



Business Intelligence Plus:

Installation Guide



PARTNER





Install the Creditsafe Salesforce Business Intelligence Plus package in your Salesforce Org. Choose a custom installation to modify the default package settings, including limiting who has access to the package. It's advised that before you install a package, verify on the AppExchange listing that the offering is compatible with the Salesforce edition in your org. If you're unsure what edition of Salesforce you are using, please contact your Salesforce Account Manager.

Installation

****IT IS ADVISED THAT A SALESFORCE SYSTEM ADMINISTRATOR PERFORMS THE INSTALLATION****

Follow these instructions to install the application to your Salesforce organisation.

- Log in to Salesforce with your System Administrator account.
- The link to install the application is provided on your welcome email.

Creditsafe is listed on Salesforce AppExchange.


Depending on whether you are installing the application to your production Salesforce org or Sandbox, choose Install in Production or Install in Sandbox.

IMPORTANT: If you're installing into a sandbox, replace the www.salesforce.com portion of the installation (package) link with **test.salesforce.com**. The package is removed from your sandbox organisation whenever you create a new sandbox copy.

Select I have read and agree to the terms and conditions and then select Confirm and Install.


I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

In Enterprise, Performance, Unlimited, and Developer Editions, choose one of the following security options.




Install Creditsafe Risk Management


By Creditsafe



☒ Install for Admins Only



☐ Install for All Users



☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
Creditsafe Risk Management	Creditsafe	ver 3.1	3.1

Additional Details

[View Components](#)



Install for Admins Only

Specifies the following settings on the installing administrator's profile and any profile with the "Customise Application" permission.

- Object permissions — "Read," "Create," "Edit," "Delete," "View All," and "Modify All" enabled
- Field-level security — set to visible and editable for all fields
- Apex classes — enabled
- Visualforce pages — enabled
- App settings — enabled
- Tab settings — determined by the package creator
- Page layout settings — determined by the package creator
- Record Type settings — determined by the package creator

After installation, if you have Enterprise, Performance, Unlimited, or Developer Edition, set the appropriate user and object permissions on custom profiles as needed.

Install for All Users

Specifies the following settings on all internal custom profiles.

- Object permissions — "Read," "Create," "Edit," and "Delete" enabled
- Field-level security — set to visible and editable for all fields
- Apex classes — enabled
- Visualforce pages — enabled
- App settings — enabled
- Tab settings — determined by the package creator
- Page layout settings — determined by the package creator
- Record Type settings — copied from admin profile

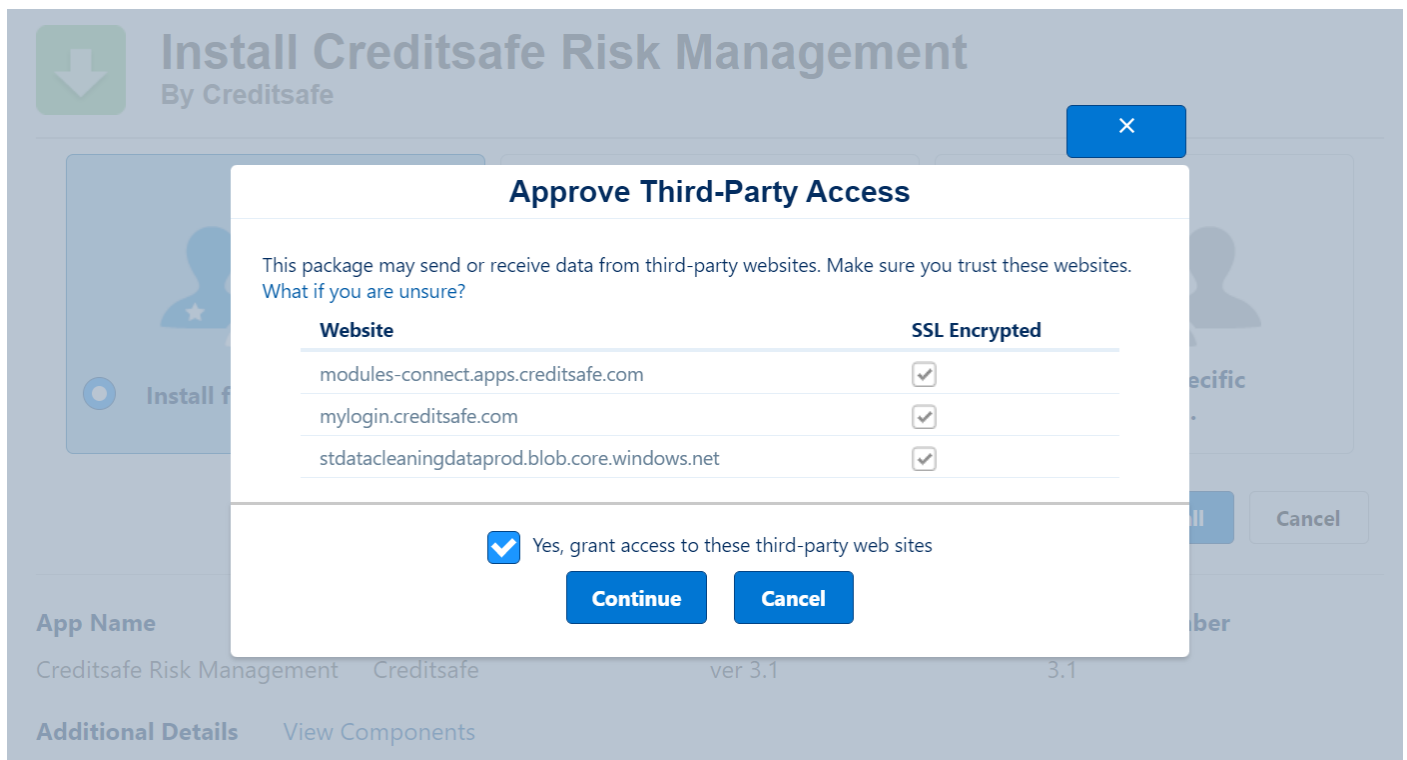
Install for Specific Profiles

Enables you to choose the usage access for all custom profiles in your Salesforce Org. You can set each profile to have full access or no access for the Creditsafe Salesforce Business Intelligence Plus package and all of its components.

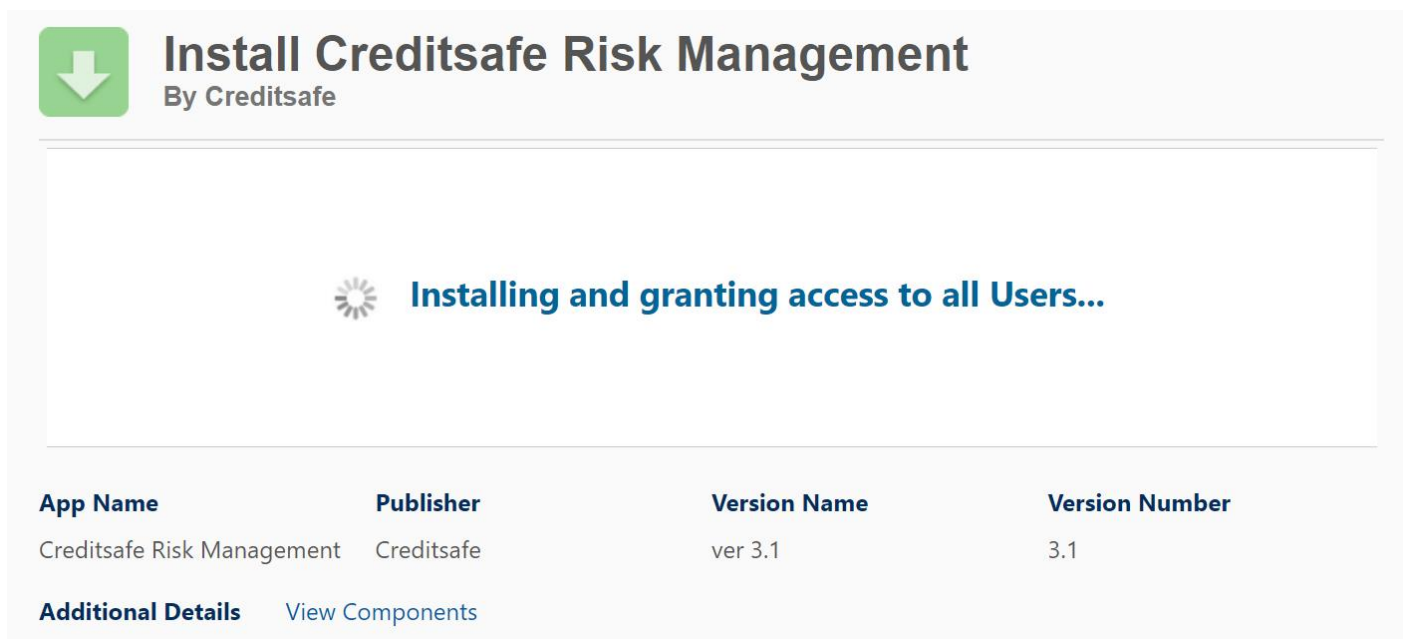
- Full Access — Specifies the following settings for each profile.
- Object permissions — "Read," "Create," "Edit," "Delete," "View All," and "Modify All" enabled
- Field-level security — set to visible and editable for all fields
- Apex classes — enabled
- Visualforce pages — enabled
- App settings — enabled
- Tab settings — determined by the package creator
- Page layout settings — determined by the package creator
- Record Type settings — determined by the package creator
- No Access — specifies the same settings as Full Access, except all object permissions are disabled



A pop-up will appear asking to Approve Third-Party Access. Select Yes, grant access to these third-party websites to allow the application to connect to the Creditsafe services. Then, select Continue.



The App will begin to install in your Org. On screen you'll see a notification that says 'Installing and granting access to' appended with the users you have chosen. In the example below All Users.



IMPORTANT: If you receive a message that the app is taking too long to install, wait for a confirmation email from Salesforce that the app has been installed.



Install Creditsafe Risk Management

By Creditsafe



This app is taking a long time to install.

You will receive an email after the installation has completed.

Done

App Name	Publisher	Version Name	Version Number
Creditsafe Risk Management	Creditsafe	ver 3.1	3.1

Select Done when the installation is complete. This will take you back to your Org.

Salesforce will send you confirmation that the App has been successful.

⏮ Reply all | ⏮ Delete | ⏮ Junk | Block | ⋮

Package Creditsafe Risk Management Install Successful

① This message was sent with High importance.



support@emea.salesforce.com

Mon 10/25/2021 9:42 AM

To: You

Your request to install package "Creditsafe Risk Management ver 1.7" was successful.

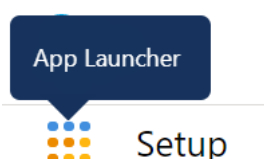
Organization: TST Limited (00D8d000001FSfb)

User: Jack Davis (0058d0000017aok)

Package: Creditsafe Risk Management (04t4K000001Poq9)

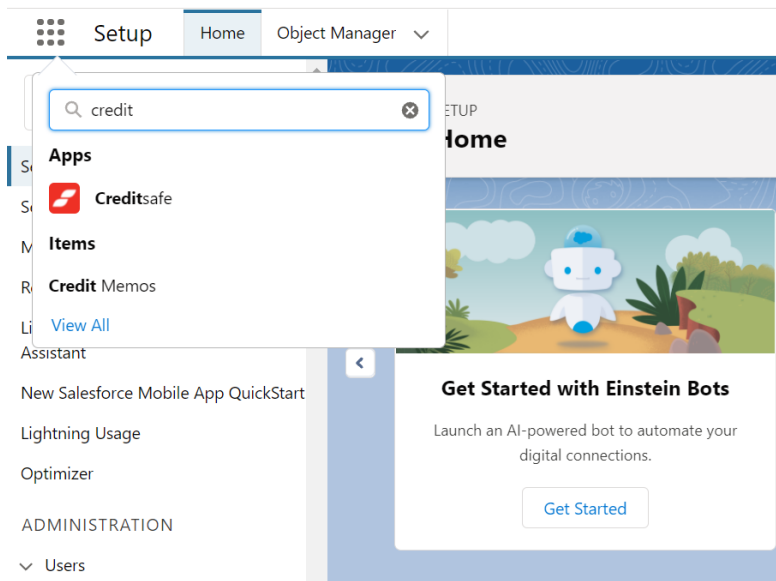
Some components, such as custom objects, custom report types, and workflow rules, must be activated using the package deploy process, before they are available to your organization.

Once successfully installed, hover your mouse over the App Launcher icon (with the 9 dots) at the upper-left of any Salesforce console screen, and "App Launcher" appears:

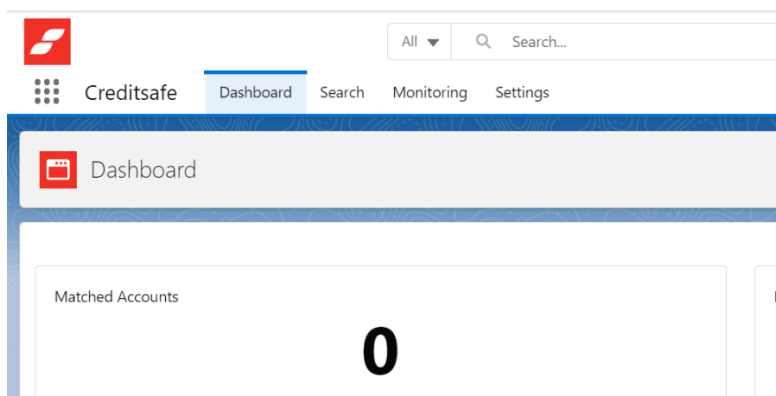


Setup

In the search bar, type Creditsafe and you will see the Creditsafe Business Intelligence Plus Salesforce Application is able to be selected from the App Launcher.



Selecting Creditsafe will take you into the Creditsafe App. The Dashboard tab is set as the default as standard.



In order to make use of the Creditsafe application you will need to Sign in with Connect credentials.

