Business Credit Reports

SYNERGY

FOR SALESFORCE

User Guide | Version 1.0

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PREFACE

This user manual will guide you through how to use **Synergy for Salesforce**, from installation to the step by step process of ordering and viewing a report.

As you may know, Business Credit Reports, Inc. provides an in-depth look at a company's credit file & information from each of the major business credit bureaus through blended multi-bureau business credit reports.

With this application, you have direct access to your Business Credit Reports, Inc. account and report options for the U.S., Canada, and International from within your Salesforce org.

Features of Synergy for Salesforce:

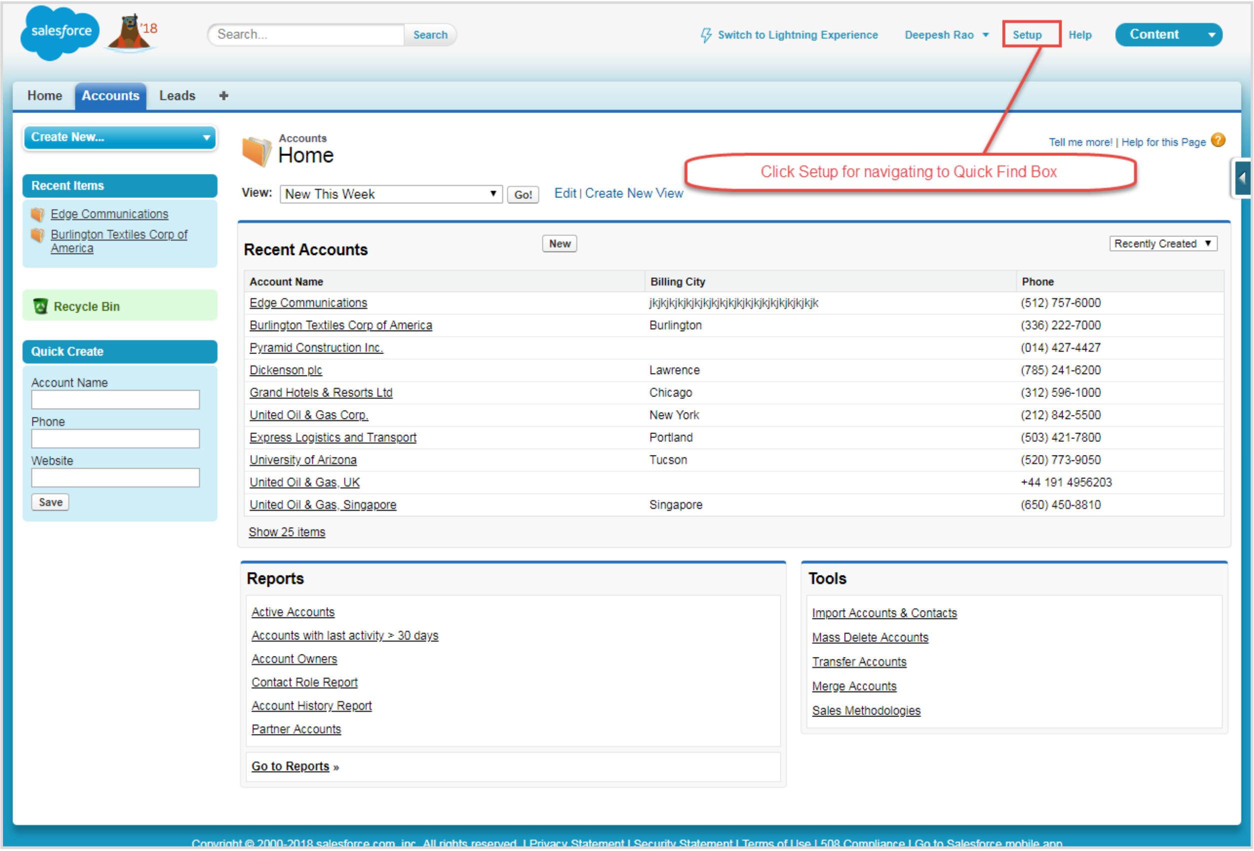
- Order, generate, and save business credit reports from within your Salesforce org using your Business Credit Reports, Inc. account
- View, print, save, or email ordered reports as a PDF
- Ordered reports are saved as XML and PDF to the company's record within your Salesforce org for future reference
- Global report coverage

PREREQUISITES BEFORE USING THIS APP

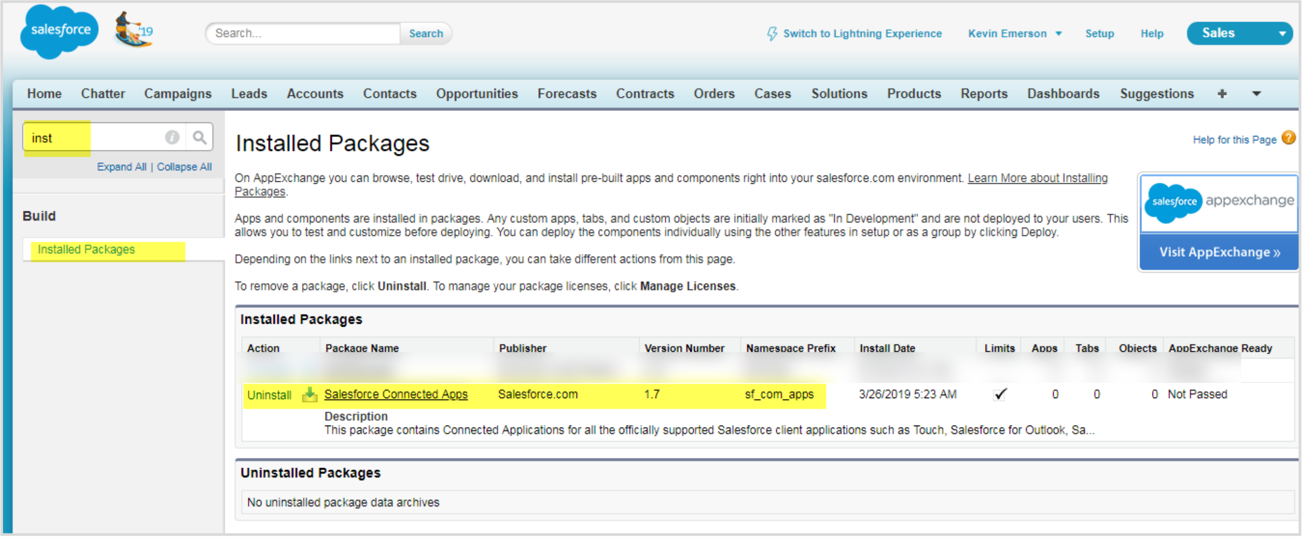
Check for Salesforce Connected Apps

Before you install **Synergy for Salesforce**, you must make sure Salesforce Connected Apps by Workbench is installed in your org.

1. Go to **Setup**

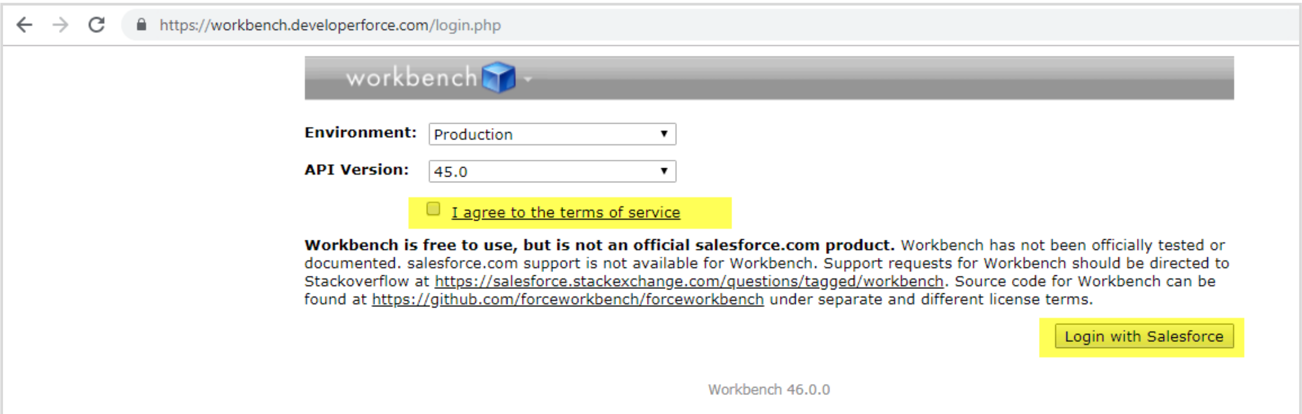


2. In the Quick Find Box, type 'Installed Packages'
3. Under the 'Build' section, click **Installed Packages** and look to see if 'Salesforce Connected Apps' is listed.

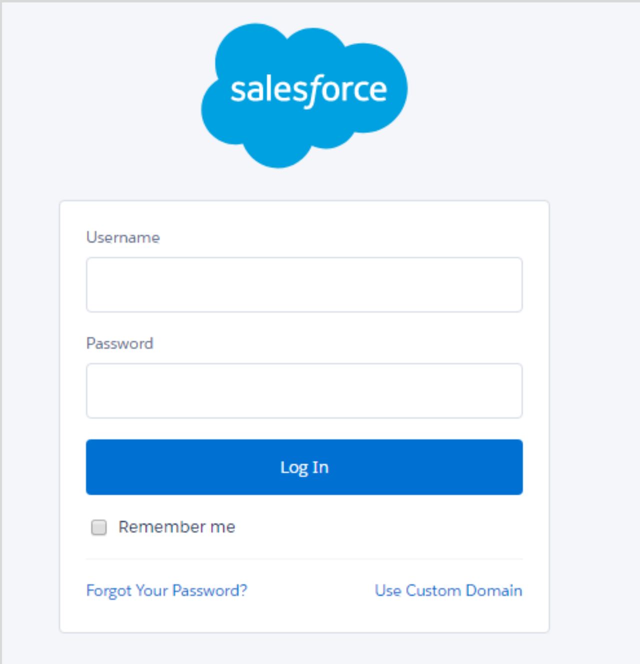


If Salesforce Connected Apps is not installed

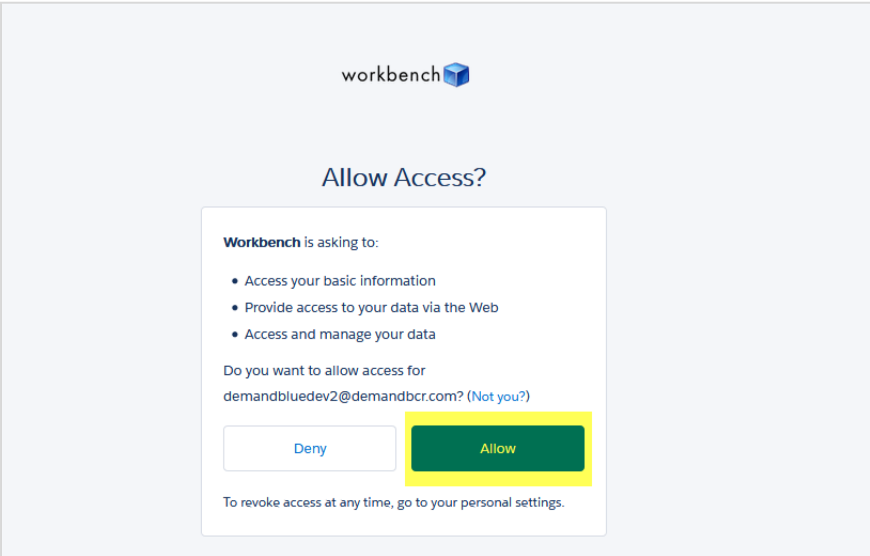
1. Open a New Tab
2. Navigate to https://workbench.developerforce.com
3. Choose the appropriate Environment type based on the environment you are using – whether it is Production or Sandbox
4. Select the latest API version
5. Agree to the terms of service and click **Login with Salesforce**



6. Enter the Username and Password of the org you are going to use for the application and click **Log In**



7. The system will prompt you to 'Allow' access to Workbench. click on **Allow**. This will install Salesforce Connected Apps into the org.



Please Note: the installation takes just a few minutes to appear in the Installed Packages list in your Salesforce org.

POST INSTALLATION INSTRUCTIONS

Getting Started

To get started, ensure you have downloaded **Synergy for Salesforce** from the Salesforce AppExchange.
Note: Only Salesforce administrators and users with the “Download AppExchange packages” permission can install AppExchange apps.

Create/Add your Business Credit Reports, Inc. credentials

Once the application has been downloaded, you will need to install the app in your Salesforce org, create a Business Credit Reports, Inc. company or user account (if you don’t already have one), then add your credentials to the application.

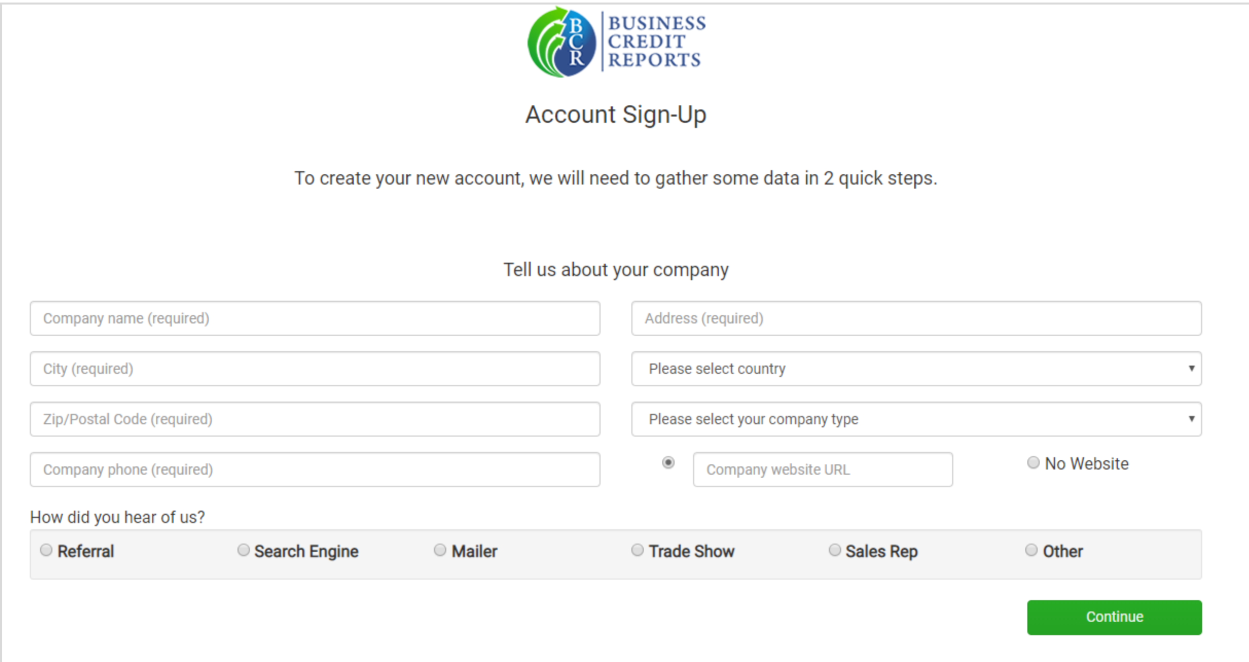
If your company does not have a Business Credit Reports, Inc. account, one will need to be created.

If your company has an existing Business Credit Reports, Inc. account, you will need to be added as a User to the company account.

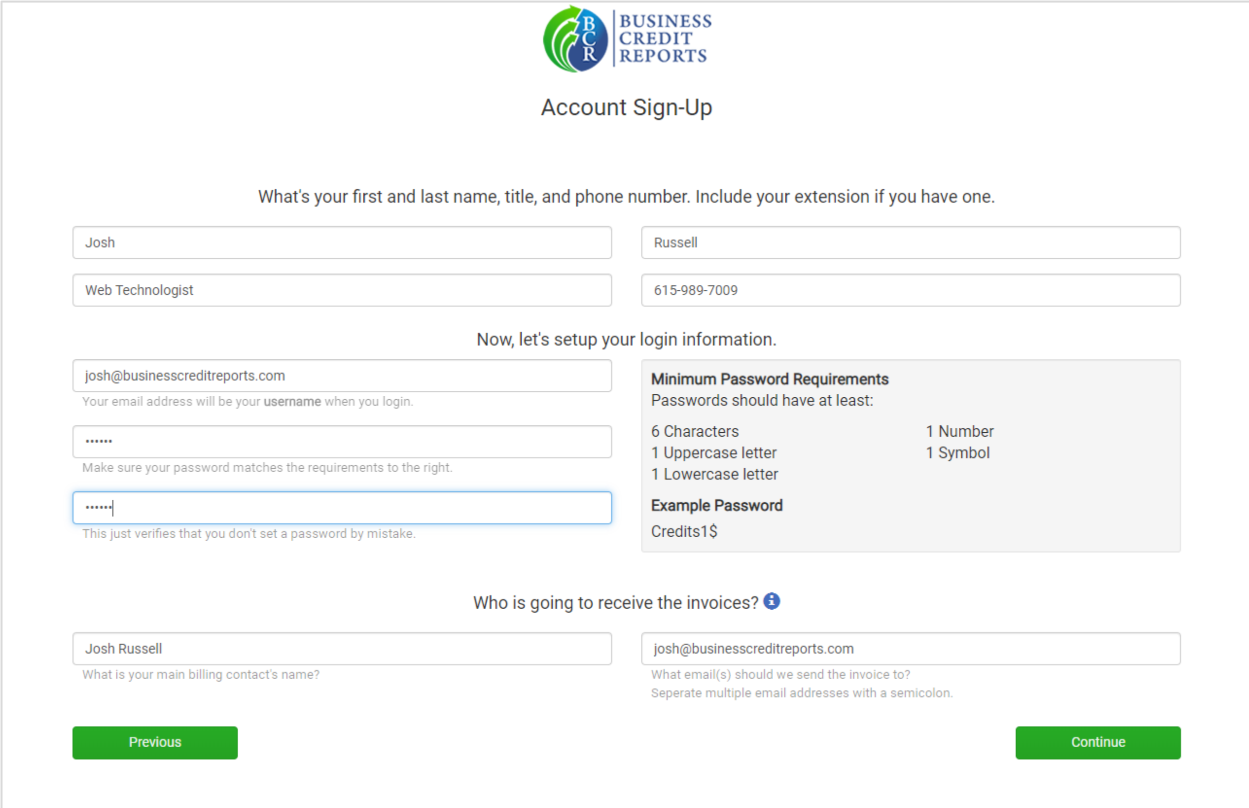
Creating a Business Credit Reports, Inc. company account

Here are the steps for creating a Business Credit Reports, Inc. company account:

1. Navigate to https://salesforce.businesscreditreports.com/SignUp
2. Fill out your company information & click **Continue**



3. Fill out your information for your user account & click **Continue**



4. Look over the Price List and click **Accept**
   Please Note: The Price List is just a list of report prices, it is not a contract or subscription agreement.
5. The last page will ask you if there are any additional users that need their own user account. Just fill out their information and **Submit**!
6. Once created, your account will be put under temporary hold while we verify your information. A Business Credit Reports, Inc. representative will reach out with the status of your account shortly after account creation.

Creating your Business Credit Reports, Inc. user account credentials

Once your company has a Business Credit Reports, Inc. company account, you will need to be added as a user to create your credentials for the app.

To be added as a user, you have 3 options:

A. Fill out the [New User Request](https://businesscreditreports.com/new-user-request/) form: https://businesscreditreports.com/new-user-request/

B. Have your Account Manager add you as a user through the Business Credit Reports, Inc. proprietary platform

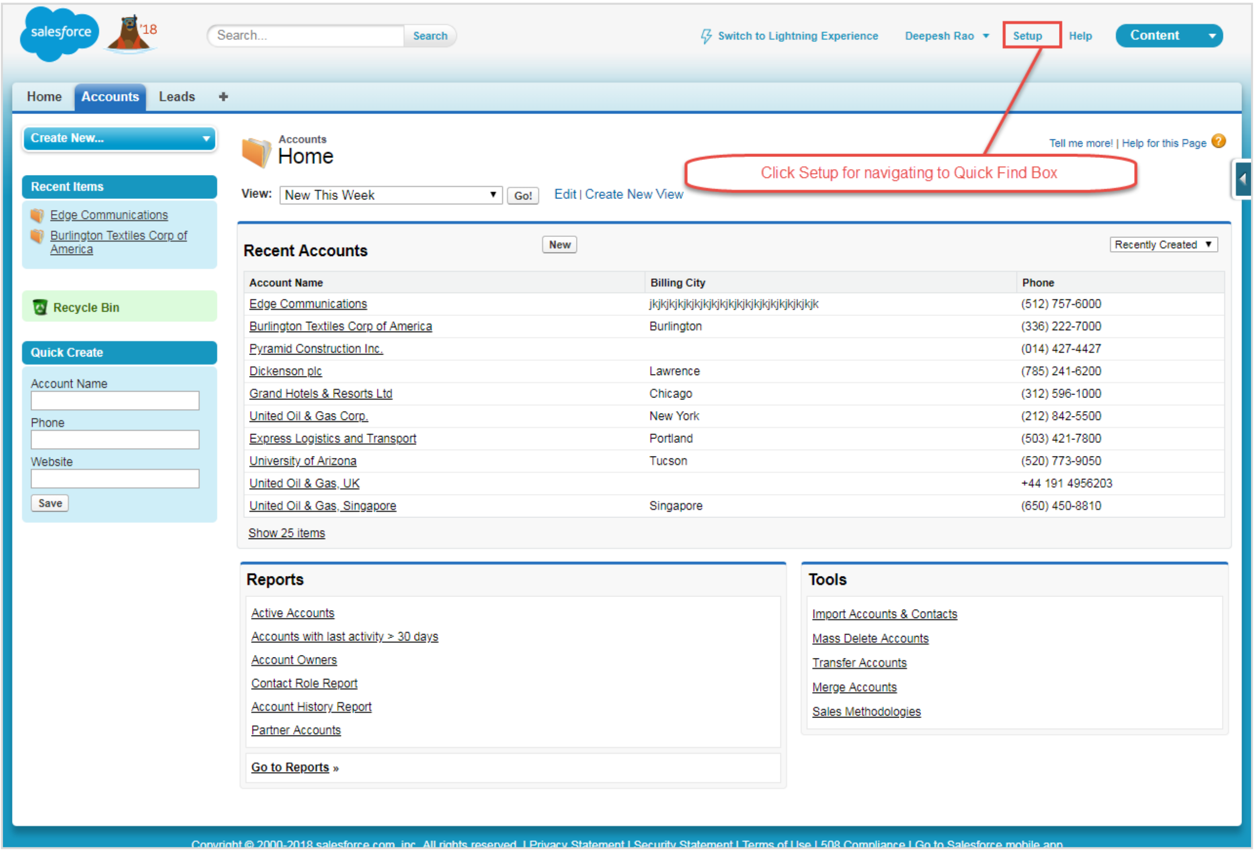
C. Send an email to service@businesscreditreports.com requesting to be added as a user

Once you have been setup as a user, you will receive an email to set your password. Your username and password are used in the app to access the reports.

Add your Business Credit Reports, Inc. credentials

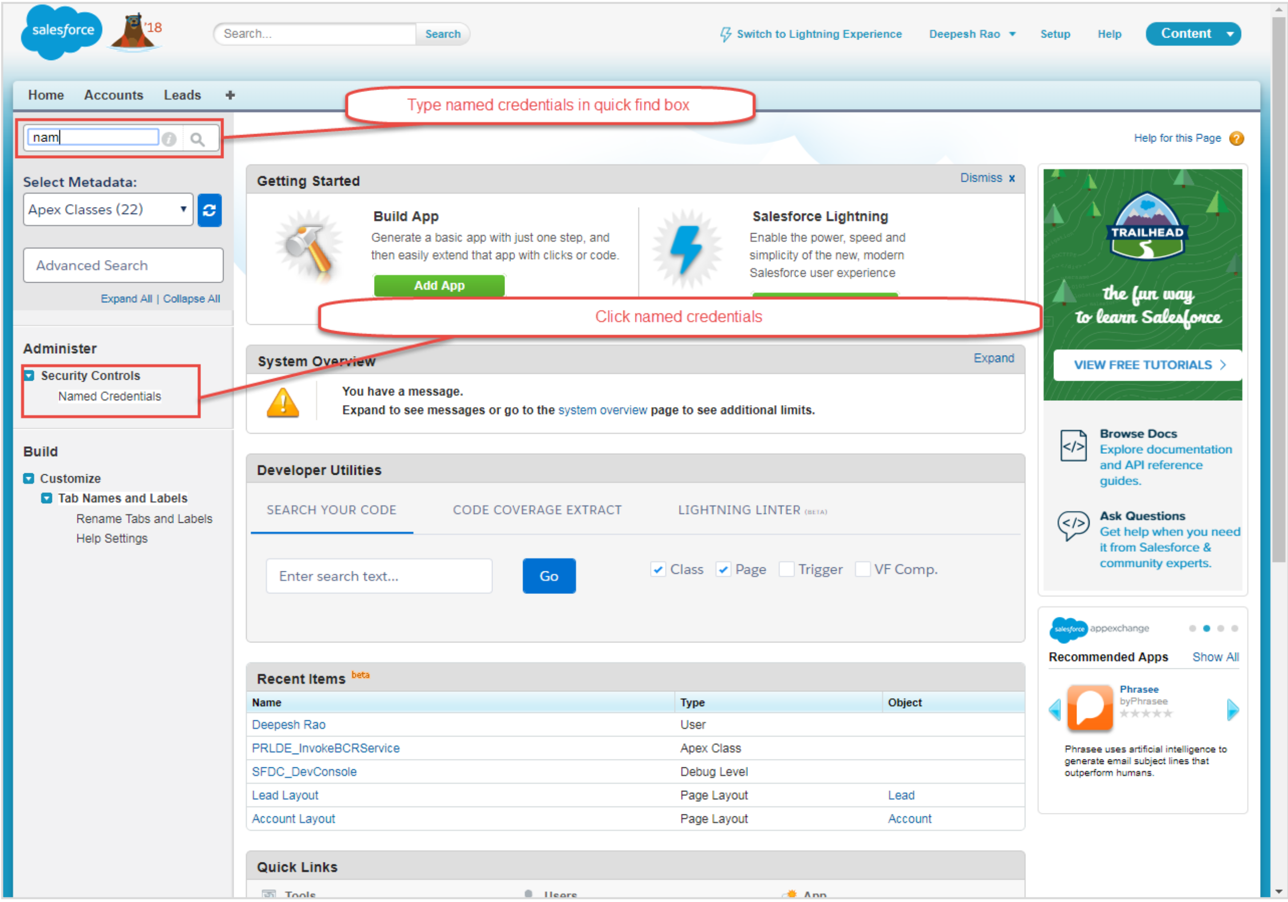
Here are the steps for adding your Business Credit Reports, Inc. username and password credentials to your Salesforce org:

1. Go to **Setup**

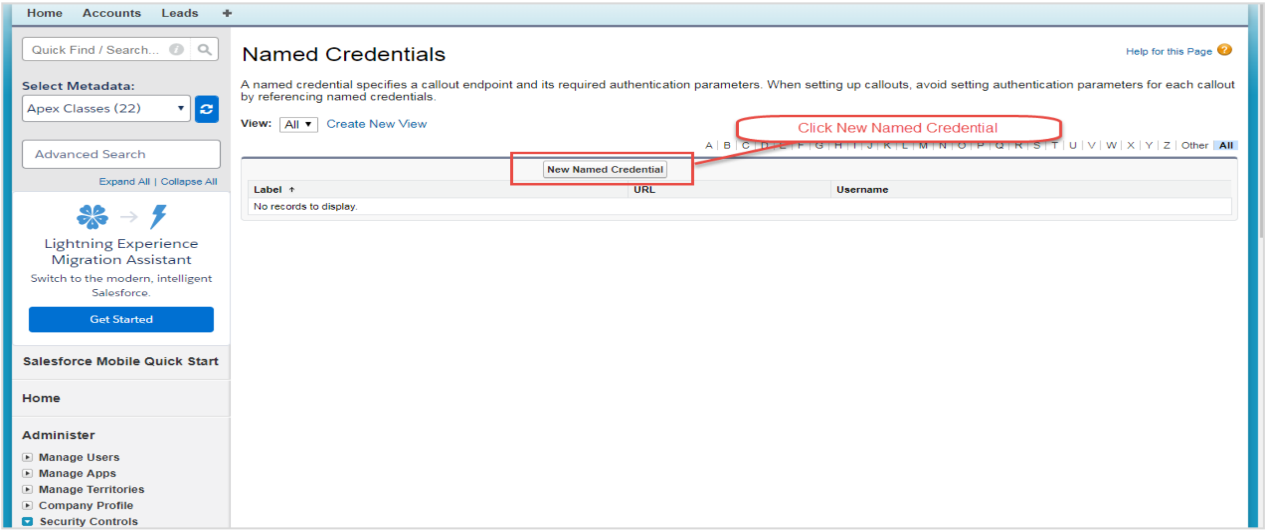


2. In the Quick Find Box, type 'Named Credentials'

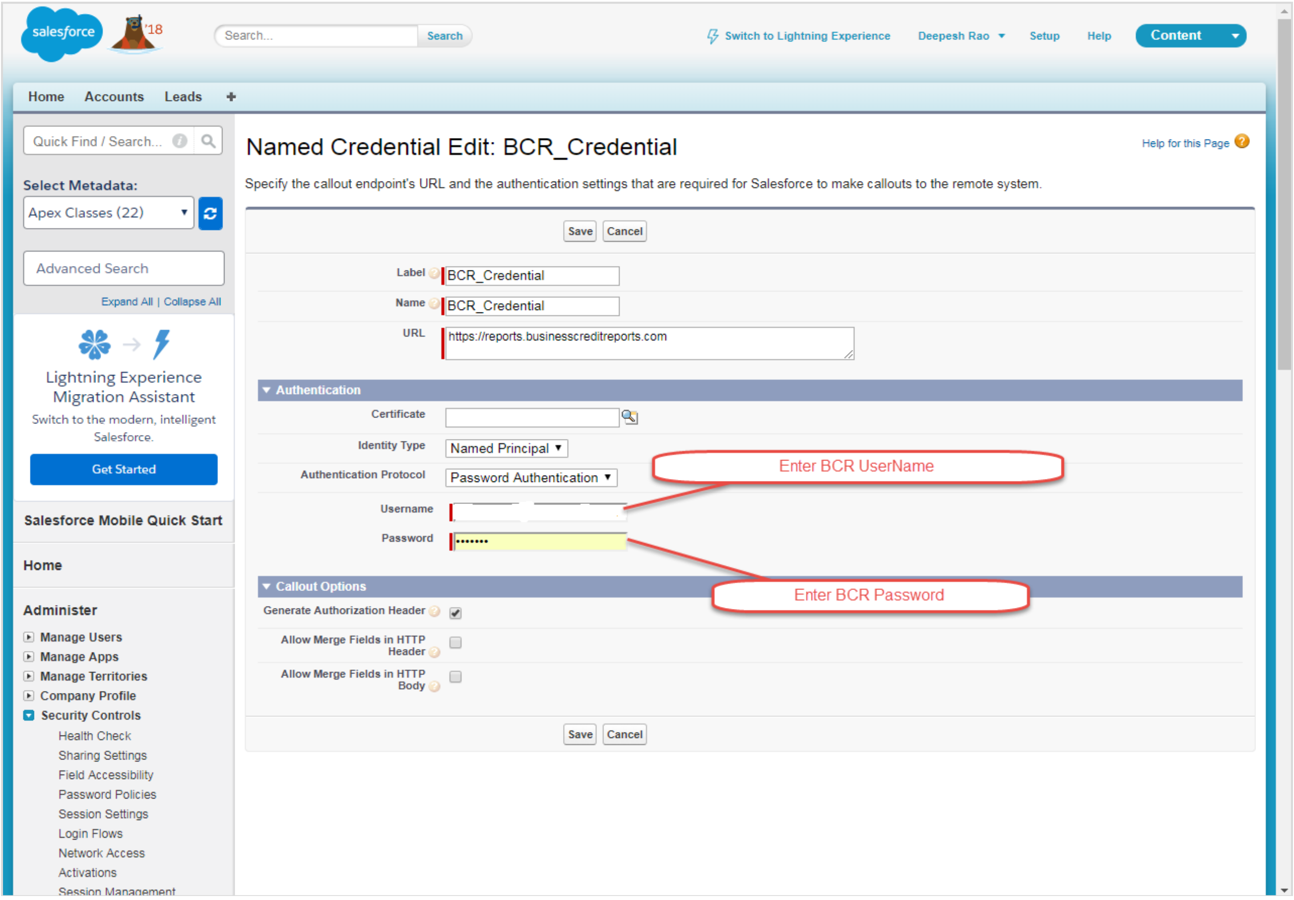
3. Under 'Security Controls' section, click **Named Credentials**



4. Click New Named Credential



5. Fill in the below details
    a. **Label:** "BCR_Credential"
    b. **Name:** "BCR_Credential"
    c. **URL:** "https://webservice.businesscreditreports.com"
    d. **Identity Type:** Set to "Named Principal"
    e. **Authentication Protocol:** Set to "Password Authentication"
    f. **Username:** Enter your Business Credit Reports, Inc. account Username
    g. **Password:** Enter your Business Credit Reports, Inc. account Password
    h. **Enable** the checkbox for "Generate Authorization Header"
    i. **Disable** the checkbox for "Allow Merge Fields in Http Header"
    j. **Disable** the checkbox for "Allow Merge Fields in Http Body"
    k. Click **Save** to save the Named Credential

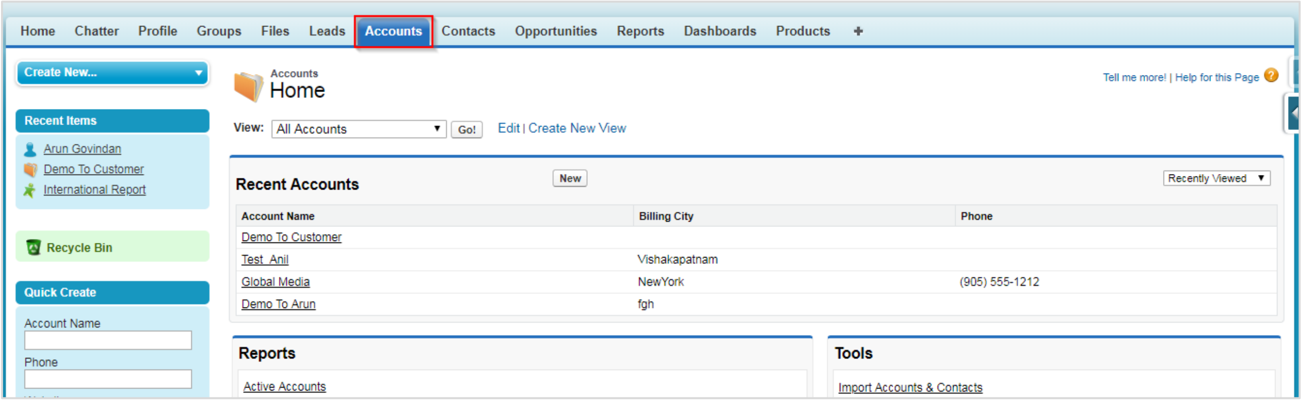


Add the “Get Business Credit Report” button to your page layout

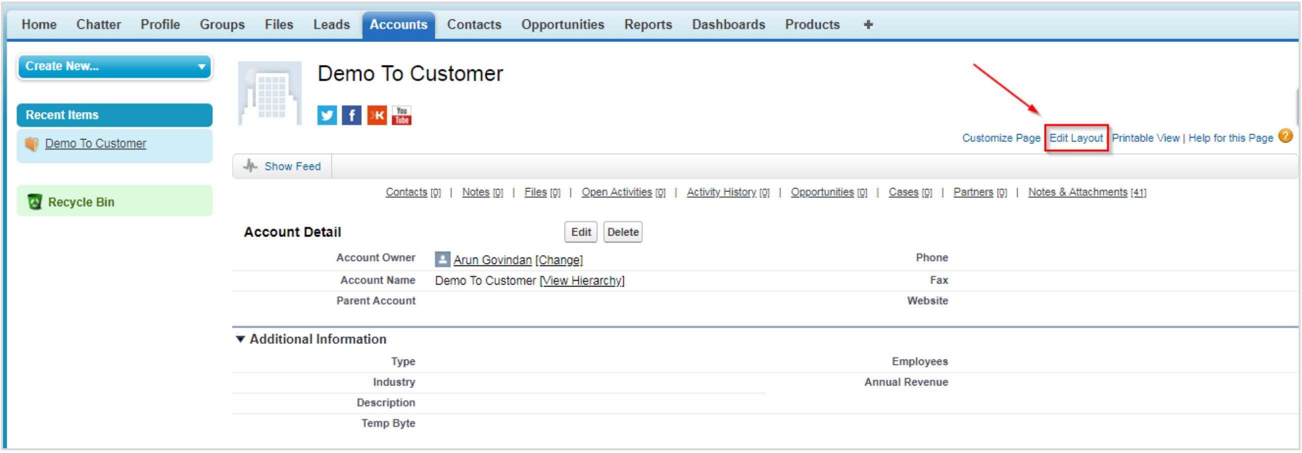
Here are the steps to add the **Get Business Credit Report** button to your Accounts/Leads Page Layout:

Note: Only Salesforce administrators and users with the “View Setup and Configuration” and “Customize Application” permissions can edit page layouts

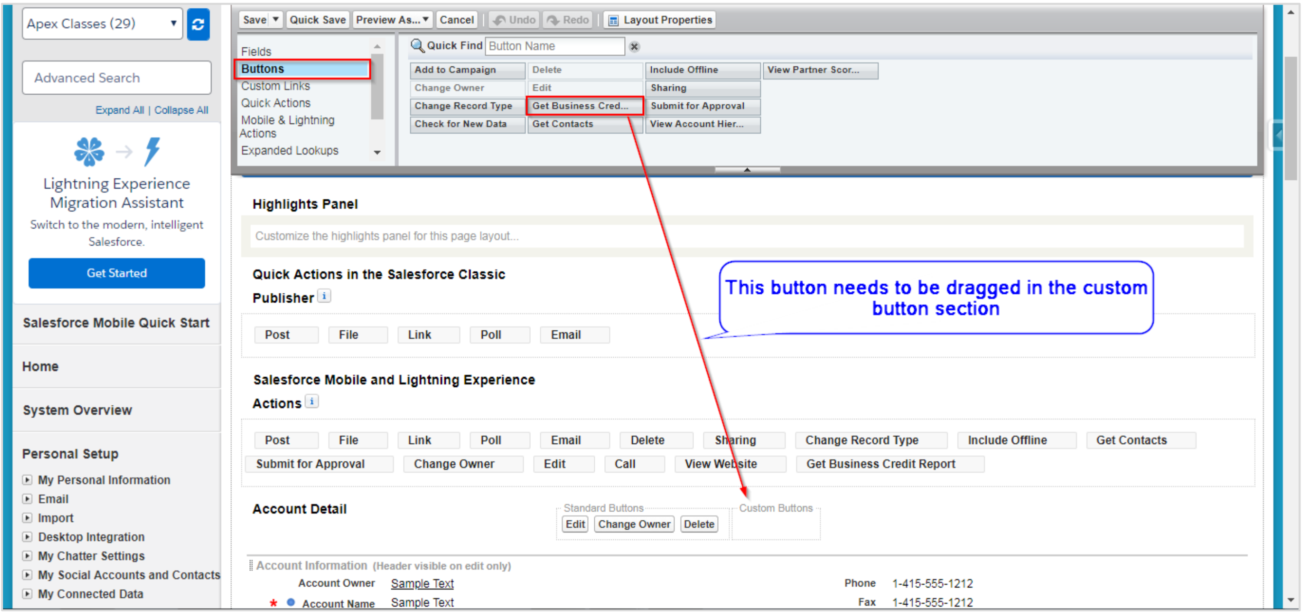
1. Click on the **Accounts**/**Leads** tab



2. Click on any record to open it
3. In the top right corner, click **Edit Layout**, this will open the layout editor



4. Click on **Buttons** and then drag the **Get Business Credit Report** button to the Custom Button section of the layout



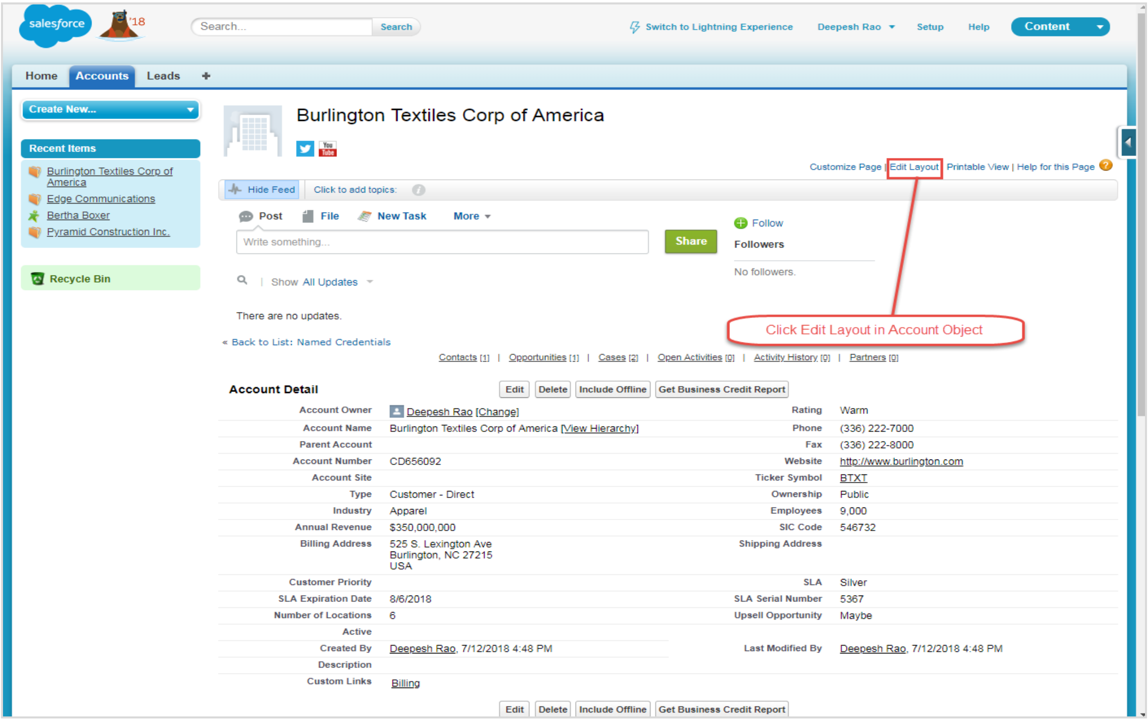
Add the "Files" and "Credit Fields" objects to your Account/Lead related page layouts

The reports you generate are saved in the 'Files' object, while the XML data for the generated report is stored in the 'Credit Fields' object. To access the 'Files' and the 'Credit Fields' objects from the related Account/Lead, you will need to add both objects to your page layouts.

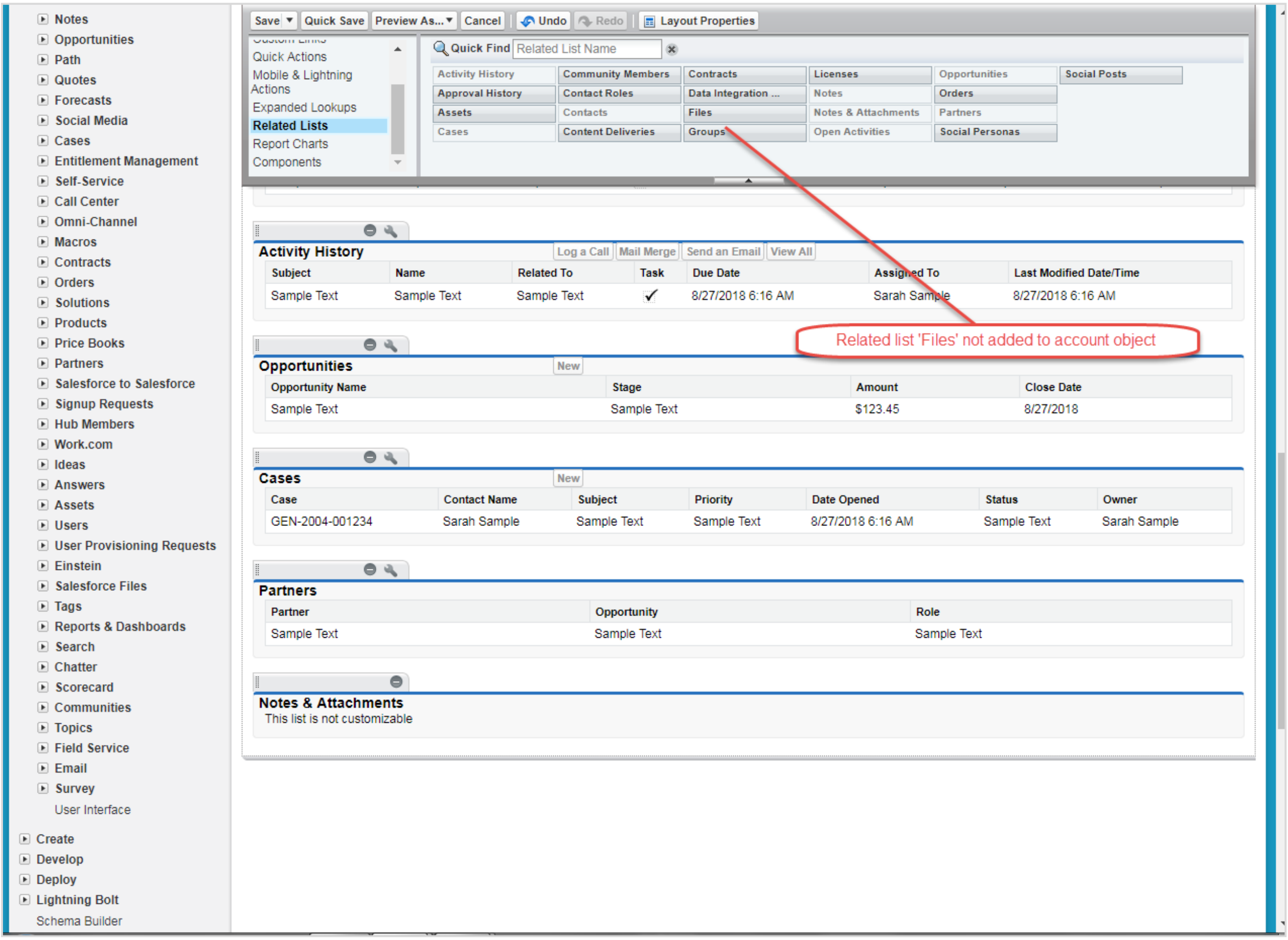
Note: Only Salesforce administrators and users with the "View Setup and Configuration" and "Customize Application" permissions can edit page layouts

Here are the steps to adding the 'Files' and 'Credit Fields' objects to your Account/Lead related page layouts:

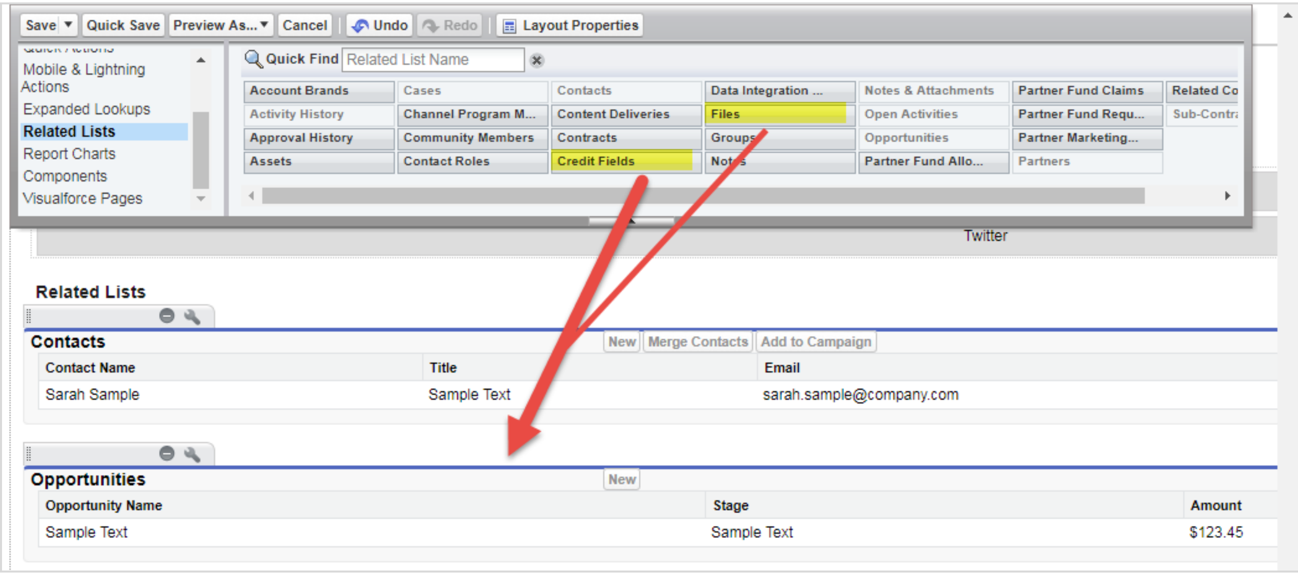
1. Click **Edit Layout** from an Account/Lead object



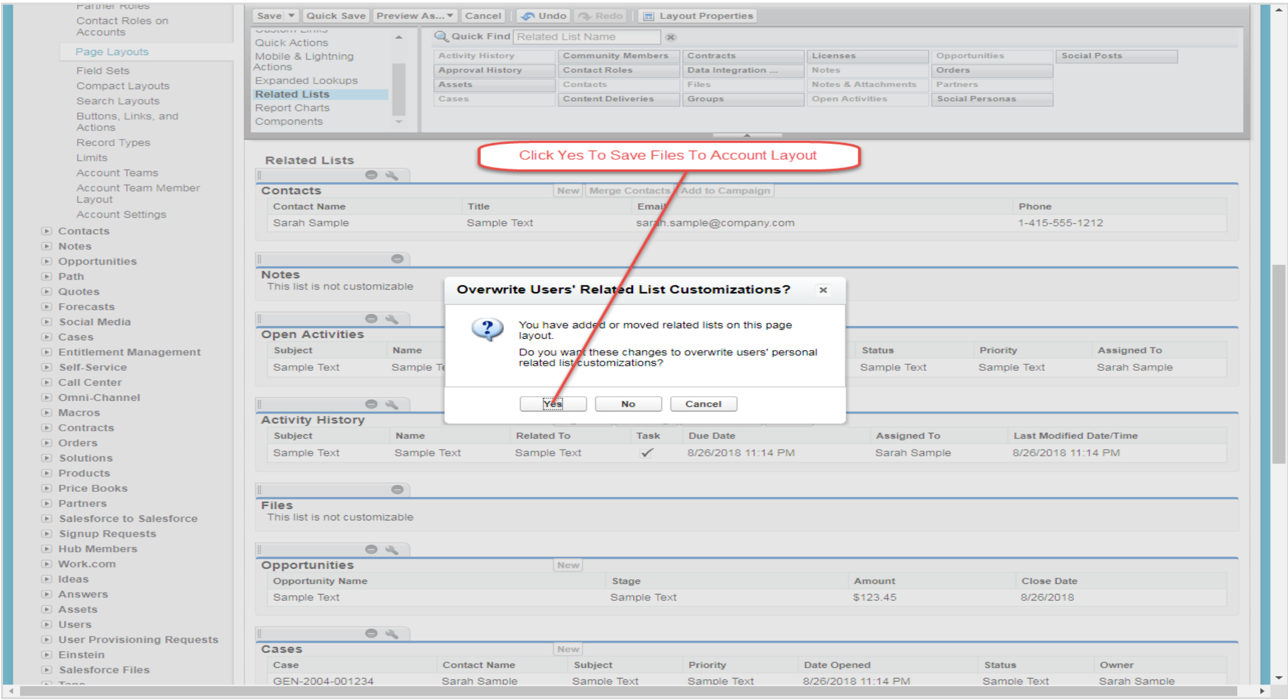
2. Click **Related Lists** in Account/Lead Layout



3. Drag the 'Files' object and the 'Credit Fields' object to the Account/Lead Related List



4. Click **Yes** to save the changes to the Account/Lead Layout



5. Now that you have added the Get Business Credit Report button and Related Lists, you are ready to start ordering reports for your Accounts/Leads.

CLASSIFICATION OF REPORTS

In this application, companies are sorted into one of three Report Types based on their location:

- United Stated
- Canada
- International

The Report Type determines the fields necessary to search for and generate a report.

United States:

To search for and generate a report for companies in the United States, you will need the following fields populated:

- Account Name
- Billing City
- Billing State/Province
- Billing Zip/Postal Code
- Billing Country

If you do not have this information populated in the Account or Lead, you will not be able to perform the search.

Note: The country name can be given as 'United States', 'USA', or 'US'.

Canada:

To search for and generate a report for companies in Canada, you will need the following fields populated:

- Account Name
- Billing City
- Billing State/Province
- Billing Zip/Postal Code
- Billing Country

In the 'Billing State/Province' field, you can enter either the full name of the province or its code (ex. "Ontario" or "ON").

If you do not have this information populated in the Account or Lead, you will not be able to perform the search.

Note: The country name can be given as ‘Canada’, ‘CAN’, or ‘CA’.

International:

A. Instant Online

To search for an Instant Online report on companies outside of the United States and Canada, you will need the following fields populated:

- Account Name
- Billing Street
- Billing City
- Billing State/Province
- Billing Zip/Postal Code
- Billing Country

If the business does not have a Billing State/Province, you can enter the city name in the ‘Billing State/Province’ field.

If you do not have this information populated in the Account or Lead, you will not be able to perform the search.

B. Developed International Report

To request a Developed International Report on companies outside of the United States and Canada, you will need the following fields populated:

- Account Name
- Billing Street
- Billing City
- Billing State/Province
- Billing Zip/Postal Code
- Billing Country

If you do not have this information populated in the Account or Lead, you will not be able to place the request.

Note: The country name can be spelled out, Alpha-2 (two digit) or Alpha-3(three digit).

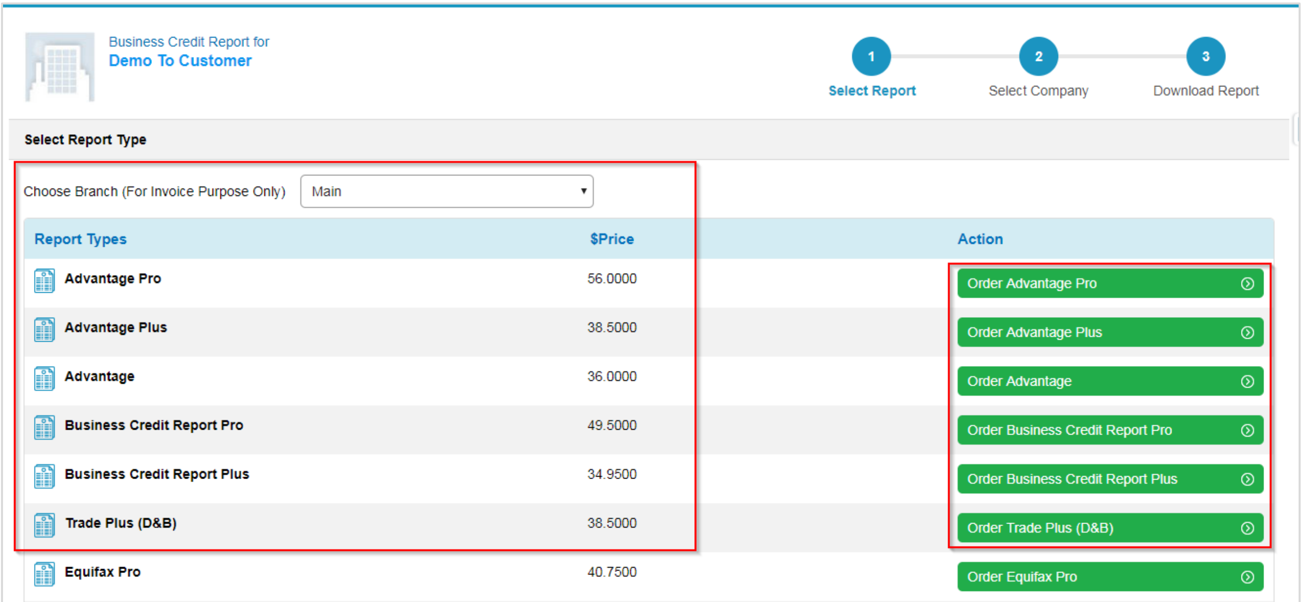
ORDER REPORT

Once the company details are filled in for the Account/Lead, you can click on **Get Business Credit Report**, which will start the search and report ordering process:

Note: The application pulls the business information for the search from the Account/Lead record – if this information is not present, you will have to enter it into the Account/Lead to pull the report.

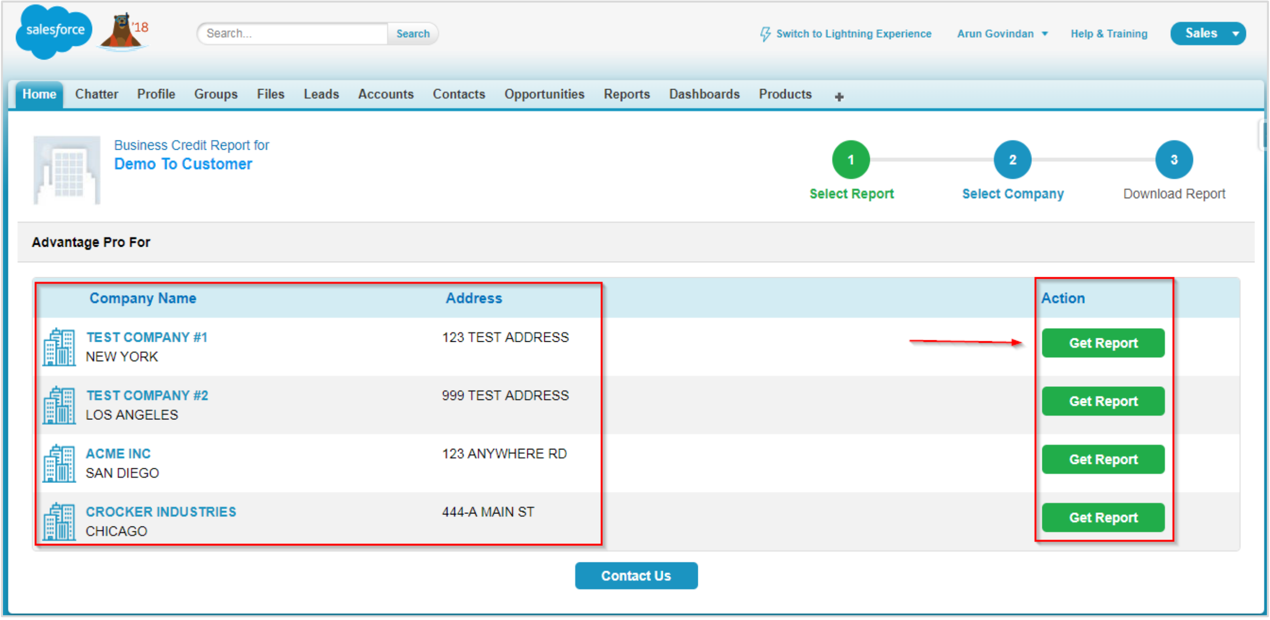
United States, Canada, and Instant Online International Reports

1. **Select Report:**
    a. First, select your Branch from the **Choose Branch** drop down. A list of available reports along with the price for each report will be displayed
    b. Pick the report you would like and click on **Order {Report Name}** to the right of the report Price



2. Select Company:

Here you will find a list of companies closely matching the Account/Lead information you have on file. Choose the company you are looking for and click **Get Report** to the right of the Address.



If the company you are looking for is not listed, you can request a free investigation by:

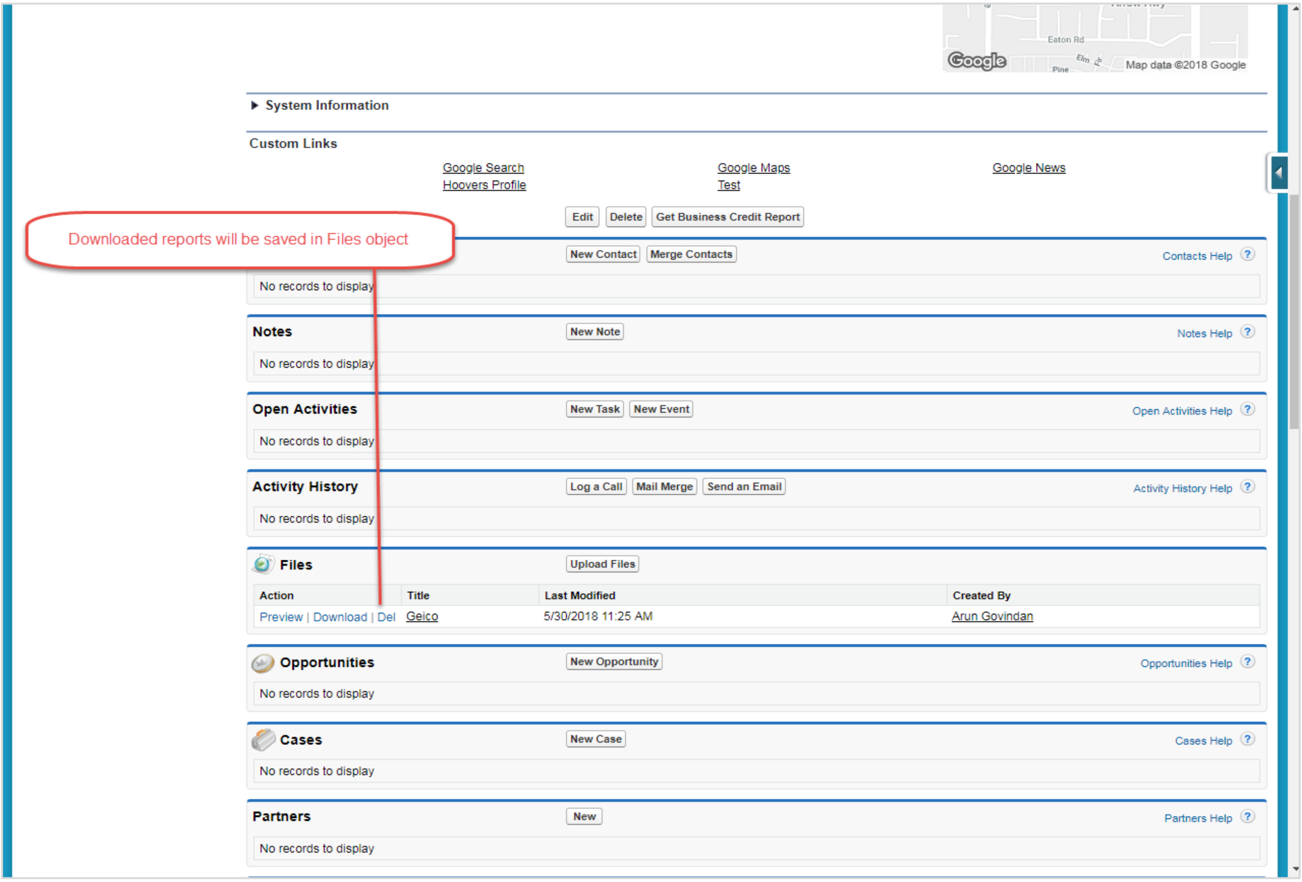
1. Click Contact Us
2. In the ‘Comments’ box, enter the Report Type you were looking for, the company name, full company address and any additional information you would like to include
3. Fill in your contact information, and click **Submit**

This will send an email to Business Credit Reports, Inc. customer/technical support with your information. The team will investigate the file, find out what is going on, and email you with the results and recommendations on how to move forward.

Note: Some companies may be filed under a different name or address you have on file. Typically, this is due to previously used names and addresses, or Doing Business As (DBA) names.

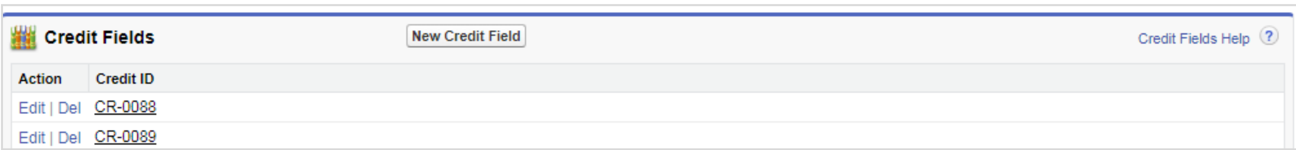
3. Download Report:

The report will start generating and be downloaded into your Salesforce org. Once downloaded, the report will be saved in the 'Files' object as a pdf and the XML data in the 'Credit Fields' object of the related Account/Lead.



Credit Fields:

Once the report is downloaded, the data for the report is stored in the related Account/Lead as a 'Credit Fields' object.

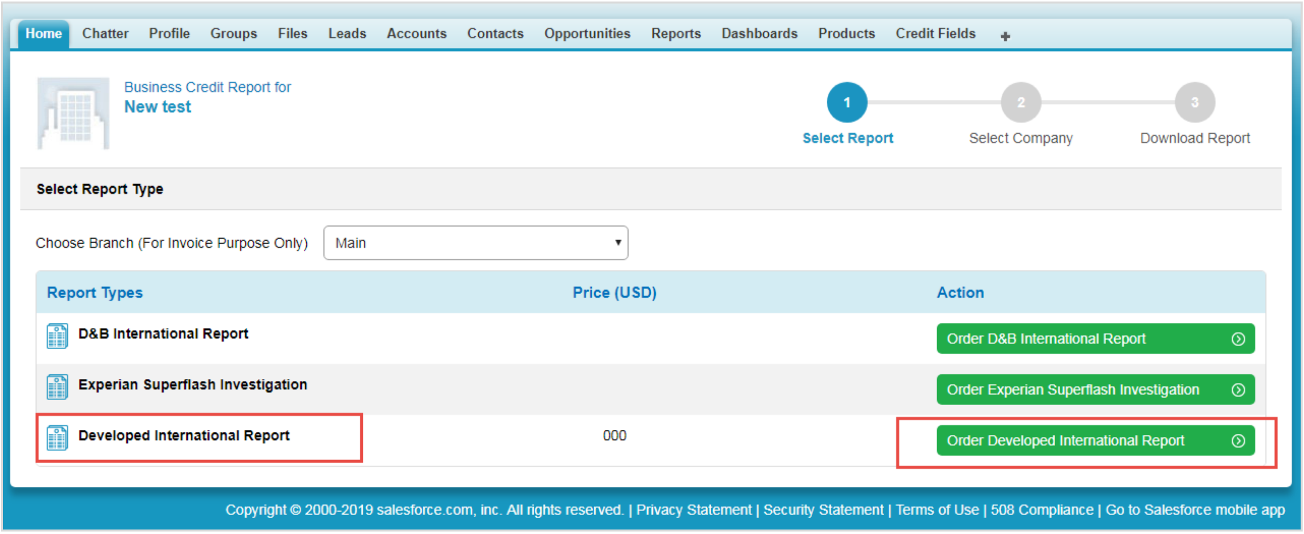


Developed International Report

The Developed International Report is available only for International countries **(not United States or Canada).**

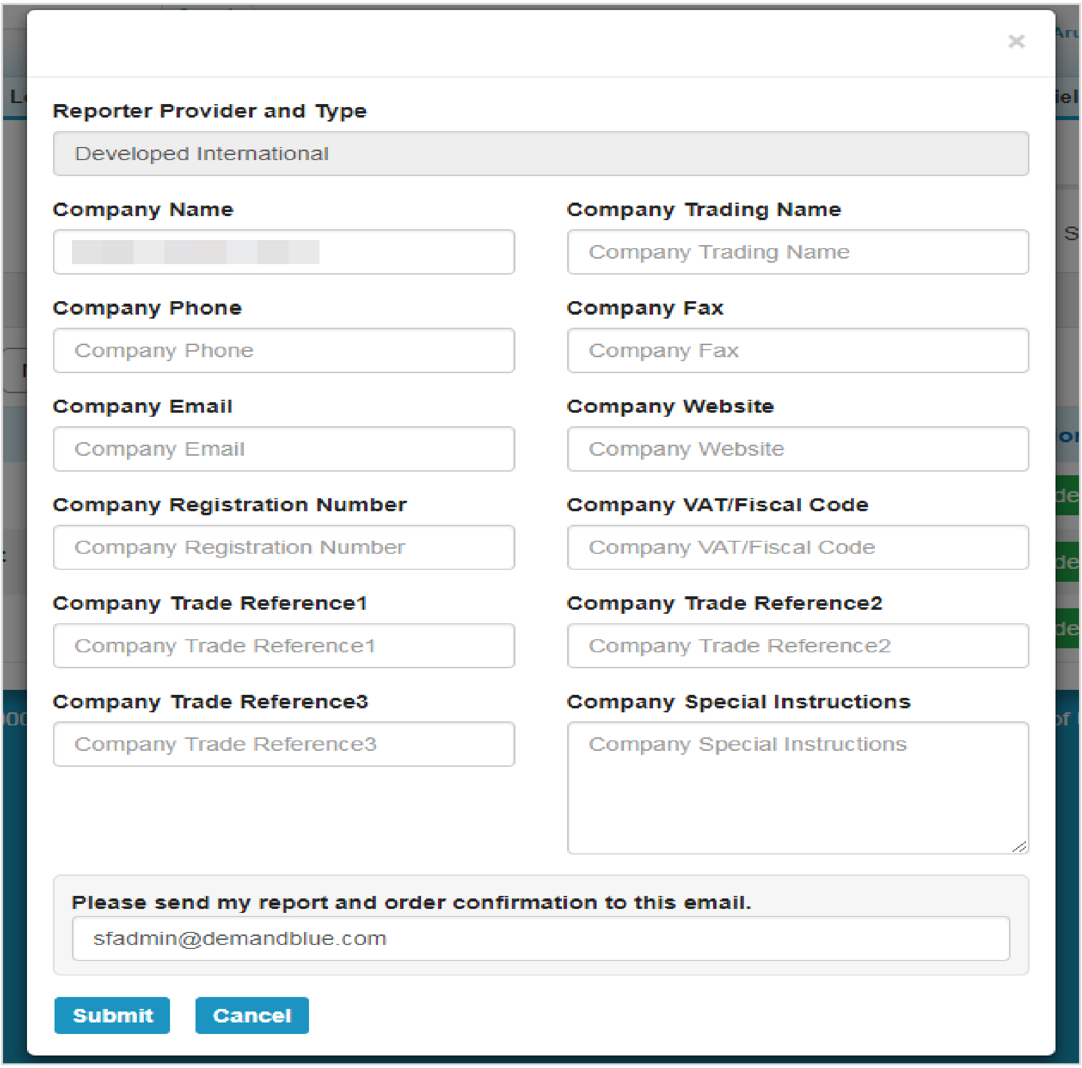
Follow these steps to place an order for a Developed International Report:

1. Select Report:
    a. First, select your Branch from the **Choose Branch** drop down. A list of available reports along with the price for each report will be displayed
    b. Choose the Developed International Report by clicking **Order Developed International Report** to the right of the report Price

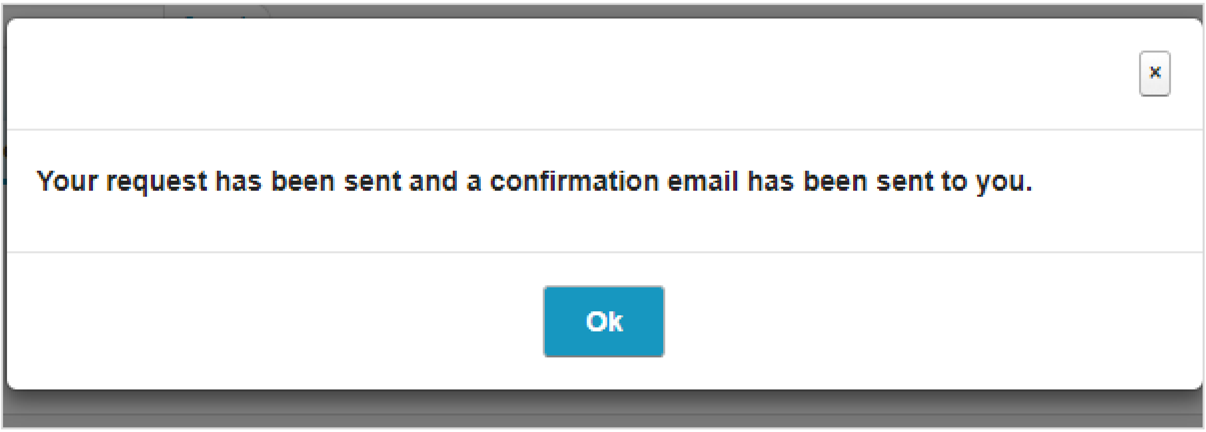


2. Enter Company Information:
    a. You will be prompted to fill in the company details such as: Company Name, Company Phone, Email, etc. Once the details are filled in, click **Submit** to place the order.

Note: Developed International Report requests cannot be cancelled once submitted.

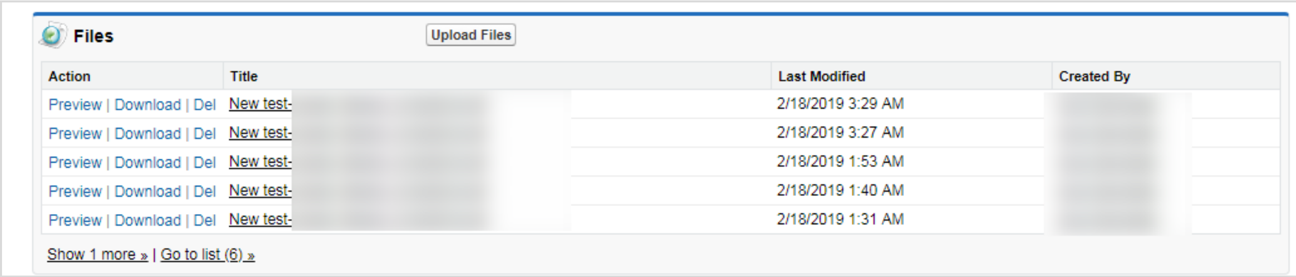


You will receive a message to confirm that your request has been sent.
Click **Ok** to navigate to the Account Details page.



3. Download Report:

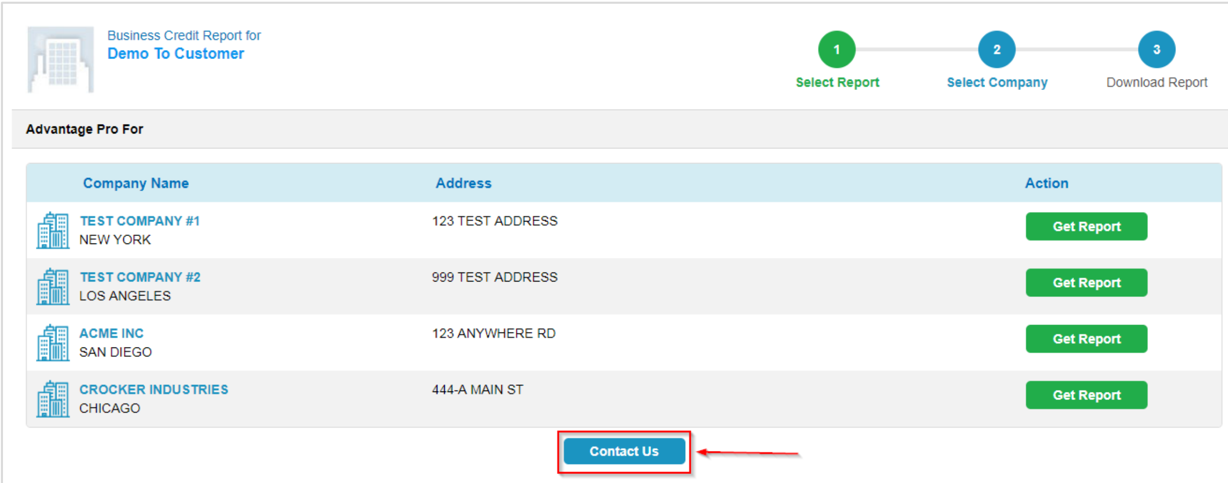
    a. Once available, you will receive a notification email with a copy of the report. The report will also be saved in the 'Files' and 'Notes & Attachments' objects of the related Account/Lead.



Exceptional Conditions

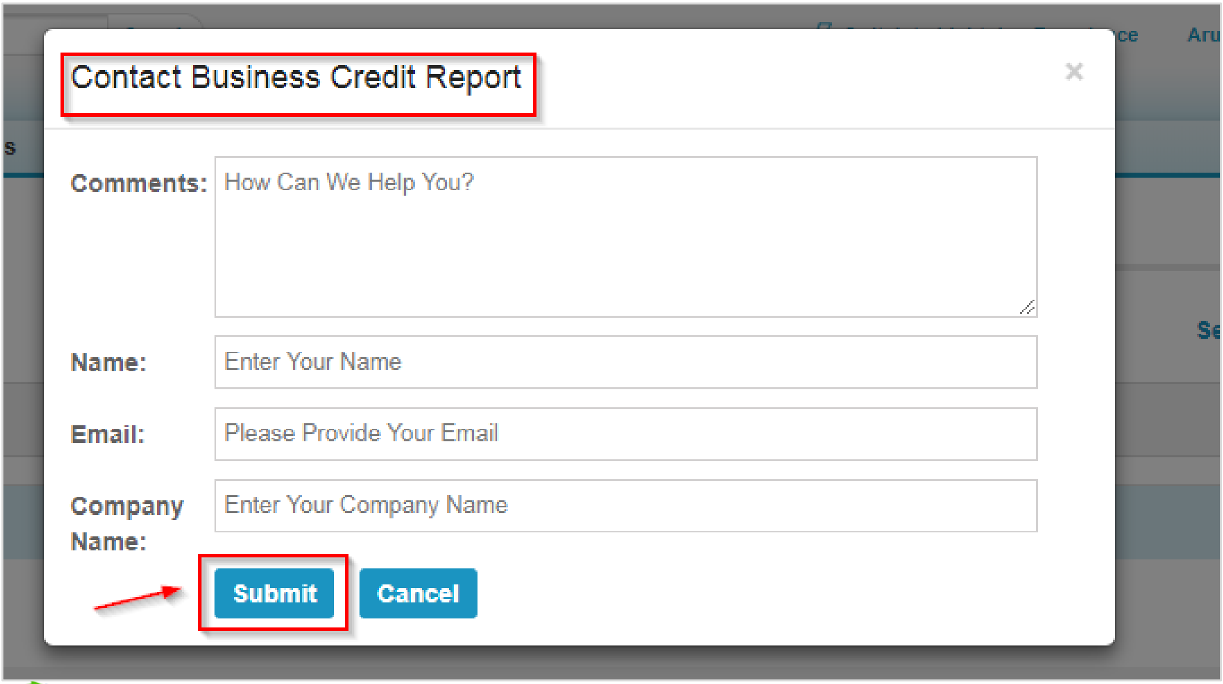
Issue while downloading the report

If you have any issues while downloading a report, please click **Contact Us**.



This will open a window for you to enter information about your issue and company. Fill in all the required details and click **Submit**.

A notification email will be sent to Business Credit Reports, Inc. customer service with your entered details, and you will also receive an email acknowledging your submission. Once

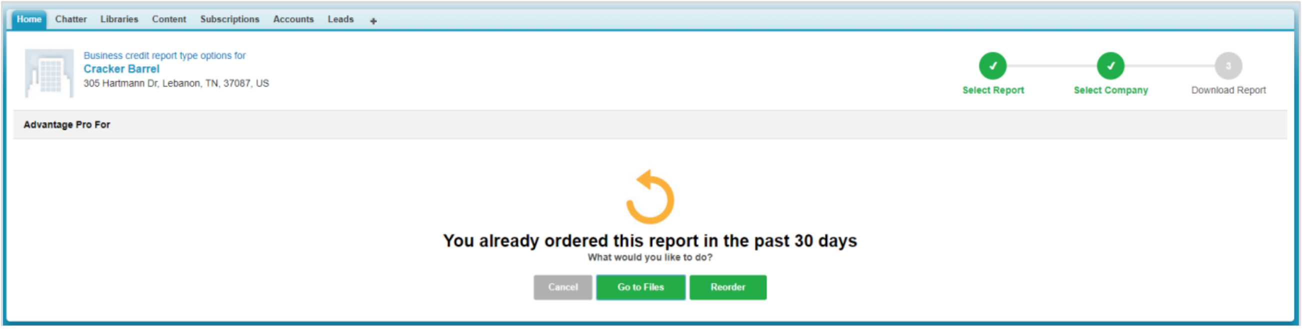


your message is received by Business Credit Reports, Inc. customer service, they will contact you for more details or with a solution for the reported issue.

Already ordered report

If you try to order a report that has already been ordered recently, you will receive a notification message.

If you would still like to order the report, click **Cancel** to cancel the request, **Go to Files** to go to the existing report or **Reorder** to proceed with the order.



SYNERGY FOR SALESFORCE IN LIGHTING

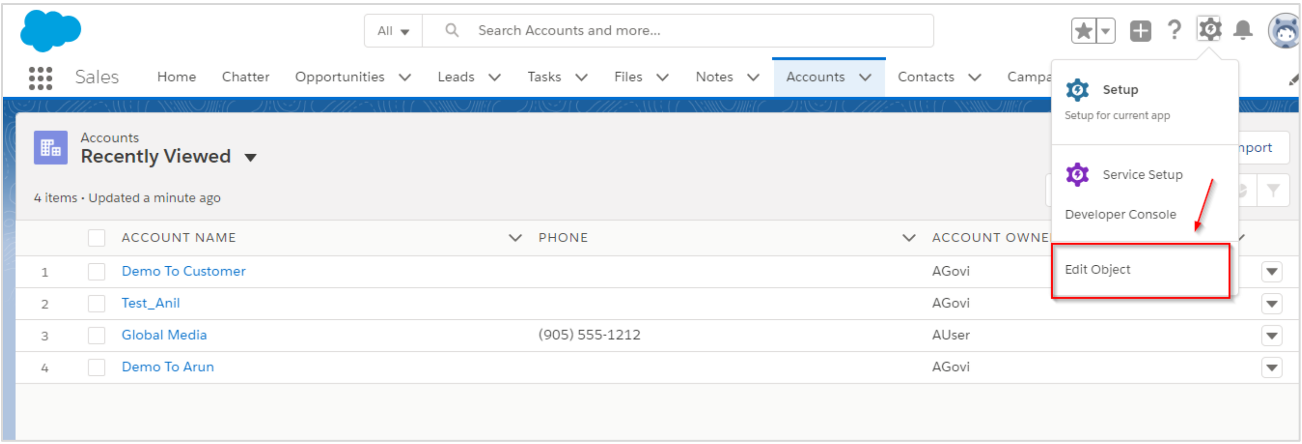
Synergy for Salesforce is very similar in Lightning as it is Classic. The only difference between the two is the setup for the **Get Business Credit Report** button. In Lightning, it is a Quick Action that must be added to your page layout.

Add the "Get Business Credit Reports" quick action to your page layout

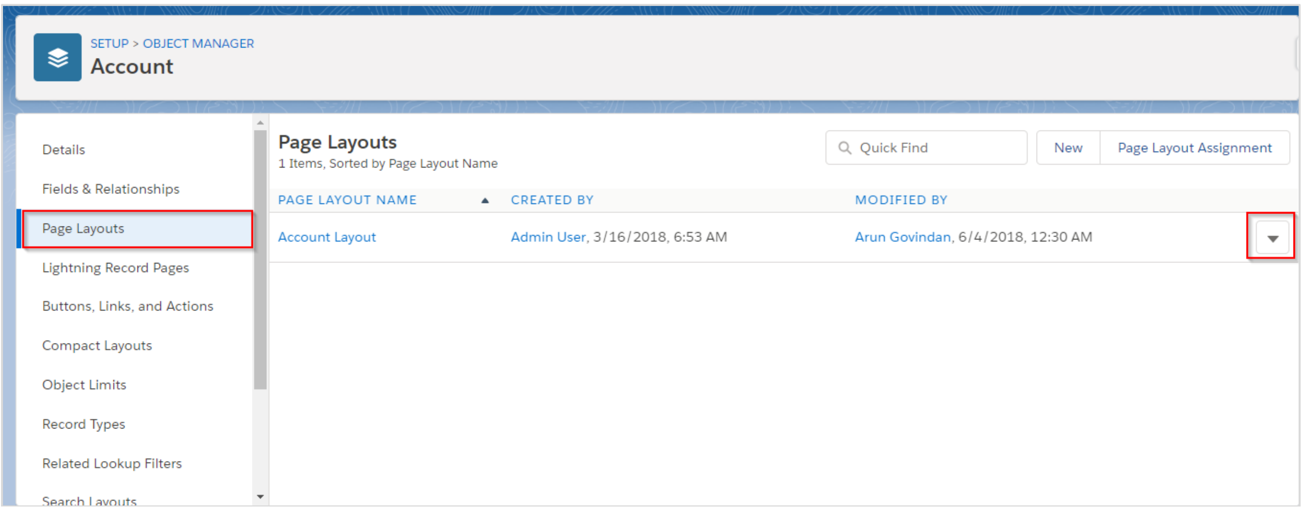
You can quickly navigate to Salesforce Lightning by clicking **Switch to Lightning Experience** on the top right side of your page.

Note: Only Salesforce administrators and users with the "View Setup and Configuration" and "Customize Application" permissions can edit page layouts

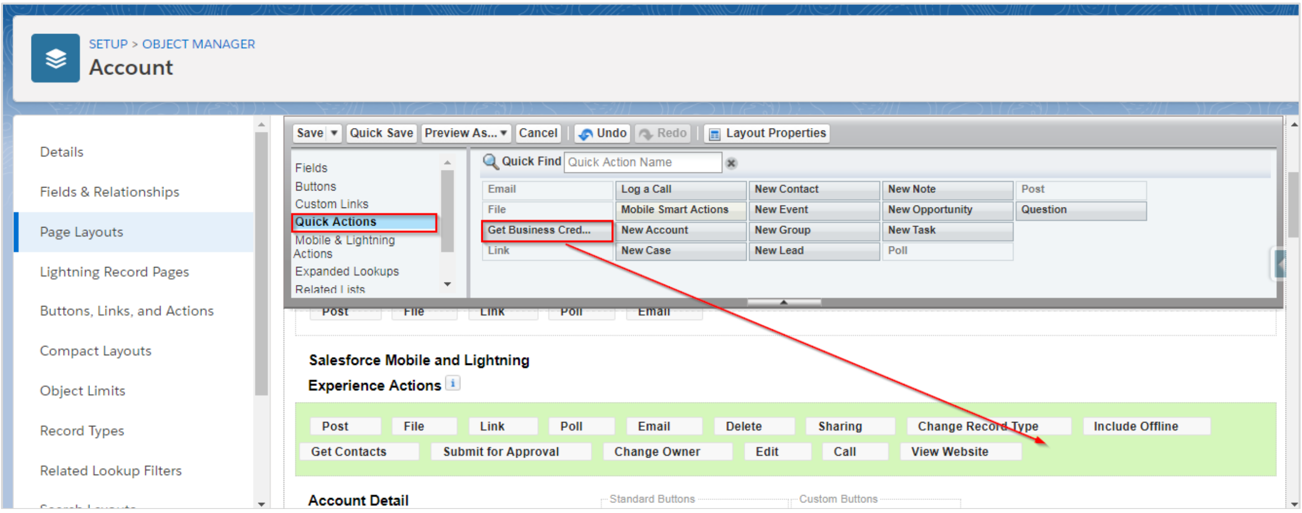
1. Click on the **Accounts/Leads** tab
2. Click the **Setup Cog** in the top right corner, and then click **Edit Object**



3. Click **Page Layouts**, select the layout you would like to edit, click on the down arrow on the right-hand side to expand the menu, and then click **Edit**



4. From the edit page layout screen, click **Quick Actions** and drag the **Get Business Credit Report** quick action into the Salesforce Mobile and Lightning Experience Actions section



5. If you are unable to see the Get Business Credit Report button on the Account or Lead page after it has been included in the page layout, click on the down arrow on the right side of the Account Name ribbon