5. Click Save
6. As of now every Account that is being created manually in your org, is being created via the Company.info for Salesforce app, improving the data quality within your org.

9. Default language for Creditsafe Company Report

By default, the langue when creating a Creditsafe Company Report is English, meaning that when a user wants to create a Creditsafe Company Report in Dutch or German, he must select that language. When creating a lot of Creditsafe Company Reports, this is an extra mouse click for the user.

Via a Flow it is now possible to set your own default language to Dutch or German.

1. In Setup search for Flow and select Flows
2. Clone the Flow 'Get Creditsafe Report Quick Action on Account'
3. Open Subflow 'Get Creditsafe Report Quick Action'

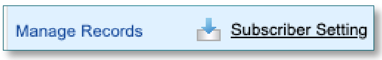


4. In field 'ReportDefaultLanguage' change the value to NL or DE

5. Click Done
6. Click Save As
7. Add a name
8. Copy the Flow API Name (we need that value later)

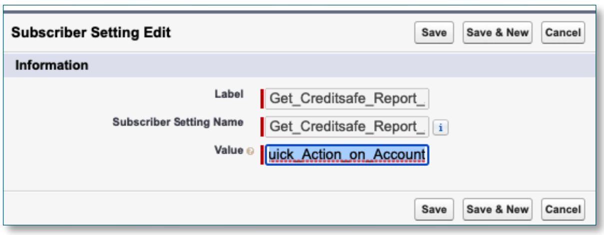
*Make sure your Flow API Name **does not contain** the namespace 'Appsolutely' anymore*

9. Click Save
10. Click Activate
11. In Setup search for 'Custom Metadata' and select 'Custom Metadata Types'
12. Click 'Manage Records' for the 'Subscriber Setting'

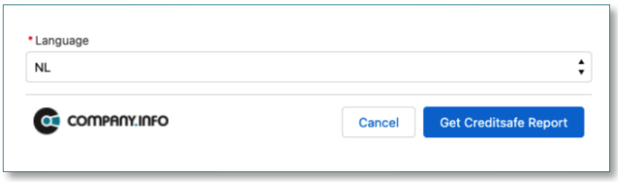


13. Click 'Edit" for the Subscriber setting 'Get_Creditsafe_Report_Account

14. Paste the API name of your Flow in the field 'Value'



15. Click Save
16. As of now when a user creates a Creditsafe Company Report the default language in the confirmation screen has the value you have set in the Flow.



10. Define Search Fields

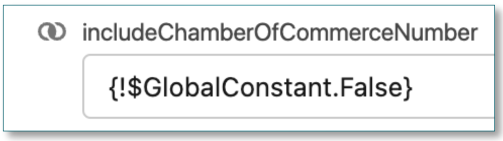
Some Admins want to offer less search fields to their users, making it easier to navigate for them. The Admin can now configure the Search Business component to determine what Search Fields to be shown when enriching or creating an existing account.

The Business Screen Component can be adjusted for the Create Account and Enrich Account scenarios.

Creating an account

1. From Setup open Flows
2. Open the Flow 'Create Account based on Company info data' **or** the flow you have configured for creating accounts.
3. Open Subflow element 'Organisation Search Flow'

4. **Include** the Boolean fields* you do not want to offer to your users 



5. Add value {!$GlobalConstant.False}per **included** field

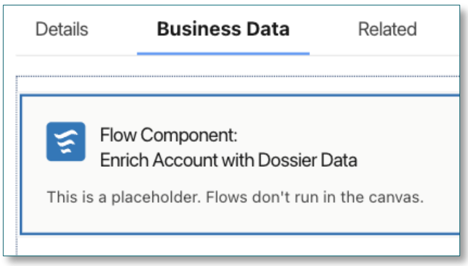
6. Save and Activate the Flow and test it.

** Only Include fields of type Boolean*  *If you include any other type of field, this will result in an error when running the Flow. The fields shown on the subflow element are <u>all</u> available fields for <u>all</u> Data Sources, meaning that you must determine per data source which field to in- or exclude.*

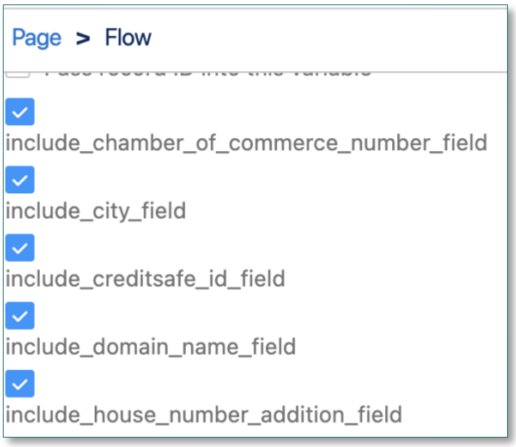
Enrich an account

1. From Setup open object Account
2. From the menu select Lightning Record Pages
3. Open the record page you assigned as Org Default and click View

4. On the Account Record Page select the Company.info Flow you have assigned



5. On the right side disable or enable the search fields you want to present



6. Save and Activate the Lightning Page and test it.

11. Customer Onboarding Flow

A new Business Search component has been created for Experience Sites, to support your B2B Onboarding Process. The component can be added to your Experience Page and can be integrated in any of your Flows.

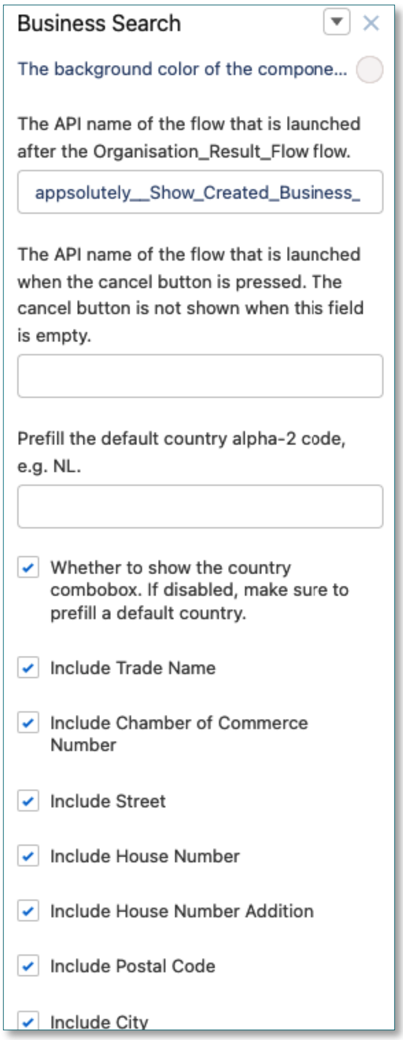
The component offers the following functionality to configure:

- Determine which search fields to present to your visitors to search for their company (from the Company.info servers)
- Configure which Flow to be triggered from the Business Search component (For example: Let the customer add extra information like contact person and email address, and create the Account and Contact)
- Set the color(s) of your component so it adheres to your Experience Site theme
- Set the Default Country so the customer and the selector so your customer can only register from that country

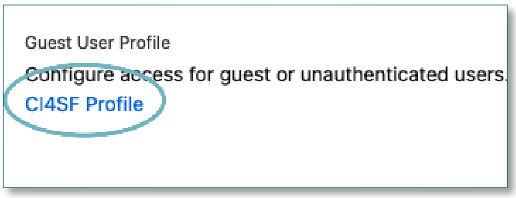
1. From Setup select Digital Experiences and open your Experience Site

2. From Builder open the (public) page for your onboarding
3. From the Components Menu select the Business Search component

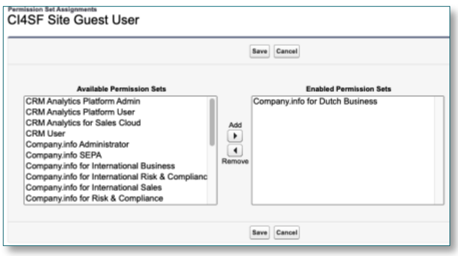
4. Add the component to your page
5. Select the component and configure the Business Search Settings
    - Set the follow-up launched Flow
    - Set the cancel launched Flow
    - Set a default country, and if required hide the country selector
    - Set the search fields to be shown



6. Open Site Settings from the menu
7. On tab General open the Guest User Profile by clicking on the hyperlink (You will be redirected to the Profile in Setup)



8. Click Assigned Users
9. Open the Site Guest User
10. Click Edit Assignments in section 'Permission Set Assignments'
11. Add the Company.info Permission set that you have a contract for



12. Click Save
13. Navigate back to your Experience Site
14. Publish the site
15. Test your new onboarding process

That’s it!

Thank you for using the Company.info for Salesforce app. This guide covers all steps for customizing the app. 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.