

creditsafe[✓]

Business Intelligence Plus:

User Guide

salesforce

PARTNER



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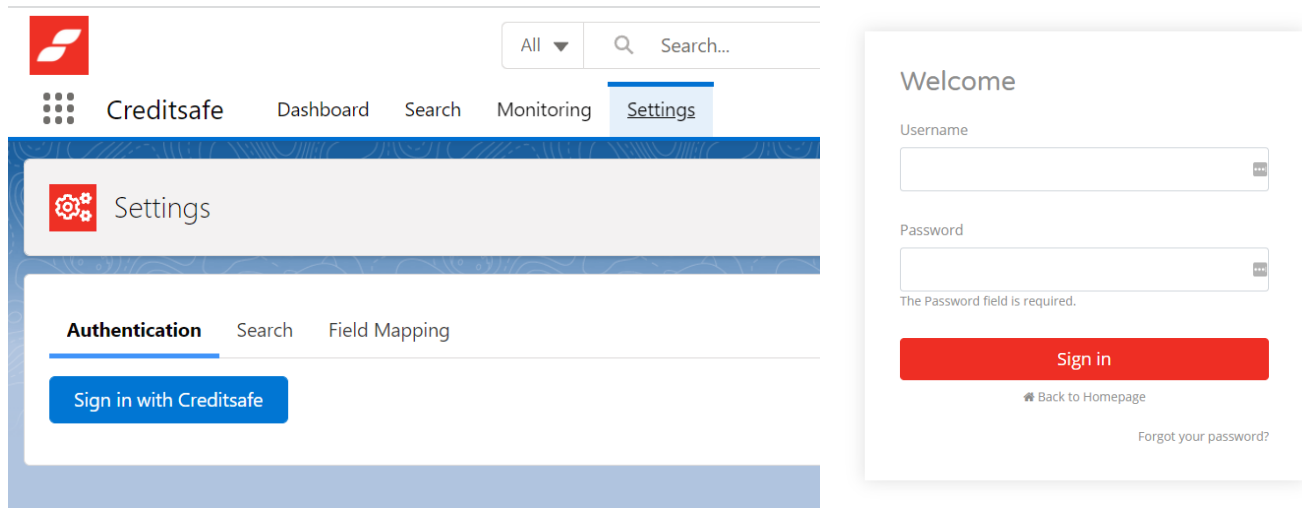
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Settings

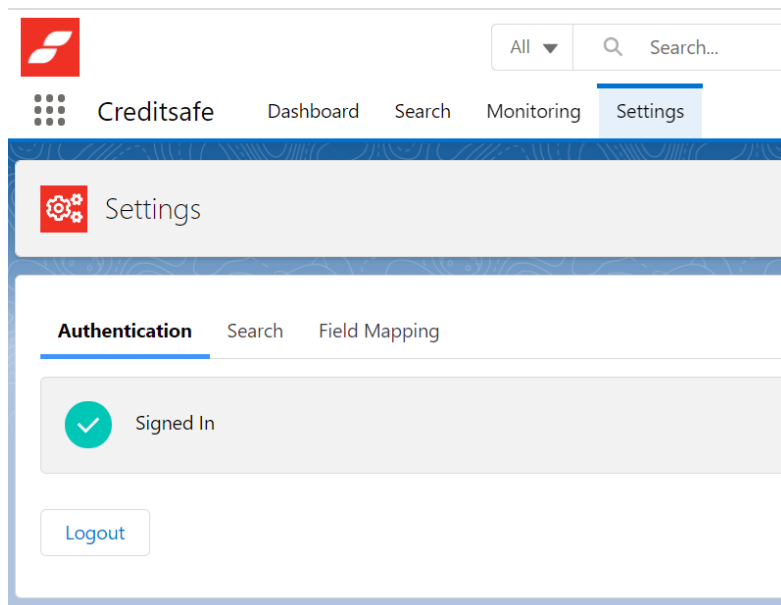
You will start by going into Settings, and here you will be presented with the Authentication Login Page. Click the “Sign in with Creditsafe” button and this will open a login page where you can connect to Creditsafe. In here, you should enter your Creditsafe Connect credentials, which you will have received via email.

IMPORTANT: You will only be prompted to login once.

Authentication



Once logged in, you will see the Authentication display a check to confirm you are Signed In.



The following Service Lines are required to maximise the the app: Data Cleaning, Monitoring and Search & Report.

Search

The search tab allows you to set default values for whenever you want to conduct a Search. You can still manually change to another Country when using the search function.

- **Default Country** – Pre-defines the default Search Country
- **Search Method** – Pre-defines the default Search Method using one of the following: Name, Registration Number, Safe Number or VAT Number.
- **Default Ltd option value** – Pre-defines your search with a Limited or Non Limited Company.
- **Default Active option value** – Pre-defines whether you search for an Active or Non-Active company.

The screenshot shows the 'Settings' page in the Creditsafe application, specifically the 'Search' tab. The page has a navigation bar with 'Creditsafe', 'Dashboard', 'Search', 'Monitoring', and 'Settings'. Below the navigation bar, there are tabs for 'Authentication', 'Search', and 'Field Mapping'. The 'Search' tab is active. The form contains the following fields:

- Default Country:** A text input field.
- Default Search Method:** A dropdown menu with 'Name' selected.
- Default Ltd option value:** A dropdown menu with 'Select an Option' selected.
- Default Active option value:** A dropdown menu with 'Select an Option' selected.

Buttons for 'Cancel', 'Save', and a refresh icon are located at the top right of the form area.

Once you have set your default values, please define object fields for the Salesforce Accounts or Leads to use when pre-populating criteria for manual matching from the Creditsafe data: Name, Address Line 1, Street, City, Country, Postcode, Phone Number, Registration Number, VAT Number.

The screenshot shows the 'Search Field Mappings' page in the Creditsafe application. The page has a navigation bar with 'Creditsafe', 'Dashboard', 'Search', 'Monitoring', and 'Settings'. Below the navigation bar, there are tabs for 'Account' and 'Lead'. The 'Account' tab is active. The page displays a table for mapping Creditsafe fields to Account fields.

Creditsafe Fields	Account Fields
Name	Account Name
Address Line 1	Billing Street
Street	Billing Street
City	Billing City
Country	Billing Country
Postcode	Billing Zip/Postal Code
Phone Number	Account Phone
Registration Number	None

Field Mapping

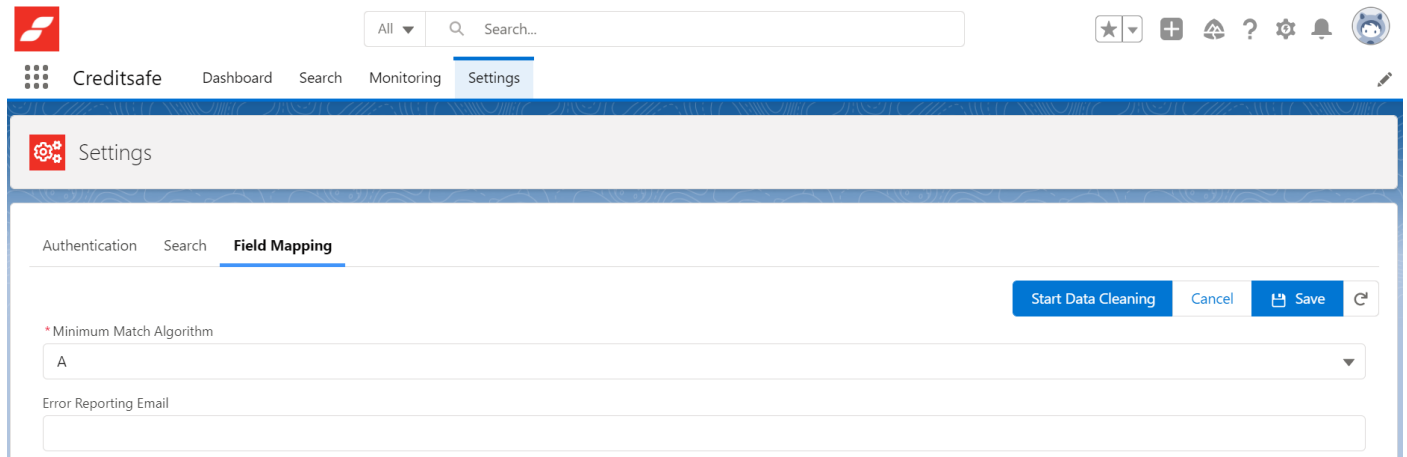
These settings are used for the Data Cleaning function. It allows you to define what data you want to match and what fields are enriched with the new data.

Minimum Match Algorithm

This is for the minimum match level required to define and store matches against a Salesforce Account. Users can select the match algorithm tolerance they want: A-E banding. "A" represents the highest certainty of match, and "E" the lowest certainty of match.

Error Reporting Email

In this field you should enter an email address where you can receive error reporting notifications from any of the matching processes that are executed.



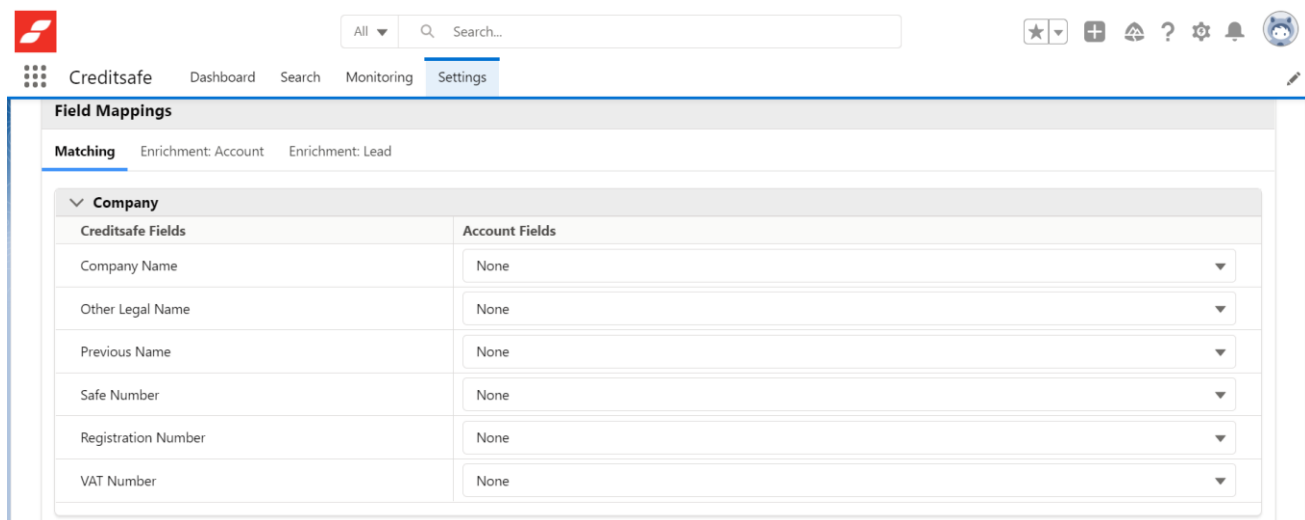
The screenshot shows the Creditsafe Settings page. The top navigation bar includes the Creditsafe logo, a search bar, and tabs for Dashboard, Search, Monitoring, and Settings. The Settings page has a sub-tab for Field Mapping. The main content area shows the 'Minimum Match Algorithm' dropdown menu set to 'A' and an empty 'Error Reporting Email' text field. Action buttons for 'Start Data Cleaning', 'Cancel', and 'Save' are visible.

Matching

This section is used to map your Salesforce fields to the values that Creditsafe require to match your records to the Creditsafe database. The data fields and data quality in this file will determine the effectiveness of your match.

E.g. Company Name can be mapped to the Account Name on the Account Object.

Please note: In order for the automated data cleaning to work, your country field will need to be populated prior to the matching process. This enables the matching algorithm to look for the company in its associated country and not worldwide.



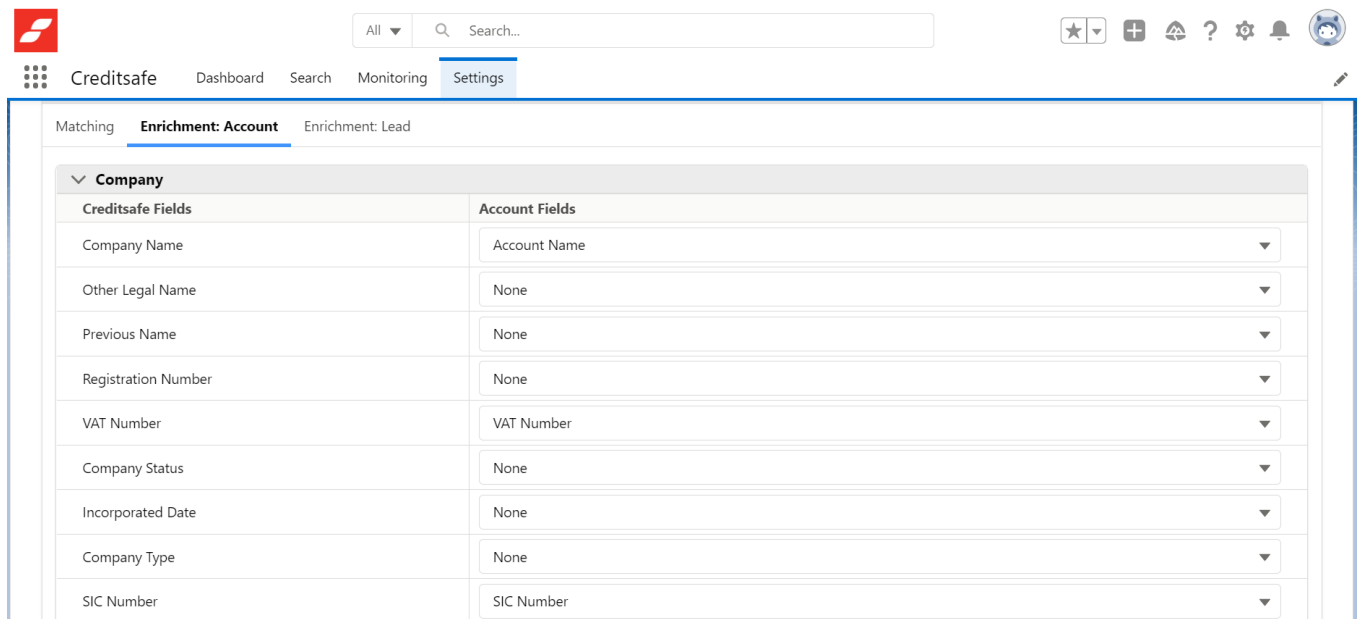
The screenshot shows the Creditsafe Field Mappings page. The top navigation bar is the same as in the previous screenshot. The main content area is titled 'Field Mappings' and has tabs for 'Matching', 'Enrichment: Account', and 'Enrichment: Lead'. The 'Matching' tab is active, showing a table with 'Creditsafe Fields' and 'Account Fields' columns. The 'Company' section is expanded, showing the following mappings:

Creditsafe Fields	Account Fields
Company Name	None
Other Legal Name	None
Previous Name	None
Safe Number	None
Registration Number	None
VAT Number	None

Enrichment

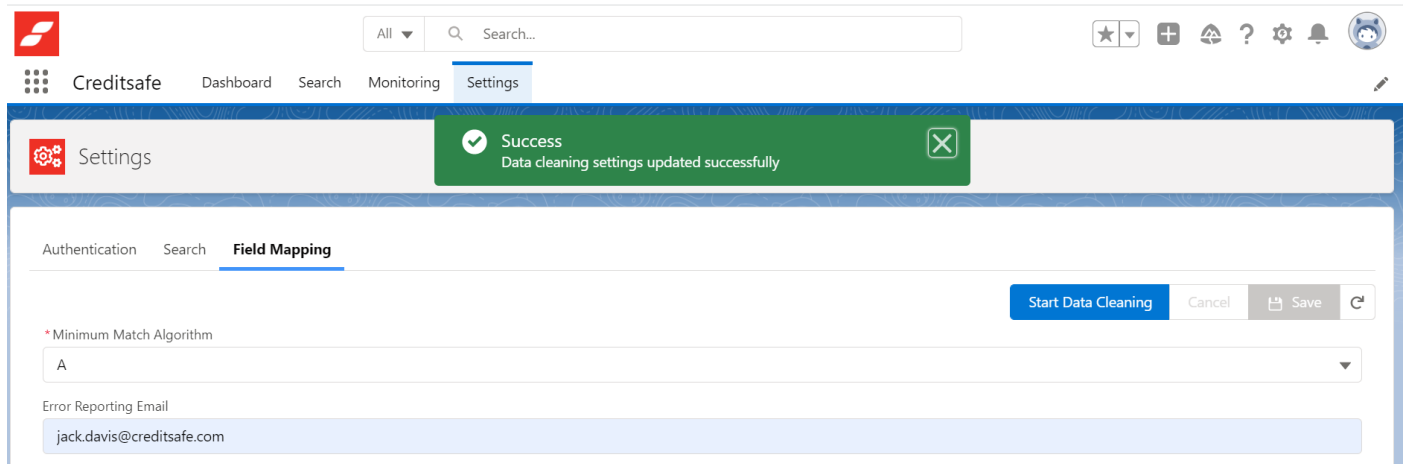
Once Creditsafe has a match, you will need to select/map, which fields you want to be automatically enriched and updated on the Account/Lead object record in Salesforce. There are three categories of data which you can complete to ensure the enrichment - Company, Contact and Financial. These sections determine where manually enriched data is saved when you refresh a report.

IMPORTANT: We do not auto match or enrich Lead data.



Creditsafe Fields	Account Fields
Company Name	Account Name
Other Legal Name	None
Previous Name	None
Registration Number	None
VAT Number	VAT Number
Company Status	None
Incorporated Date	None
Company Type	None
SIC Number	SIC Number

Once you have completed all the mappings, scroll to the top of the page and press the save icon on the top right of the page. A green toast message will appear informing you that the changes have been saved successfully.



Success
Data cleaning settings updated successfully

Start Data Cleaning Cancel Save

*Minimum Match Algorithm
A

Error Reporting Email
jack.davis@creditsafe.com

Once your mappings are complete, you will need to select the "Start Data Cleaning" button on the top right hand side of the page.

The screenshot shows the Creditsafe Settings page with the 'Field Mapping' tab selected. A red box highlights the 'Start Data Cleaning' button. Below the button, there is a dropdown menu for '*Minimum Match Algorithm' set to 'A' and an 'Error Reporting Email' field containing 'jack.davis@creditsafe.com'. Other buttons like 'Cancel', 'Save', and a refresh icon are also visible.

You will be able to verify that Data Cleaning is running by a change in the button, which will now display “Stop Data Cleaning”, and you will see a Data Cleaning Active checkbox.

This screenshot shows the same Creditsafe Settings page after data cleaning has started. A green checkmark icon is next to the text 'Data Cleaning Active'. The button that was previously 'Start Data Cleaning' is now 'Stop Data Cleaning'. The other settings, such as the '*Minimum Match Algorithm' set to 'A' and the 'Error Reporting Email' 'jack.davis@creditsafe.com', remain the same.

Dashboard (Data Cleaning)

The data cleaning dashboard provides an overview of your Salesforce database and tells you how many records you have been able to match to Creditsafe and how many remain unmatched. There is also a doughnut chart, which is a visual representation of matched/unmatched accounts.

The dashboard displays two summary cards on the left: 'Matched Accounts' with a value of 33 and 'Unmatched Accounts' with a value of 472. On the right, a donut chart titled 'Matched/Unmatched Accounts' shows a small green slice for 'Matched Accounts' and a large red slice for 'Unmatched Accounts'. A legend to the right of the chart identifies the colors: green for Matched Accounts and red for Unmatched Accounts.

Unmatched Accounts

This table of Accounts will list any Accounts in the database not yet matched and enriched with Creditsafe data. You are able to manually match Accounts by clicking the Match button on the right hand side. This will allow you to perform a matching exercise on the selected Account.

Account Name	Billing Street	Billing City	Billing Country	Phone	Owner Alias	
AXA			FR		GJ	Match
Volvo			SE		GJ	Match
Walmart			US		GJ	Match
bosch group					GJ	Match
PADOVA ATTILA					GJ	Match
GOTJW					GJ	Match
RUILR					GJ	Match
ILERT					GJ	Match

Manually Matching Data - Company Search

Company Search will allow you to manually search the Creditsafe Global Database, powered by the Creditsafe Connect API. Using search parameters available from the Connect API, you will be able to search for a company report. You will only have access to countries defined within your Creditsafe Package. The company search will incorporate the search availability of the Connect API. Both global and country specific search methods will be available.

Select the Search tab and this will open the Country Selection. Choose the Country you wish to search the company from. Once you have chosen a Country, this will collapse the menu.

The screenshot shows the Creditsafe web application interface. At the top, there is a navigation bar with the Creditsafe logo, a search bar, and several utility icons. Below the navigation bar, the 'Search' tab is selected, and a 'Country Selection' menu is open. The menu lists several countries with their respective flags and a green dot indicating selection status: Belgium, Canada, Denmark, France, Germany, Ireland, and Italy. A 'Filter By Name...' search box is located at the top of the country list.

Choose which search parameters you will use. Not all search parameters are applicable to all countries. Common search parameters include:

- Name

- Registration Number
- Safe Number
- VAT Number (where applicable)

The screenshot shows the Creditsafe search interface. At the top, there is a navigation bar with the Creditsafe logo, a search bar containing 'All' and 'Search...', and several utility icons. Below the navigation bar, the main content area is titled 'Search' and features a dropdown menu for 'United Kingdom'. Underneath, there is a 'Search Criteria' section with a 'Search By' dropdown menu set to 'Name'. This dropdown menu is open, showing options: 'Name' (selected), 'Registration Number', 'Safe Number', and 'VAT Number'. Below the dropdown, there are input fields for 'Name', 'Type', 'Status', 'Simple Value', 'Street', 'City', and 'Post Code'. The 'Type' and 'Status' fields are dropdown menus with 'Select an Option' as the current selection.

Once you have defined which search parameter you are going to use. Press the search button on the bottom right hand side.

A close-up of the search button, which is a blue rectangular button with the word "Search" written in white text.

Each company report returned in the search should include: Company Name, Company Number, Connect ID, Address and Status. Selecting the Company will open the Credit Report.

COMPANY NAME	COMPANY NO.	CONNECT ID	ADDRESS	STATUS
TESCO PLC	00445790	GB-0-0044...	TESCO HOUSE SHIRE PARK, KESTREL WAY, WELWYN GARDEN CITY, AL7 1GA	Active
TESCO PERSONAL FINANCE PLC	SC173199	GB-0-SC1...	2 SOUTH GYLE CRESCENT, EDINBURGH, City of Edinburgh, EH129FQ	Active
TESCO PROPERTY FINANCE 1 PLC	05888925	GB-0-0588...	TESCO HOUSE SHIRE PARK, KESTREL WAY, WELWYN GARDEN CITY, AL7 1GA	Active
TESCO PROPERTY FINANCE 5 PLC	07848593	GB-0-0784...	1 BARTHOLOMEW LANE, LONDON, Greater London, EC2N2AX	Active
TESCO PROPERTY FINANCE 3 PLC	07251526	GB-0-0725...	1 BARTHOLOMEW LANE, LONDON, Greater London, EC2N2AX	Active
TESCO PERSONAL FINANCE GROUP PLC	SC173198	GB-0-SC1...	2 SOUTH GYLE CRESCENT, EDINBURGH, City of Edinburgh, EH129FQ	Active
TESCO PROPERTY FINANCE 6 PLC	08228386	GB-0-0822...	1 BARTHOLOMEW LANE, LONDON, Greater London, EC2N2AX	Active
TESCO CORPORATE TREASURY SERVICES PLC	08629715	GB-0-0862...	TESCO HOUSE SHIRE PARK, KESTREL WAY, WELWYN GARDEN CITY, AL7 1GA	Active
TESCO PROPERTY FINANCE 2 PLC	07004310	GB-0-0700...	1 BARTHOLOMEW LANE, LONDON, Greater London, EC2N2AX	Active
TESCO PROPERTY FINANCE 4 PLC	07455552	GB-0-0745...	1 BARTHOLOMEW LANE, LONDON, Greater London, EC2N2AX	Active
TESCO		GB-1-1776...	18 WARWICK WAY, LONDON, SW1V 1RX	Active
TESCO		GB-1-1777...	1 THE SQUARE, GREAT NOTLEY, BRAINTREE, ESSEX, CM77 7WW	Active
TESCO		GB-1-6632...	ST PETERS BRIDGE, BURTON-ON-TRENT, STAFFORDSHIRE, DE14 3RJ	Active

Company Report

The Company Report will contain all key metrics and data held on a company. Company reports are accessible by performing a company search and selecting the appropriate match. You will only have access to company reports for countries defined within your package.

The company report will contain a heading which will demonstrate key metrics. The information will then be split into subheading categories.

The Score/Limit section provides the user details of the following, Credit Score, International Score and Credit Limit.

← Back to Search Results

TESCO PLC GB-0-00445790 PDF Create

Credit Rating	International Score	Credit Limit
86	A	£100,000,000

You can easily create an Account or Lead by simply clicking the “Create” button. Provided you have setup the mapping correctly, the information will already be pre-populated. Click Save and this will save the record in your database.

The screenshot shows a 'New Account' form. The 'Account Information' section includes the following fields:

- Account Owner: Jack Davis
- Rating: --None--
- *Account Name: TESCO PLC (highlighted with a red box)
- Phone: [Empty]
- Fax: [Empty]
- Parent Account: Search Accounts... [Search icon]
- Account Number: [Empty]
- Website: [Empty]
- Account Site: [Empty]
- Ticker Symbol: [Empty]

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

Score & Limit

The Score/Limit section provides details on the following sections:

- Risk Score (Score, Score Description, Definition)
- Credit Limit (Credit Limit, Definition)
- International Score (International Score, Definition)
- Commentaries (Commentaries)

Director & Shareholders

The Director & Shareholders section provides the following information:

- Current Company Directors
- Current Company Secretaries
- Top Shareholders

Financials

The Financials tab in the Company Report provides key financial information to analyse the company's performance.

- Profit & Loss
- Balance Sheet
- Capital & Reserves
- Other Financial Information
- Ratios

Group Structure

Provides a fully comprehensive view of the associated companies.

Additional Information

Provides different information based on your region. For example in the UK, the following information is available:

- CCJ Summary
- CCJ Details
- Mortgage Summary

- Mortgage Details
- Land Registry

The screenshot shows the Creditsafe interface for a company profile. At the top, there is a navigation bar with the Creditsafe logo, a search bar, and several utility icons. Below the navigation bar, there are tabs for 'Summary', 'Score & Limit', 'Directors & Shareholders', 'Financials', 'Group Structure', and 'Additional Information'. The 'Summary' tab is active, displaying a 'Key Information' section with the following details:

Key Information	
Company Name TESCO PLC	Incorporated Date 27/11/1947
Registered Company Name TESCO PLC	Company Type Public limited with Share Capital
Previous Name TESCO STORES (HOLDINGS) PUBLIC LIMITED COMPANY	Status Active - Accounts Filed
Registration Number 00445790	Activity Code 47110

PDF Reports

Clicking “PDF” will enable you to generate a PDF of the Credit Report to download. Once the PDF is downloaded, you can attach it as a date/time snapshot to the Account in the notes and attachment section on the Account or on another object record.



TESCO PLC

00445790



Company Summary	
Business Name	TESCO PLC
Safenumber	UK00148845
Country	UNITED KINGDOM
Company Registration Number	00445790
Activity Code	47110
Activity Description	Retail sale in non-specialised stores with food, beverages or tobacco predominating
Company Status	Active Accounts Filed(Active)
Latest Turnover Figure	57,887,000,000 GBP
Latest Shareholder Equity Figure	12,343,000,000 GBP
Creditsafe International Score (A - E)	A
Creditsafe International Description	Very Low Risk

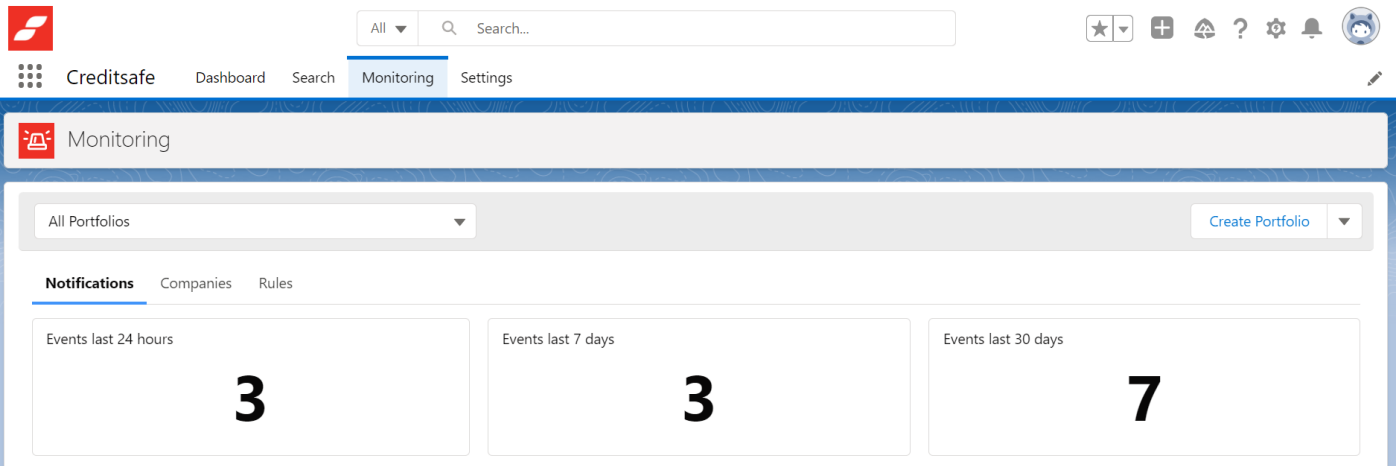
Monitoring

Monitoring is Creditsafe's company change monitoring service.

Monitoring allows you to build portfolios (lists of customers) that you would like to monitor changes on.

In this instance, rather than monitoring a company, we will be monitoring Accounts (in Salesforce). Each Account will need to have a Creditsafe ID associated before it can be added to Monitoring. To do this, you will need to successfully match an Account to Creditsafe.

Once a company is added to a portfolio, you can choose to be alerted on a number of different company events such as credit score changes, credit limit changes, company address changes etc.



This allows you to select an available Portfolio that you have associated to your Connect API Account. Selecting the drop down in the top left hand corner displays the Portfolio Name.

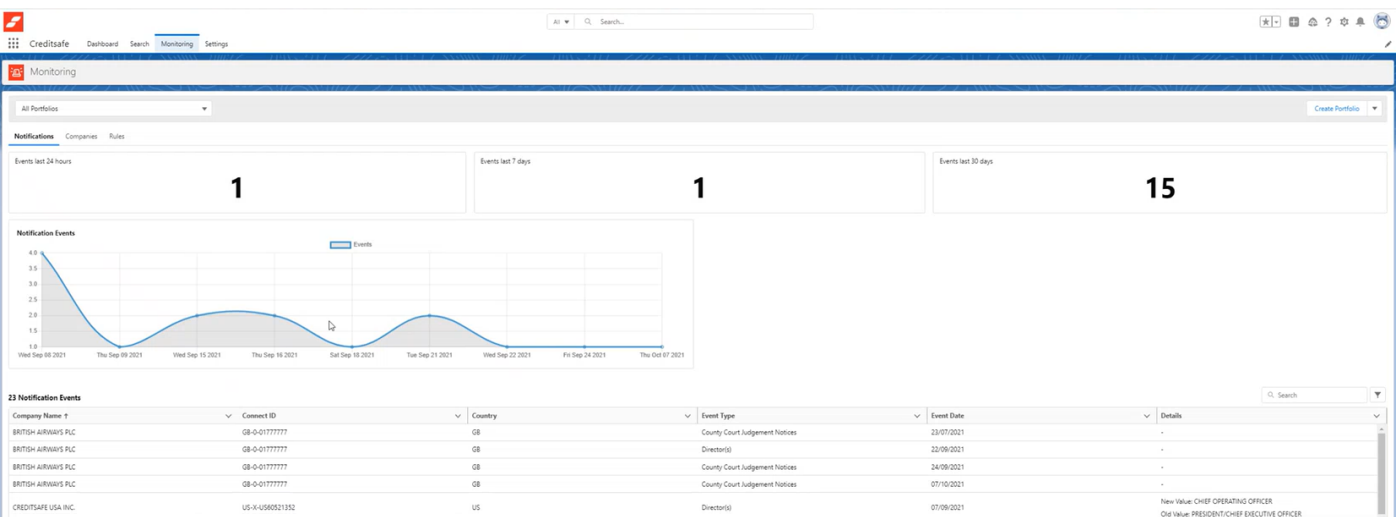
Notifications Tab

This tab will summarise the number of Events in the defined range.

- Events last 24 Hours
- Events last 7 days
- Events last 30 days

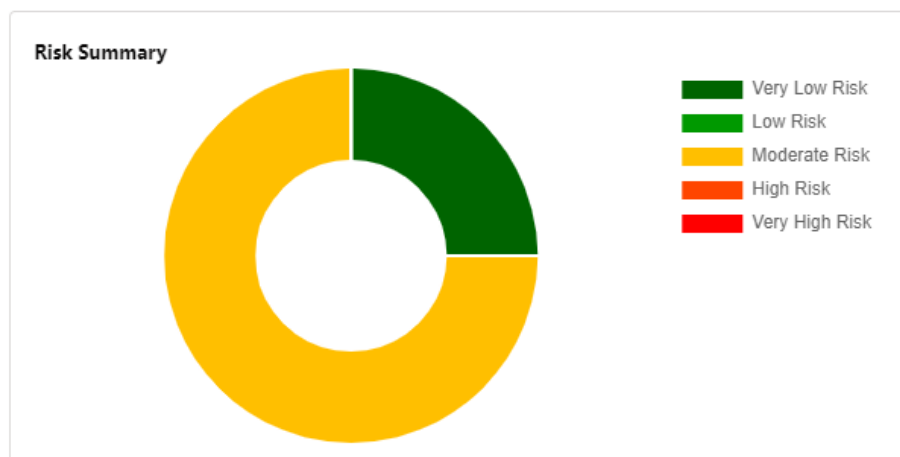
This number should correspond with All Portfolios or Selected Portfolio from the drop down available to your user account.

The Number of Events Graph will correspond to the data visible in the Events section, showing the number of events per day, or for the time period selected for All Portfolios, or the Selected Portfolio from the drop down.



Risk Summary

Here the Risk Summary is displayed for the selected Portfolio.



Notification Events

Notification Events will list the Monitoring Notification changes for all companies within the selected Portfolio.

The notification Events Table has a search for you to locate a specific Company Name from those displayed.

1 Notification Events

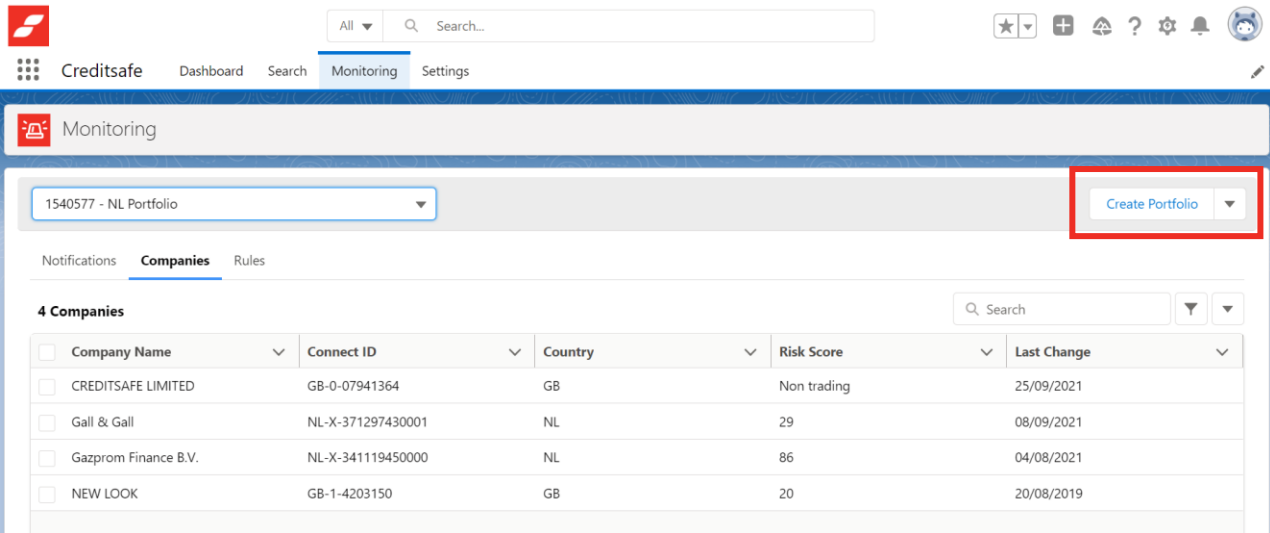
Company Name ↑	Connect ID	Country	Event Type	Event Date	Details
BRITISH AIRWAYS PLC	GB-0-01777777	GB	County Court Judgement Noti...	23/07/2021	New Value: undefined Old Value: undefined

Companies Tab

Within the “Companies” tab, the table lists all companies under the selected Portfolio. Information includes:

- Company Name
- Connect ID
- Country
- Risk Score (Credit Score)
- Last Change Date

You can also create a Portfolio by selecting the “Create Portfolio” in the top right hand corner.

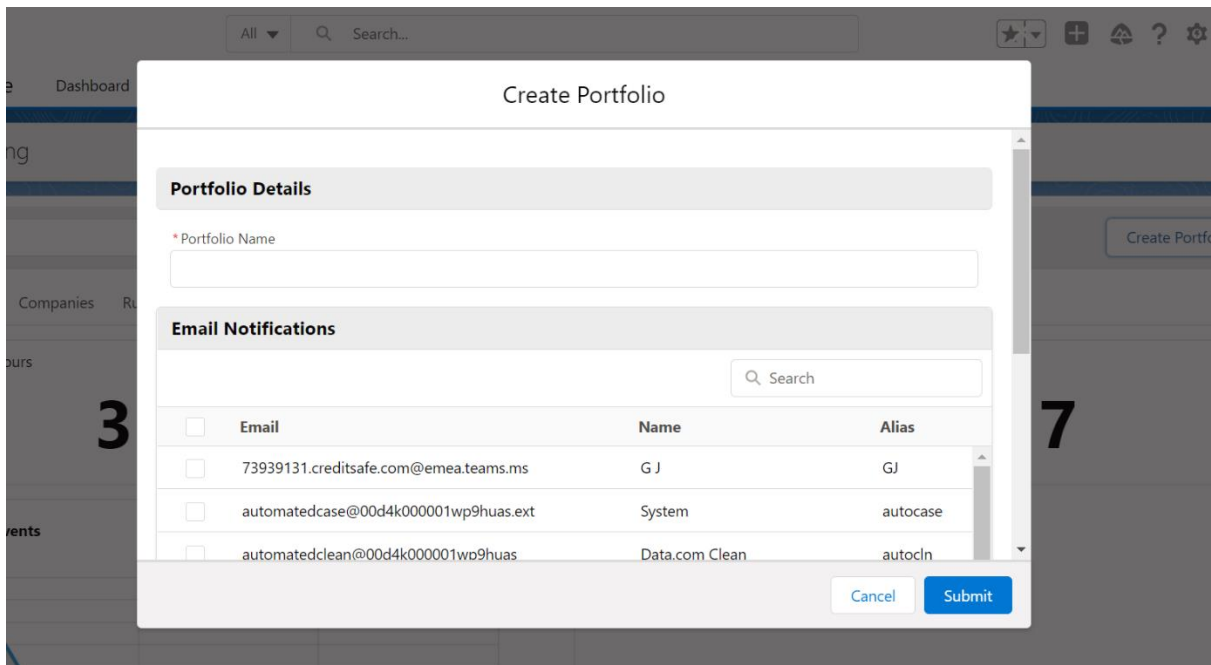


Create a Portfolio

This feature will allow the user to create a new Portfolio, you will need to configure the following settings:

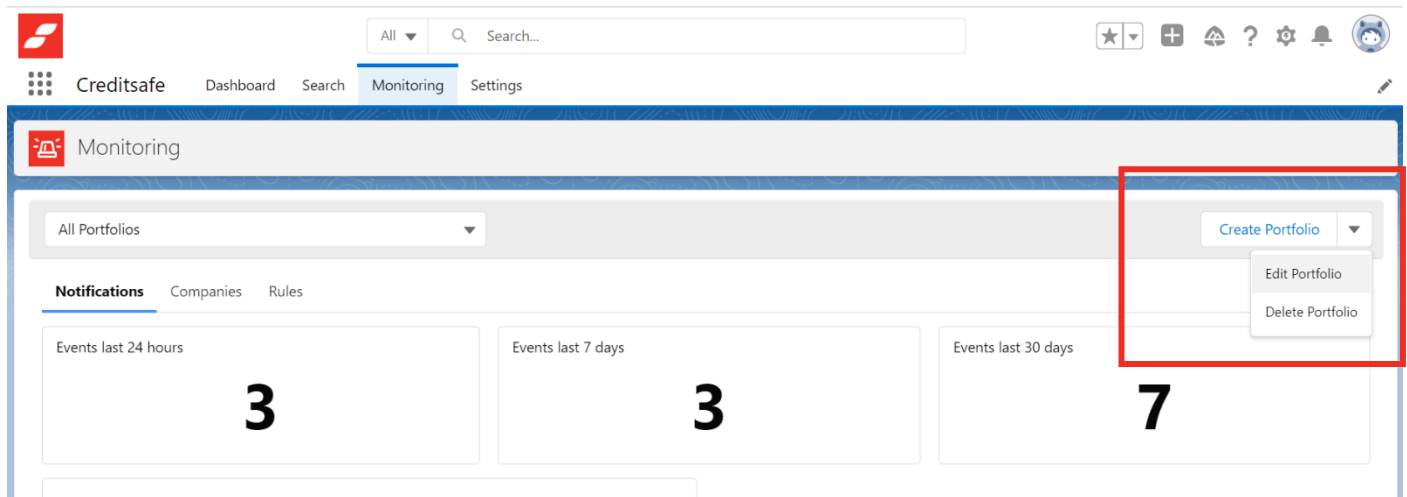
- Portfolio Name
- Default YES/NO
- Select recipients for e-mail Notifications

The Portfolio ID will return from Connect. The new portfolio will display in the Select Portfolio drop down menu.

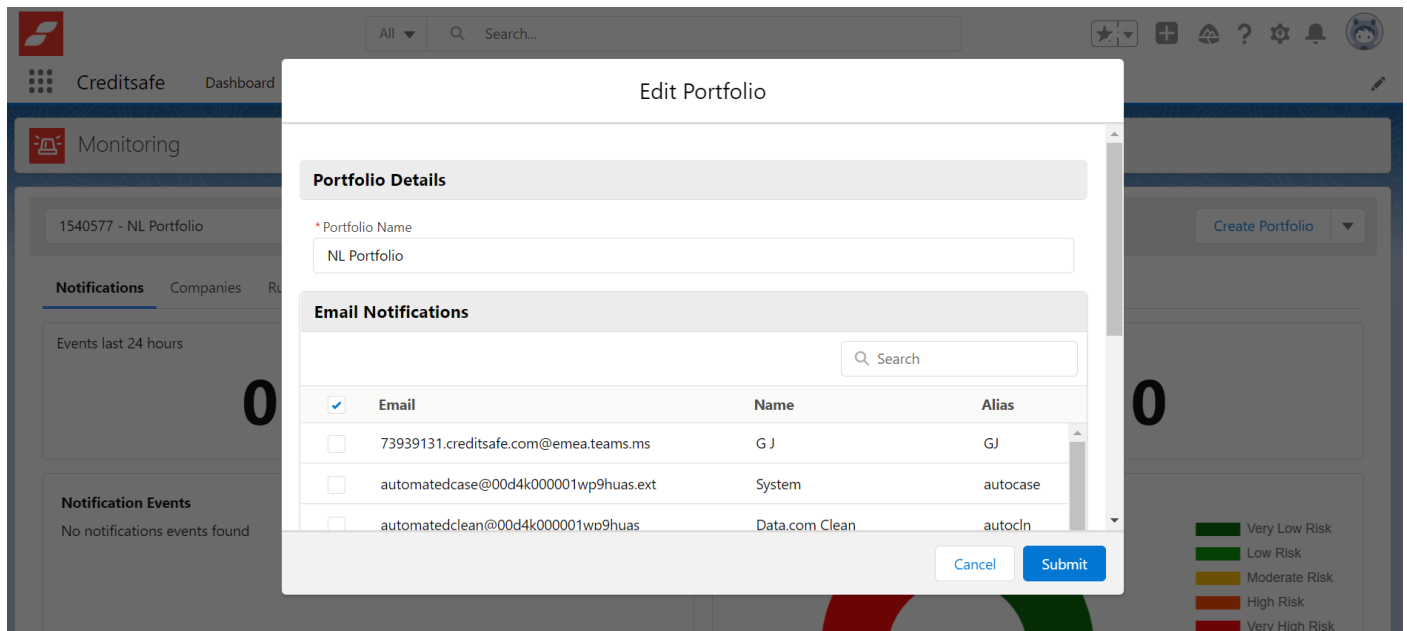


Editing a Portfolio

This will allow you to edit an existing Portfolio:

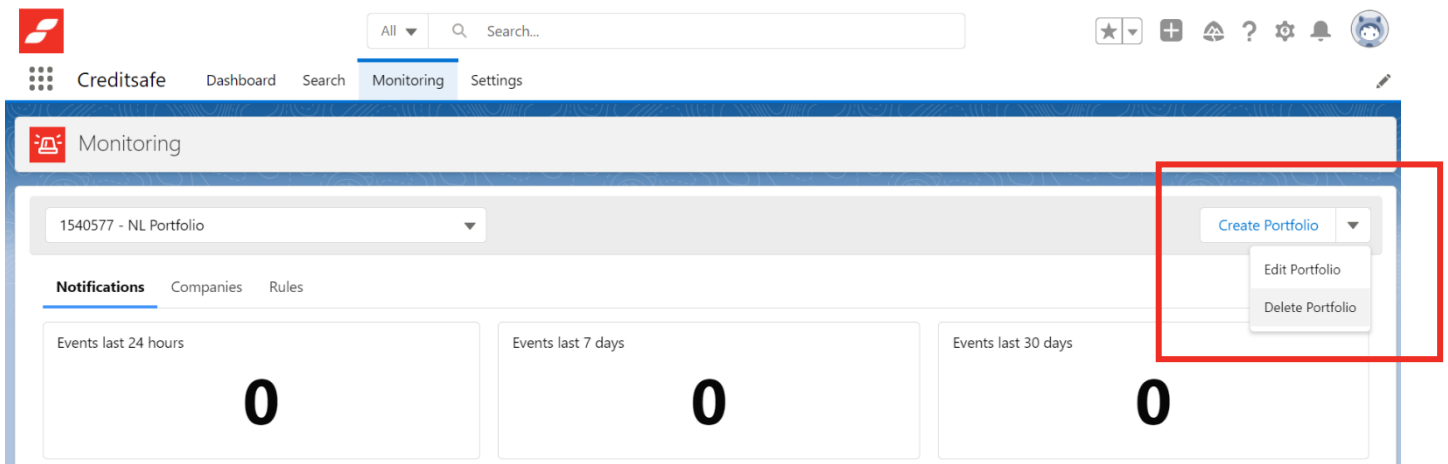


You can change the Portfolio Name, and also select recipients (from the list of users) for e-mail Notifications. Alternatively you can add the email, First and Last name of a recipient you would like to receive notifications.

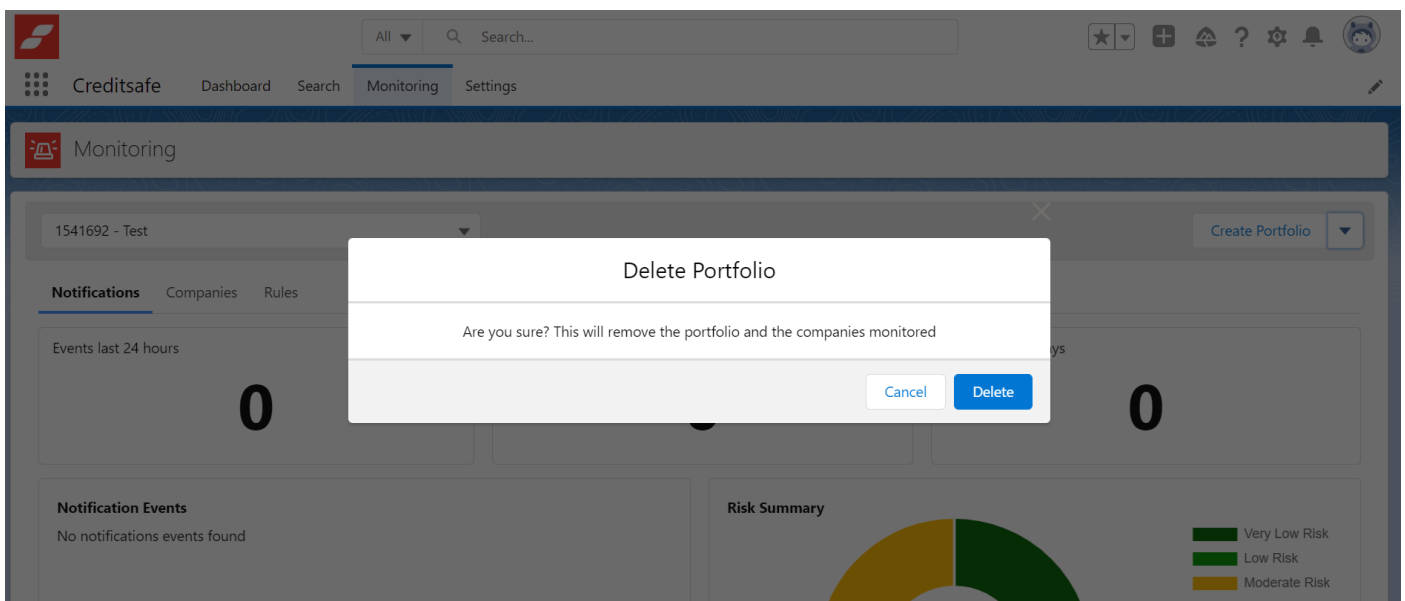


Delete a Portfolio

To delete a Portfolio, select the Portfolio you want to delete from the dropdown menu. Then select "Delete Portfolio" from the downward facing arrow.



Once you have selected “Delete”, you will get a pop up message to verify that you are sure you want to delete the selected Portfolio. From here you can Delete or Cancel.



Rules Tab

Notification Rules allows you to define which events they want to monitor for the Companies added to a Portfolio.

Global Monitoring Events include:

- Credit Score
- Credit Limit (user define value range)
- Company Name
- Address Change
- Director(s)
- Telephone Number

Score and Limit Events can have associated ranges, allowing you to input a reduce/increase by range. In this tab, you are able to easily set Notification Rules per Portfolio by selecting/de-selecting applicable Events.

IMPORTANT: Country Specific Events are applicable per Country.

The screenshot shows the 'Monitoring' section of the Creditsafe interface. At the top, there is a search bar and navigation tabs for 'Dashboard', 'Search', 'Monitoring', and 'Settings'. Below this, a dropdown menu shows '1541692 - Test' and a 'Create Portfolio' button. The main content area is titled 'Rules' and contains a section for 'Global Notification Alerts'. This section includes two rules, each with a table of parameters and a description.

Enabled	Rule & Parameters	Description
<input checked="" type="checkbox"/>	<p>International Score [(2) Return Band(A-E) Reduce by (0) Band(s) OR Less than Band (1)</p> <p>Param 2: Return Band: --Please select-- Param 0: Credit Score: 2 Param 1: Credit Rating: C</p>	Enable this rule and set the parameters to get notified when there is a negative International Rating band(A to E) change.
<input checked="" type="checkbox"/>	<p>Limit [(0) Any Reduce by (1)% OR Less than (2)</p> <p>Param 0: Any Change: True Param 1: Reduction (%): 1 - 99 Param 2: Decrease (%): 1 - 99</p>	Enable this rule and set the parameters to get notified when there are changes to the Credit Limit values

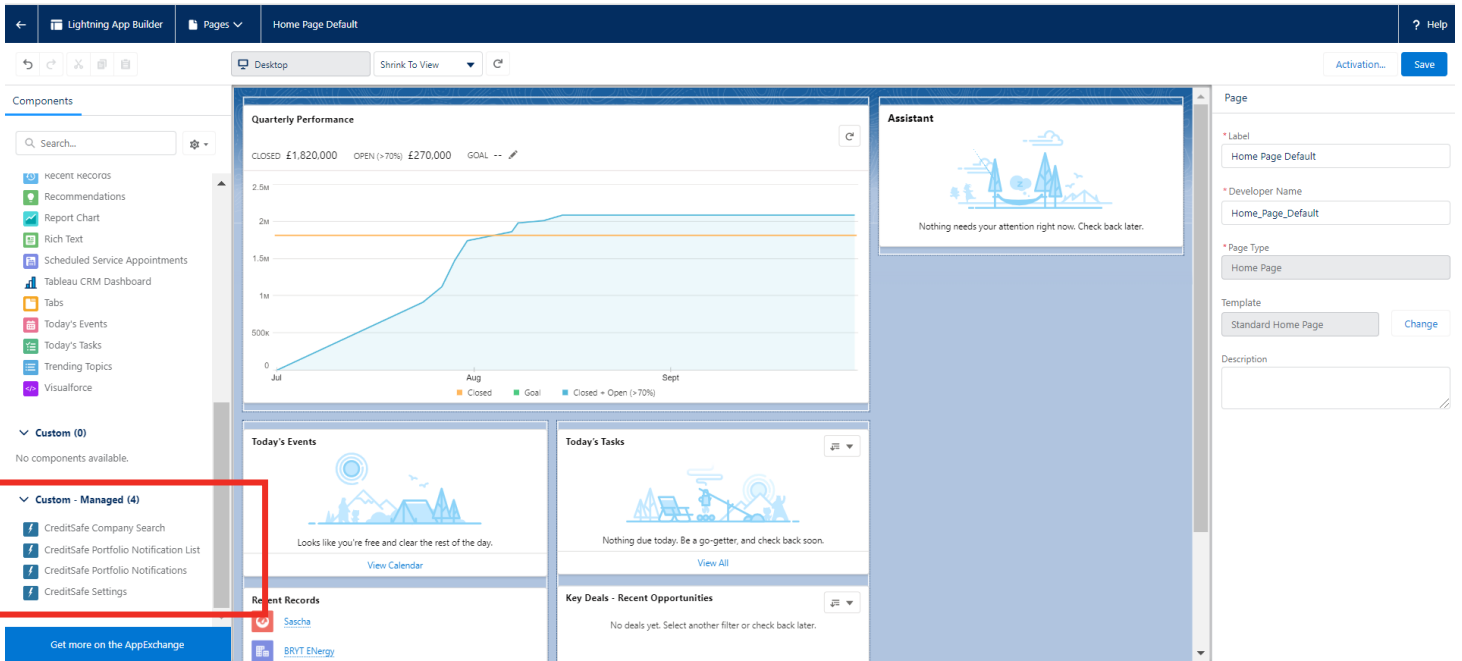
Components

Within the package, there are several custom components that can be added to a page layout to allow you to search and view reports, create Accounts and view monitoring events.

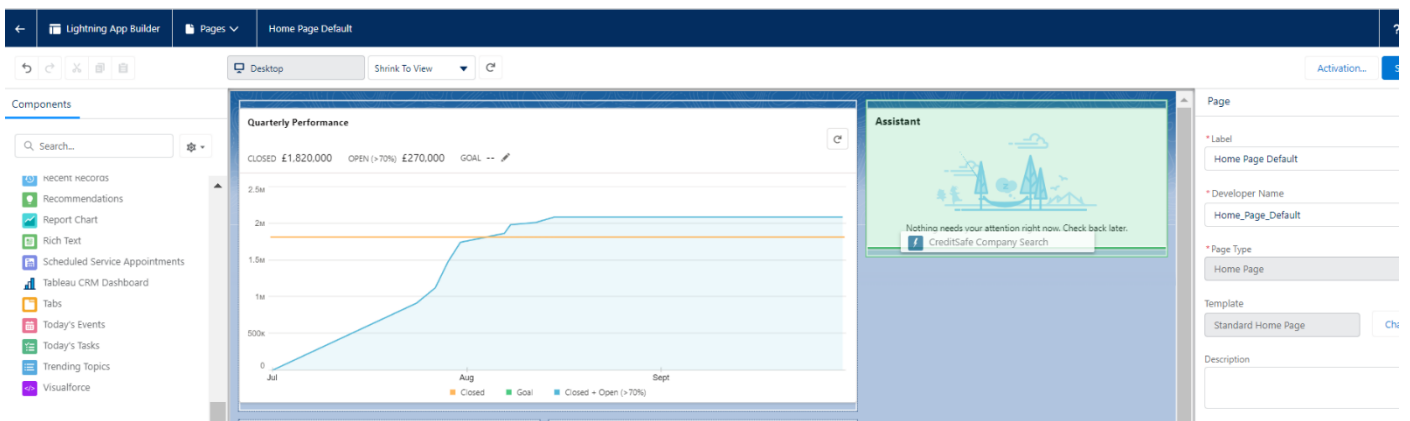
To edit an existing page, you can click the setup cog icon from the Home page, and then select "Edit Page" to create a copy of the current page to edit.

The screenshot shows the 'Home' page of the Creditsafe interface. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', and 'Dashboards'. A 'Quarterly Performance' chart is visible on the left. On the right, an 'Assistant' panel is open, and a 'Setup' menu is displayed. The 'Edit Page' option in the menu is highlighted with a red box.

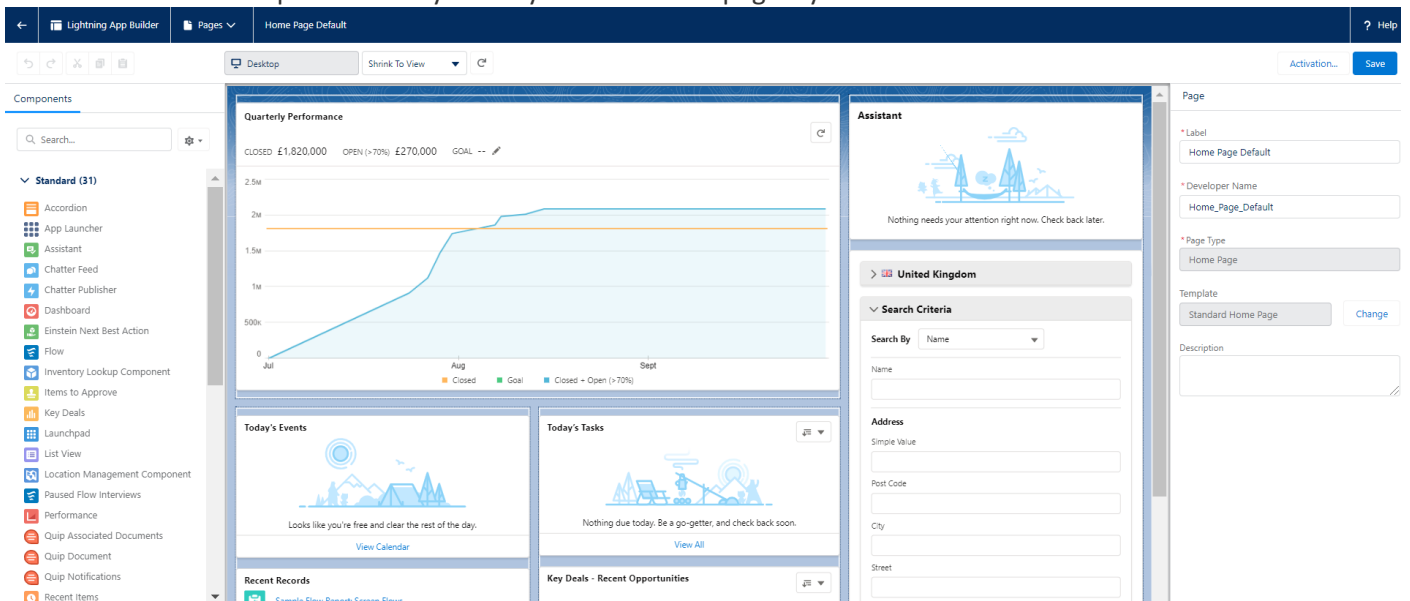
The left-side pane will display Lightning components that you can use, including both Standard and Custom Lightning components. The Creditsafe components are located under the Custom components.



To add any of the components to the page, drag the chosen component onto the page layout to any green highlighted area. This can be added to any Salesforce page.



You can move the component to anywhere you wish on the page layout.



Click save and Activate the new page.

Once you have saved the page, you can use the Company Search feature directly from the page you are on.

The screenshot shows a CRM dashboard with a navigation menu at the top including Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, and More. A search bar is located at the top right. The main content area is divided into several sections:

- Line Chart:** A line chart showing data from July to September. The y-axis ranges from 0 to 1M. The legend indicates 'Closed' (orange), 'Goal' (green), and 'Closed + Open (>70%)' (blue).
- Today's Events:** A section with a sun icon and the text "Looks like you're free and clear the rest of the day." with a "View Calendar" link.
- Today's Tasks:** A section with a task icon and the text "Nothing due today. Be a go-getter, and check back soon." with a "View All" link.
- Recent Records:** A list of recent records including "CREDITSAFE LIMITED", "Sample Flow Report: Screen Flows", and "Sascha".
- Key Deals - Recent Opportunities:** A section with the text "No deals yet. Select another filter or check back later." and a "View All" link.
- Search Results:** A panel for "United Kingdom" showing search criteria and results for three companies: CREDITSAFE LIMITED, CREDITSAFE BUSINESS SOLUTIONS LIMITED, and CREDITSAFE INFORMATION SERVICES LIMITED. Each result includes company name, company number, reason code, and status (Active).

You can also add Components to custom tabs where you can view Credit Reports and Events

The screenshot shows a CRM account page for "TESCO PLC". The navigation menu is similar to the dashboard. The account page includes the following sections:

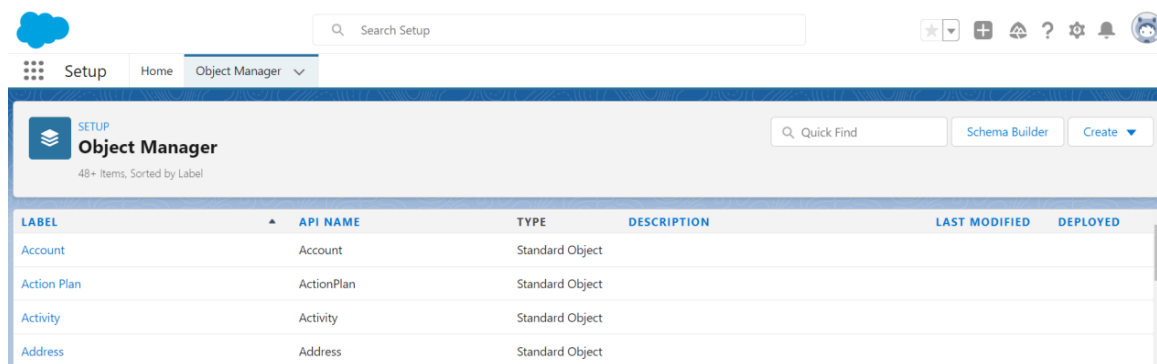
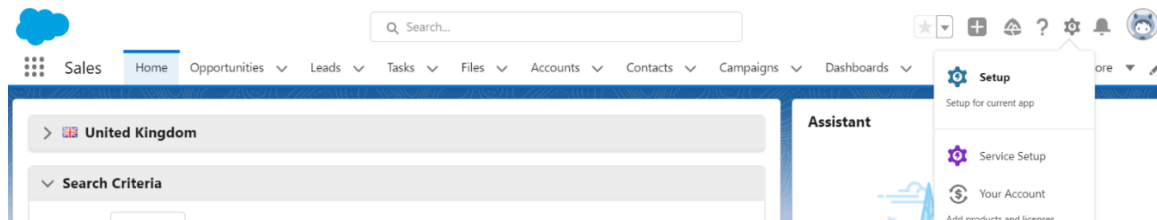
- Account Information:** Type, Phone (01992632222), Website (www.tescopl.com), Account Owner (G J), Account Site, and Industry.
- Related:** A section for "Creditsafe" with a "Match" and "Refresh" button.
- Credit Ratings:** Three boxes showing "Credit Rating: 86", "International Score: A", and "Credit Limit: £100,000,000". A note indicates "Last Updated: 3 days ago" with a "View" link.
- Activity:** A section with "Activity" and "Chatter" tabs. It includes a "New Task" button, a "Log a Call" button, a "New Event" button, and an "Email" button. There is a "Create a task..." input field with an "Add" button. Filters are set to "All time • All activities • All types".
- Upcoming & Overdue:** A section with the text "No next steps. To get things moving, add a task or set up a meeting." and "No past activity. Past meetings and tasks marked as done show up here."
- Table:** A table with columns "Event Date", "Rule", "Original Value", and "New Value". The table is empty with the text "No recent company events found".

Add Accounts to Portfolios

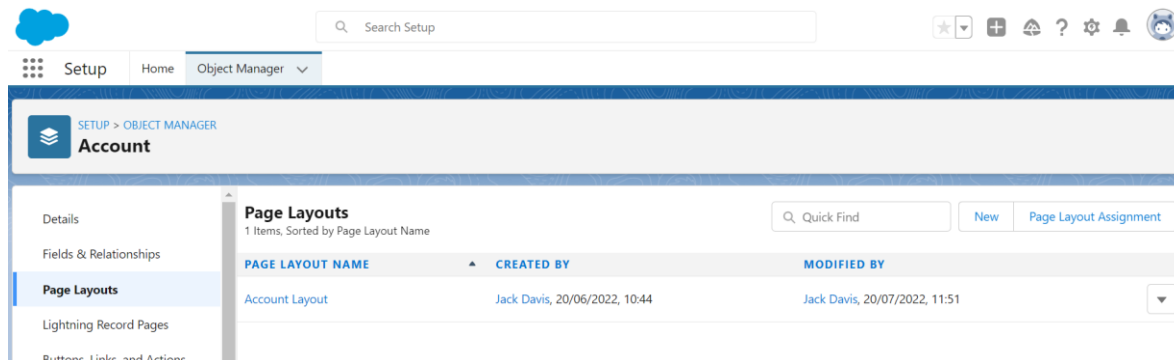
To add an Account to a portfolio, you can do this from the Account Record page or from the Account List view. This enables you to monitor those companies within a specified portfolio.

To add the Add to Portfolio Buttons your Account Record page, click Setup and then select Object Manager and choose Account.

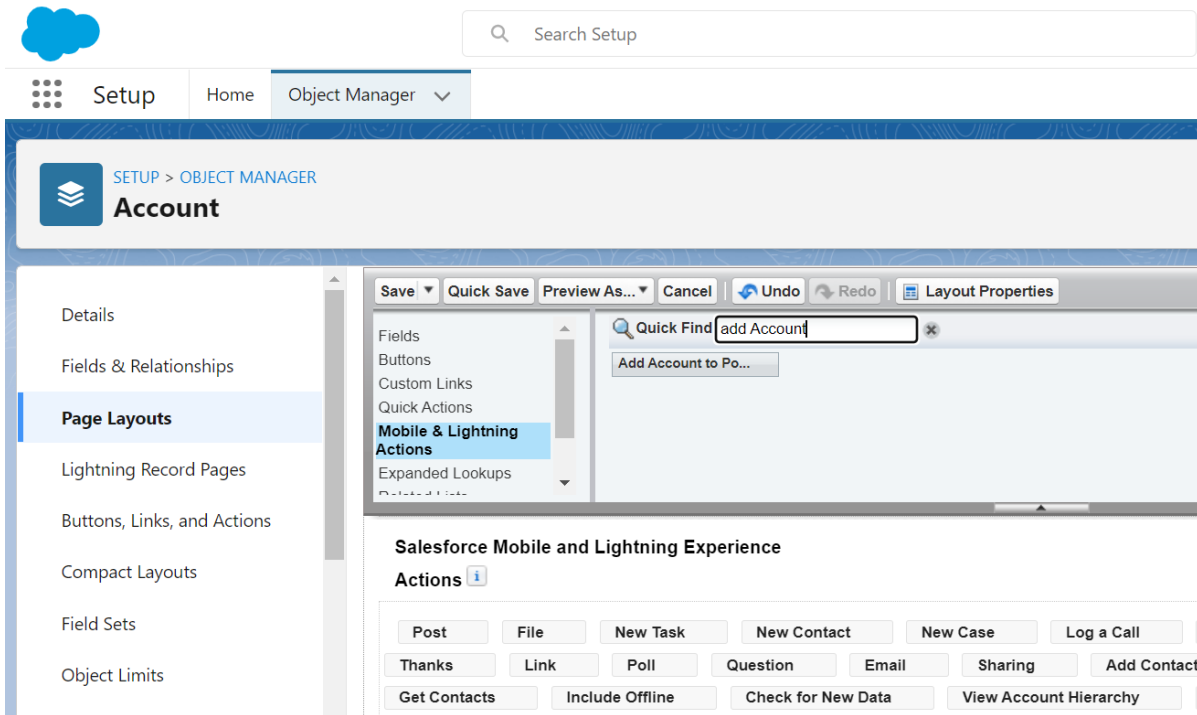
Add Account to Portfolio Button onto an Account Record



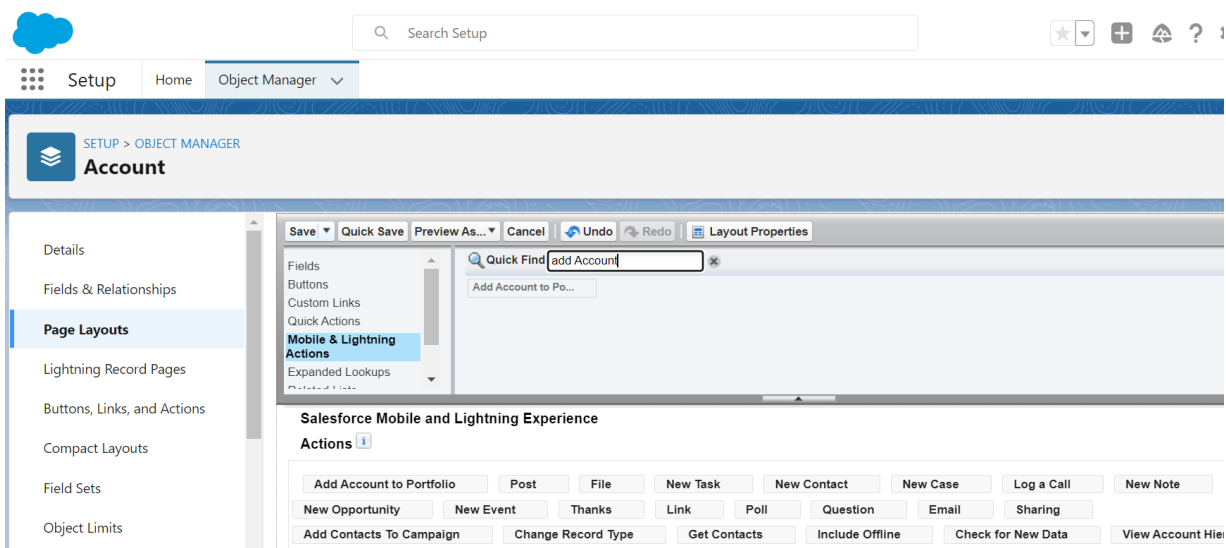
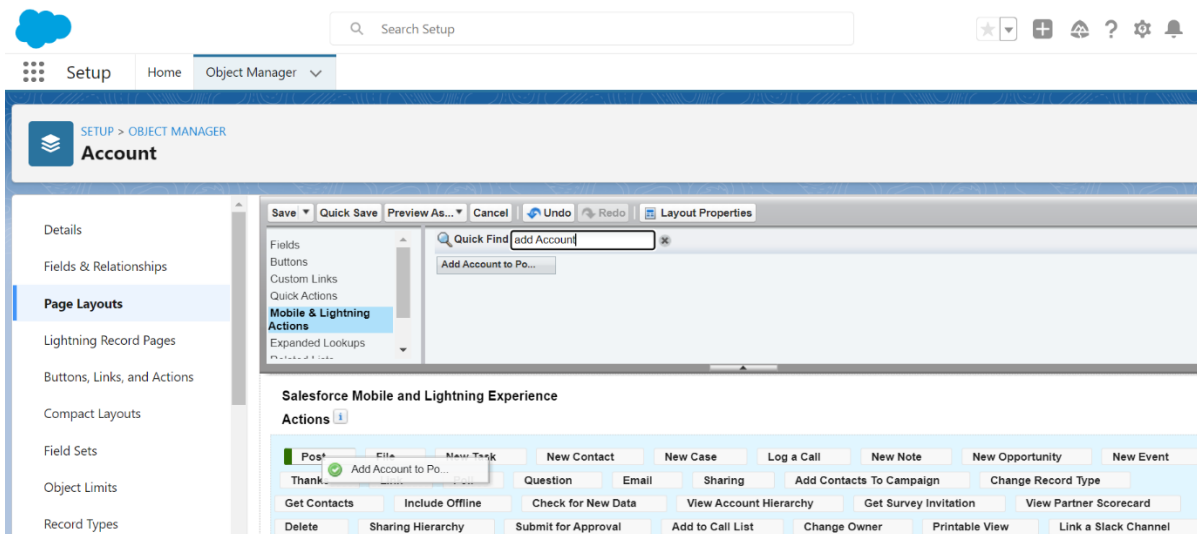
Once you're on the Account Object, select Page Layouts and edit the Page Layout where you want to add the Add Account to Portfolio button and click Edit.



Scroll down to the Mobile & Lightning Actions and in the Quick Find box, type 'Add Account to Portfolio'. This will display the relevant button.

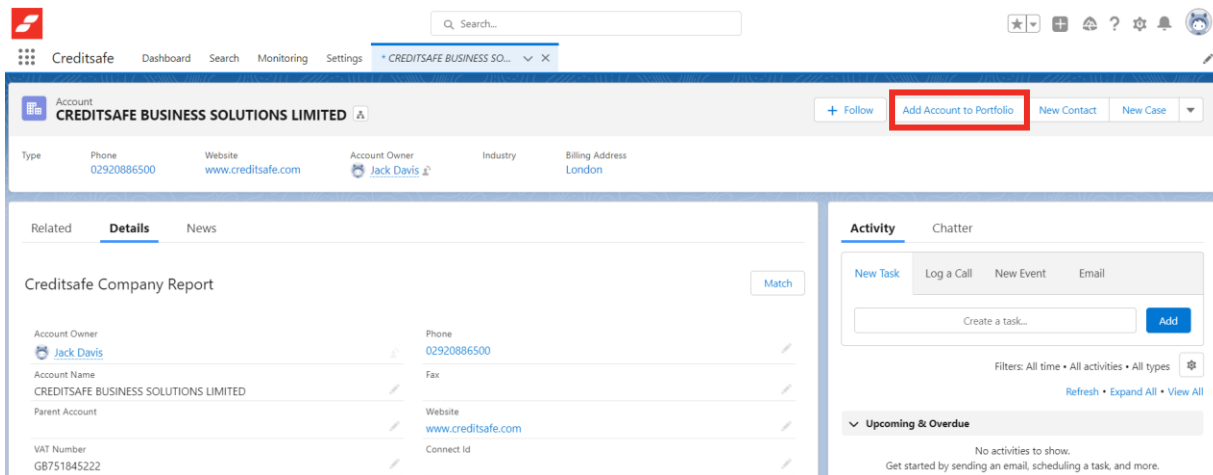


On the page, scroll down to the Salesforce Mobile and Lightning Experience Actions sections. You will need to drag the Add Account to Portfolio button into that section. A green checkmark will highlight where the button can be added. You can drag to re-order the button.



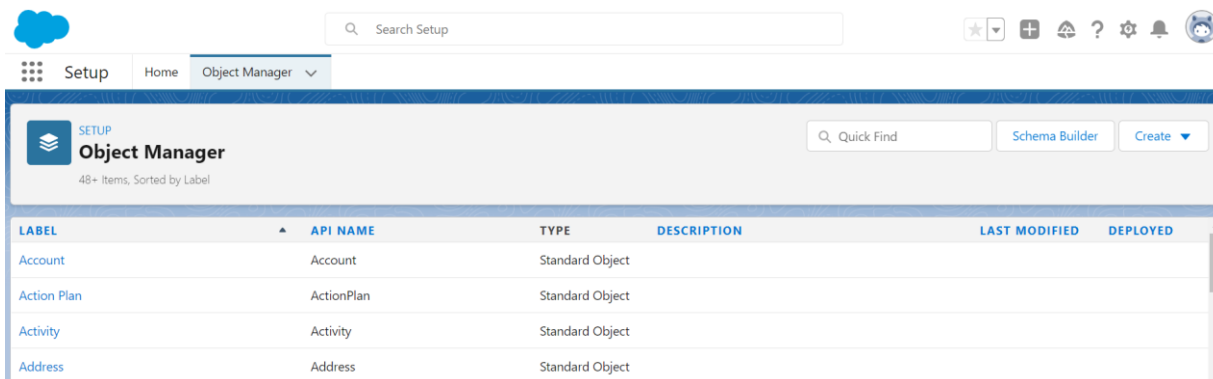
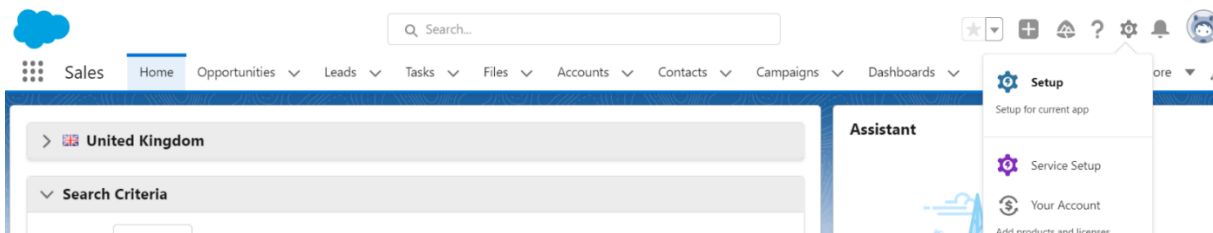
Once the button has been added. Click Save.

Navigate to an Account record, with the relevant page layout assignment. You will now see the button 'Add Account to Portfolio' displayed.



Add Account to Portfolio Button to List Views

To add the Add to Portfolio Buttons your List Views page, click Setup and then select Object Manager and choose Account.



Once you're on the Account Object, select Search Layouts where you want to add the Add Account to Portfolio button and click Edit.

From Object Manager, you see two search layouts options:

- Search Layouts apply to Lightning Experience.
- List View Button Layout applies to Lightning Experience and Salesforce Classic

Search Layout

The screenshot shows the 'Account' setup page in Salesforce, specifically the 'Search Layouts' section. The left sidebar contains navigation options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts (highlighted), List View Button Layout, and Hierarchy Columns. The main content area is titled 'Search Layouts' and shows a table with 27 items, sorted by Profile. The table has two columns: 'PROFILE' and 'COLUMNS DISPLAYED'. The rows are as follows:

PROFILE	COLUMNS DISPLAYED
Default Layout	Account Name, Account Site, Phone, Account Owner Alias
Analytics Cloud Integration User	Default Layout
Analytics Cloud Security User	Default Layout
Chatter External User	Default Layout
Chatter Free User	Default Layout
Chatter Moderator User	Default Layout
Chatter Only User	Default Layout
Company Communities User	Default Layout

To edit the layout, from the drop-down menu across from layout Profile Name, select Edit. Scroll down to the custom button section within the Account Search Results.

The screenshot shows the 'Account' setup page in Salesforce, specifically the 'Search Layouts' section. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Search Layouts' and shows a table with 27 items, sorted by Profile. The table has two columns: 'PROFILE' and 'COLUMNS DISPLAYED'. The rows are as follows:

PROFILE	COLUMNS DISPLAYED
Default Layout	Account Name, Account Site, Phone, Account Owner Alias
Analytics Cloud Integration User	Default Layout
Analytics Cloud Security User	Default Layout
Chatter External User	Default Layout
Chatter Free User	Default Layout
Chatter Moderator User	Default Layout
Chatter Only User	Default Layout
Company Communities User	Default Layout

Below the table, there is a section for 'Standard Buttons' and 'Custom Buttons'. The 'Standard Buttons' section is empty. The 'Custom Buttons' section has two columns: 'Available Buttons' and 'Selected Buttons'. The 'Available Buttons' column contains 'Add Accounts To Portfolio'. The 'Selected Buttons' column contains '--None--'. There are 'Add' and 'Remove' buttons between the columns, and 'Up' and 'Down' buttons to the right of the 'Selected Buttons' column. At the bottom, there are 'Save' and 'Cancel' buttons.

To change what's visible on the page, move the Available Button 'Add Accounts to Portfolio' to the Selected Buttons using the Add or Remove controls. Click Save.

The screenshot shows the 'Account' setup page in Salesforce, specifically the 'Search Layouts' section. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Search Layouts' and shows a table with 27 items, sorted by Profile. The table has two columns: 'PROFILE' and 'COLUMNS DISPLAYED'. The rows are as follows:

PROFILE	COLUMNS DISPLAYED
Default Layout	Account Name, Account Site, Phone, Account Owner Alias
Analytics Cloud Integration User	Default Layout
Analytics Cloud Security User	Default Layout
Chatter External User	Default Layout
Chatter Free User	Default Layout
Chatter Moderator User	Default Layout
Chatter Only User	Default Layout
Company Communities User	Default Layout

Below the table, there is a section for 'Standard Buttons' and 'Custom Buttons'. The 'Standard Buttons' section is empty. The 'Custom Buttons' section has two columns: 'Available Buttons' and 'Selected Buttons'. The 'Available Buttons' column contains '--None--'. The 'Selected Buttons' column contains 'Add Accounts To Portfolio'. There are 'Add' and 'Remove' buttons between the columns, and 'Up' and 'Down' buttons to the right of the 'Selected Buttons' column. At the bottom, there are 'Save' and 'Cancel' buttons.

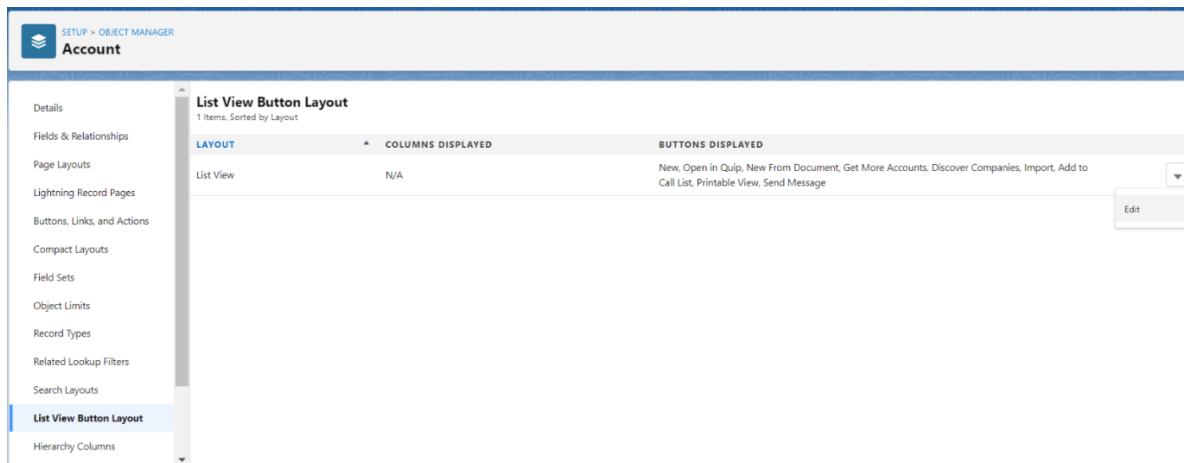
List View Button Layout

In Lightning Experience, you can select List View Button Layout. Use the List View Button Layout to add and remove the Add Account to Portfolio button that users see on all the list views for the Account object.

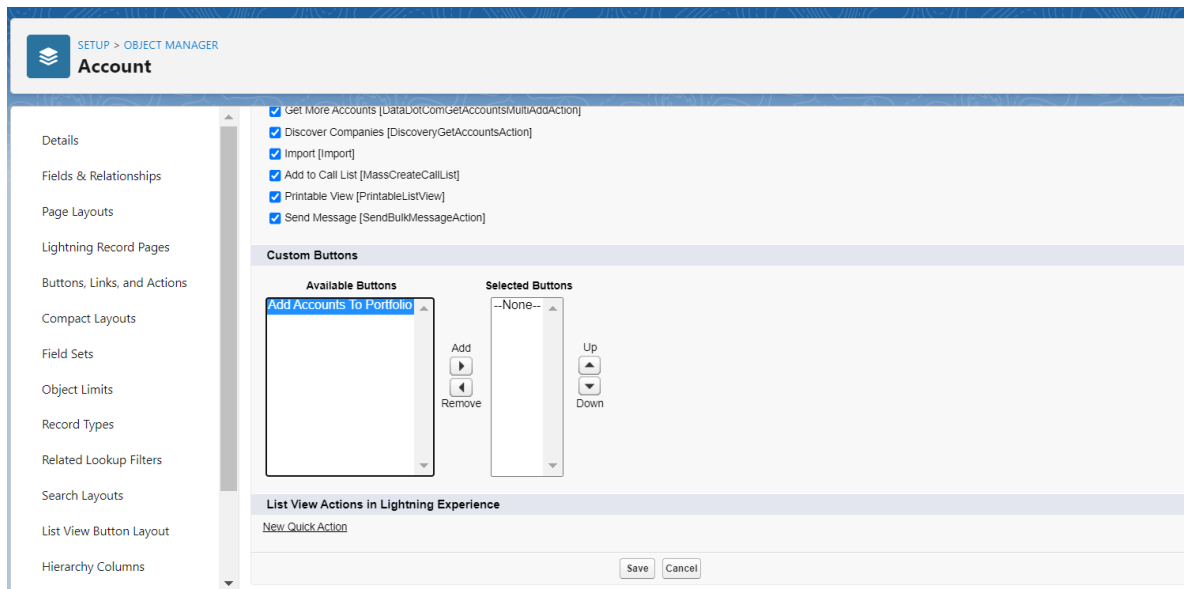
For example, if you remove the Add Account to Portfolio button from the account list view, that button is no longer shown on any account list view. The List View Button Layout applies to Lightning Experience and Salesforce Classic.

Navigate to Setup > Object Manager > Account > List View Button Layout

Click the drop-down arrow next to the “List View” layout and select the “Edit” value in the drop-down.



On the edit page for the List View Button layout, scroll down to the Custom Buttons section and select your new list view button.



Move the Available Button ‘Add Account to Portfolio’ to the Selected Button using the Add or Remove controls. Click Save. Return to the Account Object List view, you should be able to see your button on any list view.

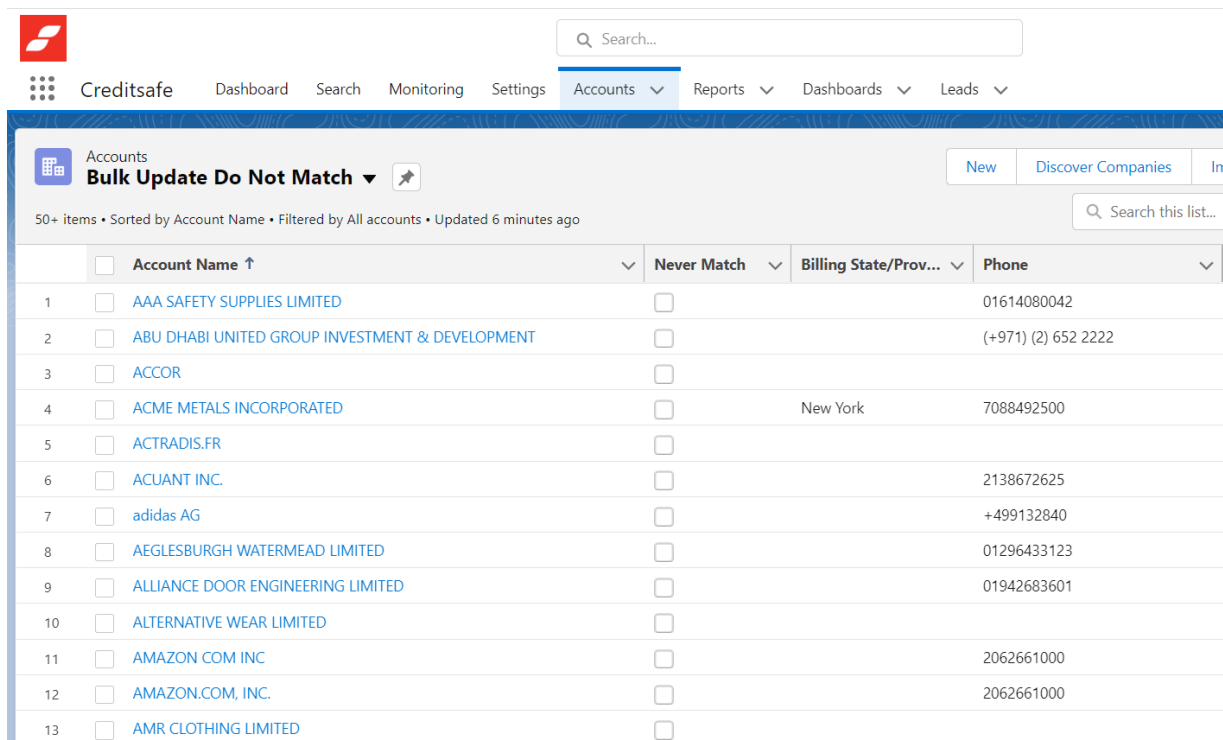
Bulk Never Match

To bulk update records you want to exclude from the automatic matching and enriching process, you will need to create a list view on the Account Object.

Create a List View

- From the App Launcher, find and select the Sales app and select the Accounts tab.
- From the List View Controls, select New.
Name the list - in the example, the list view has been named 'Bulk Update Do Not Match'.
- Select which users can see this list view.
- Click Save.

So far, the list view is showing us all the accounts.



The screenshot shows the Salesforce interface for the 'Accounts' list view. The list is titled 'Bulk Update Do Not Match' and contains 50+ items. The columns displayed are 'Account Name', 'Never Match', 'Billing State/Prov...', and 'Phone'. The 'Never Match' column contains checkboxes for each account, all of which are currently unchecked. The 'Billing State/Prov...' column shows 'New York' for the 4th account. The 'Phone' column shows various phone numbers for the other accounts.

	<input type="checkbox"/> Account Name ↑	<input type="checkbox"/> Never Match	<input type="checkbox"/> Billing State/Prov...	<input type="checkbox"/> Phone
1	<input type="checkbox"/> AAA SAFETY SUPPLIES LIMITED	<input type="checkbox"/>		01614080042
2	<input type="checkbox"/> ABU DHABI UNITED GROUP INVESTMENT & DEVELOPMENT	<input type="checkbox"/>		(+971) (2) 652 2222
3	<input type="checkbox"/> ACCOR	<input type="checkbox"/>		
4	<input type="checkbox"/> ACME METALS INCORPORATED	<input type="checkbox"/>	New York	7088492500
5	<input type="checkbox"/> ACTRADIS.FR	<input type="checkbox"/>		
6	<input type="checkbox"/> ACUANT INC.	<input type="checkbox"/>		2138672625
7	<input type="checkbox"/> adidas AG	<input type="checkbox"/>		+499132840
8	<input type="checkbox"/> AEGLESBURGH WATERMEAD LIMITED	<input type="checkbox"/>		01296433123
9	<input type="checkbox"/> ALLIANCE DOOR ENGINEERING LIMITED	<input type="checkbox"/>		01942683601
10	<input type="checkbox"/> ALTERNATIVE WEAR LIMITED	<input type="checkbox"/>		
11	<input type="checkbox"/> AMAZON COM INC	<input type="checkbox"/>		2062661000
12	<input type="checkbox"/> AMAZON.COM, INC.	<input type="checkbox"/>		2062661000
13	<input type="checkbox"/> AMR CLOTHING LIMITED	<input type="checkbox"/>		

Set fields to display

- Click the gear icon and then Select Fields to Display.
A picklist should pop up showing you two columns, one on the left with all your field choices and one on the right with all the fields being displayed.
You can add the fields you wish to display by selecting them in the left column and clicking > to move them over to the right column.
- You can also remove fields from being displayed by selecting them in the right column and clicking < to move them back to the left column.
- If you want to reorder the fields being displayed you can select one or multiples and move them up and down in order by hitting the up and down arrows to the right of the fields being displayed.
- Click Save.

Select Fields to Display

Available Fields

- Account Source
- Annual Revenue
- Billing City
- Billing Country
- Billing Country (text only)
- Billing State/Province (text only)

Visible Fields

- Account Name
- Never Match
- Billing State/Province
- Phone
- Type
- Account Owner Alias

Cancel Save

Set filter criteria

- From List View Controls, select Edit List Filters. Alternatively, click List View Filters icon.
- Edit, remove, or add filters to view only the records that meet your filter criteria. You have different options depending on the field you want to filter and the operator you choose.
- From the Filter by dropdown menu, select an operator. For example, choose equals, starts with, or excludes.
- For Value, make a selection or enter a value, then click Done.
- To apply the edited filters and update the current list view, click Save.

Creditsafe Dashboard Search Monitoring Settings Accounts Reports Dashboards Leads

Accounts Bulk Update Do Not Match

50+ items • Sorted by Account Name • Filtered by All accounts • Updated 16 minutes ago

	Account Name ↑	N...	Billing State/...	Phone	Type	Acc...
1	AAA SAFETY SUPPLIES LIMITED	<input type="checkbox"/>				
2	ABU DHABI UNITED GROUP INVESTMENT & DEVELOPMENT	<input type="checkbox"/>				
3	ACCOR	<input type="checkbox"/>				
4	ACME METALS INCORPORATED	<input type="checkbox"/>	New York			
5	ACTRADIS.FR	<input type="checkbox"/>				
6	ACUANT INC.	<input type="checkbox"/>				
7	adidas AG	<input type="checkbox"/>				
8	AEGLESBURGH WATERMEAD LIMITED	<input type="checkbox"/>				
9	ALLIANCE DOOR ENGINEERING LIMITED	<input type="checkbox"/>				
10	ALTERNATIVE WEAR LIMITED	<input type="checkbox"/>				
11	AMAZON.COM INC	<input type="checkbox"/>				
12	AMAZON.COM, INC.	<input type="checkbox"/>		2062661000	jdavi	
13	AMR CLOTHING LIMITED	<input type="checkbox"/>			jdavi	

Field: Account Name

Operator: equals

Value:

Done

Filters

Filter by Owner: All accounts

Matching all of these filters

New Filter*

Add Filter Remove All

Add Filter Logic

Edit multiple records

- Select the checkbox from the left of the records that you need to edit (select multiple records at a time).
- Hover over the cell to edit, and then click the pencil icon (top right) or double click the cell.
- Make your change in the editable cell or cells.
- Select the checkbox to update the selected items and click Apply.
- Click Save to update multiple records.

IMPORTANT: Currently you can only have one record type for the inline editing to work. To allow inline editing list views for multiple record types, you will need to add a field in Filter By Additional Fields (as above).

To enable inline editing for Account records, use Account Record Type | equals | *choose a record type from the list*. This only works with a single record type. It does not work for multiple record types in the same list view.

The screenshot shows the Creditsafe Accounts page with a modal dialog open. The dialog has a title bar with 'Bulk Update Do Not Match' and a search field. Below the title bar, there are buttons for 'New', 'Discover Companies', 'Import', 'Printable View', and 'Add Accounts To Portfolio'. The main content of the dialog is a table with 50 items selected. The table has columns for 'Account Name', 'Never Match', 'Billing State/Prov...', 'Phone', 'Type', and 'Account Owne...'. A modal dialog is open over the 'Never Match' column, showing a checkbox for 'Update 50 selected items' and 'Cancel' and 'Apply' buttons.

Account Name	Never Match	Billing State/Prov...	Phone	Type	Account Owne...
1 AAA SAFETY SUPPLIES LIMITED	<input checked="" type="checkbox"/>		4080042		jdavi
2 ABU DHABI UNITED GROUP INVESTMENT & DEVELOPMENT	<input checked="" type="checkbox"/>		1) (2) 652 2222		jdavi
3 ACCOR	<input checked="" type="checkbox"/>				penn
4 ACME METALS INCORPORATED	<input checked="" type="checkbox"/>		492500	Prospect	CReed
5 ACTRADIS.FR	<input type="checkbox"/>				penn
6 ACUANT INC.	<input type="checkbox"/>		2138672625		jdavi
7 adidas AG	<input type="checkbox"/>		+499132840		jdavi
8 AEGLESBURGH WATERMEAD LIMITED	<input type="checkbox"/>		01296433123		jdavi
9 ALLIANCE DOOR ENGINEERING LIMITED	<input type="checkbox"/>		01942683601		jdavi
10 ALTERNATIVE WEAR LIMITED	<input type="checkbox"/>				jdavi
11 AMAZON.COM INC.	<input type="checkbox"/>		2062661000		jdavi
12 AMAZON.COM, INC.	<input type="checkbox"/>		2062661000		jdavi
13 AMR CLOTHING LIMITED	<input type="checkbox"/>				jdavi

The screenshot shows the Creditsafe Accounts page with a modal dialog open. The dialog has a title bar with 'Bulk Update Do Not Match' and a search field. Below the title bar, there are buttons for 'New', 'Discover Companies', 'Import', 'Printable View', and 'Add Accounts To Portfolio'. The main content of the dialog is a table with 50 items selected. The table has columns for 'Account Name', 'Never Match', 'Billing State/Province', 'Phone', 'Type', and 'Account O...'. The 'Never Match' column is highlighted in yellow. At the bottom of the dialog, there are 'Cancel' and 'Save' buttons.

Account Name	Never Match	Billing State/Province	Phone	Type	Account O...
1 AAA SAFETY SUPPLIES LIMITED	<input checked="" type="checkbox"/>		01614080042		jdavi
2 ABU DHABI UNITED GROUP INVESTMENT & DEVELOPMENT	<input checked="" type="checkbox"/>		(+971) (2) 652 2222		jdavi
3 ACCOR	<input checked="" type="checkbox"/>				penn
4 ACME METALS INCORPORATED	<input checked="" type="checkbox"/>	New York	7088492500	Prospect	CReed
5 ACTRADIS.FR	<input checked="" type="checkbox"/>				penn
6 ACUANT INC.	<input checked="" type="checkbox"/>		2138672625		jdavi
7 adidas AG	<input checked="" type="checkbox"/>		+499132840		jdavi
8 AEGLESBURGH WATERMEAD LIMITED	<input checked="" type="checkbox"/>		01296433123		jdavi
9 ALLIANCE DOOR ENGINEERING LIMITED	<input checked="" type="checkbox"/>		01942683601		jdavi
10 ALTERNATIVE WEAR LIMITED	<input checked="" type="checkbox"/>				jdavi
11 AMAZON.COM INC.	<input checked="" type="checkbox"/>		2062661000		jdavi
12 AMAZON.COM, INC.	<input checked="" type="checkbox"/>		2062661000		jdavi