



Creditsafe Business Intelligence Release

Match & Append Salesforce Lead Records

Version 1.0

Publication Date: 19th September 2019

Introduction

As a user you can now match and append Creditsafe Data to a Salesforce Lead Record.

We have released a new Visualforce Page specifically for Lead Layouts [*Business Intelligence – Lead View*] which allows the user to link an existing Salesforce Lead Record to a Creditsafe Record, as well as Refresh as and when desired.

This allows users to append key Business Data to an existing Salesforce Lead as well as verify the Companies Credit Worthiness before converting them to a Customer.

Installation

Package URL

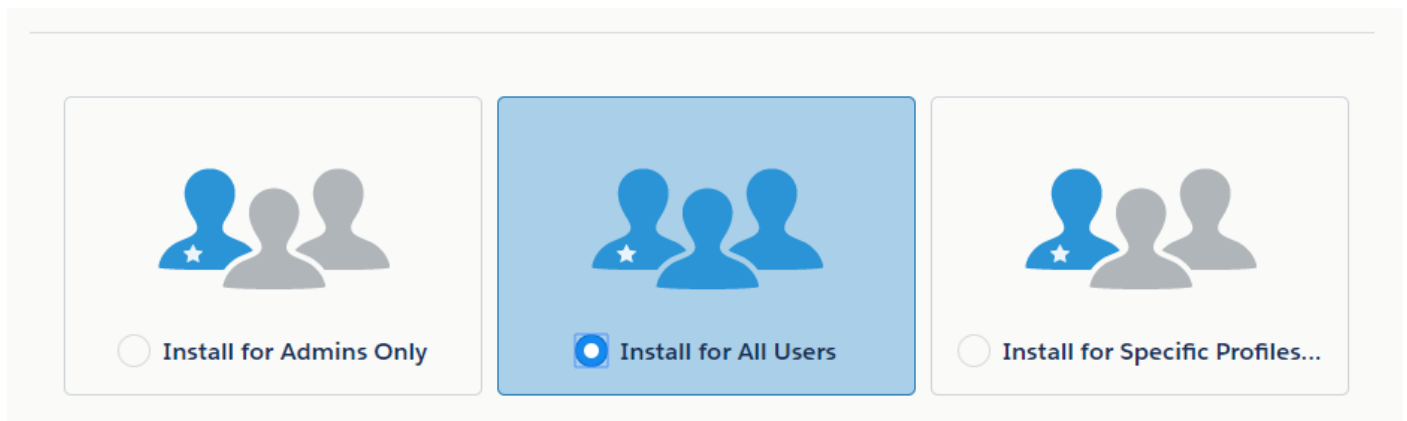
NOTE: DUE TO DEFAULT PROFILE PERMISSIONS, A "SYSTEM ADMINISTRATOR" PROFILE MUST PERFORM THE INSTALLATION

PRODUCTION

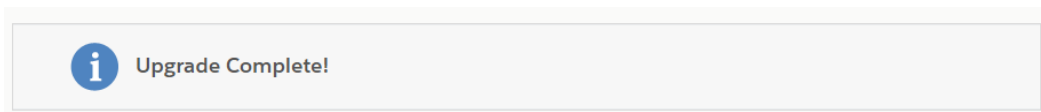
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1p000000gQ9s>

SANDBOX

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t1p000000gQ9s>



Please select **INSTALL FOR ALL USERS**. User Permissions and access restrictions can be applied post-installation.



Once complete, you will notice **CS LEAD VIEW** under Components for Business Intelligence

Configurations

Enable Visualforce Page Access

For [CLASSIC](#)

[1] Select **SETUP > ADMINISTER > MANAGE USERS > PROFILES**

[2] Select the relevant **PROFILE**

[3] Select **ENABLED VISUALFORCE PAGE ACCESS**

[4] Select **BLUETAHITI.CS_LEADVIEW**

[5] Move to **ENABLED VISUALFORCE PAGES**

[6] Click **SAVE**

For [LIGHTNING](#)

[1] Select **SETUP > ADMINISTRATION > USERS > PROFILES**

[2] Select the relevant **PROFILE**

[3] Select **ENABLED VISUALFORCE PAGE ACCESS**

[4] Select **BLUETAHITI.CS_LEADVIEW**

[5] Move to **ENABLED VISUALFORCE PAGES**

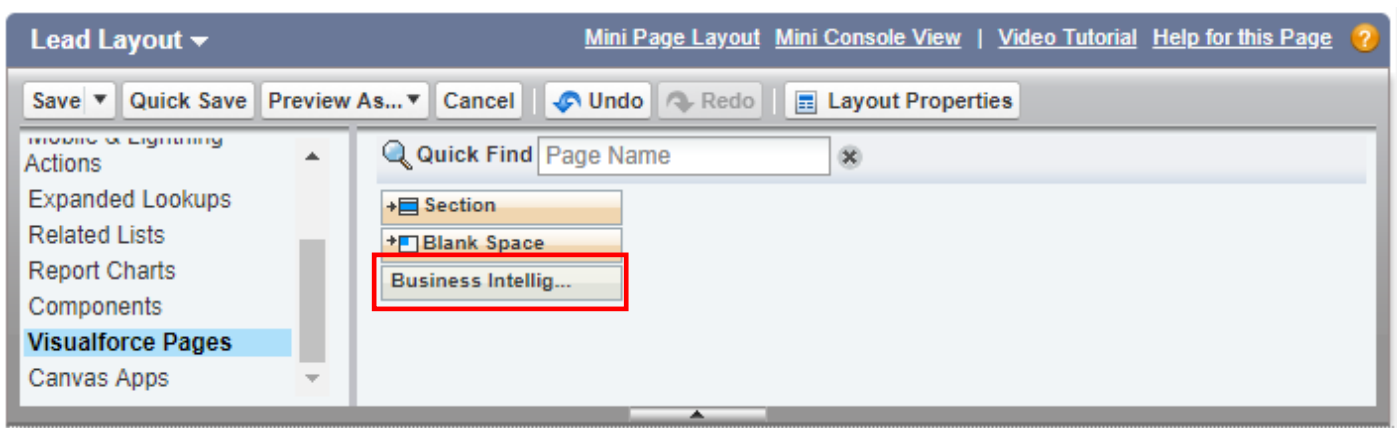
[6] Click **SAVE**

Object Page Layout

Add Visualforce Page to Lead Object Page Layout

For [CLASSIC](#)

- [1] Select **SETUP > BUILD > CUSTOMIZE > LEAD > PAGE LAYOUTS**
- [2] Select the **LAYOUT** to **EDIT**
- [3] Drag & Drop a **SECTION** to the Object Page **LAYOUT (1-Column)**
- [4] Select **VISUALFORCE PAGES**
- [5] Drag and Drop the **BUSINESS INTELLIGENCE – LEAD VIEW** from **VISUALFORCE PAGES** to the **SECTION**



- [6] Select **PROPERTIES** and set **WIDTH** to 100% (recommended) and **HEIGHT** to 100 (recommended)
- [7] Select **OK**

For [LIGHTNING](#)

- [1] Select **SETUP > OBJECTS AND FIELDS > OBJECT MANAGER**
- [1] Select **LEAD**
- [1] Select **PAGE LAYOUTS**
- [2] Select the **LAYOUT** to **EDIT**
- [3] Drag & Drop a **SECTION** to the Object Page **LAYOUT (1-Column)**
- [4] Select **VISUALFORCE PAGES**
- [5] Drag and Drop the **BUSINESS INTELLIGENCE – LEAD VIEW** from **VISUALFORCE PAGES** to the **SECTION**
- [6] Select **PROPERTIES** and set **WIDTH** to 100% (recommended) and **HEIGHT** to 100 (recommended)
- [7] Select **OK**

Application Options

Find Company Options			
Account			
Company Name	Account Name	Street	Billing Street
Registration Number		City	Billing City
		Postcode	Billing Zip/Postal Code
Lead			
Company Name	Company	Street	Street
Registration Number		City	City
		Postcode	Zip/Postal Code

FIND COMPANY OPTIONS allows you to select the matching criteria when linking a **SALESFORCE ACCOUNT** or **SALESFORCE LEAD** to a Creditsafe Report.

You can match by either Company Name (*optional Street / City / Postcode*) or Registration Number

User Guide

Lead Visualforce Page

The Creditsafe Business Intelligence Lead VisualForce Page is designed for use with the **SALESFORCE LEAD OBJECT**

It allows the user to link an existing Salesforce Lead Record to a Creditsafe Record

Find Company

Lead Owner	CS Demo [Change]	Phone	
Title		Mobile	
Name	Cato Syversen	Fax	
Company	Creditsafe	Email	
Creditsafe Company Registration Number		Website	
Industry		Lead Source	
Creditsafe Business Name		Lead Status	Open - Not Contacted
Creditsafe Previous Name			
Creditsafe Company Status			
Creditsafe Incorporation Date			
Creditsafe Principal Activity			
No. of Employees			

▼ Creditsafe

Creditsafe Rating	<input type="button" value="Find Company"/>	Last Refreshed	
Creditsafe Limit		Creditsafe Number	

▼ Creditsafe Information

Creditsafe Limit	Creditsafe Number
Creditsafe Rating	Creditsafe Last Refreshed
Creditsafe Description	
Creditsafe International Rating	
Creditsafe International Description	


Find Company allows the user to create a link between an existing Salesforce Record and a Creditsafe Record

Select **FIND COMPANY**

Company information					3 companies found
Name	Registration Number	Type	Address	Status	
CREDITSAFE IRELAND LIMITED	FC035438	Limited	BRANCH REGISTRATION,REFER TO PARENT REGISTRY	Other	<input type="button" value="Link Account"/>
CREDITSAFE BUSINESS SOLUTIONS LIMITED	03836192	Limited	BRYN HOUSE,CAERPHILLY BUSINESS PARK, CAERPHILLY, CF83 3GG	Active	<input type="button" value="Link Account"/>
CREDIT SAFE UK		Non Limited	CASPIAN POINT, CARDIFF, SOUTH GLAMORGAN, CF10 4DQ	Active	<input type="button" value="Link Account"/>

Select **LINK ACCOUNT** for the appropriate **CREDITSAFE COMPANY REPORT**

Lead Detail

Lead Owner	 CS Demo [Change]	Phone	
Title		Mobile	
Name	Cato Syversen	Fax	
Company	CREDITSAFE BUSINESS SOLUTIONS LIMITED	Email	
Creditsafe Company Registration Number		Website	
Industry		Lead Source	
Creditsafe Business Name	CREDITSAFE BUSINESS SOLUTIONS LIMITED	Lead Status	Open - Not Contacted
Creditsafe Previous Name	CREDITSAFE UK LIMITED		
Creditsafe Company Status	Active - Accounts Filed		
Creditsafe Incorporation Date	1999-08-31		
Creditsafe Principal Activity	The provision of credit referencing services.		
No. of Employees	247		

▼ Creditsafe

Creditsafe Rating	B 66 Low Risk View	Last Refreshed	2019-09-17 Refresh Clear
Creditsafe Limit	820,000.00	Creditsafe Number	GB003/0/03836192

▼ Creditsafe Information

Creditsafe Limit	820000	Creditsafe Number	GB003/0/03836192
Creditsafe Rating	66	Creditsafe Last Refreshed	17/09/2019
Creditsafe Description	Low Risk		
Creditsafe International Rating	B		
Creditsafe International Description	Low Risk		

Creditsafe Business Intelligence populates the **MAPPED DATA FIELDS** and updates the Salesforce Lead Record

Creditsafe Business Intelligence only appends the Company Information to a Lead Record and does not provide the First Name/Last Name Fields

View

View allows the user to access the full Creditsafe Report

Creditsafe Rating	B 66 Low Risk	<input type="button" value="View"/>	Last Refreshed	2019-09-17	<input type="button" value="Refresh"/>	<input type="button" value="Clear"/>
Creditsafe Limit	820,000.00		Creditsafe Number	GB003/0/03836192		

Select **VIEW**

The full Creditsafe Company Report is displayed

Refresh

Refresh allows the user to update the Salesforce Lead Record

Creditsafe Rating	B 66 Low Risk	<input type="button" value="View"/>	Last Refreshed	2019-09-17	<input type="button" value="Refresh"/>	<input type="button" value="Clear"/>
Creditsafe Limit	820,000.00		Creditsafe Number	GB003/0/03836192		

Select **REFRESH**

Any updates to Creditsafe Data Fields will update

Clear

Clear allows you to remove the link between Creditsafe Company Information and a Salesforce Account, if matched incorrectly or the data is no longer required

Creditsafe Rating	B 66 Low Risk	<input type="button" value="View"/>	Last Refreshed	2019-09-17	<input type="button" value="Refresh"/>	<input type="button" value="Clear"/>
Creditsafe Limit	820,000.00		Creditsafe Number	GB003/0/03836192		

Select **CLEAR**

The link between the Salesforce Lead Record and Creditsafe Record will be removed, allowing the user to link the Lead Record to an alternative Creditsafe Record