Salesforce Business Intelligence Plus

Version 4.1
Release Notes

creditsafe

SF Version 4.1

Data Cleaning Updates

Over 600 new company enrichment fields are available.

We are pleased to announce that we have increased the number of possible enrichment fields by more than 600 data sets. Additionally, we have extended the country coverage of existing data cleaning data points, including VAT, Profit Before Tax, Net Worth and Company Status.

Search & Reports Updates

Safe Number will be displayed on a Company Report.

We will now be displaying our Safe Number on our Creditsafe reports, as well as our Connect ID. Both can be utilised as unique identifiers for businesses. For more details on our Unique Identifiers, please speak with your Account Manager.

Linking Company Reports to Existing Salesforce Records from a Creditsafe Report.

We will now allow you to match an existing Salesforce record to a Creditsafe record from a Creditsafe Report. Previously this was only possible from a Salesforce record. A new button will now be visible on the report.

Enrichment File contains additional match information.

Previously your enrichment file detailed the strength of your match from A – D, now we will also be including the Matching Description and Matching Pattern ID to explain how the records are matched. Please speak to your Account Manager for details of our Pattern IDs.

Credit Score Description Fields.

We have extended the description of the Credit Score Description to 225 characters to improve the visibility of this information in the lead & account records.

- Score descriptions will also be updated to reflect the risk level associated with the account from Very Low Risk to High Risk, as well as not scored.

Additional Search Criteria Available for Swedish & Norwegian Businesses.

You will now also be able to search for Swedish and Norwegian businesses using Safe Number and VAT number.

Enrichment now includes House No.

You will now be able to map House No to be enriched when manually matching records.

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Check & Decide Decision Automation Updates

View and Update Templated Decision Models Yourself.

We are pleased to announce an exciting update to Check & Decide Templated Decision Models, where you can edit and update your policy configuration online yourself via our online platform. If you already automate your policies using Check & Decide Templated Decision Models, please speak to your account manager for editing access.

French Specific

Updated French Translations.

We have updated certain labels within our app across the dashboard, company search fields, portfolio settings, record match component and others, in order to improve the accuracy of their name and descriptions.

French Branches (Secondary Establishments /SIRET).

In a French company report, you will be able to see all associated branches and the appointed head office for a company. You can access this information from the new 'Branches' tab in a French company report.

Filtering Branch View on FR Reports.

You can filter the branches view on the report itself, allowing you to pinpoint certain branches by criteria such as address or postcode.

Record Creation from Branches on FR Reports.

Instantly create a record for a branch from a company report. The associated head office will also be created as a record if a matched record for this company doesn't already exist. The new branch and head office records will be linked through the Salesforce account hierarchy.