



Company.info for Salesforce

RELEASE NOTES

An overview of new features and improvements.

Release 5.5



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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. Search Business component

The Search Business screen when creating or enriching an account via the app has been updated, offering the following functionality to configure:

A. Single Search Business screen

In the version 5.3 we introduced the new component 'Override Account'. With this option you can override the New Account button, forcing users to always create a new account via the Company.info app. This drives up the data quality.

In the new version we improved the component by having only 1 screen to search for an organization within the selected country

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B. Determine which search fields to present to the users

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.



C. Set the Default Country for all users

If you are making use of one of the International modules of the app and mainly do business in one foreign country (for example France), you can now set that country as a default when creating enriching or creating an account. This saves up time for your users when creating or enriching an account with Company.info data. *

Details	Business Data	Related
Search Business		
* Country		
France		
Trade Name		
Street		
City		

**You can configure it for all users or a selection of users, by configuring and assigning multiple Account Lightning Pages.*

D. Hide country selection for all users

In addition to the functionality 'Set the Default Country for all users' (see C) you can now also hide the country selection, meaning users can only enrich accounts for that country. This might be applicable if users are working in that country or are responsible for that business region. **

Details	Business Data	Related
Search Business		
Trade Name		
Street		
City		

***You can configure it for all users or a selection of users, by configuring and assigning multiple Account Lightning Pages.*





2. Business Search component for Experience Site

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:

- A. Determine which search fields to present to your visitors to search for their company (from the Company.info servers)
- B. 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)
- C. Set the color(s) of your component so it adheres to your Experience Site theme
- D. Set the Default Country so the customer and the selector so your customer can only register from that country

The screenshot displays the configuration interface for the Business Search component. The main area shows a 'Search Business' form with the following fields:

- Trade Name
- Chamber of Commerce Number
- Street
- House Number
- Addition
- Postal Code
- City
- Domain Name
- Phone Number

A 'Strict Search' toggle is located at the bottom left of the form. The right sidebar contains the following configuration options:

- Business Search** (Component title)
- The background color of the compone... (Color selection)
- The API name of the flow that is launched after the Organisation_Result_Flow flow. (Text input: `appolutely__Show_Created_Business_`)
- The API name of the flow that is launched when the cancel button is pressed. The cancel button is not shown when this field is empty. (Text input: `B2B_Customer_Onboarding`)
- Prefill the default country alpha-2 code, e.g. NL. (Text input: `NL`)
- Whether to show the country combobox. If disabled, make sure to prefill a default country.
- Include Trade Name
- Include Chamber of Commerce Number
- Include Street
- Include House Number
- Include House Number Addition
- Include Postal Code




3. 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. Some of our customers want to exclude certain Business Dossiers from being updated by the update service or don't want any Business Dossier to be updated. In the new version you can now completely disable the Dutch Update Service, set a default update value (update or no update) for new Business Dossiers, and let the user decide per Business Dossier if it needs to be updated.

In this way your organization has maximum (configuration) control over the Dutch Update Service.

a. Disable the Dutch Update Service

If for some reason your organization does not want to keep the Business Dossiers up to date, it is now possible to disable the Dutch Update Service. Via the Company.info Setup app your Administrator can disable and enable the service. When disabled all your Dutch Business Dossiers will no longer be updated with changes from the Dutch Chamber of Commerce.

 **Update Service Schedule**

Enable or disable the Dutch Business Update Service. You can specify at which moments the Update Service runs if the Update Service is enabled. Don't forget to click the Save button after you have updated the schedule.

Enable or Disable Enabled

Select a Frequency

Daily

Select a Time

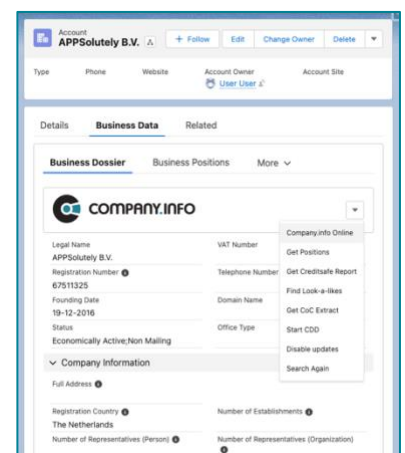
05:00

[Save](#)

b. Exclude Dutch Business Dossiers from the update service

Your organization wants to keep all data up to date, but not every Business Dossier has to be up to date with changes from the Dutch Chamber of Commerce. For this you can choose to let your users decide per Business Dossier if it needs to be updated or not (for example after a customer contract has finished).

From the Business Dossier menu (on the tab Business Data) the user can enable or disable the Update Service from a single Business Dossier. Only users assigned to the Company.info Update Service permission set, will be able to update the Update Service per Business Dossier.

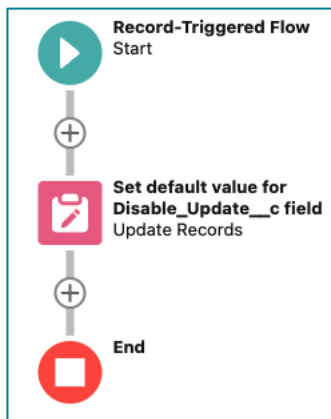




c. Default value per new Business Dossier

When your organization wants to let the users decide per Business Dossier if it needs to be updated, you can set a default update value per new created Business Dossier. This means that every new Business Dossier by default has the Update Service enabled or disabled. The user can then manually change the value.

Via the Template Flow 'Set Default Value for Disable Update Field' the Admin can determine the default value for new Business Dossiers.



4. Visualized data for Creditsafe Company Report

We added a component that presents the overall status of the company in a graphical way to the user and shows some (financial) data from child records (like the Balance Sheet). This makes it easier for the user to have a good overview of the situation of the account.

The Admin can configure the component to determine what data to show to the users.

Financial Year	2019	2018	2017
Number of Weeks	52.00	52.00	52.00
Currency	EUR	EUR	EUR
Consolidated Accounts	false	false	false
Total Tangible Assets	1259912.00	1314458.00	858476.00
Investments	1208413.00	118220.00	42750.00
TOTAL FIXED ASSETS	2475455.00	1649954.00	1037796.00
Miscellaneous Receivables	9357400.00	7589055.00	7235317.00
Total Receivables	9357400.00	7589055.00	7529585.00
Cash	2393069.00	3999127.00	2177757.00
TOTAL CURRENT ASSETS	12256409.00	11588182.00	9707342.00
TOTAL ASSETS	14731864.00	13238136.00	10745137.00
Miscellaneous Liabilities	4198918.00	5411186.00	5601177.00



2. Improvements

From the latest published version of the app, v5.3.1, several improvements have been added to the new release. Below an overview of the improvements categorized per functionality and per module.

1. Search results of a compliance search for Persons or Organizations are being stored
2. Automatically fetch business positions in a B2B Customer Onboarding flow for Experience Cloud
3. Minor updates Company.info Setup app
 - Improved UX design for (de)activating a country in the Data Sources tab
 - Improved UX design for setting a country's data source in the Data Sources tab
 - Re-sorting in the Data Sources tab when changing the data source or activation status of a country.
 - Updated success message when assigning users to a module via the Access Management tab
 - Updated Error logs for several user or admin warnings

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.

