



cloud solutions

CreditSafe Account Association

FHL CreditSafe Integration



Document References

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1. Navigation

CreditSafe Account Associations can be navigated to via the navigation bar or via the global search.

To access CreditSafe Account Associations via the navigation bar, navigate to CreditSafe > Search > Account Association (Figure 1). The CreditSafe Center Tab is visible, by default, in Administrator and Full Access roles.

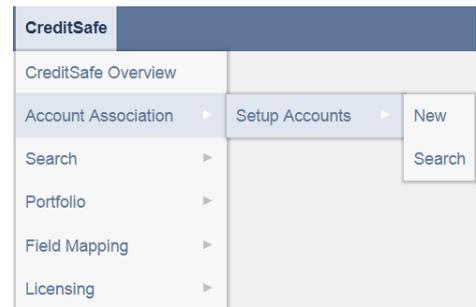


Figure 1: CreditSafe Account Association menu navigation

From the CreditSafe navigation menu, Account Associations can be viewed as a list, created or searched.

Account Associations are also accessible via the global search, by selecting the CreditSafe Account Association result to view the list of Account Associations, or selecting the New CreditSafe Account Association result to create a new Account Association (Figure 2).



Figure 2: CreditSafe Account Association global search

2. Account Association

A CreditSafe Account Association (Figure 3) defines the link between a NetSuite account (or Subsidiary) and a CreditSafe Global Gateway Service (GGS) account. The creation and visibility of Account Association records is available within Administrator and Full Access roles. For more information on permissions for CreditSafe Account Association records, please refer to the Admin Documentation included with the bundle.

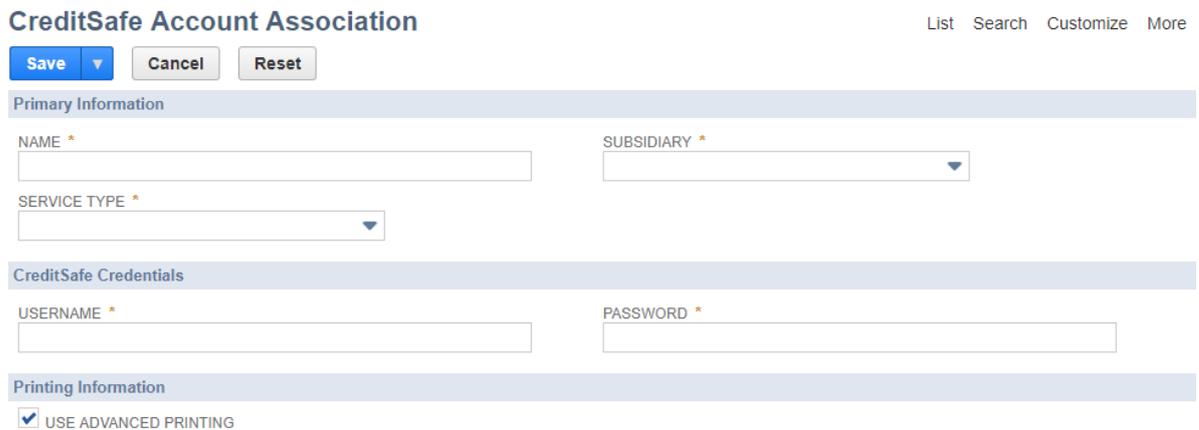


Figure 3: CreditSafe Account Association form

If the NetSuite account is not a One-World instance, the Subsidiary field is not visible (Figure 4).

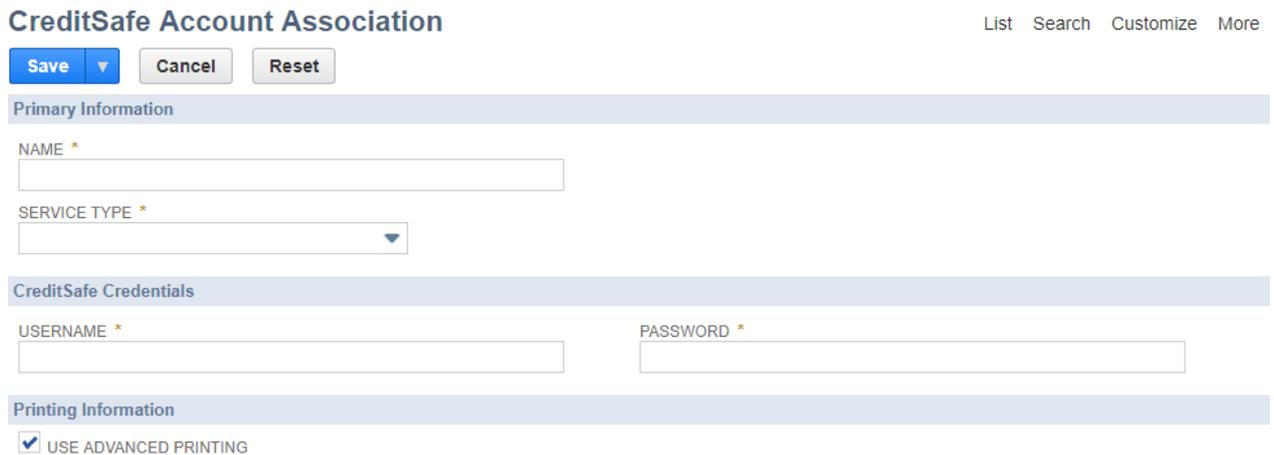


Figure 4: CreditSafe Account Association form, in non-One-World instance

2.1. Primary Information

The fields provided in the Primary Information section of the form are used to define the use of the CreditSafe account within NetSuite. The Name of the Account Association is provided for reference purposes, specifically in the case where multiple Account Associations are present within the account. The Subsidiary field, visible in One-World instances of NetSuite, defines the Subsidiary that can utilise this CreditSafe account. For a user to utilise a CreditSafe account defined via an Account Association record, the



Subsidiary on the Employee record must match the Subsidiary of the desired Account Association.

The Service Type (Figure 5) defines the type of GGS account that is to be utilised. Test accounts can be made available by CreditSafe, using the Test service, if desired.



Figure 5: Service Type field on CreditSafe Account Association form

2.2. CreditSafe Credentials

The Username and Password fields define the credentials to be used during requests to CreditSafe (e.g. Company Searches).

Passwords are encrypted, for security purposes, and have a character limit of 15 characters.

2.3. Printing Information

The Use Advanced Printing checkbox defines whether a printed version of a Company Report should be requested during the obtainment of the report from CreditSafe. If this checkbox is checked, the obtainment of a CreditSafe Company Report will, where possible, include a printed version of the Company Report from CreditSafe. If this checkbox is not checked, a printed version of a report is still available, but it is a plain text version of the report displayed on screen.

It is noteworthy that the use of advanced printing may have performance implications during the obtainment of live CreditSafe Company Reports.