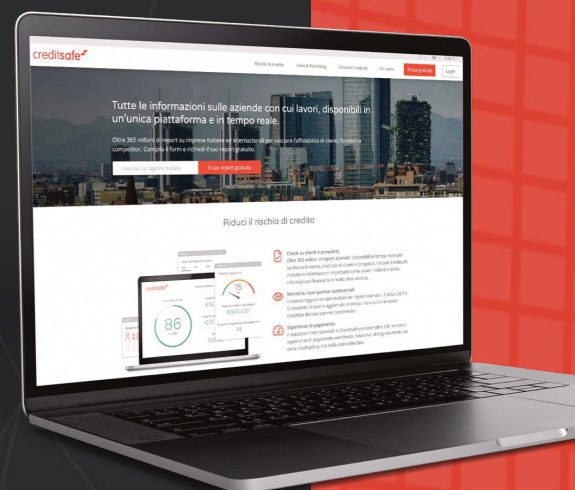


Installation guide Plugin Creditsafe with Hubspot

IN PARTNERSHIP WITH





INSTALATION GUIDE

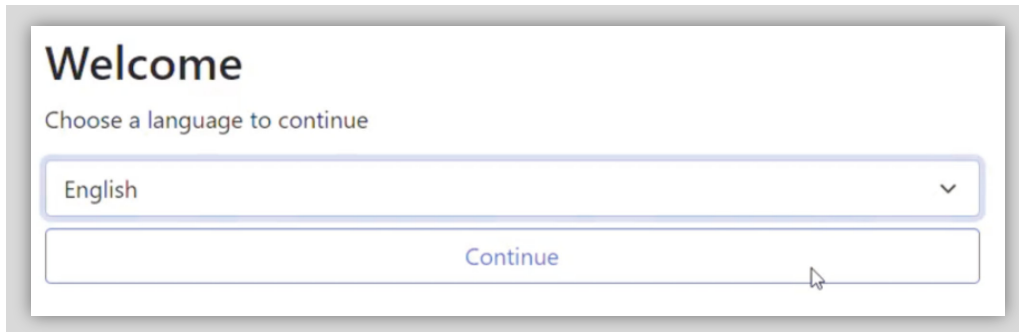
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INITIAL INSTALLATION

Choose language

The first step of the installation requires to choose a language.

After the installation it will be always possible to switch to another language.



The screenshot shows a 'Welcome' dialog box with the following elements:

- Welcome** (Section Header)
- Choose a language to continue (Instructional text)
- A dropdown menu with 'English' selected and a downward arrow icon on the right.
- A 'Continue' button with a mouse cursor hovering over it.

INITIAL INSTALLATION

Choose VAT number field

The second step will be to choose a new field which the Plugin will use to get the VAT number. If the user was already using a field, it can be chosen in the showed list.

Fields that were created by the user are showed in bold (not compatible with IOS devices).

Vat/Reg. number field

This plugin uses the VAT/reg. number field of the company in HubSpot to find the financial information. If you already have a custom field which contains the VAT/reg. number please select it from the menu below. If you don't have any we will create it for you.

Create a new VAT/reg. number field ▾

- Number of employees
- Annual revenue
- Time zone
- Description ⓘ
- LinkedIn company page
- Vat/Registration number**
IT 0123456789

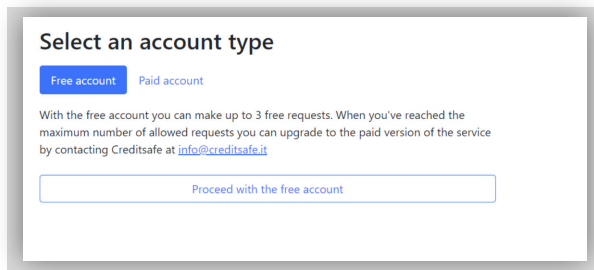
[View all properties](#) [View property history](#)

[Continue](#)

INITIAL INSTALLATION

Choose Type of Account

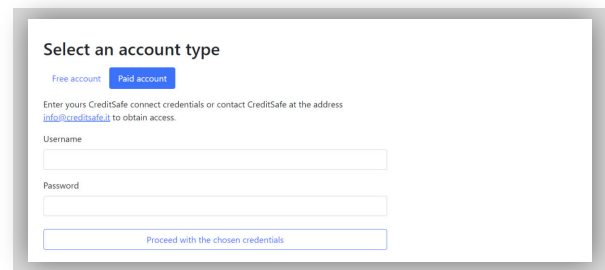
The third step requires to choose to continue with a free account (up to three free requests) or a paying CreditSafe account.



Select an account type

Free account Paid account

With the free account you can make up to 3 free requests. When you've reached the maximum number of allowed requests you can upgrade to the paid version of the service by contacting Creditsafe at info@creditsafe.it



Select an account type

Free account Paid account

Enter your Creditsafe connect credentials or contact Creditsafe at the address info@creditsafe.it to obtain access.

Username

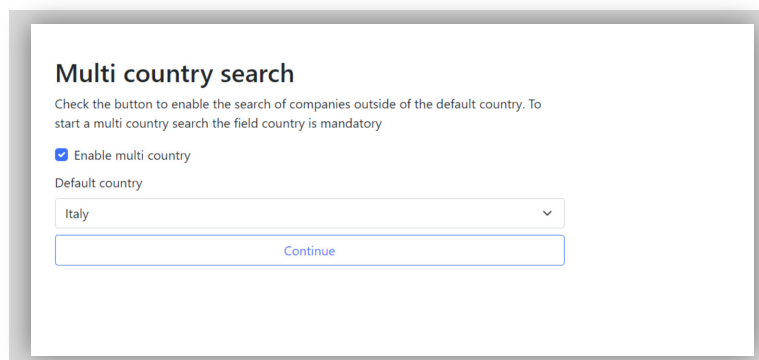
Password

Search configuration

The search by VAT number is always conducted in all the available nations; in the free version the only available nation is Italy. For the search by using the company name it is possible to choose to search always in the default country or also in other countries based on the value inserted in the field country.

The default country selection has two main functionalities:

- If the multicountry is not enabled, the plugin will always search in the default country
- If the multicountry is selected and the user hasn't put a value in the field country, the search will be conducted in the default country



Multi country search

Check the button to enable the search of companies outside of the default country. To start a multi country search the field country is mandatory

Enable multi country

Default country

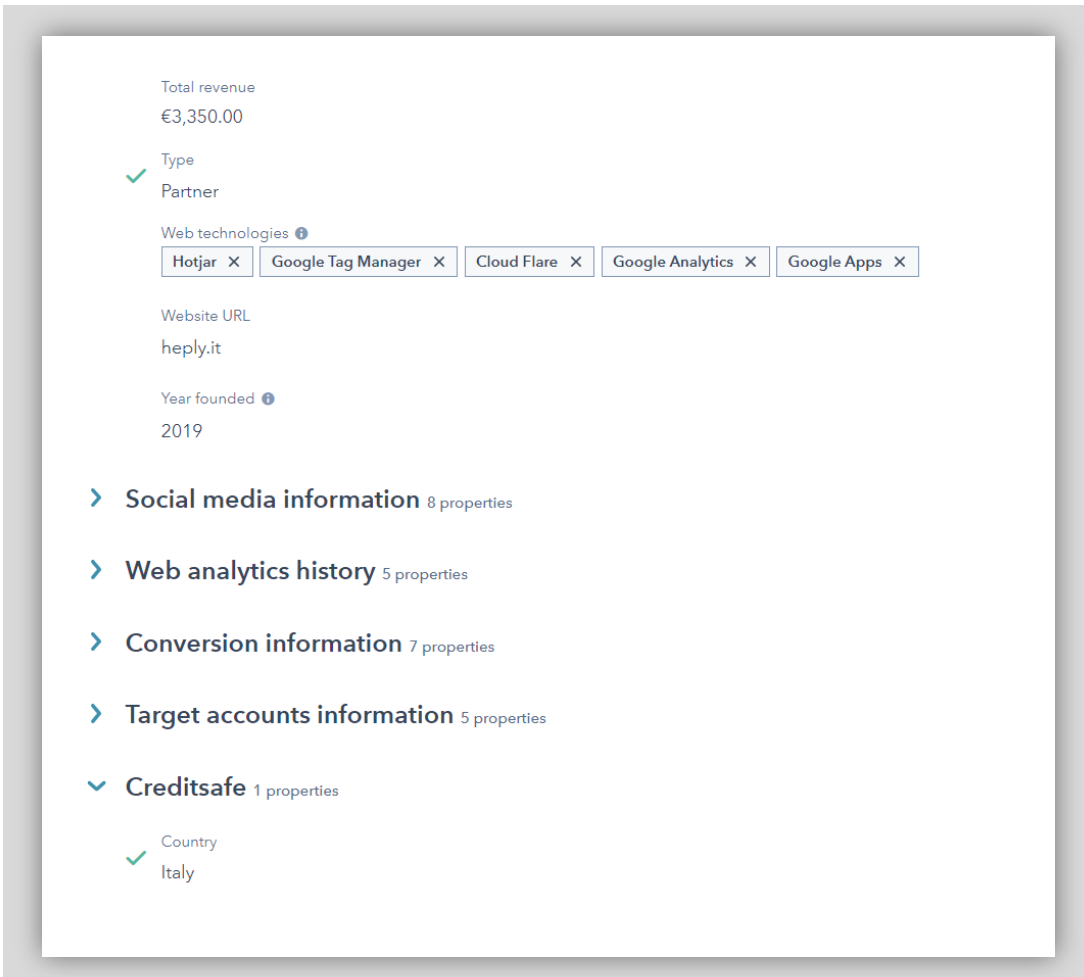
VIEW CONFIGURATION

After the plugin installation it is necessary to make visible the fields country and Vat Number in the view of every company.

To make it visible it is necessary to enter in the record of a company and scroll to the bottom of the “Information of this company” section.

At the end click on the “View all the proprieties” button, and scroll down to the last category named “CreditSafe”.

Click “Add to your view” for all the proprieties available. On the top left it is possible to select the order in which the fields should be shown.



The screenshot displays a HubSpot company record with the following details:

- Total revenue: €3,350.00
- Type: Partner (checked)
- Web technologies: Hotjar, Google Tag Manager, Cloud Flare, Google Analytics, Google Apps
- Website URL: heply.it
- Year founded: 2019

Below these details is a list of property categories:

- > Social media information 8 properties
- > Web analytics history 5 properties
- > Conversion information 7 properties
- > Target accounts information 5 properties
- ▼ Creditsafe 1 properties
 - Country (checked): Italy

COMPANY CREATION

To manually create a company, navigate to *Contacts>Companies*.

1. On the top right click on Create company
2. On the right panel insert the data of the company
3. Insert the VAT number and the country in the field chosen during installation

Create company [X]

Company domain name

Company name

Company owner
 Alek Dewetak [v]
Start by entering a domain name, an account name, or both.

Industry
 Search [v]

Vat/Registration number

Type
 Search [v]

City

State/Region

< Companies Creditsafe Italia creditsafe.com

Search activities [Q] [Expand all] [Co]

Activity | Notes | Emails | Calls | Tasks | Meetings

Filter by: Filter activity (9/16) | All users

This company was created May 5, 2022 at 10:28 AM

Allentown

State/Region PA

Postal code 18104

Number of employees 5,000

HOW THE PLUGIN WORKS

The plugin searches companies in two ways:

1. By using VAT number
2. By using Company name

The search by VAT number always takes place in all the states to which the user has access (in the free version, the user has access only to Italian companies), and the VAT number must be inserted in the field chosen during the configuration by the user.

Before the VAT number it is always necessary to enter the identification code of the nation (ex: for Italy IT, Germany DE).

When a valid VAT number is entered, the plugin automatically associates the company with the same VAT number.

If you do not have a VAT number, you can search directly by using the company name. For research using the company name you need to choose a default country from the drop-down menu in the settings.

By using the company name, it is possible to choose whether to carry out multicountry search (in additional nations) or to search always in the same nation.

The choice of the default country has two functions:

1. If multicountry search is not enabled, when the plugin searches for the company, it will only return results based in the default country.
2. If the multicountry search is enabled and the user does not enter the status of the company, the search will be made in the default country.

When you search by company name, all the results will be shown in the CreditSafe card on the right.

SETTINGS

To enter in the settings, it is necessary to enter into the record of a company. In the column on the right search for the CreditSafe card. Under the card click the link called Settings.

The user can in any moment use the settings to:

- Change the language
- Activate the multicountry
- Change the default nation
- Change the field VAT number
- Migrate to a CreditSafe paying account

www.creditsafe.com

