

creditsafe

Business Intelligence

Empowering your business with global credit insight



Creditsafe Salesforce App

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Introduction

Creditsafe's Business Intelligence Application for Salesforce allows you to gain insight on companies in over 100 countries instantly within your Salesforce CRM. Creditsafe provides only accurate and trusted information in real time, ensuring the data your teams are utilising is up to date so they know they can rely on the information to make informed credit decisions.

When accessing company information you will be able to view a full company credit report instantly within your Salesforce CRM. This will give you access to information on directors, company credit scores & limits, full financials, complete event history and the company group structure.

Through using the Business Intelligence Application within your Salesforce CRM, you will be able to instantly create an account from the company credit report, meaning there is no need for members of your team to undergo the long, time-consuming process of creating an account and gathering all the relevant information. Through the Business Intelligence Application the information available can be mapped; resulting in accounts being set up instantly and multiple fields being fully populated, saving you both time and resources.

By providing real time, accurate and trusted information globally, Creditsafe are able to help companies of all sizes maximise sales and reduce exposure to credit risk.



Creditsafe Salesforce App

Data availability

Creditsafe's Business Intelligence Application will give you access to detailed information on over 240 million companies based in over 100 countries, directly within your Salesforce CRM. You will be able to view full company credit reports directly within your Salesforce CRM, eliminating the need to switch to a different system or access a website.

The company credit reports include detailed information on:



Summary Information



Directors & Shareholders



Financials



Event History



Group Structure



Mortgages

Within each category, there is a wealth of varied information presented, giving you a full, in-depth insight into companies around the world.

A wealth of information



Data sources

The information that makes up a company credit report is collected in a number of different ways across our network of local offices and handpicked partners spanning over 100 countries. Where possible, we will always collect information direct from official sources such as the domestic equivalent of Companies House, Federal and Domestic Gazettes and the Courts.

Although we may not hold information on every business in the world, 99.9% of all company reports requested by our customers are delivered instantly online.



Installation

Business Intelligence Application for Salesforce CRM is compatible with the following Salesforce editions:

- Performance edition
 - Enterprise edition
 - Unlimited edition
 - Developer edition
- } Lightning & classic compatible

Once you have verified your Salesforce organisation ID with your dedicated Creditsafe account manager, you will be supplied with a link, which will allow you to quickly and easily download the Business Intelligence Application.

You will be able to select the type of access you want, based on which users you will grant admittance to the application; allowing you to manage which members of staff can see the information.

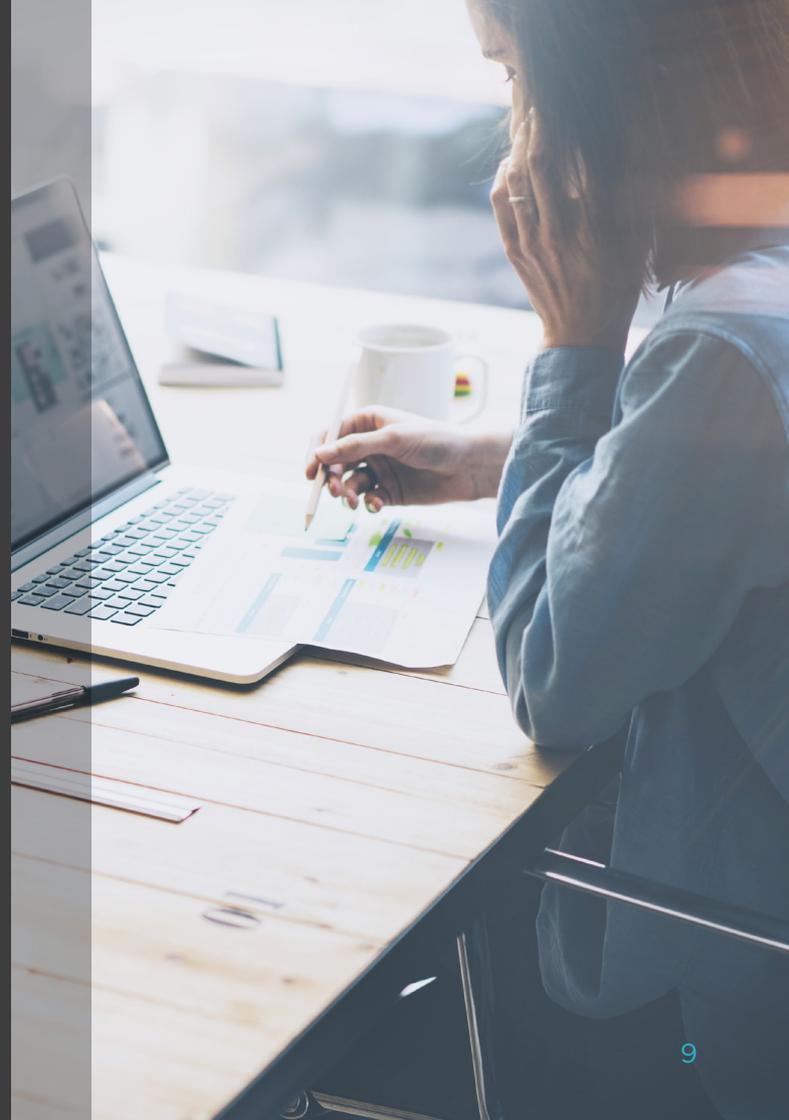


Configuration

Any Salesforce administrator can easily configure the Business Intelligence Application.

Through the options within the application, the user can specify which data is mapped to certain data fields within Salesforce CRM; allowing you to ensure that the data pulled through when an account is created maps back to where you want it.

Full support documentation is provided to help support you through the configuration process.





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To start your free trial visit www.solutions.creditsafeuk.com/salesforce