# Company.info for Salesforce

## RELEASE NOTES

An overview of new features and improvements.

Release 5.1


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# 1. New functionality

On a constant basis we are working on adding new functionality to the app. In this version the following functionality has been made available.

### 1. International Business data

A new data source 'International Business' has been incorporated in the app.
The 'International Business' data source gives access to extensive data from over 249 countries, such as addresses, parent companies, CEO names and sales figures.

Customers that have signed up to use one of the international modules (Business, Sales, or Risk & Compliance) can use this data source when creating Business Dossiers. Also, a contract with Company.info is required be able to make use of this data source.

### 2. Activate countries

On top of the new International Business data source, we also added new functionality to activate or deactivate countries within the app. This enables the admin to offer the users a limited list of countries to select from when creating a new account or enriching an existing account via the app.

### 3. Dutch Business Update Service

The update service will keep your Dutch accounts (that have a Company.info data) up to date with any updates available from the Dutch Chamber of Commerce. You can determine at which moment(s) the Dutch Business Update Service must be executed to check if there are any changes available and to automatically update the Business Dossier.

Next to once per day, or once per week as of now you can also run the Dutch Business Update Service twice per day. Company.info receives financial status data from 'Het Centraal Insolventieregister' twice per day. The service will by default run at 10.30AM and 4.30PM.

*Business Data changes will be synced Thursday nights, so you will receive those on Friday mornings.*


## 4. Account Creation

*You want to improve the data quality of accounts as well? And you want all the accounts in your Salesforce instance being enriched with Company.info data? We got you!*
As of now it is possible to make it mandatory for the users to always create new accounts via the app. If a country is not available as a data source or a certain company cannot be found, you can decide if the user is able to create the account via the standard account creation of Salesforce, or you can redirect them to your own account creation component. This will for sure help you to increase data quality.

## 5. Contact support

*How can you remember all the support options every provider of your apps is offering?*
Well, we made it easy for you. We added a Support Information page to the app, that will explain you who and how to contact in case of any issues or questions you have. The page can be found in the Company.info setup app, on the tab Support.

## 6. When has the Business Dossier been updated at the Dutch CoC?

Many of our customers need to know what the age of the Dutch data at the Business Dossier is. We can now fetch the changed date from the Dutch CoC and have added it to the app. The field 'Last Update Date' will contain the date at which the data was updated at the Dutch CoC. You can add this field to the Page Layout 'Dutch Business Dossier Layout'.

*To avoid any misunderstanding: The 'Last Update Date' is <u>not</u> the date at which the Business Dossier was synchronized with the Company.info Webservice. For this you can check the field 'Last Synchronization Date' on the Business Dossier.*

## 7. Exclude Business Dossiers from Dutch Business update service

Some of our customers want to exclude certain Business Dossiers from being updated by the update service. *I.e., The Account is no longer a customer, but the data must be stored in Salesforce for a certain period.*

The user can now exclude a Dutch Business Dossier from being updated by the Dutch Update Service by setting the checkbox 'Disable Update' on the Business Dossier record.
By default, each Dutch Business Dossier that is being created is being updated by the update service.


**8. Source of a record**

In the app Business Dossiers, Business Positions and Business Persons are being stored via different data sources and processes. This means that duplicate records may be created, which the app cannot de-duplicate.

For a user to understand why a duplicate record has been created and from which process it was created, we added the Source Feature field. This field holds the source from which the record was created.

**9. Notification when UBO Investigation has finished**

When starting a Customer Due Diligence for a Dutch Dossier, a UBO Investigation is being started at Company.info. The UBO Investigation can take somewhere from 1 minute up to a max of 24 hours (in very complex company structures).

To not have the user that started the Customer Due Diligence check the results every few minutes, we have added a on screen notification that will notify the user once the UBO Investigation at Company.info has finished. By clicking on the notification the user will automatically be directed to the Customer Due Diligence record.


# 2. Improvements

From the latest published version of the app, v4.1, several improvements have been added to the new release. Below an overview of the improvements categorized per functionality and per module.

## 2.1 General

### A. Length of Record names

Once in a while a Business Dossier record is being retrieved that has a Company Name that has more characters as Salesforce can handle. This resulted in an error and blocked certain processes from continuing to run. As of now, in these cases we trim the record name, so the record can be stored.

### B. Rename Locality

For the international data sources the field Locality is used to state the city, municipality, or district. For some users this is confusing, so we have renamed the label to Locality/City.

## 2.2 R&C module

- **Extra data when searching for Compliance Check Person**

  When performing a compliance check for persons extra data is being shown, so the user has less false positives and has a greater certainty the correct person is being selected.

## 2.3 Sales module

### A. Dutch Business Positions

Downloading of the Business Positions for Dutch Business Dossiers has been improved, to improve the user experience.

#### 1. Spinner for Business Positions

Once the user has clicked on Get Positions a spinner is shown that informs the user the data is being downloaded.

#### 2. Refreshing of the screen

When the Business Positions have been downloaded, the Business Positions related list was not automatically being updated and thus not showing the data. This was confusing for the user.


We now automatically refresh the screen, so the user immediately sees the downloaded data. *The user is being redirected to the start screen of the account and must navigate back to the Business Positions list.*

B. Multiple Credit Reports

As of now it is possible to generate multiple Creditsafe Company Reports for a Business Dossier. This offers users the possibility to compare the reports over time and see how the (financial) situation of the customer has evolved.

C. Update of translation for Find Dutch Businesses

Some of the picklist in Find Dutch Businesses were not translated to Dutch, so we added the translation.

# That’s it!

Thank you for installing the Company.info for Salesforce app. In this document we have tried to describe all changes added to the new version. If you have questions or are experiencing any issues, please visit the Company.info website for more information and to contact us.