

Company.info for Salesforce

RELEASE NOTES

An overview of new features and improvements.

Release 5.5.4



A APPSOLUTELY

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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

			Business Sea	rch
	* Country			
	The Net	herlands		•
				Manually enter an Account
	Search	Business		Cancel Confirm
Country				
The Netherlands				•
zade Name		Chamber of Commer	ce Number	
		House Number	Addition	
itreet		House Number	Addition	
Postal Code	City			
Iomain Name		Phone Number		
Itrict Search 🗸 🔿				
COMPRIMINFO			Cancel Search	

Version 5.3



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.

Trade Name		
City		





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		
			Sea	rch Business
• Country				
France				
Trade Name				
Street				
City 0				

*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

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✓ Include House Number Addition				





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

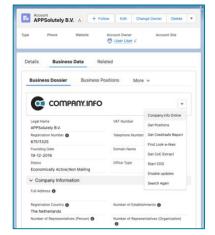
If for some reason your organization does not want to keep the Business Dossiers up to date, it is now possible to disable the Dutch Update Service. Via the Company.info Setup app your Administrator can disable and enable the service. When disabled all your Dutch Business Dossiers will no longer be updated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



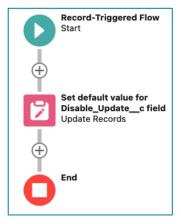




c. Default value per new Business Dossier

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.

nancial Overview	Details Relat	ted						
	Percenta Presenta	ieu -						
Rating	Rating Value		Provider Value		Rating Description	Credit Rating Limit	Company Status	Company Language
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2. Improvements

Since 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





3. Known issues

During testing known issues might be found for existing implementations of the Company.info for Salesforce app.

1. Cloned Flow 'Create Account based on Company info data'

If you previously cloned the Flow 'Create Account based on Company info data' **and** you are overriding the New Account button, you might get the following error when running the Flow: There was a problem running this flow. Contact your system administrator with this error message: The input variable "showManualAccountCreationButton" doesn't exist in the active version of the flow "XXXXXX".

	New Resource	
* Resource Type		
Variable		•
* API Name		
showManualAccountCreationButton		
Description		
		G
• Data Type		/
Boolean	Allow multiple values (collection) (1)	
Default Value		
{!\$GlobalConstant.False}		
Availability Outside the Flow		
 Available for input 		
Available for output		
	Cancel	Done

This can be solved by adding the following **Variable** to the Flow:

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 <u>website</u> for more information and to contact us.



