



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.

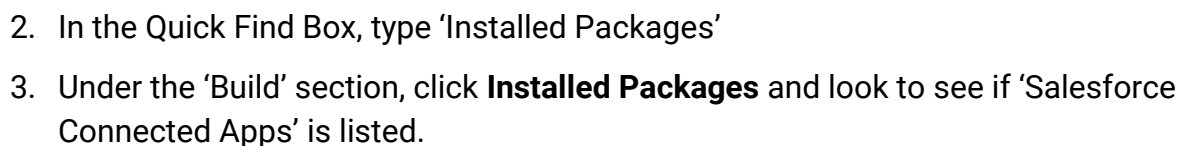
With this application, you have direct access to your Business Credit Reports, Inc. account and report options for the U.S., Canada, and International from within your Salesforce org.

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

Check for Salesforce Connected Apps

1. Go to **Setup**



Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	3/26/2019 5:23 AM	✓	0	0	0	Not Passed

Uninstalled Packages

No uninstalled package data archives

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**

workbench

Environment: Production

API Version: 45.0

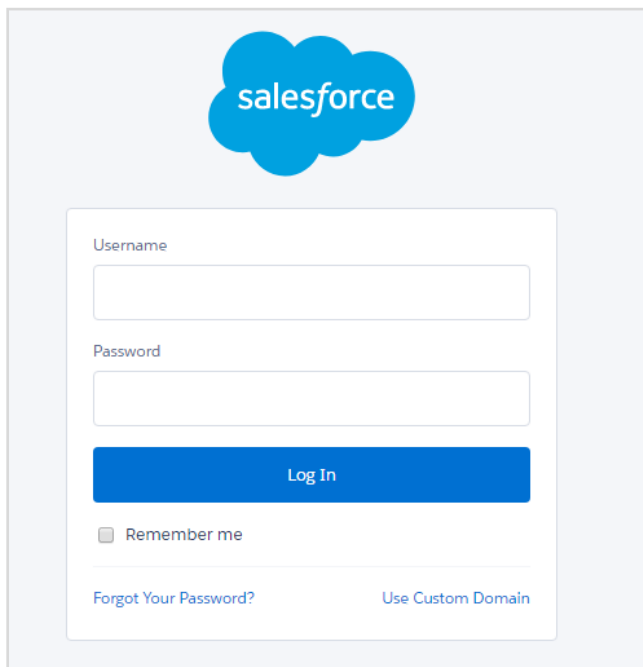
☐ I agree to the terms of service

Workbench is free to use, but is not an official salesforce.com product. Workbench has not been officially tested or documented. salesforce.com support is not available for Workbench. Support requests for Workbench should be directed to Stackoverflow at <https://salesforce.stackexchange.com/questions/tagged/workbench>. Source code for Workbench can be found at <https://github.com/forceworkbench/forceworkbench> under separate and different license terms.

Login with Salesforce

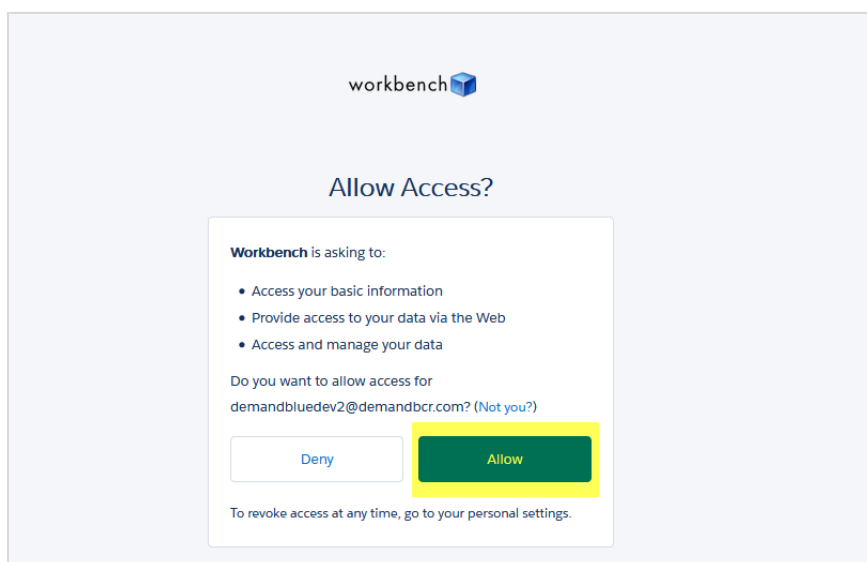
Workbench 46.0.0

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



The image shows the Salesforce login interface. At the top is the Salesforce logo. Below it is a login form with fields for 'Username' and 'Password'. A blue 'Log In' button is positioned below the password field. Underneath the button is a 'Remember me' checkbox. At the bottom of the form are two links: 'Forgot Your Password?' and 'Use Custom Domain'.

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



The image shows a 'workbench' 'Allow Access?' dialog box. It lists the permissions Workbench is requesting: 'Access your basic information', 'Provide access to your data via the Web', and 'Access and manage your data'. Below the list, it asks 'Do you want to allow access for demandbluedev2@demandbcr.com? (Not you?)'. There are two buttons: 'Deny' and 'Allow'. The 'Allow' button is highlighted with a yellow border. At the bottom, it says 'To revoke access at any time, go to your personal settings.'

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**



Account Sign-Up

To create your new account, we will need to gather some data in 2 quick steps.

Tell us about your company

Company name (required)	Address (required)
City (required)	Please select country
Zip/Postal Code (required)	Please select your company type
Company phone (required)	☒ Company website URL ☐ No Website

How did you hear of us?

☒ Referral	☐ Search Engine	☐ Mailer	☐ Trade Show	☐ Sales Rep	☐ Other
---	-------------------------------------	------------------------------	----------------------------------	---------------------------------	-----------------------------

Continue

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

 BUSINESS CREDIT REPORTS

Account Sign-Up

What's your first and last name, title, and phone number. Include your extension if you have one.

Now, let's setup your login information.

Your email address will be your username when you login.

Make sure your password matches the requirements to the right.

This just verifies that you don't set a password by mistake.

Minimum Password Requirements
Passwords should have at least:

6 Characters	1 Number
1 Uppercase letter	1 Symbol
1 Lowercase letter	

Example Password
Credits1\$

Who is going to receive the invoices? ⓘ

What is your main billing contact's name?

What email(s) should we send the invoice to?
Seperate multiple email addresses with a semicolon.

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.

- 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!**
- 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.

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.

- 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

Add your Business Credit Reports, Inc. credentials

1. Go to **Setup**

[illegible]

2. In the Quick Find Box, type 'Named Credentials'
3. Under 'Security Controls' section, click **Named Credentials**

The screenshot shows the Salesforce Developer Console interface. A red box highlights the 'Quick Find' search bar at the top left, with the text 'Type named credentials in quick find box' pointing to it. Another red box highlights the 'Named Credentials' link under the 'Security Controls' section in the left sidebar, with the text 'Click named credentials' pointing to it. The main content area shows the 'Getting Started' section with 'Build App' and 'Salesforce Lightning' options. Below that is the 'System Overview' section with a message icon. The 'Developer Utilities' section includes a search bar and filters for 'Class', 'Page', 'Trigger', and 'VF Comp.'. The 'Recent Items' table lists various items like 'Deepesh Rao', 'PRLDE_InvokeBCRService', 'SFDC_DevConsole', 'Lead Layout', and 'Account Layout'. The 'Quick Links' section at the bottom lists 'Tools', 'Users', and 'App'.

Home Accounts Leads +

Quick Find / Search... Search

Select Metadata: Apex Classes (22) Advanced Search Expand All | Collapse All

Administer

- Security Controls
 - Named Credentials

Build

- Customize
 - Tab Names and Labels
 - Rename Tabs and Labels
 - Help Settings

Getting Started

Build App Generate a basic app with just one step, and then easily extend that app with clicks or code. Add App

Salesforce Lightning Enable the power, speed and simplicity of the new, modern Salesforce user experience

System Overview You have a message. Expand to see messages or go to the system overview page to see additional limits.

Developer Utilities

SEARCH YOUR CODE CODE COVERAGE EXTRACT LIGHTNING LINTER (BETA)

Enter search text... Go ☒ Class ☒ Page ☐ Trigger ☐ VF Comp.

Recent Items beta

Name	Type	Object
Deepesh Rao	User	
PRLDE_InvokeBCRService	Apex Class	
SFDC_DevConsole	Debug Level	
Lead Layout	Page Layout	Lead
Account Layout	Page Layout	Account

Quick Links

Tools Users App

Help for this Page

Trailhead the fun way to learn Salesforce VIEW FREE TUTORIALS

Browse Docs Explore documentation and API reference guides.

Ask Questions Get help when you need it from Salesforce & community experts.

Recommended Apps Show All

Phrasee byPhrasee ★★★★★ Phrasee uses artificial intelligence to generate email subject lines that outperform humans.

4. Click New Named Credential

The screenshot shows the 'Named Credentials' page in the Salesforce Developer Console. A red box highlights the 'New Named Credential' button, with the text 'Click New Named Credential' pointing to it. The page title is 'Named Credentials'. Below the title is a description: 'A named credential specifies a callout endpoint and its required authentication parameters. When setting up callouts, avoid setting authentication parameters for each callout by referencing named credentials.' The 'View' dropdown is set to 'All', and there is a 'Create New View' link. The table below shows no records. The left sidebar shows the 'Administer' section with 'Security Controls' selected.

Home Accounts Leads +

Quick Find / Search... Search

Select Metadata: Apex Classes (22) Advanced Search Expand All | Collapse All

Lightning Experience Migration Assistant Switch to the modern, intelligent Salesforce. Get Started

Salesforce Mobile Quick Start

Home

Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls

Named Credentials

A named credential specifies a callout endpoint and its required authentication parameters. When setting up callouts, avoid setting authentication parameters for each callout by referencing named credentials.

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New Named Credential

Label + URL Username

No records to display.

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

Named Credential Edit: BCR_Credential

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

Save Cancel

Label BCR_Credential

Name BCR_Credential

URL https://reports.businesscreditreports.com

Authentication

Certificate

Identity Type Named Principal

Authentication Protocol Password Authentication

Username

Password

Callout Options

Generate Authorization Header ☒

Allow Merge Fields in HTTP Header ☐

Allow Merge Fields in HTTP Body ☐

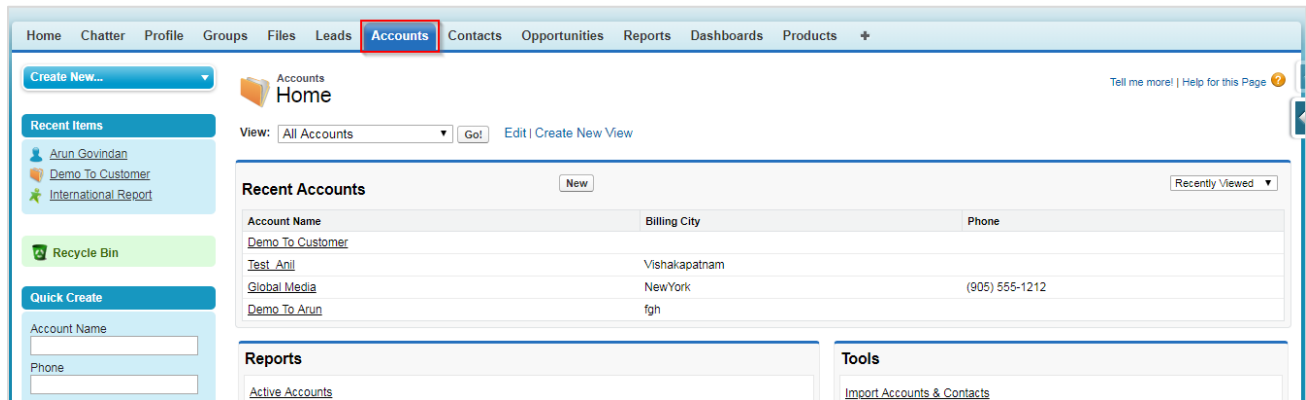
Save Cancel

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

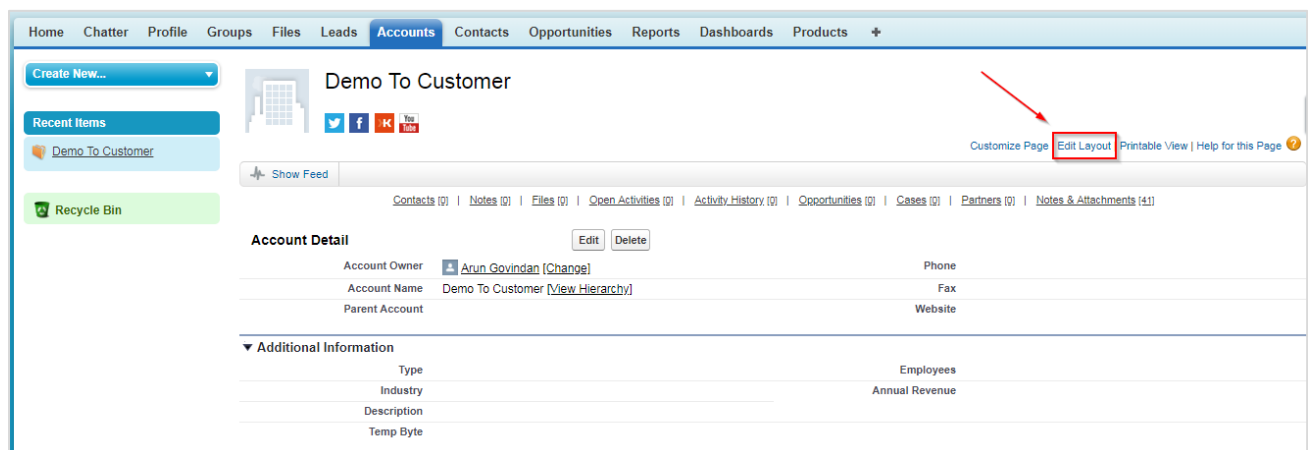
Here are the steps to add the **Get Business Credit Report** button to your Accounts/Leads Page Layout:

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

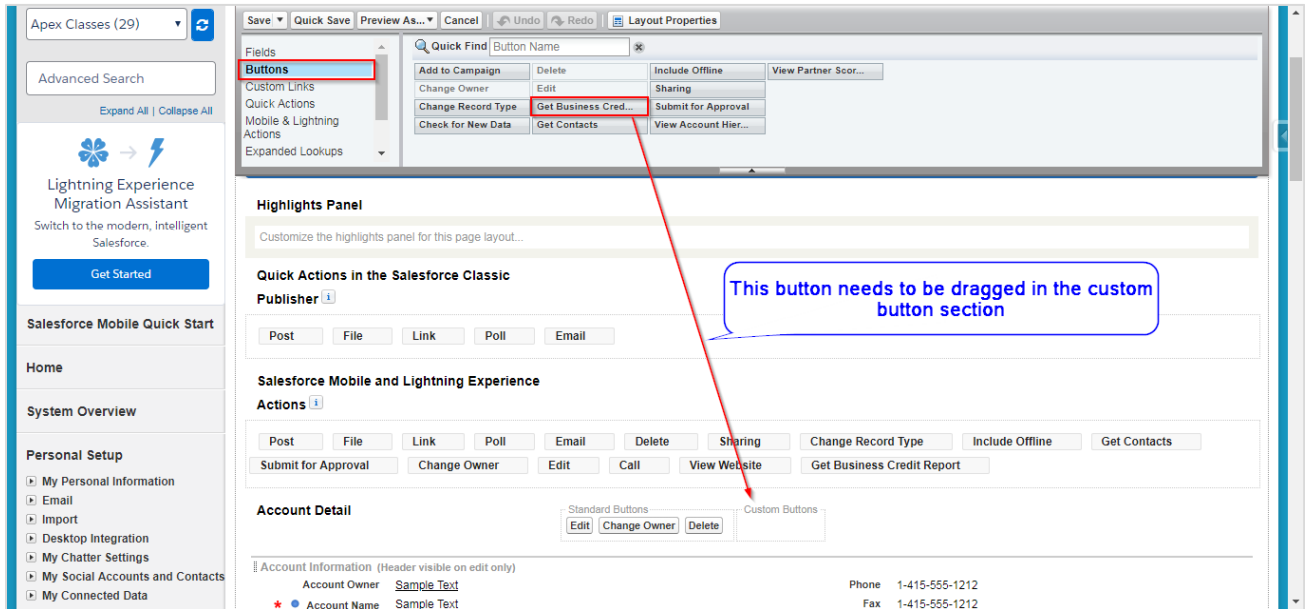
1. Click on the **Accounts/Leads** tab



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



- 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:

- Click **Edit Layout** from an Account/Lead object

Account Detail

Account Owner	Devesh Rao (Change)	Rating	Warm
Account Name	Burlington Textiles Corp of America [View Hierarchy]	Phone	(336) 222-7000
Parent Account		Fax	(336) 222-8000
Account Number	CD656092	Website	http://www.burlington.com
Account Site		Ticker Symbol	BTXT
Type	Customer - Direct	Ownership	Public
Industry	Apparel	Employees	9,000
Annual Revenue	\$350,000,000	SIC Code	546732
Billing Address	525 S. Lexington Ave Burlington, NC 27215 USA	Shipping Address	
Customer Priority		SLA	Silver
SLA Expiration Date	8/6/2018	SLA Serial Number	5367
Number of Locations	6	Upsell Opportunity	Maybe
Active			
Created By	Devesh Rao, 7/12/2018 4:48 PM	Last Modified By	Devesh Rao, 7/12/2018 4:48 PM
Description			
Custom Links	Billing		

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

Related Lists

Subject	Name	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Sample Text	Sample Text	Sample Text	✓	8/27/2018 6:16 AM	Sarah Sample	8/27/2018 6:16 AM

Opportunities

Opportunity Name	Stage	Amount	Close Date
Sample Text	Sample Text	\$123.45	8/27/2018

Cases

Case	Contact Name	Subject	Priority	Date Opened	Status	Owner
GEN-2004-001234	Sarah Sample	Sample Text	Sample Text	8/27/2018 6:16 AM	Sample Text	Sarah Sample

Partners

Partner	Opportunity	Role
Sample Text	Sample Text	Sample Text

Notes & Attachments

This list is not customizable

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

The screenshot shows the Synergy interface with the 'Related Lists' section expanded. The 'Files' button in the 'Data Integration' tab is highlighted with a red arrow. Below the 'Related Lists' section, there are two tables: 'Contacts' and 'Opportunities'.

Contact Name	Title	Email
Sarah Sample	Sample Text	sarah.sample@company.com

Opportunity Name	Stage	Amount
Sample Text	Sample Text	\$123.45

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

The screenshot shows the Synergy interface with the 'Related Lists' section expanded. A dialog box titled 'Overwrite Users' Related List Customizations?' is displayed, asking if the user wants to overwrite their personal related list customizations. The 'Yes' button is highlighted with a red arrow. A red box with the text 'Click Yes To Save Files To Account Layout' is also present.

Overwrite Users' Related List Customizations?

You have added or moved related lists on this page layout. Do you want these changes to overwrite users' personal related list customizations?

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 States
- 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:

- 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
- Pick the report you would like and click on **Order {Report Name}** to the right of the report Price

Business Credit Report for Demo To Customer

1 Select Report 2 Select Company 3 Download Report

Select Report Type

Choose Branch (For Invoice Purpose Only) Main

Report Types	\$Price	Action
Advantage Pro	56.0000	Order Advantage Pro
Advantage Plus	38.5000	Order Advantage Plus
Advantage	36.0000	Order Advantage
Business Credit Report Pro	49.5000	Order Business Credit Report Pro
Business Credit Report Plus	34.9500	Order Business Credit Report Plus
Trade Plus (D&B)	38.5000	Order Trade Plus (D&B)
Equifax Pro	40.7500	Order Equifax Pro

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.

Company Name	Address	Action
TEST COMPANY #1 NEW YORK	123 TEST ADDRESS	Get Report
TEST COMPANY #2 LOS ANGELES	999 TEST ADDRESS	Get Report
ACME INC SAN DIEGO	123 ANYWHERE RD	Get Report
CROCKER INDUSTRIES CHICAGO	444-A MAIN ST	Get Report

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.

Downloaded reports will be saved in Files object

Credit Fields:

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

Credit Fields		New Credit Field	Credit Fields Help ?
Action	Credit ID		
Edit Del	CR-0088		
Edit Del	CR-0089		

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

The screenshot shows the 'Business Credit Report for New test' interface. At the top, there's a navigation bar with links like Home, Chatter, Profile, Groups, Files, Leads, Accounts, Contacts, Opportunities, Reports, Dashboards, Products, and Credit Fields. Below this, a progress bar indicates three steps: 1. Select Report (active), 2. Select Company, and 3. Download Report. The main section is titled 'Select Report Type'. It includes a 'Choose Branch (For Invoice Purpose Only)' dropdown menu currently set to 'Main'. Below this is a table with three columns: 'Report Types', 'Price (USD)', and 'Action'.

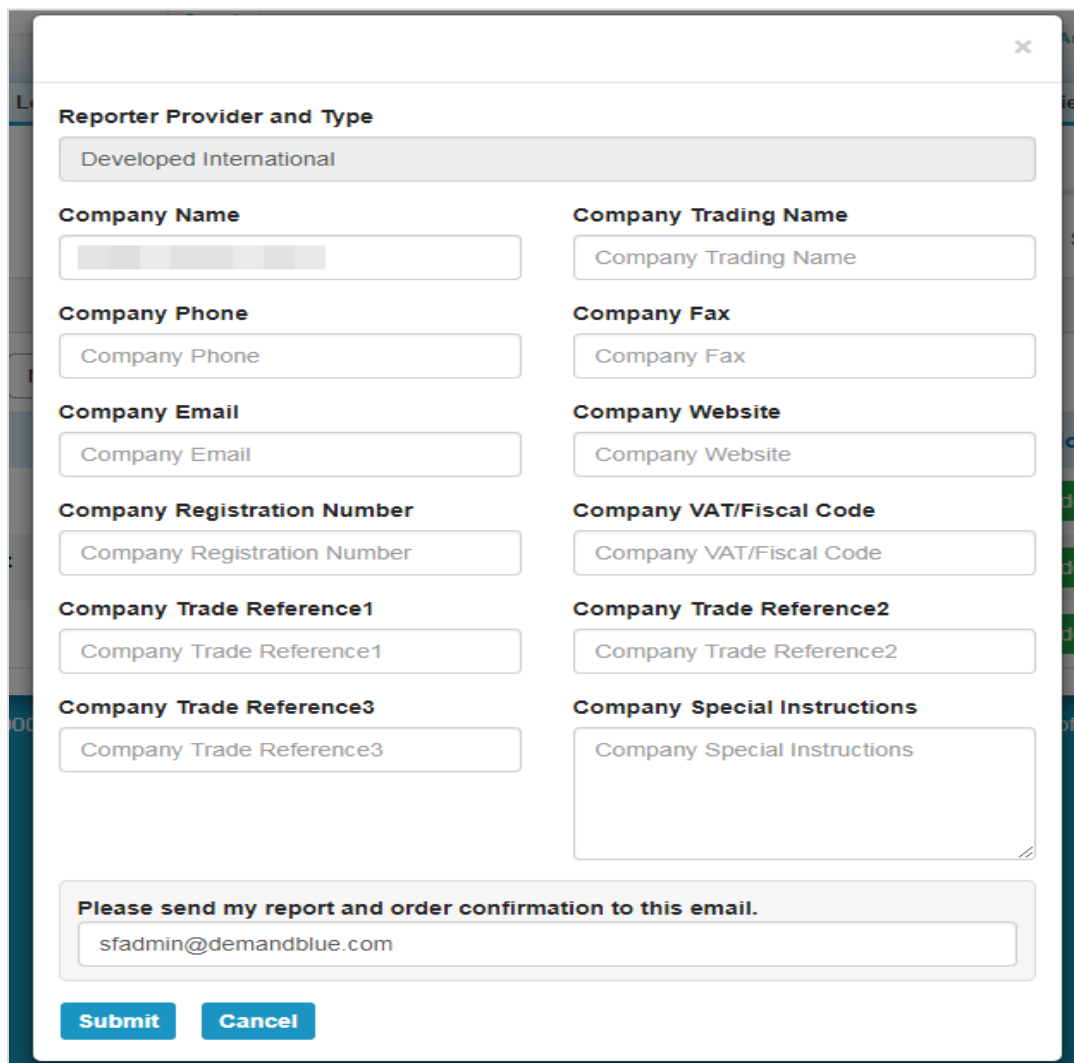
Report Types	Price (USD)	Action
D&B International Report		Order D&B International Report
Experian Superflash Investigation		Order Experian Superflash Investigation
Developed International Report	000	Order Developed International Report

At the bottom, there's a copyright notice: 'Copyright © 2000-2019 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance | Go to Salesforce mobile app'.

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.



A screenshot of a web form titled "Reporter Provider and Type". The form is enclosed in a light gray border with a close button (X) in the top right corner. It contains several input fields arranged in two columns. The first column includes fields for "Company Name", "Company Phone", "Company Email", "Company Registration Number", "Company Trade Reference1", "Company Trade Reference3", and "Company Special Instructions". The second column includes fields for "Company Trading Name", "Company Fax", "Company Website", "Company VAT/Fiscal Code", "Company Trade Reference2", and "Company Special Instructions". At the bottom, there is a section titled "Please send my report and order confirmation to this email." with an input field containing the email address "sfadmin@demandblue.com". Below this section are two buttons: "Submit" and "Cancel".

Reporter Provider and Type

Developed International

Company Name

Company Trading Name

Company Phone

Company Fax

Company Email

Company Website

Company Registration Number

Company VAT/Fiscal Code

Company Trade Reference1

Company Trade Reference2

Company Trade Reference3

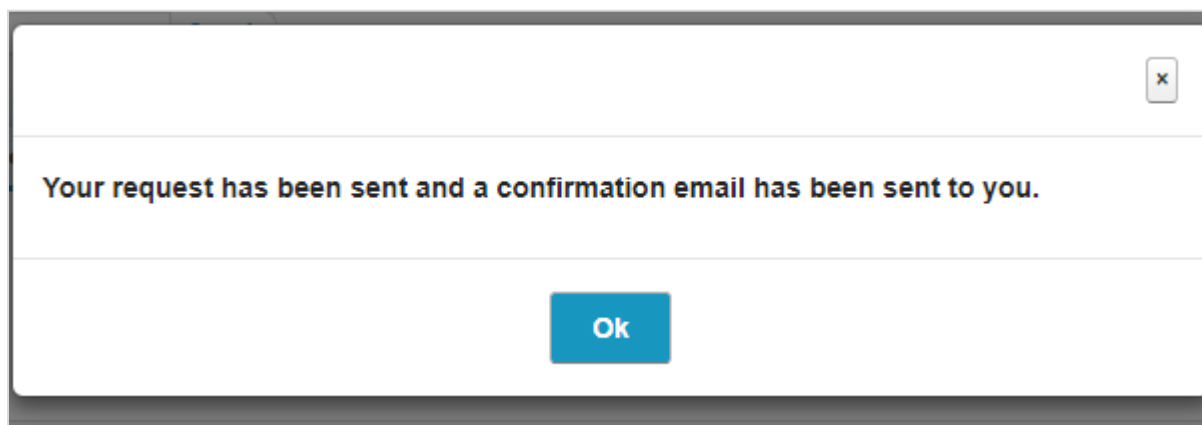
Company Special Instructions

Please send my report and order confirmation to this email.

sfadmin@demandblue.com

Submit **Cancel**

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



A screenshot of a confirmation message dialog. It is a light gray box with a close button (X) in the top right corner. The message text is "Your request has been sent and a confirmation email has been sent to you." Below the message is a single blue button labeled "Ok".

Your request has been sent and a confirmation email has been sent to you.

Ok

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.



Files

Upload Files

Action	Title	Last Modified	Created By
Preview Download Del	New test-	2/18/2019 3:29 AM	
Preview Download Del	New test-	2/18/2019 3:27 AM	
Preview Download Del	New test-	2/18/2019 1:53 AM	
Preview Download Del	New test-	2/18/2019 1:40 AM	
Preview Download Del	New test-	2/18/2019 1:31 AM	

[Show 1 more »](#) | [Go to list \(6\) »](#)

Exceptional Conditions

Issue while downloading the report

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

Business Credit Report for
Demo To Customer

1
Select Report

2
Select Company

3
Download Report

Advantage Pro For

Company Name	Address	Action
 TEST COMPANY #1 NEW YORK	123 TEST ADDRESS	<button>Get Report</button>
 TEST COMPANY #2 LOS ANGELES	999 TEST ADDRESS	<button>Get Report</button>
 ACME INC SAN DIEGO	123 ANYWHERE RD	<button>Get Report</button>
 CROCKER INDUSTRIES CHICAGO	444-A MAIN ST	<button>Get Report</button>

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

Contact Business Credit Report

Comments: How Can We Help You?

Name: Enter Your Name

Email: Please Provide Your Email

Company Name: Enter Your Company Name

Submit

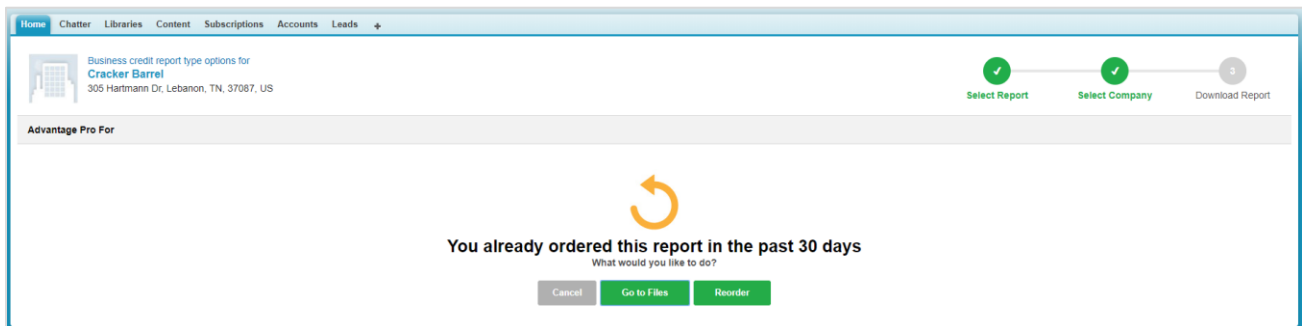
Cancel

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 LIGHTNING

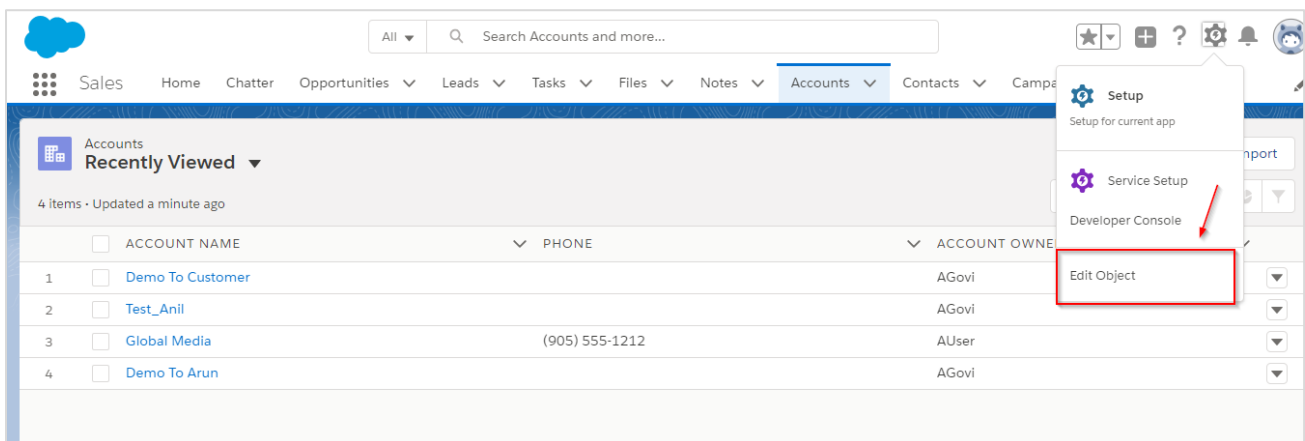
Synergy for Salesforce is very similar in Lightning as it is Classic. The only difference between the two is the setup for the **Get Business Credit Report** button. In Lightning, it is a Quick Action that must be added to your page layout.

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

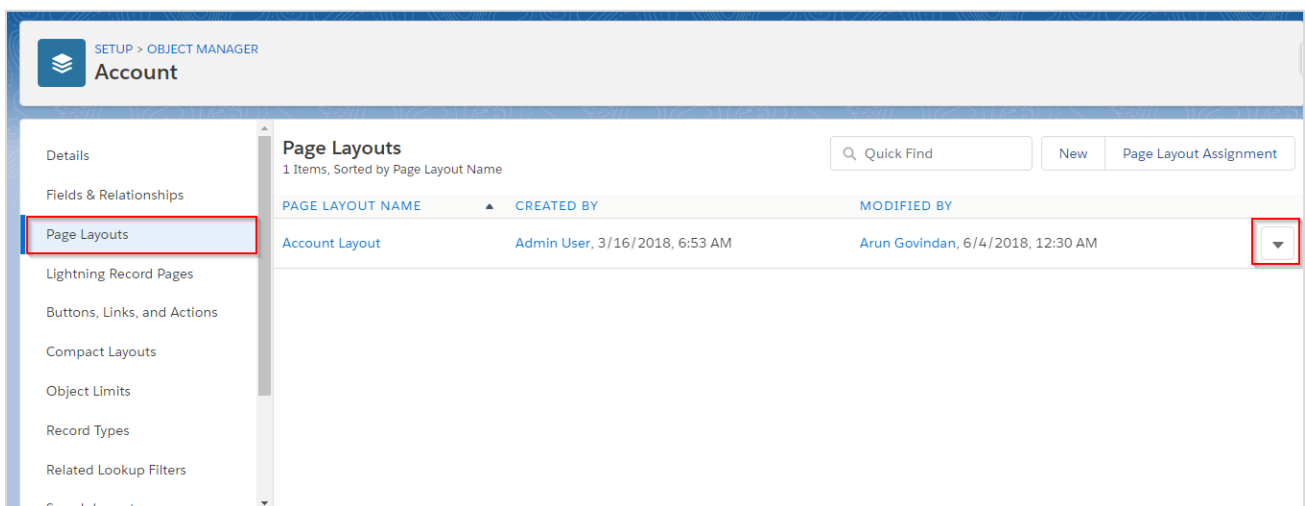
You can quickly navigate to Salesforce Lightning by clicking **Switch to Lightning Experience** on the top right side of your page.

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

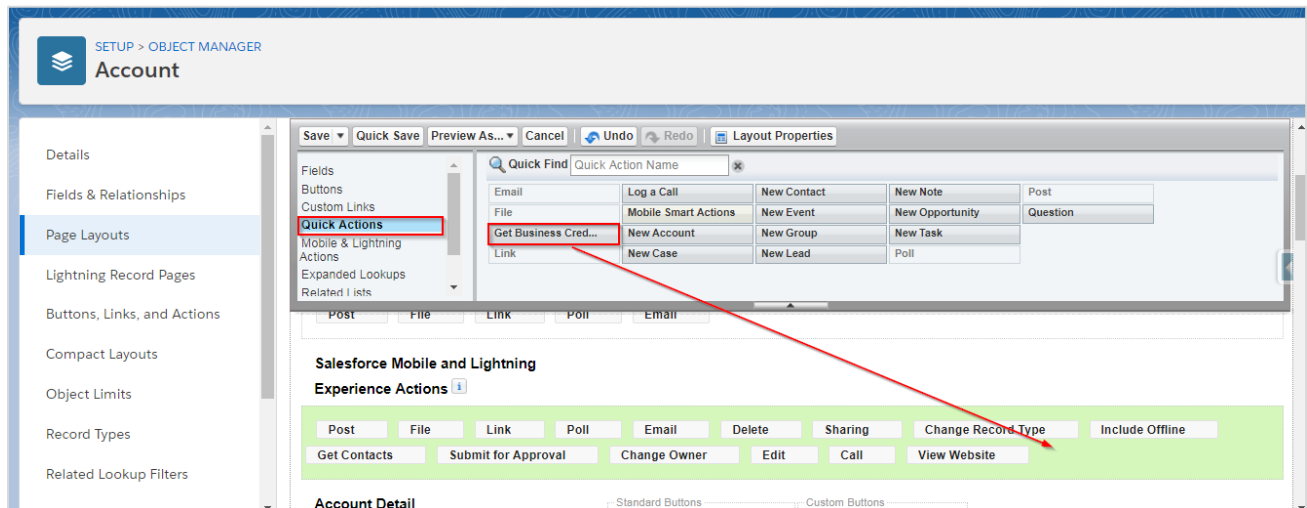
1. Click on the **Accounts/Leads** tab
2. Click the **Setup Cog** in  the top right corner, and then click **Edit Object**



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**



- 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



- 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

