



# Business Intelligence Plus: Installation Guide



## Pre-Installation

### Compatibility

The Creditsafe Business Intelligence Salesforce Plus Application is compatible with the following Salesforce Editions:

**Enterprise Edition**

**Unlimited Edition**

**Developer Edition**

**Performance Edition**

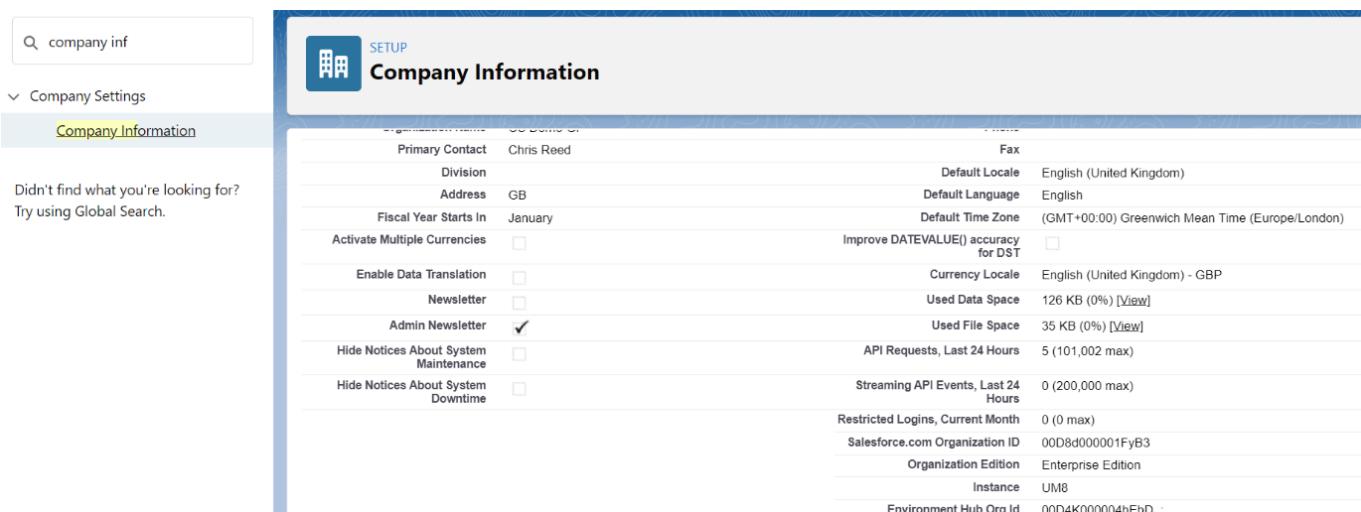
### Verification

The Creditsafe Salesforce Business Intelligence Plus Application requires your Salesforce Organisation ID to use Creditsafe Connect. Please ensure you have your Salesforce Organisation ID [Org ID].

#### *Find your Salesforce Organisation ID*

The Salesforce Organisation (Org) ID is the unique identifier for your Salesforce environment. Use the steps below to find it:

1. Click on the Gear Icon top, right of the page
2. Click Salesforce Setup
3. Click Setup Home (below the Settings heading)
4. Click Company Settings
5. Click Company Information



The screenshot shows the 'Company Information' page in the Salesforce Setup. The page includes a sidebar with a search bar and a 'Company Information' link. The main content area displays various company settings and performance metrics. Key data points include:

Setting	Value
Primary Contact	Chris Reed
Division	GB
Address	GB
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Default Locale	English (United Kingdom)
Default Language	English
Default Time Zone	(GMT+00:00) Greenwich Mean Time (Europe/London)
Improve DATEVALUE() accuracy for DST	<input type="checkbox"/>
Currency Locale	English (United Kingdom) - GBP
Used Data Space	126 KB (0%) <a href="#">[View]</a>
Used File Space	35 KB (0%) <a href="#">[View]</a>
API Requests, Last 24 Hours	5 (101,002 max)
Streaming API Events, Last 24 Hours	0 (200,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00D8d0000001FyB3
Organization Edition	Enterprise Edition
Instance	UMB
Environment Hub Org Id	00D4K000004hEhD :

**IMPORTANT:** The Org ID of your Production environment is different to your Sandbox Org ID. Whenever a Sandbox is refreshed, a new Org ID is created.

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.

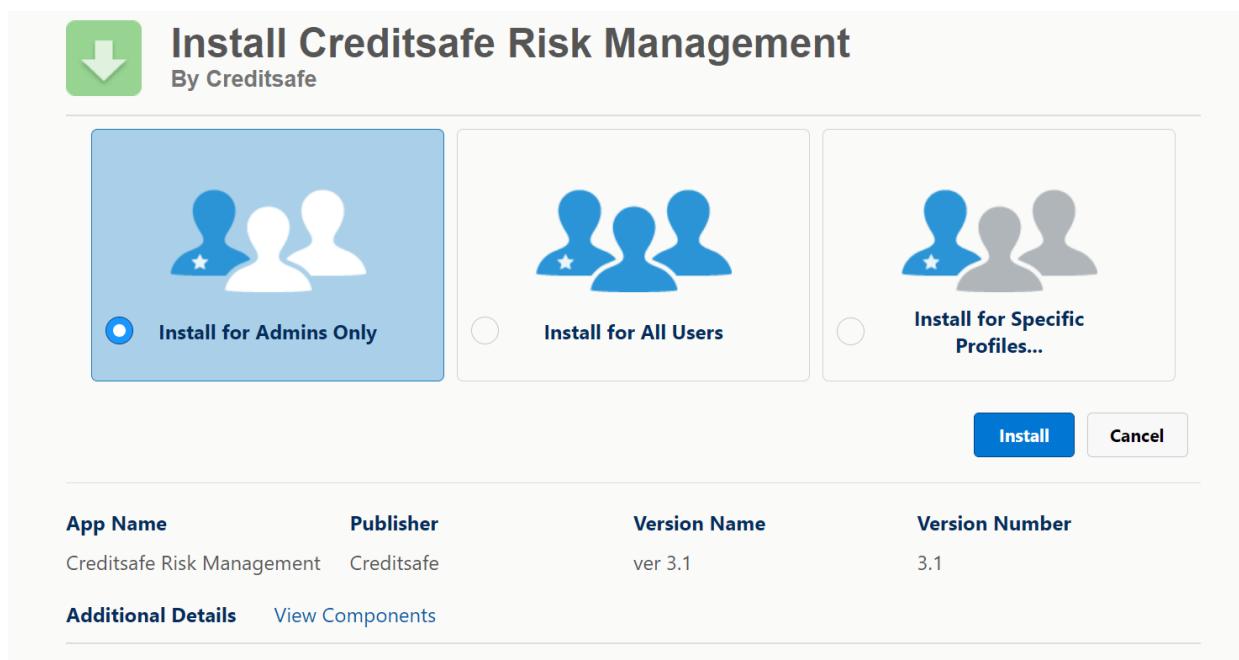
Depending on whether you are installing the application to your production Salesforce org or Sandbox, choose Install in Production or Install in Sandbox.

**IMPORTANT:** If you're installing into a sandbox, replace the [www.salesforce.com](http://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...**

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.

## Install Creditsafe Risk Management

By Creditsafe

**Approve Third-Party Access**

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
modules-connect.apps.creditsafe.com	<input checked="" type="checkbox"/>
mylogin.creditsafe.com	<input checked="" type="checkbox"/>
stdatacleaningdataprod.blob.core.windows.net	<input checked="" type="checkbox"/>

Yes, grant access to these third-party web sites

**Continue** **Cancel**

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

**Additional Details** [View Components](#)

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.

## Install Creditsafe Risk Management

By Creditsafe

**Installing and granting access to all Users...**

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

**Additional Details** [View Components](#)

**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.

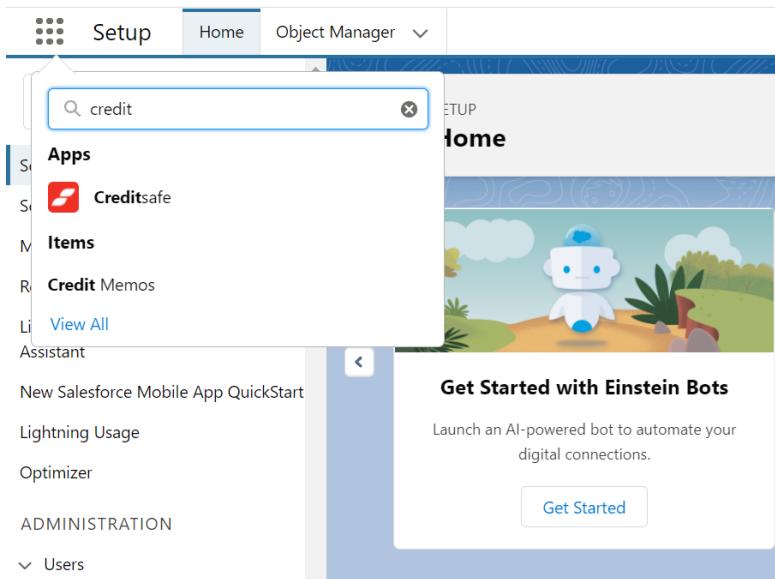
Organization: TST Limited (00D8d000001FSfb)  
User: Jack Davis (0058d0000017aok)  
Package: Creditsafe Risk Management (04t4K000001Poq9)

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.

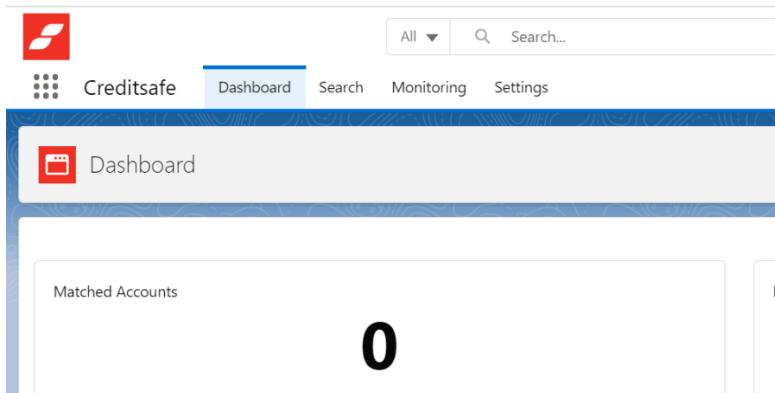
Once successfully installed, hover your mouse over the App Launcher icon (with the 9 dots) at the upper-left of any Salesforce console screen, and "App Launcher" appears:



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.

