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Business Intelligence Plus for Salesforce

Release Notes v4.5

Our brief, high-level descriptions of enhancements and new features.

What's New This Release

Invocable Apex Actions with Salesforce Flow

Automate Decision Processes
A new Invocable Apex action is now available for Salesforce Flow, enabling decision-making processes to be automated. By integrating this action using Flow, decision logic can be executed, reducing manual intervention and streamlining workflows. Details on how to utilise the new Creditsafe action can be found within our latest user guide.

Refresh Records
This feature introduces the ability to automatically refresh Account and Lead Records for countries that are not currently available in the app's Data Cleaning functionality. This ensures data consistency and accuracy across the rest of your international business profiles.

Automatically Add/Remove Records from Monitoring Portfolios
Companies can now be automatically added or removed from Monitoring Portfolios, enhancing the management of portfolios without manual effort. This can be actioned one-by-one or in bulk.

Default flows are available to help you test and automate these actions efficiently. These can be found under the Demo Flows tab in the settings.

Data Cleaning Test Batches

Review Data Errors Before Activation

The app will now show you what potential data or processing errors you may experience before activating the data cleaning service.

Director Reports - Access from Company Reports

View Director Information Directly from Company Reports
Salesforce users can now access detailed information about company directors, including current and past appointments, directly from the Company Report page without navigating away from Salesforce. Each director associated with a company is now displayed as a clickable link on the Company Report.

Customisable Metrics on Record Match Component

Customised Display Metrics
Salesforce users can now customise the metrics displayed on the record match component on an Account Record. This feature enables users to select the most relevant data points they wish to view immediately within the Account Record.

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Track Usage

View Credit Usage for all Creditsafe Services
Salesforce users can now check the credits used within the application for all Creditsafe services in your subscription, from Reports Viewed and Monitored Companies to Data Cleaning and Check & Decide decisions.

Standardised Page Layouts, Pages, and Profiles for Improved Troubleshooting

Standardised Page Layouts
A consistent set of page layouts has been created for essential Salesforce objects (e.g., Accounts, Leads). These layouts are designed to ensure that users have access to the most relevant fields and related Creditsafe information.

Profiles with Appropriate Permissions
A new profile called “Creditsafe” has been created with permissions tailored to ensure users have access to the necessary features of the package.

Global Language Preference for Data Return

Set a Global Language Preference for Data Output
Users can now set a global language preference for data return. This feature ensures that data is consistently returned in the user’s preferred language for both manual matches and automated data cleaning processes.

Location of the Setting
The language preference can be configured under the "Settings" tab, specifically within the "Search" section. The setting is labelled as "Default Data Output Language" (name subject to confirmation).

Supported Languages
The dropdown list includes a variety of supported languages, including:

English
French (Français)
German (Deutsch)
Italian (Italiano)
Dutch (Nederlands)
Japanese (日本語)
Swedish
Danish
Norwegian

Updated "Match Accounts/Leads" Permission for Enhanced Access Control

Independently Match Accounts and Leads Without Report Access
The existing "Match Accounts/Leads" permission has been updated, allowing users with this permission to “View Report” to be independent from their permissions to match a Lead or Account record. Users can have both, or either, settings enabled.

Error Messages Updated

Enhanced Error Messaging for Enrichment Failures
Enrichment error messages now include the Job ID, providing users with precise information to locate and troubleshoot the exact job causing the error.

New Data Points Added for Data Cleaning

Additional Fields in Data Cleaning
Users can now select new data points to enrich their Account and Lead records with. Country coverage does apply.

Company Org Number
Payment Behaviour Indicator
Payment Expectation Indicator
Number of Establishments
Algorithm Description