

Product manual

Dynamics 365 Creditsafe Connect Version 4.2.0

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1 Introduction

1.1 Overview











Dynamics 365 Creditsafe Connect is an add-on to Dynamics 365 CE. The add-on support integration to Creditsafe and the possibility to search, create and monitor Account and Lead in the Creditsafe database inside Dynamics 365 CE GUI. Dynamics 365 Creditsafe Connect is developed and supported by Endeavor.

Key Features:

- Search for companies
- Create accounts and leads
- Possibility to manually update accounts
- Possibility to manually update leads
- Monitoring of accounts - scheduling of automatic updates
- Enable monitoring inside CE (per account)
- Custom mapping of fields
- Open detailed report in web GUI (Only valid for Sweden Search)

1.2 Supported versions

Dynamics 365 Creditsafe Connect is fully supported by Dynamics 365 Online version 9.2 or higher.

Version	Online	On-Premise
CRM 2011		
CRM 2013		
CRM 2015		
CRM 2016		
Dynamics 365 version 9.2		

It is however possible to run Dynamics 365 Creditsafe Connect on older versions of Dynamics CRM and on an On-Premise version, but that requires manual upgrades using older versions of the solution.

1.3 Available languages

- English
- German
- Swedish

1.4 Supported Browsers

- Microsoft Edge
- Google Chrome

2 Functionality

2.1 Search for companies via Account – Create new Account

Use “Search Creditsafe” in Account view to search for new accounts.

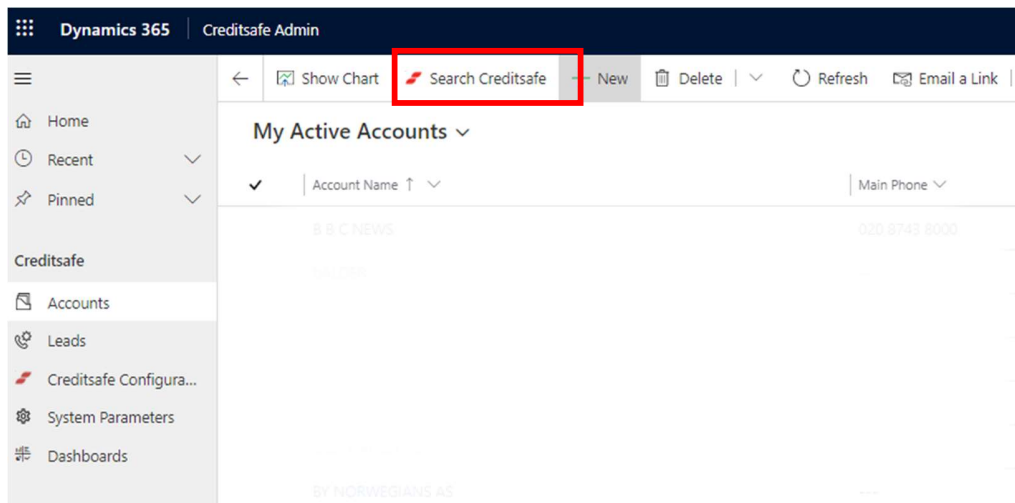


Fig: 1. Search Creditsafe in Account

Search window: Type Company name or Registration Number and select Country

SEARCH / RESULT

Search In Creditsafe

Enter your search criteria.

Company name	creditsafe
Registration Number	--
Address	--
Postal code	--
City	--
Country	Sweden - SE

Search

Fig:2. Search in the Creditsafe database

SEARCH / RESULT

CRM	Registration Number	Company name	Type	Address	Postal cc	City	Status	Country	Part of group
	556514-4408	Creditsafe i Sverige AB	AB	Fabrikgatan 7,Gårda Fab	41250	GÖTEBORG	Active	Sweden	Yes

Relation Type --

Create/update Account Create/update Lead

Fig:3. Result list after search in the Creditsafe database.

Select the company in the list and create an Account or a Lead.



← Save Creditsafe Update Creditsafe Web Save & Close Update Credit Rating + New Open Org Chart Deactivate Connect Add to Marketing List Assign

Creditsafe i Sverige AB
Account - Creditsafe

kr164,965,000.00 Annual Revenue 75 No. of Employees

Summary Creditsafe Details Related

Creditsafe Info		Creditsafe Details	
Organization Number	556514-4408	CS Internal Id	5565144408
Address 1: Street 1	Fabrikgatan 7,Gårda Fabriker	Creditsafe Legal Type	AB
Address 1: ZIP/Postal Code	41250	CreditSafe Origin	Sweden
City	GÖTEBORG	Creditsafe Connected	Yes
Visit Country	Sweden	Credit Monitoring	Yes
Main Phone	031-7255000	Modified On Creditsafe	3/21/2021 9:58 PM
Website	https://www.creditsafe.se	Search engine	Sweden Company Search
Number of Employees	75	Reason Code - Germany	0
Industry	Inkasso- och kreditupplysningsföretag	Relation Type	---
Annual Revenue	kr164,965,000.00		

Fig 4: A new account has been created.

2.1.1 Search for companies' Ultimate parent

If a company is part of a group, it is possible to show their ultimate parent company. Press the button and it will be replaced by the Company name.



SEARCH / RESULT											
CRM	Registration Number	Company name	Type	Address	Postal co	City	Status	Country	Part of group	Ultimate parent	
	556935-8921	Endeavor AB	AB	Hvitfeldtsgatan 15	41120	GÖTEBORG	Active	Sweden	Yes	DM GROUP AB	
	556935-8913	DM Group AB	AB	Hvitfeldtsgatan 15	41120	GÖTEBORG	Active	Sweden	Yes	Show ultimate parent	

Fig 5: Ultimate Parent in Result View

Info about Ultimate parent is only visible if System Parameter "Show Ultimate Parent" = Yes.

For Company Search Sweden the Ultimate parent button is only visible when the company is part of a group.




For GGS the Ultimate parent button will be visible for all companies in the search list even if the company is not part of a group.

2.2 Search for companies via Account – that already exists in your CRM

SEARCH / RESULT	
Search In Creditsafe	
Enter your search criteria.	
Company name	Endeavor
Registration Number	--
Address	--
Postal code	--
City	--
Country	Sweden - SE
Search	

Fig:6. Search in the Creditsafe database

SEARCH / RESULT



CRM	Registration Number	Company name	Type	Address	Postal code	City	Status	Country
	55060070	Endeavor AB	AB	Hvitfeldtsgränd 15	41120	GÖTEBORG	Active	Sweden
	556935-8921	Endeavor AB	AB	Hvitfeldtsgränd 15	41120	GÖTEBORG	Active	Sweden
	55060070	Endeavor AB	AB	Hvitfeldtsgränd 15	41120	GÖTEBORG	Active	Sweden
	55060070	Endeavor AB	AB	Hvitfeldtsgränd 15	41120	GÖTEBORG	Active	Sweden
	55060070	Endeavor AB	AB	Hvitfeldtsgränd 15	41120	GÖTEBORG	Active	Sweden
	55060070	Endeavor AB	AB	Hvitfeldtsgränd 15	41120	GÖTEBORG	Active	Sweden
	55060070	Endeavor AB	AB	Hvitfeldtsgränd 15	41120	GÖTEBORG	Active	Sweden
	55060070	Endeavor AB	AB	Hvitfeldtsgränd 15	41120	GÖTEBORG	Active	Sweden
	55060070	Endeavor AB	AB	Hvitfeldtsgränd 15	41120	GÖTEBORG	Active	Sweden
	55060070	Endeavor AB	AB	Hvitfeldtsgränd 15	41120	GÖTEBORG	Active	Sweden
	55060070	Endeavor AB	AB	Hvitfeldtsgränd 15	41120	GÖTEBORG	Active	Sweden
	55060070	Endeavor AB	AB	Hvitfeldtsgränd 15	41120	GÖTEBORG	Active	Sweden

Relation Type: --

Create/update Account Create/update Lead

Fig:7. Result list after search in the Creditsafe database.

Search Result:

- If a company exists in your CRM system, it has a green highlight color.
- Icons show if the company exists as a Lead:  or as an Account 

2.3 Link an existing account to Creditsafe

It is possible to link an existing account in Dynamics 365 CE to an account in the Creditsafe database. Click on Creditsafe Update and you are prompted with a question to map the account to Creditsafe.

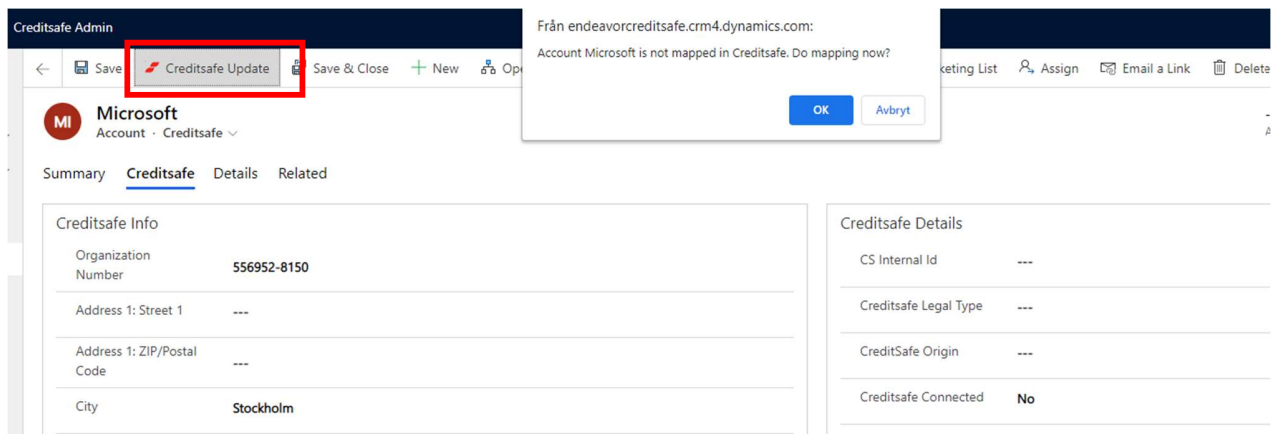


Fig:8. Existing account record without mapping to Creditsafe.

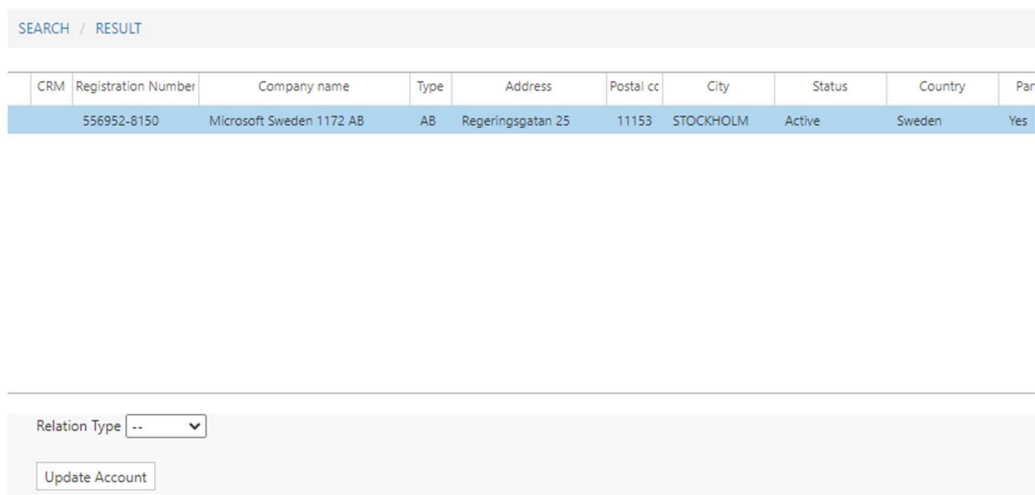


Fig:9. Verify that you map against correct company, and click Update Account

SEARCH / RESULT


CRM	Registration Number	Company name	Type	Address	Postal cc	City	Status	Country	Part of group
	556952-8150	Microsoft Sweden 1172 AB	AB	Regeringsgatan 25	11153	STOCKHOLM	Active	Sweden	Yes

Dynamics 365 record successfully updated

Ok


Relation Type: --

Update Account

**Microsoft Sweden 1172 AB**
Account · Creditsafe

[Summary](#) [Creditsafe](#) [Details](#) [Related](#)

Creditsafe Info

Organization Number	556952-8150
Address 1: Street 1	Regeringsgatan 25
Address 1: ZIP/Postal Code	11153
City	STOCKHOLM
Visit Country	 Sweden
Main Phone	08-50241301

Creditsafe Details

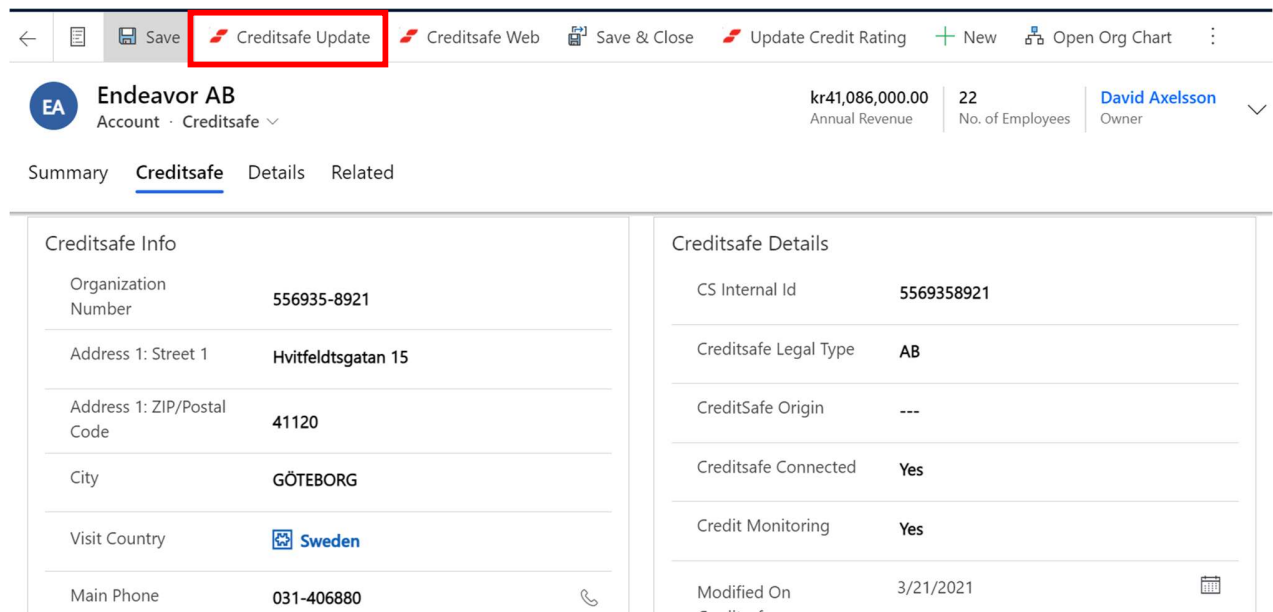
CS Internal Id	5569528150
Creditsafe Legal Type	AB
CreditSafe Origin	---
Creditsafe Connected	Yes
Credit Monitoring	No
Modified On Creditsafe	3/21/2021

Fig:10. Account record mapped to Creditsafe.

2.4 Manual update via Account

2.4.1 Single update of Account

Manual update of information by pressing “Creditsafe Update” on an account. The account will be updated with the latest available information to the fields you have mapped with Creditsafe. Read more about mapping below.



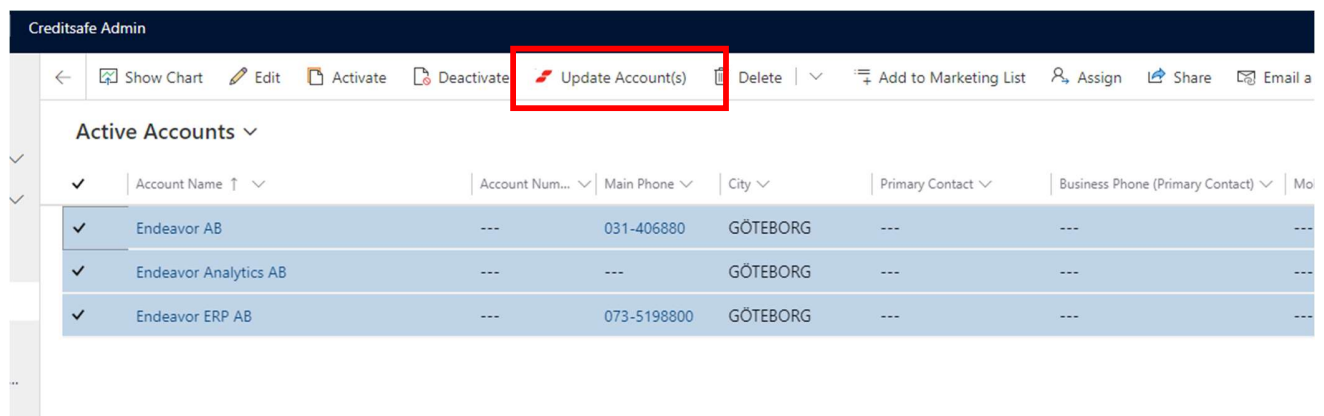
The screenshot shows the 'Creditsafe Admin' interface for the 'Endeavor AB' account. The top navigation bar includes buttons for 'Save', 'Creditsafe Update' (highlighted with a red box), 'Creditsafe Web', 'Save & Close', 'Update Credit Rating', 'New', and 'Open Org Chart'. Below the navigation bar, the account details for 'Endeavor AB' are displayed, including 'Annual Revenue' (kr41,086,000.00), 'No. of Employees' (22), and 'Owner' (David Axelsson). The 'Creditsafe' tab is selected, showing 'Creditsafe Info' and 'Creditsafe Details'.

Creditsafe Info		Creditsafe Details	
Organization Number	556935-8921	CS Internal Id	5569358921
Address 1: Street 1	Hvitfeldtsgatan 15	Creditsafe Legal Type	AB
Address 1: ZIP/Postal Code	41120	CreditSafe Origin	---
City	GÖTEBORG	Creditsafe Connected	Yes
Visit Country	Sweden	Credit Monitoring	Yes
Main Phone	031-406880	Modified On	3/21/2021

Fig:11. Update a single Account.

2.4.2 Multi update of Account

Update accounts by selecting one or more companies in your view and press “Update Account(s)”



The screenshot shows the 'Creditsafe Admin' interface with a list of 'Active Accounts'. The top navigation bar includes buttons for 'Show Chart', 'Edit', 'Activate', 'Deactivate', 'Update Account(s)' (highlighted with a red box), 'Delete', 'Add to Marketing List', 'Assign', 'Share', and 'Email a'. Below the navigation bar, the 'Active Accounts' section displays a table with columns for 'Account Name', 'Account Num...', 'Main Phone', 'City', 'Primary Contact', 'Business Phone (Primary Contact)', and 'Mo'.

Account Name	Account Num...	Main Phone	City	Primary Contact	Business Phone (Primary Contact)	Mo
Endeavor AB	---	031-406880	GÖTEBORG	---	---	---
Endeavor Analytics AB	---	---	GÖTEBORG	---	---	---
Endeavor ERP AB	---	073-5198800	GÖTEBORG	---	---	---

Fig:12. Update multiple Accounts.

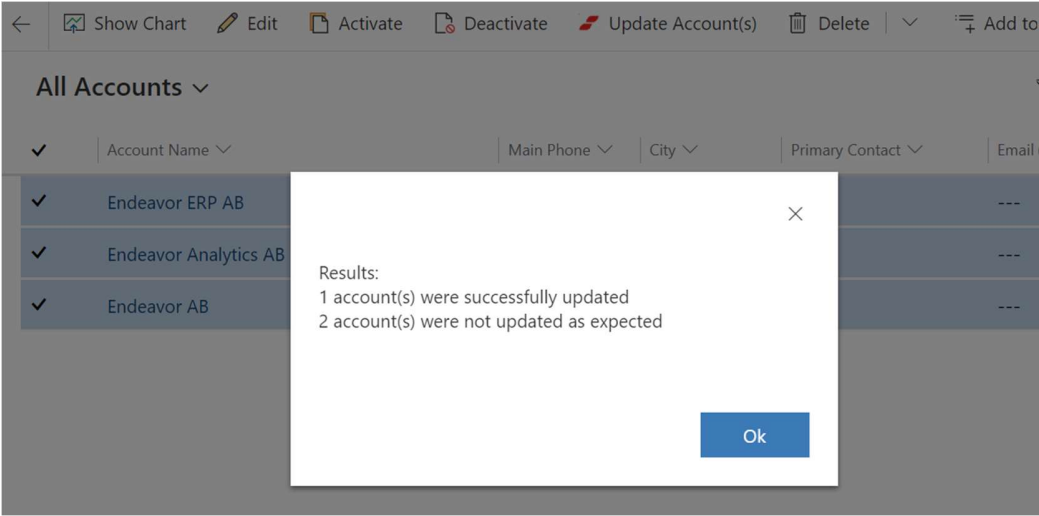
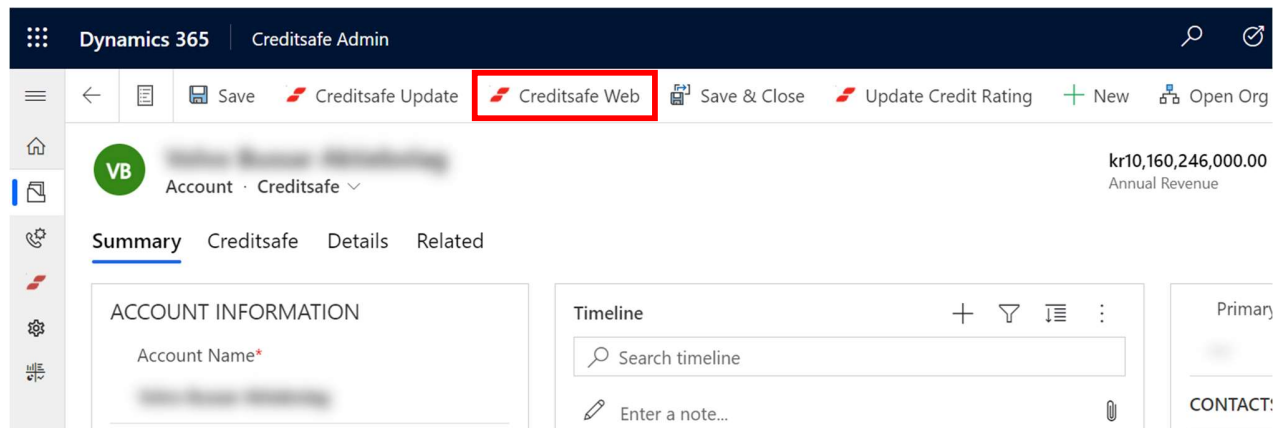


Fig:13. Update info after updating multiple Accounts.

2.5 Creditsafe web, HTML-report (Only for Sweden)

Access Creditsafe detailed report (HTML) through Creditsafe Web button in Account in CRM.



Report is in web format letting user click on all tabs and get detailed information about rating, history, board members etc.



Fig:14. Creditsafe Web info.

In Creditsafe Web you configure a Credit template defining Credit Rating for your accounts. Type in the name of the template in Creditsafe Configuration for Company Search Sweden – field “Credit Worthiness Template” and the template will be used when updating your accounts Credit Rating in Dynamics.

2.6 Update Credit Rating – Accounts (Only for Sweden)

Update Credit Rating manually using “Update Credit Rating”. This function uses the template defined in the field “Credit Worthiness Template” in Creditsafe Configuration for Company Search Sweden.

The screenshot shows the 'Endeavor AB' account page in the Creditsafe system. The 'Update Credit Rating' button is highlighted with a red rectangle. Below the header, the 'Creditsafe' tab is selected, showing a table of credit rating details.

Creditsafe Credit Rating	
Credit Rating	---
Last Credit Report	---
Credit Limit	kr2,540,000.00
Rating	91
Rating Text	Very Low Risk

Fig:15. Update Credit Rating.

The screenshot shows the 'Endeavor AB' account page with the 'Update Credit Rating' dialog box open. The dialog box asks 'Do you want to initiate a Credit Rating Request?' and 'Last Credit Rating: Never'. The 'Update Credit Rating' button is highlighted in red. Below the dialog box, the 'Creditsafe' tab is selected, showing a table of credit rating details.

Creditsafe Credit Rating	
Credit Rating	Approved
Last Credit Report	2/12/2021 9:02 AM
Credit Limit	kr500,000,000.00
Rating	83
Rating Text	Very Low Risk

- Credit Rating: “Approved” in this example is defined in the Credit Worthiness Template
- Last Credit Report: Last time the Credit rating request was initiated.

Credit Limit, Rating and Rating Text is part of standard mapping.

2.7 Monitoring

Creditsafe Connect has an advanced function for monitoring data on your accounts on a regular basis.

When the monitoring job is run, the account will be checked for changes and if changed, the account record will be updated automatically.

2.7.1 Enable Monitoring per Creditsafe Configuration

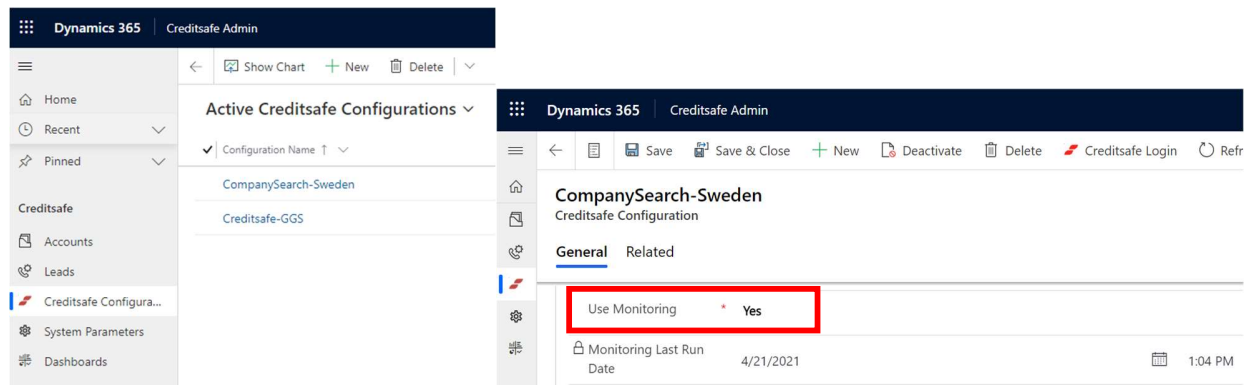


Fig. 16. Enable Credit Monitoring on Creditsafe Configurations

Via Creditsafe Configuration you can enable monitoring by setting Use Monitoring to Yes. This gives you the flexibility to only run monitoring for Accounts linked via Sweden Company Search but not for Accounts linked to GGS, or vice versa.

When monitoring is enabled – see Enable Monitoring, Monitoring Last Run Date is updated.

2.7.2 Monitoring Account

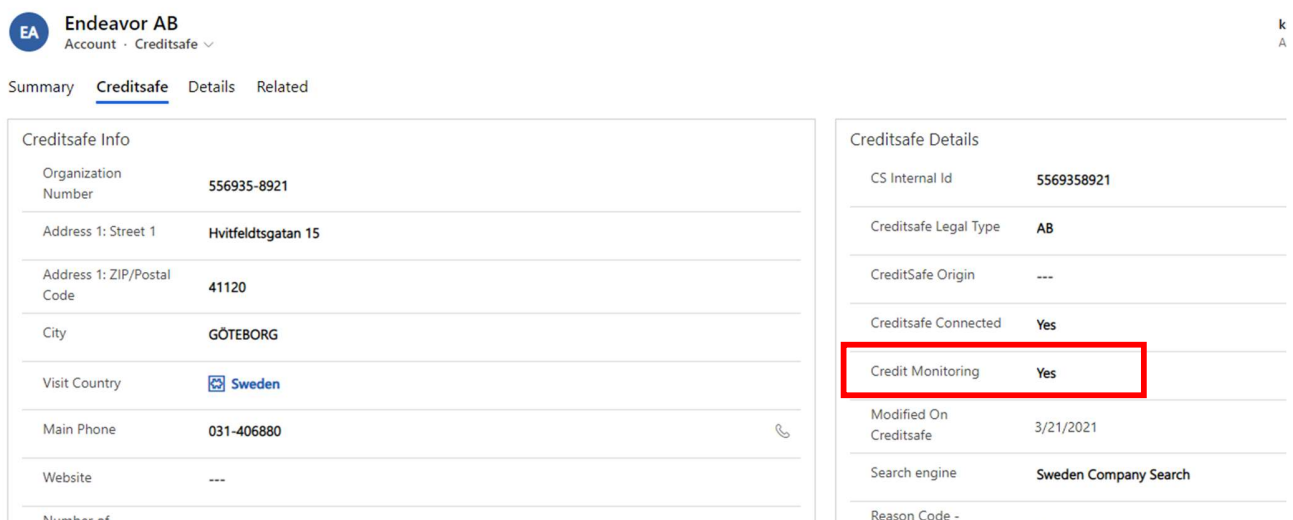


Fig. 17. Credit Monitoring on Account.

If parameter “Use Monitoring” = Yes and an account is created directly via Search Creditsafe then Credit Monitoring [account.edp_cscreditmonitored] is set to Yes by default.

You can deactivate monitoring for a single account by setting Credit Monitoring to No, then no automatic updates will be made for that account.

Please note that Credit Monitoring [account.edp_cscreditmonitored] is set to No by default when creating new accounts manually in Dynamics 365 CE. Even if you link the account to Creditsafe, Credit Monitoring is still set to No.

If you manually change the value on Credit Monitoring to Yes, the company is added to the Creditsafe list of monitored companies. This can be done either on one account at a time or via multi update, the plugin that updates the monitoring list is run in both cases.

2.7.3 Enable Monitoring

Activate monitoring by setting Monitoring Enabled to Yes in the System Parameter form. This will initiate the monitoring job.

“Monitoring Next Execution” will be updated showing the time and date for the next execution of the monitoring process.

The screenshot displays the Dynamics 365 Creditsafe Admin interface. The left sidebar shows the navigation menu with options like Home, Recent, Pinned, Creditsafe, Accounts, Leads, Creditsafe Configura..., System Parameters, and Dashboards. The main area shows the 'EndeavorCreditsafe' System Parameter form. The 'Creditsafe Parameters' tab is active, displaying a list of parameters. The 'Monitoring Next Execution' field is highlighted with a red box, showing a time of 17:01.

Creditsafe Parameters	
Name	EndeavorCreditsafe
Enabled	Yes
Show Relation Type	Yes
Disregard Duplicate Warnings	No
Default Search Country	Sweden
Monitored Companies Chunk Size	10
Monitored Companies Page Size	50
Disregard Monitoring Change Date	No
Monitoring Interval	5
Monitoring Interval Unit	Hours
Monitoring Start Time	17:01
Monitoring Enabled	Yes
Monitoring Next Execution	3/22/2021 5:01 PM

Fig:18. Enable monitoring

2.7.4 Monitoring – Test run

After you have configured the monitoring, you can initiate a single execution of a monitoring run. You execute this in System Parameter via “Run monitoring”.

The purpose of this run is to secure that the current mapping works.

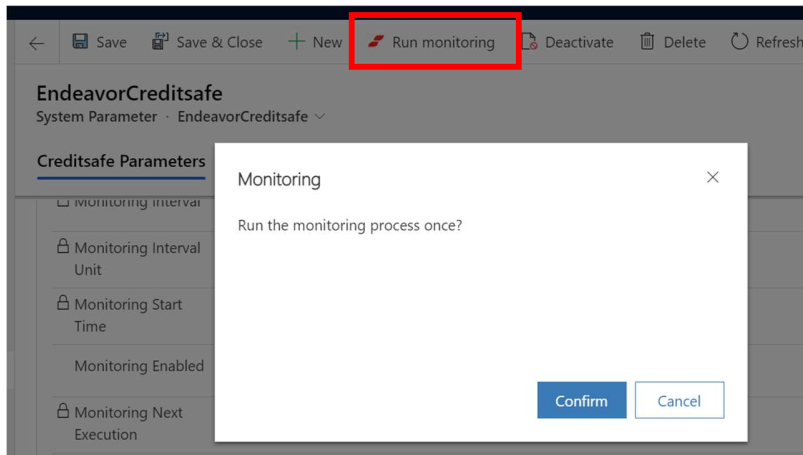


Fig:19. Test run monitoring

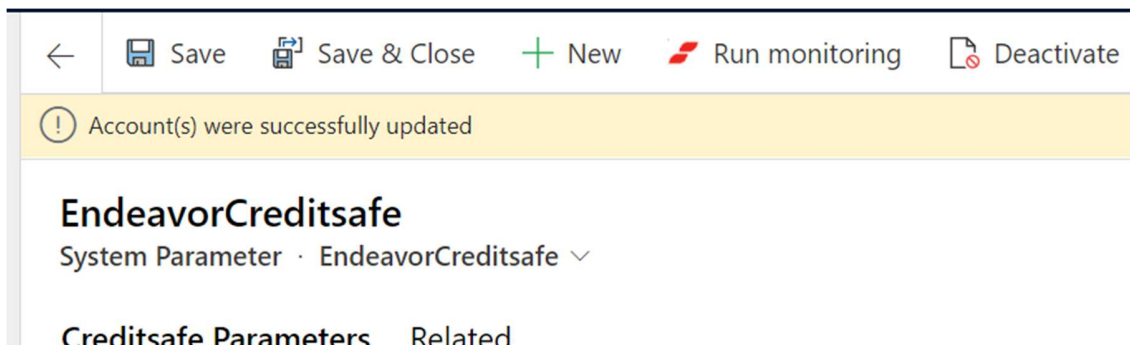
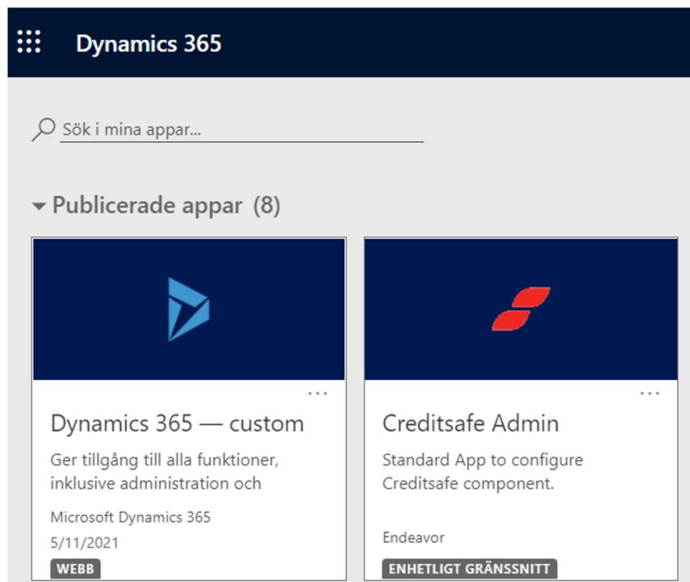


Fig:20. Result - Test run monitoring – succeeded!

3 Configuration

Use the Creditsafe Admin app to access System Parameter and Creditsafe Configurations.



3.1 System Parameters

System Parameters consists of no data on installation.

Add a System Parameter record, set a name and set Enabled to Yes. See suggested values below:

Dynamics 365
Creditsafe Admin

Save
Save & Close
New
Run monitoring
Deactivate
Delete
Refresh
Check Access
Assign
Share
Email a

Home
Recent
Pinned
Creditsafe
Accounts
Leads
Creditsafe Configura...
System Parameters
Dashboards

EndeavorCreditsafe

System Parameter · EndeavorCreditsafe

Creditsafe Parameters Related

Name	* EndeavorCreditsafe
Enabled	* Yes
Show Relation Type	Yes
Disregard Duplicate Warnings	No
Default Search Country	Sweden
Monitored Companies Chunk Size	10
Monitored Companies Page Size	50
Disregard Monitoring Change Date	No
Monitoring Interval	5
Monitoring Interval Unit	Hours
Monitoring Start Time	17:01
Monitoring Enabled	Yes
Monitoring Next Execution	3/22/2021 5:01 PM
Show Ultimate Parent	Yes

Fig:21. System Parameters

Parameter	Suggested Default value	Description
Name	EndeavorCreditsafe	Give the parameter record a name.
Enabled	Yes	Current System parameter is active
Show Relation Type	Yes	Show or hide the relation type option in Creditsafe search window
Disregard Duplicate Warnings	No	No – Duplicate check active, Yes – Duplicate check inactive. Determines whether duplicate detection rules will be followed when creating records using data from Creditsafe web services. When set to Yes, duplicate detection rules will not be applied.
Default Search Country	Sweden	Default country in Creditsafe Search

Monitored Companies Chunk Size	10	Number of records (Accounts) the system will be able to handle in a single transaction (within 2 minutes) before the operation times out. If you have many fields and/or custom plugins performing operations that reduces the transaction time limit significantly when an Account is updated a lower value may be needed, otherwise 10 is the recommended default value. If you get a timeout, lower the amount.
Monitored Companies Page Size	1000 (or more)	Creditsafe Connect retrieves the number of companies listed here to be updated each time the monitoring process is executed. If you have 1000 listed and there is 1001 companies that has been updated, the 1001 company will not be updated via the monitoring run until the next time the company is updated in Creditsafe.
Disregard Monitoring Change Date	No	Determines whether the monitoring process should skip updating a changed company if the field Modified On Creditsafe is more recent than the Last Changed Date in Creditsafe. Default is NO – i.e. Monitoring only updates Account where Modified On Creditsafe is earlier than Last Changed Date in Creditsafe.
Monitoring Interval	24	Monitoring Interval value combined with monitoring interval unit will set how often the process will run.
Monitoring Interval Unit	Hours	Hours, Days, Minutes available
Monitoring Start Time	-	Enter start time with the format HH:MM (24h)
Monitoring Enabled	No	Yes – Monitoring process will execute according to given interval values. No – Monitoring process will not run automatically. Value No is needed to change other monitoring parameters.
Monitored Next Execution (Time and date)		Date and time when the next monitoring process will run.
Show Ultimate Parent	No	Yes -> New columns in Creditsafe search, “Ultimate Parent” and “Is Part of Group”, are visible. Gives the user the possibility to see the name of the Ultimate Parent before creating an Account in CE. NB Using the button Ultimate parent calls for a Creditsafe

		Report that can lead to increasing cost due to your agreement with Creditsafe. Check your agreement with Creditsafe before start using this function.
--	--	---

3.2 Creditsafe Configurations

In Creditsafe Configurations you define which search engine you use.

“CompanySearch-Sweden” for Sweden Companies and “Creditsafe-GGS” for Companies outside Sweden is the two existing search engines.

Each configuration record has its own set of parameters.

You define mapping per configuration. Possible per entity (account and lead) to map fields available in Creditsafe API. It is possible to map fields to standard Dynamics CRM fields as well as for custom added fields.

Dynamics 365

Creditsafe Admin

Fig:22. Creditsafe Configurations

3.2.1 Configuration - CompanySearch-Sweden

← 📄 💾 Save 💾 Save & Close ➕ New 🚫 Deactivate 🗑 Delete 🔑 Creditsafe Login 🔄 Refresh 🔍 Check Access 👤 Assign 🔗 Share 📧 En

CompanySearch-Sweden

Creditsafe Configuration

General Related

Configuration Name	*	CompanySearch-Sweden
Search Engine	*	Sweden Company Search
User Name	*	ENDEAVORIN
Password	*	*****
Blockname Account Market	+	ENDEAVOR_C_MARKET
Blockname Account Credit	*	ENDEAVOR_C_CREDIT
Owner	* ✔	Henrik Svensson
Compability Mode		---
Use Monitoring	*	Yes
🔒 Monitoring Last Run Date		4/21/2021 📅 1:04 PM
Credit Worthiness Template		ENDEAVOR_CAS_1
Use Creditsafe Test Endpoint		No

Fig:23. Creditsafe Configuration CompanySearch Sweden

Configuration	Default value	Description
Configuration Name	CompanySearch Sweden	Name of the configuration record
Search Engine	Sweden Company Search	Name of the Search Engine
User Name	-	Your username at Creditsafe
Password	-	Your password at Creditsafe
Blockname Account Market	-	Blockname for market information. Using this block will not send a letter of disclosure
Blockname Account Credit	-	Blockname for Credit info
Owner	-	The owner of this record – standard CE function
Compatibility Mode	-	Some features are not available in versions of CRM. This Parameter sets the compatibility mode. Can be used for troubleshooting.

Use Monitoring	No	(Yes/No) If monitoring is active or not for the current Configuration. Set to Yes to enable. Need to be yes for Accounts created via this search engine to be monitored.
Monitoring Last Run Date / Time		Last run date/time. Can be used to verify that monitoring is active and running.
Credit Worthiness Template		Template used for credit rating. You define the template in Creditsafe web.
Use Creditsafe Test Endpoint	No	Set to Yes if Creditsafe Test endpoint is to be used. If set to Yes the Creditsafe test web service will be used when searching for or updating companies (requires specific test credentials)

3.2.2 Configuration - Creditsafe-GGS

← Save Save & Close + New Deactivate Delete Refresh Check Access Assign Share Email a Link Flow Word Templates Run Report

Creditsafe-GGS
Creditsafe Configuration

General Related

Configuration Name	Creditsafe-GGS	
Search Engine	Global Company Search	
User Name	endeavorLive	
Password	*****	
Owner	Henrik Svensson	
Compability Mode	---	
Use Monitoring	No	
Monitoring Last Run Date	---	
Portfolio Name	---	

Fig:24. Creditsafe Configuration Creditsafe GGS

Configuration	Default value	Description
Configuration Name	Creditsafe- GGS	Name of the configuration record
Search Engine	Global Company Search	Name of the Search Engine
User Name	-	Your username at Creditsafe
Password	-	Your password at Creditsafe
Owner	-	The owner of this record – standard CE function

Compatibility Mode	-	Some features are not available in versions of CRM. This Parameter sets the compatibility mode. Can be used for troubleshooting.
Use Monitoring	No	(Yes/No) If monitoring is active or not for the current Configuration. Set to Yes to enable. Need to be yes for Accounts created via this search engine to be monitored.
Monitoring Last Run Date / Time		Last run date/time. Can be used to verify that monitoring is active and running.
Portfolio Name		Read-only, only for information. This value will automatically be set when a company report is requested (e.g. by creating/updating an Account or a Lead using the Creditsafe search dialogue).

3.2.3 Entity Mapping - CompanySearch-Sweden

In Company Search Sweden we have mapping for entity Account and Lead.

For information on the available Creditsafe tables and fields, please contact your Creditsafe contact.

CompanySearch-Sweden
Creditsafe Configuration

General Related

Configuration Name * **CompanySearch-Sweden**

Search Engine * **Sweden Company Search**

Mapped Entities

Entity name ↑ ↓	Created On ↓
Account	1/11/2021 2:12 PM
Lead	1/11/2021 2:12 PM

Fig:25. Creditsafe Configuration CompanySearch Sweden Mapped Entities

ADDRESS

Creditsafe Attribute


General Related

Creditsafe Field * **ADDRESS**

Creditsafe Table Type * **GETDATA_RESPONSE**

Is List ☒

Related Entity Logical Name ---

Entity *  **Account**

Dynamics 365 Field * **address1_line1**

Exclude When Update ☐


Owner *  **Henrik Svensson**

Fig:26. Creditsafe Attribute CompanySearch Sweden

Field	Description
Creditsafe Field	The name of the field in Creditsafe for the Sweden Search Engine (i.e. the Creditsafe GetData/HämtaData service)
Creditsafe Table Type	Ex: GETDATA_RESPONSE
Is List	Set to Enabled/Yes to add a Related Entity. Can be used to map info that can be stored in an underlying table, example revenue over time. See below for more info about the Is List function.
Related Entity Logical Name	The logical name of the target entity to store the field of the Creditsafe list/collection
Entity	Reference to the Creditsafe Configuration Entity
Dynamics 365 Field	<p>Enter the Dynamics 365 field you want to map (standard or custom fields)</p> <p>[edp_creditsafeconfigurationentity.edp_crmfield] needs to be "Logical Name", i.e. always written in lower case. for example, you need to enter 'fax', and not 'Fax'. Otherwise, you will get the following error message:</p> <p><i>An error occurred while trying to create / update data in Dynamics 365. Error message:</i></p> <p><i>'account' entity does not contain attribute with Name = 'Fax' and NameMapping = 'Logical'.</i></p>
Exclude When Update	Specify if the attribute should be set during update or excluded when the target record is updated. If Enabled/Yes then info is only set on creating of record, and not on update.
Owner	The owner of this record – standard CE function

3.2.3.1 Mapping Accounts

Creditsafe Connect is delivered with the following default mapping regarding Lead for Company Search Sweden:

Account

Creditsafe Entity

CompanySearch-Sweden
Creditsafe Configuration

General **Creditsafe Attributes** Related

Show Chart + New Creditsafe Attrib... Refresh Flow Run Report Excel Templates Export Creditsafe Attri...

Active Creditsafe Configuration Entity Attributes (SWE)

Search this view

Creditsafe Configuration Entity Attribute	Creditsafe Table Type	Creditsafe Configuration	Dynamics 365 Field	Is List	Related Entity Logical Na...	Exclude When Update	Created On
ADDRESS	GETDATA_RESPONSE	Account	address1_line1	No	---	No	4/22/2021 2:38 PM
BRANSCH	GETDATA_RESPONSE	Account	edp_industrycode	No	---	---	4/22/2021 2:38 PM
COMPANY_STATUS	GETDATA_RESPONSE	Account	edp_companystatus	No	---	No	4/22/2021 2:38 PM
COUNTRY	-	Account	edp_address1_countryid	No	---	---	4/22/2021 2:38 PM
FAXNR	GETDATA_RESPONSE	Account	fax	No	---	No	4/22/2021 2:38 PM
INTJAININGSFORMAGA	GETDATA_RESPONSE	Account	edp_netmargin	No	---	No	4/22/2021 2:38 PM
LIMIT	GETDATA_RESPONSE	Account	creditlimit	No	---	---	4/22/2021 2:38 PM
NAME	GETDATA_RESPONSE	Account	name	No	---	No	4/22/2021 2:38 PM
NET_PROFIT	GETDATA_RESPONSE	Account	edp_netprofit	No	---	---	4/22/2021 2:38 PM
NET_TURNOVER	GETDATA_RESPONSE	Account	revenue	No	---	---	4/22/2021 2:38 PM
NR_EMPLOYEES	GETDATA_RESPONSE	Account	numberofemployees	No	---	---	4/22/2021 2:38 PM
ORGNR	GETDATA_RESPONSE	Account	edp_orgno	No	---	No	4/22/2021 2:38 PM
RATING	GETDATA_RESPONSE	Account	edp_rating	No	---	---	4/22/2021 2:38 PM
RATING_TEXT	GETDATA_RESPONSE	Account	edp_ratingtext	No	---	---	4/22/2021 2:38 PM
TELEPHONE	GETDATA_RESPONSE	Account	telephone1	No	---	---	4/22/2021 2:38 PM
TOWN	GETDATA_RESPONSE	Account	address1_city	No	---	No	4/22/2021 2:38 PM
WWW_ADRESS	GETDATA_RESPONSE	Account	websiteurl	No	---	---	4/22/2021 2:38 PM
ZIPCODE	GETDATA_RESPONSE	Account	address1_postalcode	No	---	---	4/22/2021 2:38 PM

Fig:27. Default mapping Account for CompanySearch Sweden

3.2.3.2 Mapping Lead

Creditsafe Connect is delivered with the following default mapping regarding Lead for Company Search Sweden:

Lead

Creditsafe Entity

CompanySearch-Sweden
Creditsafe Configuration

General **Creditsafe Attributes** Related

Show Chart + New Creditsafe Attrib... Refresh Flow Run Report Excel Templates Export Creditsafe Attri...

Active Creditsafe Configuration Entity Attributes (SWE)

Search this view

Creditsafe Configuration Entity Attribute	Creditsafe Table Type	Creditsafe Configuration	Dynamics 365 Field	Is List	Related Entity Logical Na...	Exclude When Update	Created On
ADDRESS	GETDATA_RESPONSE	Lead	address1_line1	No	---	No	4/22/2021 2:38 PM
COUNTRY	-	Lead	edp_address1_countryid	No	---	No	4/22/2021 2:38 PM
NAME	GETDATA_RESPONSE	Lead	subject	No	---	No	4/22/2021 2:38 PM
NAME	GETDATA_RESPONSE	Lead	companyname	No	---	---	4/22/2021 2:38 PM
NET_TURNOVER	GETDATA_RESPONSE	Lead	revenue	No	---	No	4/22/2021 2:38 PM
NR_EMPLOYEES	GETDATA_RESPONSE	Lead	numberofemployees	No	---	No	4/22/2021 2:38 PM
ORGNR	GETDATA_RESPONSE	Lead	edp_orgno	No	---	No	4/22/2021 2:38 PM
TELEPHONE	GETDATA_RESPONSE	Lead	telephone1	No	---	No	4/22/2021 2:38 PM
TOWN	GETDATA_RESPONSE	Lead	address1_city	No	---	No	4/22/2021 2:38 PM
WWW_ADRESS	GETDATA_RESPONSE	Lead	websiteurl	No	---	No	4/22/2021 2:38 PM
ZIPCODE	GETDATA_RESPONSE	Lead	address1_postalcode	No	---	No	4/22/2021 2:38 PM

Fig:28. Default mapping Lead for CompanySearch Sweden

3.2.4 Entity Mapping – Creditsafe-GGS

Creditsafe-GGS Creditsafe Configuration

General Related

Configuration Name	* Creditsafe-GGS
Search Engine	* Global Company Search

Mapped Entities

Entity name ↑ ↓	Created On
Account	4/22/2021 2:38 PM
Lead	4/22/2021 2:38 PM

Fig:29. Creditsafe Configuration Creditsafe GGS Mapped Entities

1. Add a new Creditsafe attribute record via “New Creditsafe Attribute”

Save
Save & Close
New
Deactivate
Delete
Refresh
Check Access
Assign
Share
Email a Link
Flow
Word Templates
Run Report

Account

Creditsafe Entity

General Related

Entity Name	* Account
Owner	* Henrik Svensson

Mapped Fields

Active Creditsafe Configuration Entity Attributes

Creditsafe Configuration Entity Attribute ↑ ↓	Creditsafe Configuration Entity ↓	Dynamics 365 Field ↓	Exclude When Update ↓	Is List ↓	Created On
CompanySummary.BusinessName	Account	name	---	No	4/22/2022
CompanySummary.CompanyRegistrationNumber	Account	edp_orgno	No	No	4/22/2022
CompanySummary.CompanyStatus.@Code	Account	edp_companystatus	No	No	4/22/2022
CompanySummary.Country	Account	edp_address1_countryid	No	No	4/22/2022
CompanySummary.CreditRating.CommonDescription	Account	edp_ratingtext	No	No	4/22/2022
CompanySummary.CreditRating.CommonValue	Account	edp_rating	No	No	4/22/2022
CompanySummary.CreditRating.CreditLimit	Account	creditlimit	Yes	No	4/22/2022
CompanySummary.LatestTurnoverFigure	Account	revenue	Yes	No	4/22/2022
ContactInformation.MainAddress.Address.City	Account	address1_city	---	No	4/22/2022
ContactInformation.MainAddress.Address.PostalCode	Account	address1_postalcode	---	No	4/22/2022

1 - 10 of 12 (0 selected)

Fig:30. List of mapped fields for Account Creditsafe GGS

←

☰

Save

Save & Close

+ New

Deactivate

Delete

Refresh

Check Access

Assign

Share

Email a Link

⌵

CompanySummary.BusinessName

Creditsafe Attribute

General Related

Creditsafe Field * CompanySummary.BusinessName

Is List ☒

Related Entity Logical Name ---

Entity * Account

Dynamics 365 Field * name

Exclude When Update ---

Owner * Henrik Svensson

Fig:31. Creditsafe Attribute Creditsafe GGS

Field	Description
Creditsafe Field	The name of the field in Creditsafe according to the Global Gateway Service (GGS)
Is List	Set to Enabled/Yes to add a Related Entity. Can be used to map information that can be stored in an underlying table, example revenue over time. See below for more info about the Is List function.
Related Entity Logical Name	The logical name of the target entity to store the field of the Creditsafe list/collection
Entity	Reference to the Creditsafe Configuration Entity
Dynamics 365 Field	<p>Enter the Dynamics 365 field you want to map (standard or custom fields)</p> <p>[edp_creditsafeconfigurationentity.edp_crmfield] needs to be "Logical Name", i.e. always written in lower case. for example, you need to enter 'fax', and not 'Fax'. Otherwise, you will get the following error message: <i>An error occurred while trying to create / update data in Dynamics 365. Error message: 'account' entity does not contain attribute with Name = 'Fax' and NameMapping = 'Logical'.</i></p>

Exclude When Update	Specify if the attribute should be set during update or excluded when the target record is updated. If Enabled/Yes then info is only set on creating of record, and not on update
Owner	The owner of this record – standard CE function

3.2.4.1 Mapping Account

Creditsafe Connect is delivered with the following default mapping regarding Account

Account
Creditsafe Entity

General **Creditsafe Attributes** Related

Show Chart + New Creditsafe Attrib... Refresh Flow Run Report Excel Templates Export Creditsafe Attri...

Active Creditsafe Configuration Entity Attributes

Creditsafe Configuration Entity Attribute	Creditsafe Configuration Entity	Dynamics 365 Field	Exclude When Update	Is List	Created On
CompanySummary.BusinessName	Account	name	---	No	4/22/2021 2:38
CompanySummary.CompanyRegistrationNumber	Account	edp_orgno	No	No	4/22/2021 2:38
CompanySummary.CompanyStatus.@Code	Account	edp_companystatus	No	No	4/22/2021 2:38
CompanySummary.Country	Account	edp_address1_countryid	No	No	4/22/2021 2:38
CompanySummary.CreditRating.CommonDescription	Account	edp_ratingtext	No	No	4/22/2021 2:38
CompanySummary.CreditRating.CommonValue	Account	edp_rating	No	No	4/22/2021 2:38
CompanySummary.CreditRating.CreditLimit	Account	creditlimit	Yes	No	4/22/2021 2:38
CompanySummary.LatestTurnoverFigure	Account	revenue	Yes	No	4/22/2021 2:38
ContactInformation.MainAddress.Address.City	Account	address1_city	---	No	4/22/2021 2:38
ContactInformation.MainAddress.Address.PostalCode	Account	address1_postalcode	---	No	4/22/2021 2:38
ContactInformation.MainAddress.Address.Street	Account	address1_line1	No	No	4/22/2021 2:38
ContactInformation.MainAddress.Telephone	Account	telephone1	---	No	4/22/2021 2:38

Fig:32. Default mapping Account for Creditsafe GGS

3.2.4.2 Mapping Lead

Creditsafe Connect is delivered with the following default mapping regarding Lead

Lead
Creditsafe Entity

General **Creditsafe Attributes** Related

Show Chart + New Creditsafe Attrib... Refresh Flow Run Report Excel Templates Export Creditsafe Attri...

Active Creditsafe Configuration Entity Attributes

Creditsafe Configuration Entity Attribute	Creditsafe Configuration Entity	Dynamics 365 Field	Exclude When Update	Is List	Created On
CompanySummary.BusinessName	Lead	subject	No	No	4/22/2021 2:38
CompanySummary.BusinessName	Lead	companyname	No	No	4/22/2021 2:38
CompanySummary.CompanyRegistrationNumber	Lead	edp_orgno	No	No	4/22/2021 2:38
CompanySummary.Country	Lead	edp_address1_countryid	No	No	4/22/2021 2:38
CompanySummary.LatestTurnoverFigure	Lead	revenue	No	No	4/22/2021 2:38
ContactInformation.MainAddress.Address.City	Lead	address1_city	No	No	4/22/2021 2:38
ContactInformation.MainAddress.Address.PostalCode	Lead	address1_postalcode	No	No	4/22/2021 2:38
ContactInformation.MainAddress.Address.Street	Lead	address1_line1	No	No	4/22/2021 2:38
ContactInformation.MainAddress.Telephone	Lead	telephone1	No	No	4/22/2021 2:38

Fig:33. Default mapping Lead for Creditsafe GGS

3.2.5 Entity Mapping Is List – for Creditsafe-GGS and Company Search Sweden

Mapping using the Is List function is described more in detail in this section. Below we use the Creditsafe GGS Configuration to describe the setup, but it works the same way using Company Search Sweden

Creditsafe-GGS
Creditsafe Configuration

General Related

Configuration Name * Creditsafe-GGS

Search Engine * Global Company Search

Mapped Entities

Entity name ↑	Created On
Account	4/22/2021 2:38 PM
Lead	4/22/2021 2:38 PM

Fig:34. Creditsafe Configuration Creditsafe GGS Mapped Entities

1. Navigate to the “GGS” Creditsafe configuration entity (“edp_creditsafeconfiguration”).
2. Navigate to a Creditsafe Configuration Entity, we will use Account in this demonstration.
3. You should now be presented with the following form.

← | Save | Save & Close | + New | Deactivate | Delete | Refresh | Check Access | Assign | Share | Email a Link | Flow | Word Templates | Run Report

Account
Creditsafe Entity

General Related

Entity Name * Account

Owner * Henrik Svensson

Mapped Fields

Active Creditsafe Configuration Entity Attributes

Creditsafe Configuration Entity Attribute ↑	Creditsafe Configuration Entity	Dynamics 365 Field	Exclude When Update	Is List	Created On
CompanySummary.BusinessName	Account	name	---	No	4/22/2021 2:38 PM
CompanySummary.CompanyRegistrationNumber	Account	edp_orgno	No	No	4/22/2021 2:38 PM
CompanySummary.CompanyStatus.@Code	Account	edp_companystatus	No	No	4/22/2021 2:38 PM
CompanySummary.Country	Account	edp_address1_countryid	No	No	4/22/2021 2:38 PM
CompanySummary.CreditRating.CommonDescription	Account	edp_ratingtext	No	No	4/22/2021 2:38 PM
CompanySummary.CreditRating.CommonValue	Account	edp_rating	No	No	4/22/2021 2:38 PM
CompanySummary.CreditRating.CreditLimit	Account	creditlimit	Yes	No	4/22/2021 2:38 PM
CompanySummary.LatestTurnoverFigure	Account	revenue	Yes	No	4/22/2021 2:38 PM
ContactInformation.MainAddress.Address.City	Account	address1_city	---	No	4/22/2021 2:38 PM
ContactInformation.MainAddress.Address.PostalCode	Account	address1_postalcode	---	No	4/22/2021 2:38 PM

1 - 10 of 12 (0 selected)

Fig:35. List of mapped fields for Account Creditsafe GGS

4. Add a new Creditsafe attribute record via “New Creditsafe Attribute”

<
Save
Save & Close
+ New
Flow

New Creditsafe Attribute

General

Creditsafe Field	*	---
Is List		<input type="checkbox"/>
Entity	*	Account
Dynamics 365 Field	*	---
Exclude When Update		<input type="checkbox"/>
Owner	*	Robert Brahm

Fig:36. Creditsafe Attribute Creditsafe GGS

- The “Creditsafe Field” field specifies which field in a Creditsafe company report to link to a “CRM Field”, just as with non-list attributes. New is that one can now also specify list attributes, such as “Directors/CurrentDirectors/Director*/Name”, taken from Creditsafe api documentation. The ‘*’ specifies that there could be more than one element for each company. For example, there could be two directors in a company, say “Bob Burger” and “Alice Allstar”.
- If such a “list” – field is entered, the “Is List” checkbox also needs to be checked, indicating that we do have a list attribute.

←
Save
Save & Close
+ New
Flow
▼

New Creditsafe Attribute

General

Creditsafe Field	*	Directors/CurrentDirectors/Director*/Name
Is List		<input checked="" type="checkbox"/>
Related Entity Logical Name		---
Entity	*	Account
Dynamics 365 Field	*	---
Exclude When Update		<input type="checkbox"/>
Owner	*	Robert Brahm

Fig:37. Creditsafe Attribute Creditsafe GGS

- As can be seen in the screenshot above when the “Is List” checkbox is checked another field is shown. This “Related Entity Logical Name” field is the logical name of the entity where the data from each list element will be placed. These entities are linked to the account created for the company. More info about this entity under “Related Entity”.
- The Dynamics 365 Field now doesn’t specify a field on an Account entity directly but instead on a field in the given “Related Entity”, if the checkbox “Is List” is unchecked and a non-list Creditsafe attribute is given, the normal behavior is used again.

←
Save
Save & Close
New
Flow
▼

New Creditsafe Attribute

General

Creditsafe Field	* Directors/CurrentDirectors/Director*/Name
Is List	<input checked="" type="checkbox"/>
Related Entity Logical Name	new_testlistentity
Entity	* Account
Dynamics 365 Field	* new_name
Exclude When Update	<input type="checkbox"/>
Owner	* Robert Brahm

Fig:38. Creditsafe Attribute Creditsafe GGS

- Say we have for a company the directors mentioned above. (Name: "Bob Burger", Gender: "Male") and (Name: "Alice Allstar", Gender: "Female"). Given the related entity and Dynamics 365 Field we have specified above, when creating/updating a company two "new_testlistentity" records will be created, with the field "new_name" in "new_testlistentity", filled with the Name of the directors, since we specified "Name" in the Creditsafe attribute field. A better name for "new_testlistentity" could in this case be "abc_Director". What if in the same entity we also want the gender information? Well this is doable, just add another Creditsafe attribute record, using the same Related entity, with a different Dynamics 365 Field that also exists in the Related Entity, and also tweak the Creditsafe Field to "Directors/CurrentDirectors/Director*/Gender".

3.2.6 Related entity:

The Related entity is the entity that is created per element in the returned list from Creditsafe. The specified Dynamics 365 Field needs to exist in this entity, there is a plugin check for this to help prevent mistakes. The Related entity also needs to have a field with lookup to the Entity, in this case Account. The fields name does not matter but could be on for example "abc_ParentAccountId". In plugin code the metadata is searched for this field that has an account lookup, (or lead). Because in every search/update there could be any number of Related Entities for different attribute, all Related Entities are deleted and then recreated again. Thus, adding or changing data in these entities manually should be avoided, as this will be lost if the account is updated.

4 Error handling Q/A

4.1 Create/Update Lead & Accounts.

4.1.1 Error message when creating/updating records in CRM using Creditsafe buttons: "A failure occurred in Web Api in Dynamics 365".

- Navigate to Advanced Settings -> Settings -> Solutions -> Dynamics 365 Creditsafe Connect -> Processes.
- Verify that all processes have status "Activated".

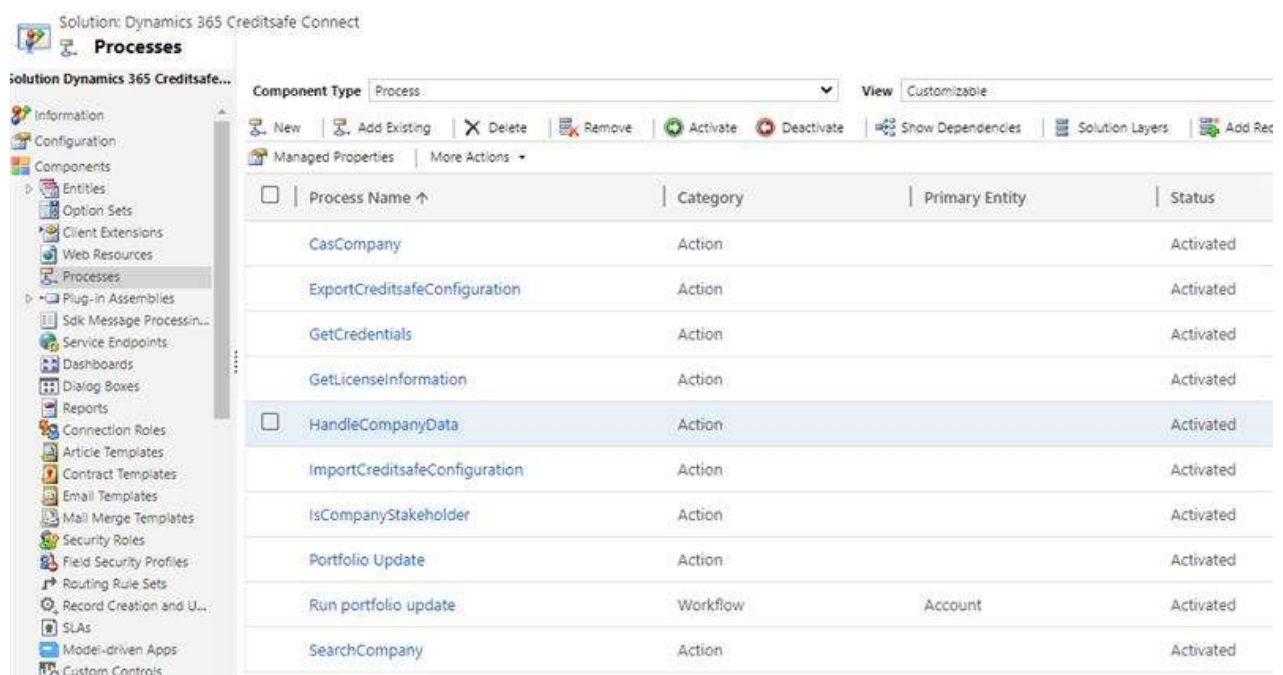


Fig:39. List of Processes in Creditsafe Connect

- If any process has status "Draft" you need to activate it.
- Make a note of the name of the process and navigate to Advanced Settings -> Settings -> Customizations -> Customize the system -> Processes.
- Locate the process you made a note of, select it, and click the "Activate" button.

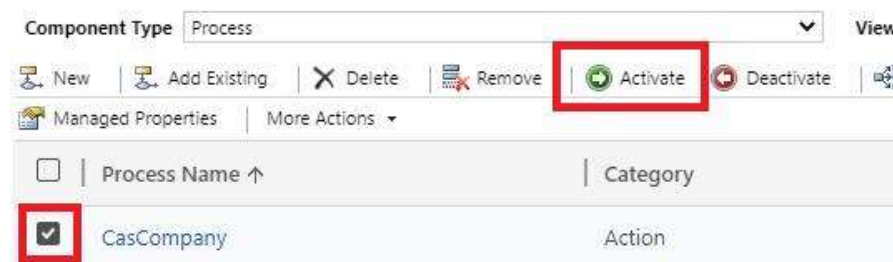


Fig:40. Activate the process

4.2 Monitoring

4.2.1 My Accounts does not get updated by the monitoring function.

- Check that the monitoring job is running:
- Use Creditsafe Admin app -> Go to System Parameters
- Check that Monitoring Enabled = Yes and you have a date and time in the Monitoring Next Execution:

Monitoring Enabled	Yes	
Monitoring Next Execution	4/20/2021	5:01 PM

Fig:41. System Parameter

- If you do not have a date and time in the Monitoring Next Execution you need to check if the Monitoring Interval/Monitoring Interval Unit/Monitoring Start Time are correctly set. In either case you can change the Monitoring Enabled to No, update these attributes to have the expected values if needed, save the record. Then you may change the value back to Yes, and then save the record again. That should result in that the Monitoring Next Execution is given a value.

4.2.2 One of my Accounts is not updated via the monitoring function.

- Check that the Credit Monitoring is set to Yes on the account.

Credit Monitoring	Yes	
Modified On Creditsafe	3/21/2021	9:58 PM
Search engine	Sweden Company Search	

Fig:42. Account

- If it still is not updated check the search engine (Creditsafe GGS or Sweden Company Search) and go to Creditsafe Configuration and check the current search engine that Use Monitoring = Yes.

Use Monitoring	* Yes
----------------	-------

Fig:43. Creditsafe Configuration Creditsafe GGS / Sweden Company Search

4.3 Access

4.3.1 Do we have any pre-configured user groups within Creditsafe Connect?

- Creditsafe Connect contains two security roles:
 - Creditsafe Basic User – For the normal CE user.

- Creditsafe Admin User – For admin to configure and monitor Creditsafe setup.

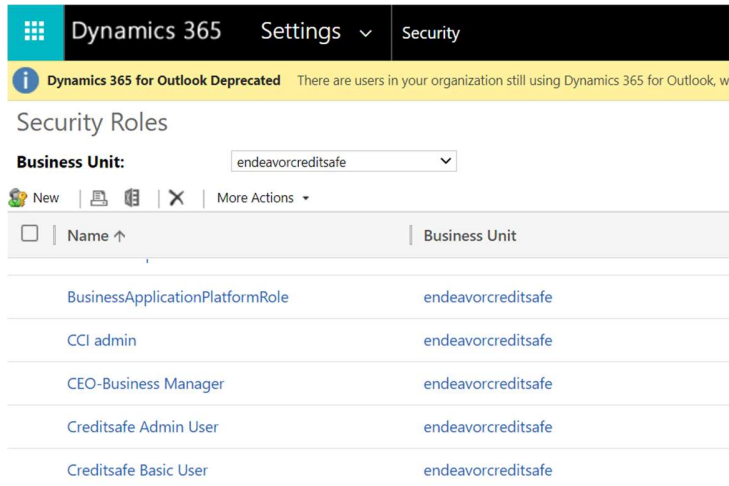


Fig:44. Security Roles

4.4 Mapping to Creditsafe Internal ID via Excel

4.4.1 Is it possible to map accounts to Creditsafe by updating CS internal ID via an Excel import, or do you need to map each account separately?

- It is possible to import accounts using Excel and map them to Creditsafe.
- After importing you need to click on “Update Account(s)” - in list mode after selecting one or more accounts. You can also click on Creditsafe Update in the account form (for a single account).
- Worth knowing is that it is not enough with just CS Internal ID, there are some other fields that need to be specified also for the account to be considered connected.

Fields needed in the Excel file (or needs to be filled in):

- Organization Number [account.edp_orgno], e.g.: 06610464
- CS Internal Id [account.edp_CreditSafeId], e.g.: GB003/0/06610464 (this may only be retrieved from any of the available Creditsafe interfaces or by contacting Creditsafe for an export of some sort)
- Visit Country [account.edp_Address1_CountryId], e.g.: Great Britain (lookup to entity edp_country)
- Search Engine [account.edp_creditsafesearchengine], e.g.: Global Company Search (value: 757550001)
- Creditsafe Connected [account.edp_connectedtocreditsafe] must be set to “Yes”
- Credit Monitoring [account.edp_cscreditmonitored] must be set to No at this point (setting it to yes will not automatically add the company to the monitoring list in Creditsafe, so setting it to Yes will be confusing)

If you get this data and click on “Creditsafe Update” on an account created as above you will not get the question “this account is not mapped to Creditsafe, do you want to map it now?” - the record will be immediately updated with the new CS info.

If the account is considered Creditsafe connected, an update of the field Credit Monitoring from No to Yes will mean that a plugin is executed which via Creditsafe's web service adds the company to the "watch list". This can be done either on one account at a time or via multi update, the plugin that updates the CS list is run in both cases.

4.5 Product license

4.5.1 For how long is the product license valid?

- Navigate to Advanced Settings -> Settings -> Solutions -> Dynamics 365 Creditsafe Connect -> Configuration.
- In License Xml you have the time limit for the license.

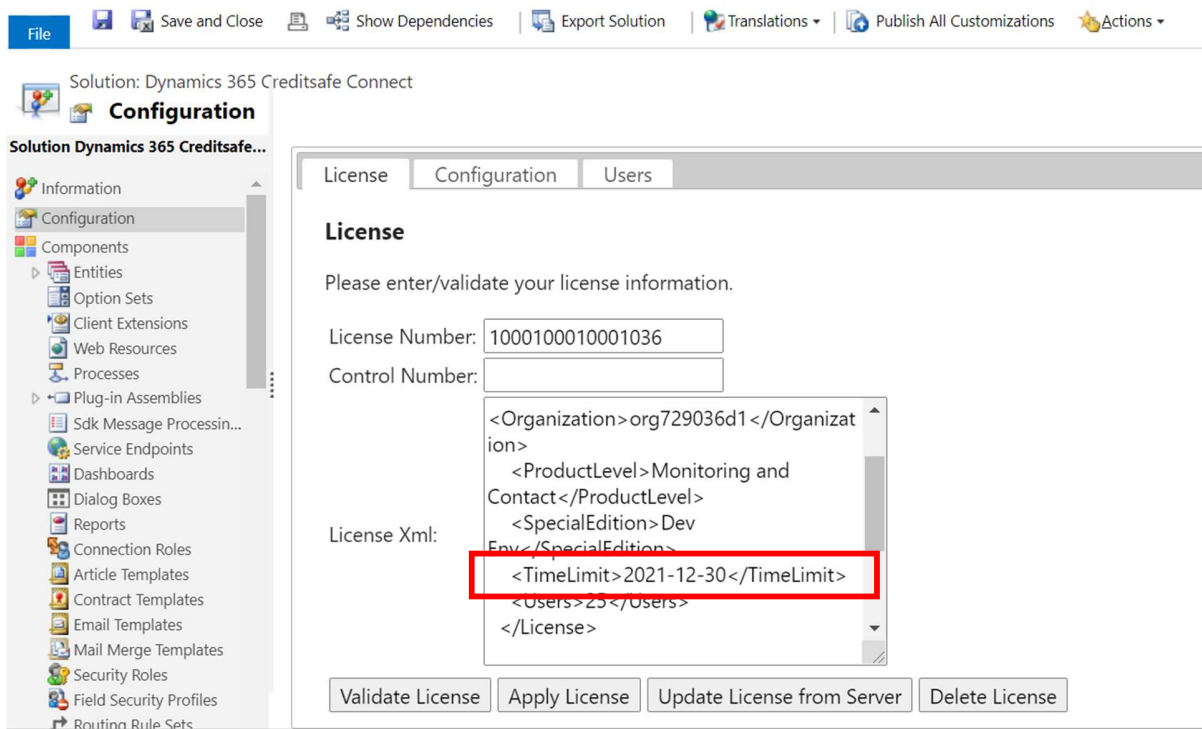


Fig:45. Product License for Dynamics 365 Creditsafe Connect

- Product license for production environments is valid for a year at a time.
- Product license for evaluation purposes is normally valid only one month.