D&B360 Administration and Installation Guide

for Oracle CRM

Version 2.2

Document Revised May 2013

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About this Guide

Audience and Purpose

This guide is for Oracle CRM administrators who plan to install the D&B360 software application in their CRM environment.

We assume that you are familiar with how to use a command-line interface and how to download and copy executable files to your local directory.

If you are interested in more training and education about using our products, learning opportunities are available here: D&B Training and Education Opportunities for Admin Users.

Conventions

Note: Notes mean *reader take note* and provide helpful suggestions.

(!) Important Note: Important Notes mean *reader be careful*. In this situation, you might do something that could result in loss of data.

In sections that include instructions for using the D&B360 and CRM graphical user interface (GUI):

- Text in **bold** indicates the name of a window, tab, field, area, or button that you click or interact with.
- Text in `monospace` indicates a directory path or a command that you need to type in the command-line interface.

Navigating in the PDF

Note: To download the free, latest version of Adobe Reader, go to this web site: http://get.adobe.com/reader/.

1. To return to the page you were on after you click a cross reference link, press **Alt + Left Arrow.**
2. To return to the first page of the document, press the **Shift + Home**.
3. To navigate in the PDF file or change the Adobe Reader settings, on the Adobe Reader menu, select **View** > **Page Navigation**, **Page Display**, and **Zoom**.

Related Documentation

For more information about D&B360 from the user perspective, refer to the *D&B360 User Guide*. For more information about using the Oracle CRM, refer to the CRM documentation.

Chapter 1: Introduction

Welcome to the *D&B360 Administration and Installation Guide*, which instantly connects you to customer and prospective customer data that only D&B can provide – plus relevant rest-of-world content, all within your instance of Oracle CRM.

Product Benefits

With D&B360, you get the business insight you need, the D&B data quality you want, and the ease-of-use you deserve.

Now you can see all angles of your prospects and customers within your CRM:

- Know your customers better.
- Acquire new prospects.
- Sell deeper into organizations.
- Improve salesperson effectiveness.

D&B empowers you with relevant and credible information, facilitating your role as a trusted advisor to enable new sales.

SEE NEW OPPORTUNITIES	Seeing your customers and prospects in a new way can uncover new information and new-sale entry points.
ACCELERATE YOUR SALES CYCLE	Once you establish relevance and credibility, customers will trust you with their business.
EXPAND YOUR CUSTOMER FOOTPRINT	Build customer relationships on a foundation that is based on relevance, credibility, and trust.
POSITION YOUR SUCCESS	With D&B360, you have a powerful tool that helps you to better understand your customers pain points, respond to their needs, and ultimately positions you to win more business. The D&B360 platform features On-demand access to D&B data, automatic refresh and synchronization with the D&B database, and seamless integration of rest-of-world data.

Guide Objectives

The D&B360 Administration and Installation Guide*for* Oracle CRM provides instructions for general D&B360 Administrator tasks.

Guide Organization

The D&B360 Administration and Installation Guide is organized by tasks groups, which are presented in the sequence in which they occur. For instance, you need to consider the pre-installation requirements before you can install or upgrade the product. Likewise, you need to install the product before you can configure profiles or deploy the application.

Access to Features

D&B360 is a powerful tool. You might find more than one way to do a specific task and learn that you can use a feature or function in more than one area.

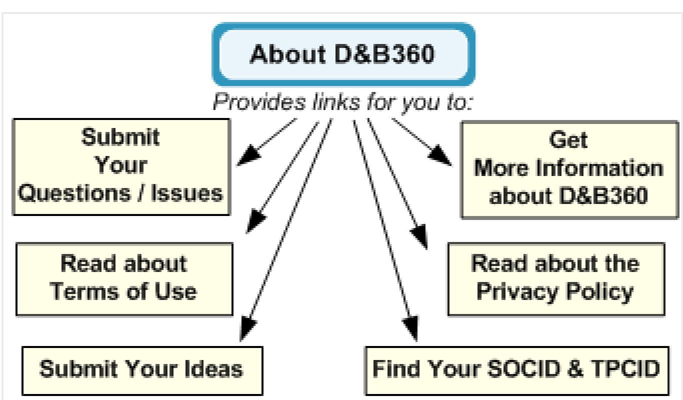
For that reason, this guide is organized by functions or tasks you are trying to accomplish. References to links or menu options that help you navigate your CRM are also included.

Chapter 2: Getting Started

Note: For more information about the user interface and other features of theOracle CRM, refer the user, getting started, installation, and administrator guides for that CRM.

About D&B360

To find basic information and useful links for interacting with D&B360, click **About D&B360**, located on the D&B360 menu. You will also find a link to the D&B training web sites here.



Considerations for Administrators

You will be working within the Oracle CRM to establish the settings that you need. Take time to familiarize yourself with Oracle operations and the location of the Oracle CRM documentation. This information will help you successfully complete your tasks as an administrator for D&B360 for Oracle CRM.

Specifying the Requirements for Your CRM Environment

Before you install D&B360 in your CRM environment, verify that the environment meets these requirements.

Platform version	18
Client operating systems	Microsoft Windows XP SP 3 or Windows 7
Browser	IE 7, 8; Firefox 3.6

Actual requirements and product functionality may vary based on your system configuration and operating system.

D&B360 Packages

D&B360 is currently available in three packages: Tier 1, Tier 2 and Tier 3. The following table provides an overview of what is available in each package.

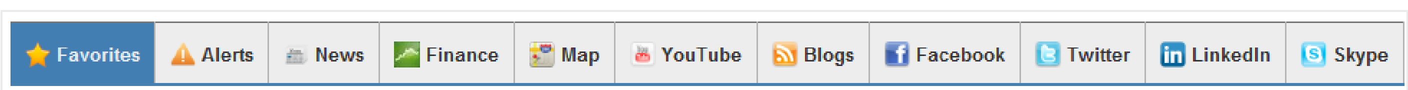
Location and Feature	Tier 1	Tier 2	Tier 3
COMPANY			
➢ **Company Matching**	✓	✓	✓
➢ **Company Data**			
➢ ➢ D&B360+ – (76 fields)	✓	✓	✓
➢ ➢ D&B360+ – (100 fields)	not available	✓	✓
➢ ➢ D&B360 View – (Related Accounts)	not available	✓	✓
➢ ➢ D&B360 View – (Family Tree Query)	not available	not available	✓
➢ ➢ D&B360 View – (Family Tree Hierarchy)	not available	not available	✓
➢ ➢ D&B360 Marketing Prescreen – (Accounts)	not available	✓	✓
➢ ➢ D&B Competitors – (Accounts)	not available	not available	✓
➢ ➢ D&B Industries powered by First Research – (Accounts)	not available	not available	✓
➢ ➢ D&B Financial – (Accounts)	not available	not available	✓
➢ **D&B360 Account Refresh** – (Accounts)	✓	✓	✓
CONTACTS			
➢ ➢ Contact Search – (including Contact Name Search)	✓	✓	✓
➢ ➢ Contact Append with smart append & merge	✓	✓	✓
REST OF WORLD (Companies and Contacts)			
➢ ➢ Favorites	✓	✓	✓
➢ ➢ Alerts	✓	✓	✓
➢ ➢ News	✓	✓	✓
➢ ➢ Finance	✓	✓	✓
➢ ➢ Map	✓	✓	✓
➢ ➢ YouTube	✓	✓	✓

Location and Feature	Tier 1	Tier 2	Tier 3
➢ ➢ Blogs	✓	✓	✓
➢ ➢ Facebook	✓	✓	✓
➢ ➢ Twitter	✓	✓	✓
➢ ➢ LinkedIn	✓	✓	✓
➢ ➢ Skype	✓	✓	✓
D&B360 BUILD A LIST			
➢ ➢ D&B360 Build-A-List	✓	✓	✓
➢ ➢ D&B360 Look-A-Like	not available	✓	✓
D&B INDUSTRIES POWERED BY FIRST RESEARCH			
➢ ➢ D&B Industry Search	not available	not available	✓

Note: Not all features and content are available in all packages. If you have questions, contact your D&B sales representative.

Using Rest of World

Rest of World, or ROW, refers to social media applications and news feeds about the companies you are interested in. These applications interact with your CRM and D&B360 to provide useful information related to D&B360 data. D&B360 ROW applications display as follows:



When you set user permissions, you will specify which ROW applications users can access. see "Establishing Permissions for Roles within D&B360" on page 5-5. By linking to ROW applications in D&B360, users can get a fully aggregated information view of their customers from several social and news media sources — all within the CRM application.

Rest of World Applications

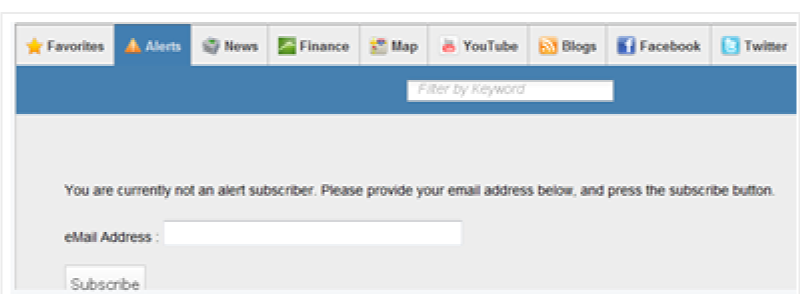
D&B360 currently supports the social and news media applications listed in the following table. From a D&B360 Account page, click **D&B360 ROW** to display the ROW tabs. To navigate through the ROW applications, click the tabs.

ROW Icons	Description
Favorites	Allows you to save items of interest to you and stores them in this tab. To add an item as a favorite, such as a news story, click the **Star** icon. When you see your cursor pointer change into a little hand, click **Mark as a Favorite**.
Alerts	Allows you to track news so you can create customized alerts targeted to your specific areas of interest. These e-mail alerts include relevant news articles, press releases, company Web site updates, and blog posts, and are delivered overnight to your email in-box. Use alerts to stay up-to-date about the most recent company news, reach out to prospects or customers, create sales opportunities, and follow events of both public and private companies. For more information, see "Setting Alerts" on page 2-6
News	Displays aggregated headlines from many of the world's news sources. In D&B360, the News tab displays overall news about the account name with links to related articles. To open an article, click its link.
Finance	Displays stock feeds and financial news feeds about a company from a variety of sources.
Map	The Map icon pre-populates the Account Billing address and connects to Google Maps to show the address location.
YouTube	YouTube is a video-sharing website where users can upload, share, and view videos. A list of YouTube videos displays from companies in your D&B360 accounts. Only company-authorized videos display.
Blogs	Blogs display a list of authorized blogs from companies in your D&B360 accounts.
Facebook	Facebook is a social utility that facilitates communication. Only company authorized Facebook pages display for each company. To view Facebook information about people and companies from within D&B360, you need to have a Facebook account. A Facebook window opens to the account page you are currently viewing if it exists in the database. To view the company Facebook information, if you are not already logged in to Facebook, log in to your Facebook account.

ROW Icons	Description
Twitter	Twitter operates a free digital service site that blends social networking with the ability to post short messages (or micro-blogs) limited to 140 characters or less, commonly known by users as Tweets. The Twitter service is designed for use on personal computers and through mobile devices such as smart phones. Tweets are published on a poster's personal web page, and can be restricted to select viewers, or viewed by anyone. In D&B360, when you click the Twitter tab, a list of that company's official tweets displays.
LinkedIn	LinkedIn is a business-oriented social networking site where you can connect with trusted contacts and exchange knowledge, ideas, and opportunities. If you are not already logged in to LinkedIn, you will need to log in when it opens in a browser window. If the account you are viewing is in the database, a LinkedIn window for that company opens. If that company is not found, a LinkedIn search window opens with that company name pre-populated. Or you can use the LinkedIn search window to define your search.
Skype	Click to make voice calls over the Internet. If you have Skype installed in on your computer, you can use the Skype icon listed next to phone number to make a Skype call. If phone numbers for companies, contacts, or leads are in your D&B360 account information, you can make Skype calls to them.

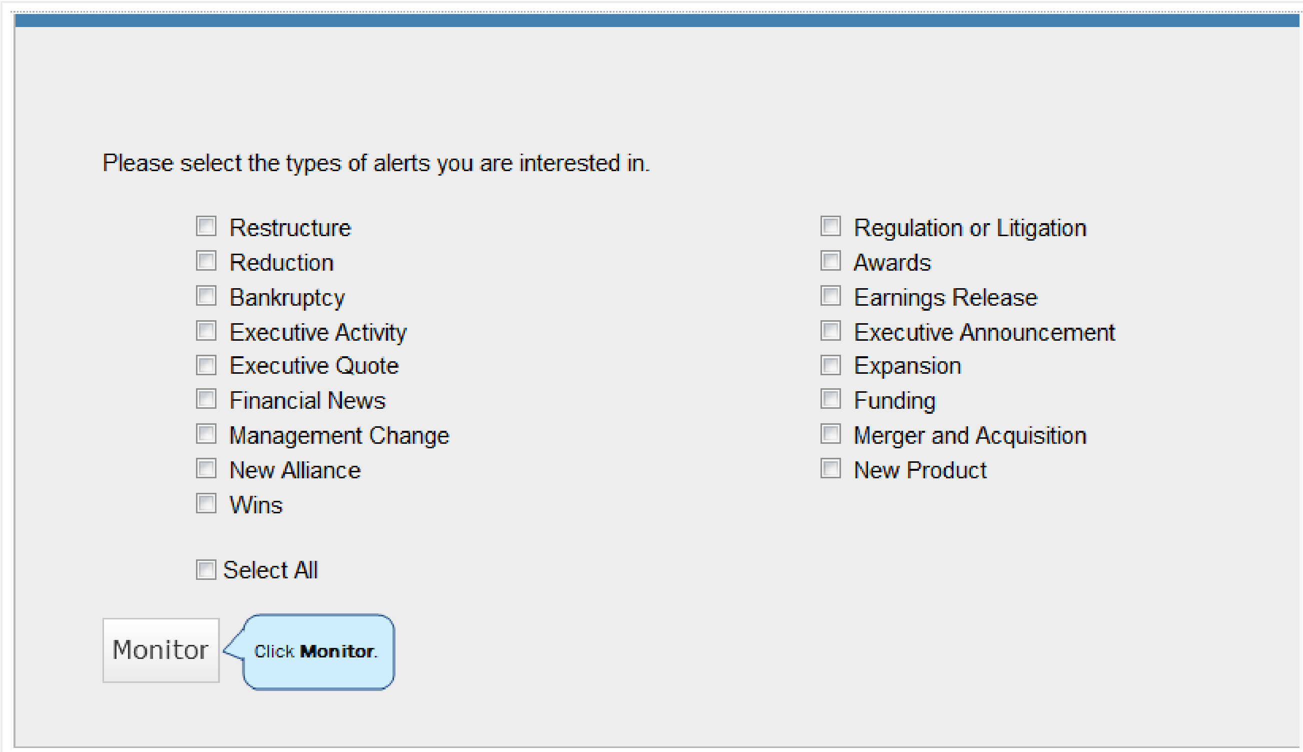
Setting Alerts

1. When you click the **Alerts** tab for the first time, in the **eMail Address** field that displays, type the email address where you want your alerts digest email to be sent.
2. Click **Subscribe.**



3. Click **Alerts.**
4. Select which type of alerts you are interested in, or click **Select All.**

5. Click **Monitor.**



Chapter 3: Installing Oracle Using the Migration Tool

Preparing for the Migration Steps

To install the D&B360 add-in application, you must first log in to the secure site. We will create custom components in your Oracle On Demand instance through Oracle's application migration tool. This process creates specific items through automated calls to your CRM system.

After the installation process has completed, use the following checklist to verify that the listed items are in your CRM instance.

Migration Checklist

Feature Name	Type of Item	Create or Update	Installed
Custom Object# D&B Company	Custom Object	Update	
Custom Object# D&B Contact	Custom Object	Update	
Custom Object# D&B Admin Review	Custom Object	Update	
Custom Object# D&B Financials	Custom Object	Update	
D&B Custom Layout	Account Page Layout	Create	
D&B Custom Layout	Lead Page Layout	Create	

D&B Custom Layout	Contact Page Layout	Create	
About D&B360	Custom Web Tab	Create	
Accounts with D&B360	Custom Web Tab	Create	
D&B360 Administration	Custom Web Tab	Create	
D&B360 Build A List	Custom Web Tab	Create	
Leads with D&B360	Custom Web Tab	Create	
D&B Industries	Custom Web Tab	Create	
D&B Access Profile	Access Profile	Create	
D&B Role	User Role	Create	

Note: The D&B Admin Review and D&B Financials custom objects are optional and require a higher level package to gain access.

To communicate with your CRM system and create detailed custom components, you need to grant access to your CRM system and select the custom objects to be included in the D&B360 add-in application. Use your Migration checklist as you proceed.

Completing the Migration Steps

1. Navigate to the D&B360 Registration Site and click the installer link.
2. For both D&B Company and D&B Contact objects, select **Custom Object Numbers**.

(!) Important Note: To avoid Data Loss, be sure to select custom objects that have not yet been used. Verify that no numbers are repeated within the 10 custom objects.

Make a note of the custom objects used for each object in the following table. You will need this information during the installation process.

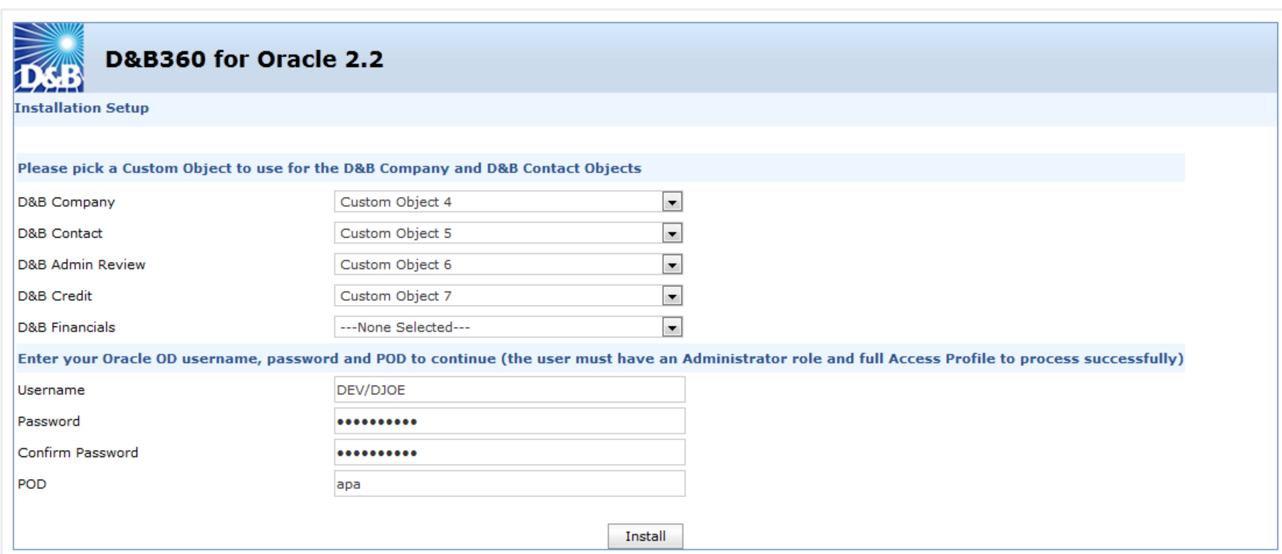
Object Type	Custom Object Selected
Required Custom Objects	
D&B Company	
D&B Contact	
Optional Custom Objects	
D&B Admin Review	
D&B Financials	

To continue, you must be logged in as an Administrator with Advanced Field Management privileges.

3. In the **D&B360 for Oracle Installation Setup** window, enter the Username, Password, and POD of the Oracle instance where you will install D&B360. See the illustration that follows.

   If you need to modify these settings after installation, you will be able to access the System Settings through the D&B360 Administration window.

4. Click **Install**.



The installation takes several minutes to complete. A message displays in the **Installation Setup** window to confirm that the installation was successful.

Chapter 4: Manually Configuring Oracle

Creating the Manual Installation Check List

Not all configurations are supported in an automated format. For those that are not automated, you are required to log in to your CRM instance and implement manual customizations. The admin user must create the following custom components. You can use the following check list to track creation of the required fields.

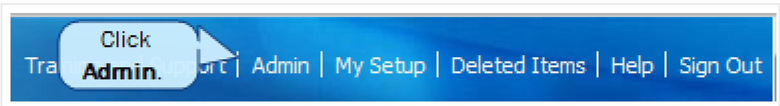
Feature Name	Type of Item	Create or Update	Installed
Account Configuration			
D&B360	Account Web Applet	Create	
D&B360 ROW	Account Web Applet	Create	
D&B360 Custom Layout	Account Page Layout	Update	
Lead Configuration			
D&B360	Lead Web Applet	Create	
D&B360 ROW	Lead Web Applet	Create	
D&B360 Custom Layout	Lead Page Layout	Update	
Contact Configuration			
D&B360 ROW	Custom Web Applet	Create	
D&B360 Custom Layout	Custom Page Layout	Update	
Action Bar Configuration			
D&B360	Global Web Applet	Create	
Action Bar Layout	Action Bar Layout	Update	

Configuring Accounts

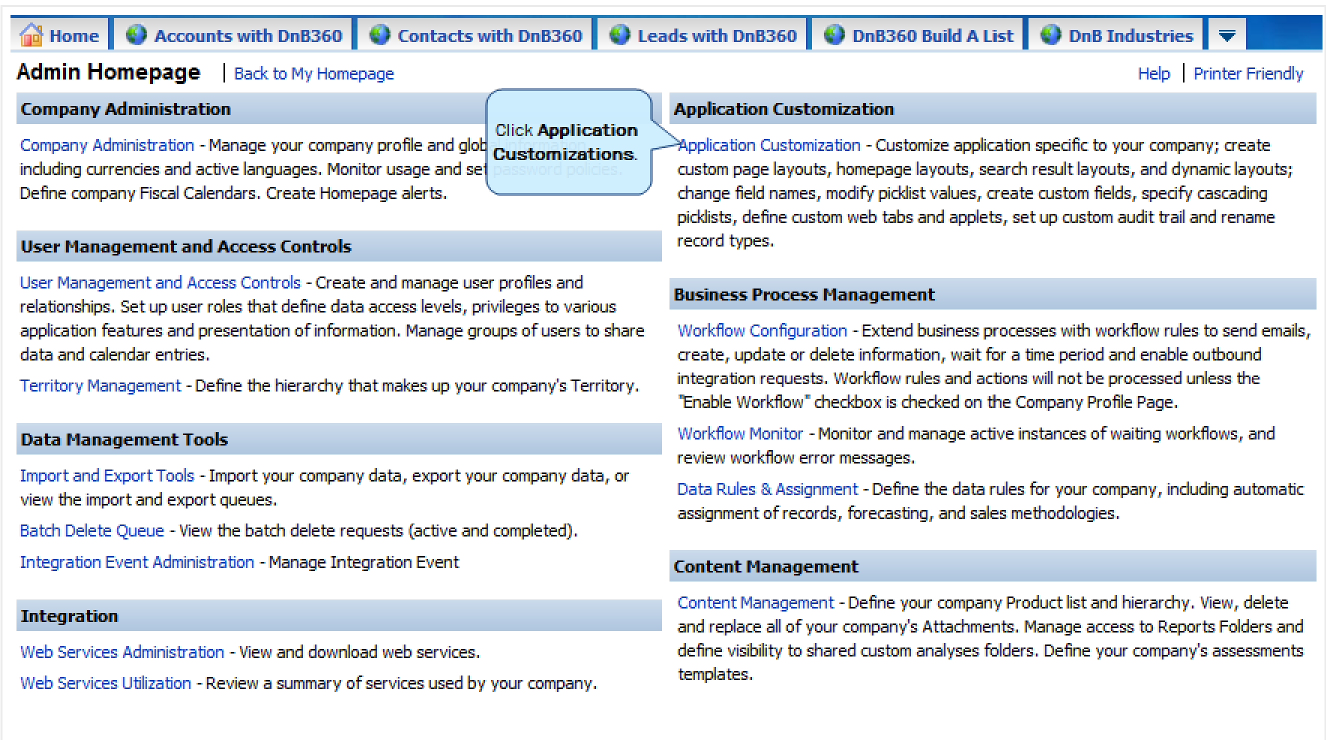
Navigating in the Admin Homepage Window to Configure Accounts

To navigate through the user interface as you complete these procedures, refer to the steps that follow:

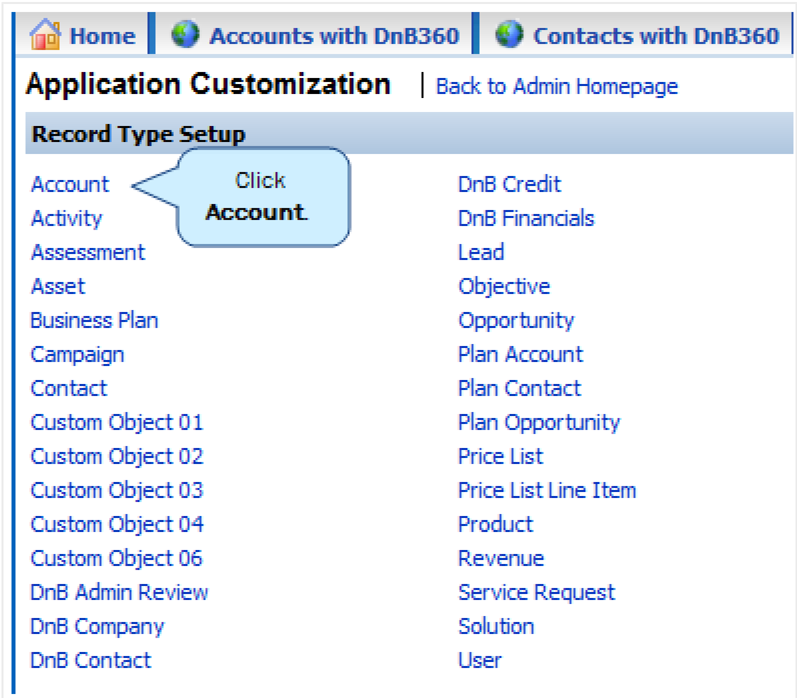
1. Log in to your Oracle instance.
2. In the top menu, click **Admin.**



3. In the **Admin Homepage** window, click **Application Customization.**



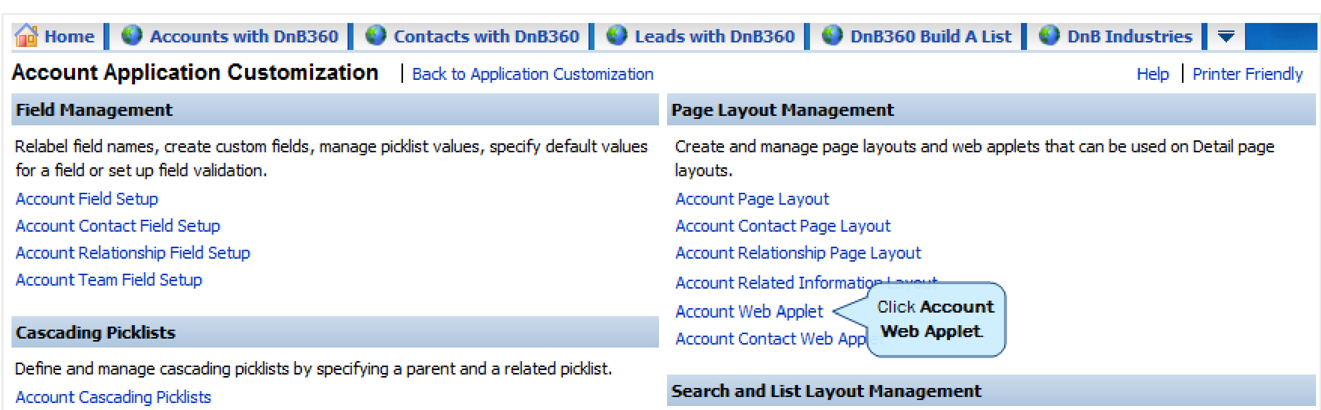
3. In the **Application Customization** window**, Record Type Setup** area, click **Account.**



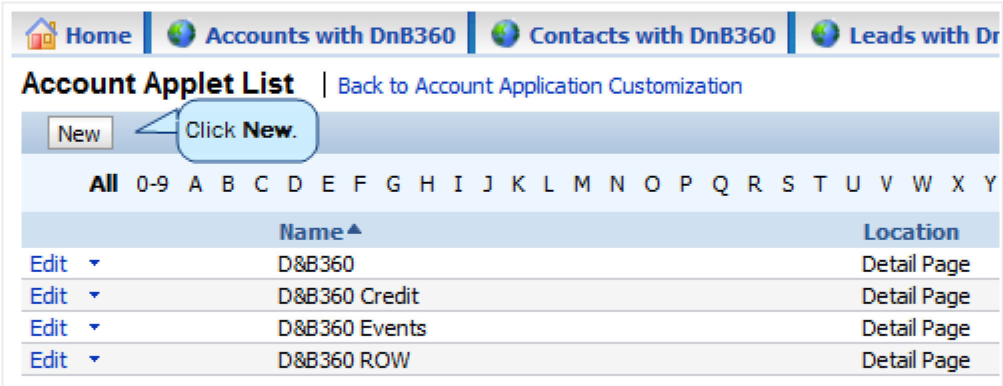
Creating the D&B360 Web Applet for Accounts

For navigation instructions to this point in the process,see "Navigating in the Admin Homepage Window to Configure Accounts" on page 4-3.

1. In the **Account Application Customization** window, **Page Layout Management** area, click **Account Web Applet.**



2. In the **Account Applet List** window, click **New.**



3. In the **Account Web Applet** window, complete these fields:

   a. In the **Name** field, type **D&B360.**

   b. In the **Location** field,select **Detail Page**.

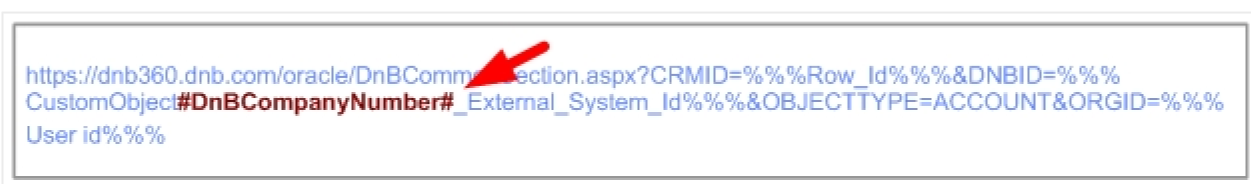
   c. In the **Columns** field,select **Single** or **Double**

   d. In the **Type** field,select **URL** .

   e. In the **User fields** field,select from the list.

   f. In the **URL** field, paste or enter this URL:
   https://dnb360.dnb.com/oracle/DnBCommonSection.aspx?CRMID=%%%Row_Id%%%&DNBID=%%%CustomObject#DnBCompanyNumber#_External_System_Id%%%&OBJECTTYPE=ACCOUNT&ORGID=%%%User id%%%

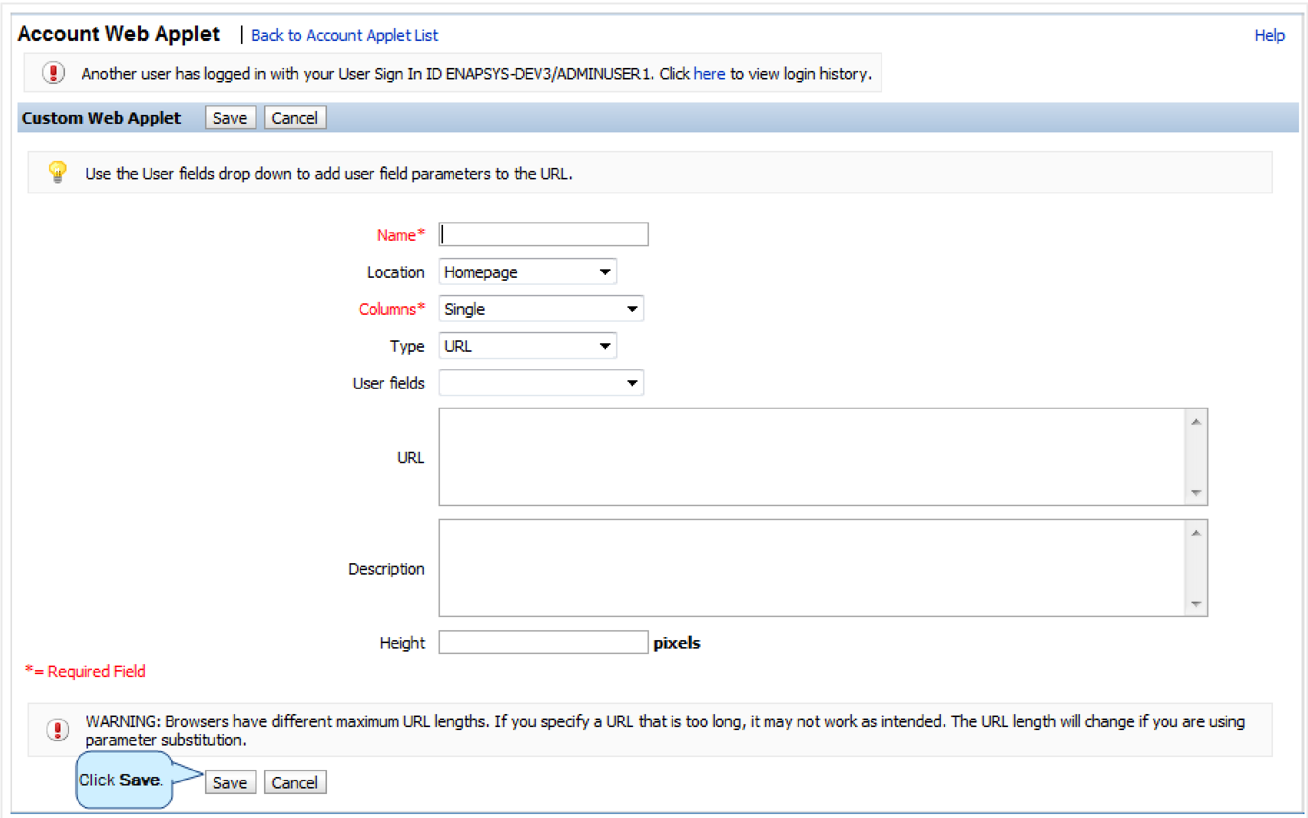
   g. In the URL you pasted, replace Replace **#DnBCompanyNumber#** with the Custom Object Number you selected for the D&B Company object. An example is shown in the following illustrations:



   h. (Optional) In the **Description** field, type a description for your custom web applet.

i. In the **Height** field, type **400** (pixels).

j. Click **Save.**



Configuring the D&B360 ROW Web Applet for Accounts

For navigation instructions to this point in the process,see "Navigating in the Admin Homepage Window to Configure Accounts" on page 4-3.

1. In the **Admin Homepage** window, click **Application Customization.**
2. In the **Account Application Customization** window, **Record Type Setup** area, click **Account.**
3. In the **Page Layout Management** area, click **Account Web Applet.**
4. Click **New.**
5. In the **Account Web Applet** window, complete these fields:

   a. In the **Name** field, type **D&B360 ROW.**

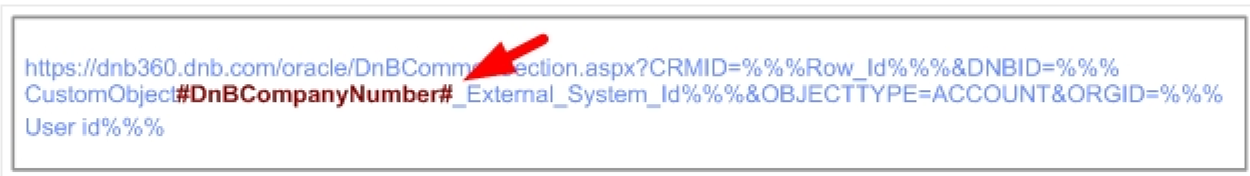
   b. In the **Location** field, select **Detail Page.**

c. In the **Columns** field, select **Single** or **Double**.

d. In the **Type** field, select **URL**.

e. In the **URL** field, paste or enter this URL:
https://dnb360.dnb.com/oracle/DnBROW.aspx?CRMID=%%%Row_Id%%%&DNBID=%%%CustomObject#DnBCompanyNumber#_External_System_Id%%%&OBJECTTYPE=ACCOUNT&ORGID=%%%User id%%%

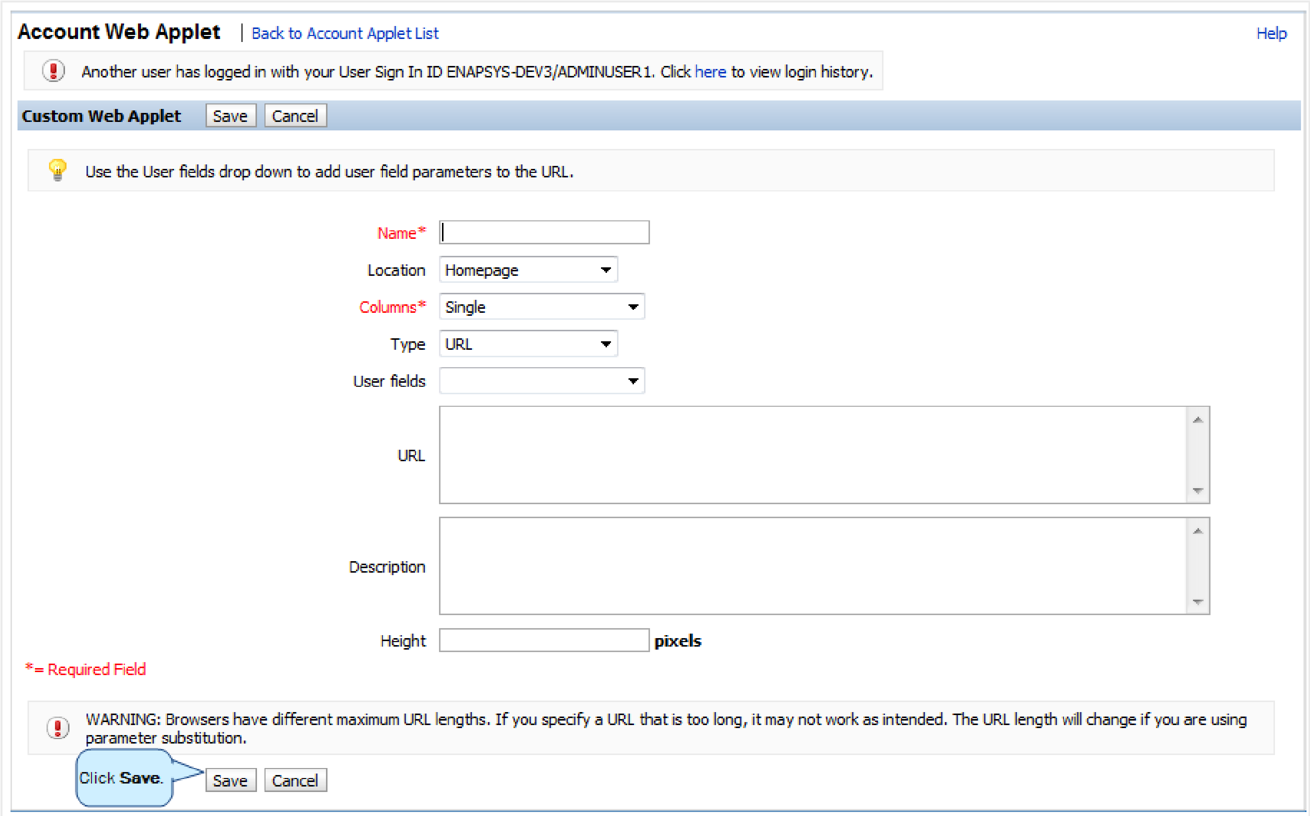
f. Modify the URL by replacing **#DnBCompanyNumber#** with the Custom Object Number that you chose for the D&B Company object. An example is shown in the following illustrations:



g. (Optional) In the **Description** field, type a description for your custom web applet.

h. In the **Height** field, type **750**.

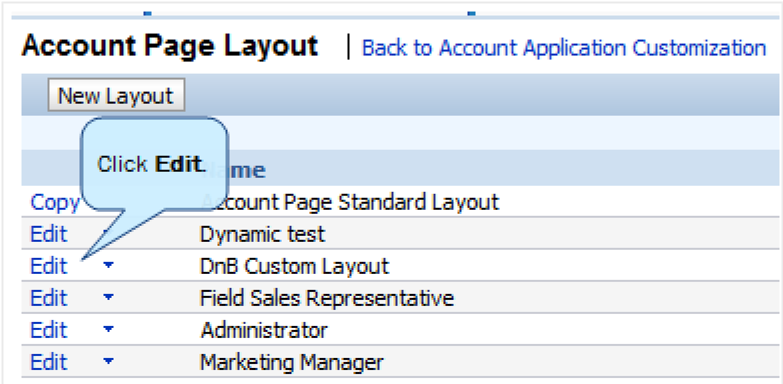
i. Click **Save**.



Configuring the D&B Custom Page Layout for Accounts

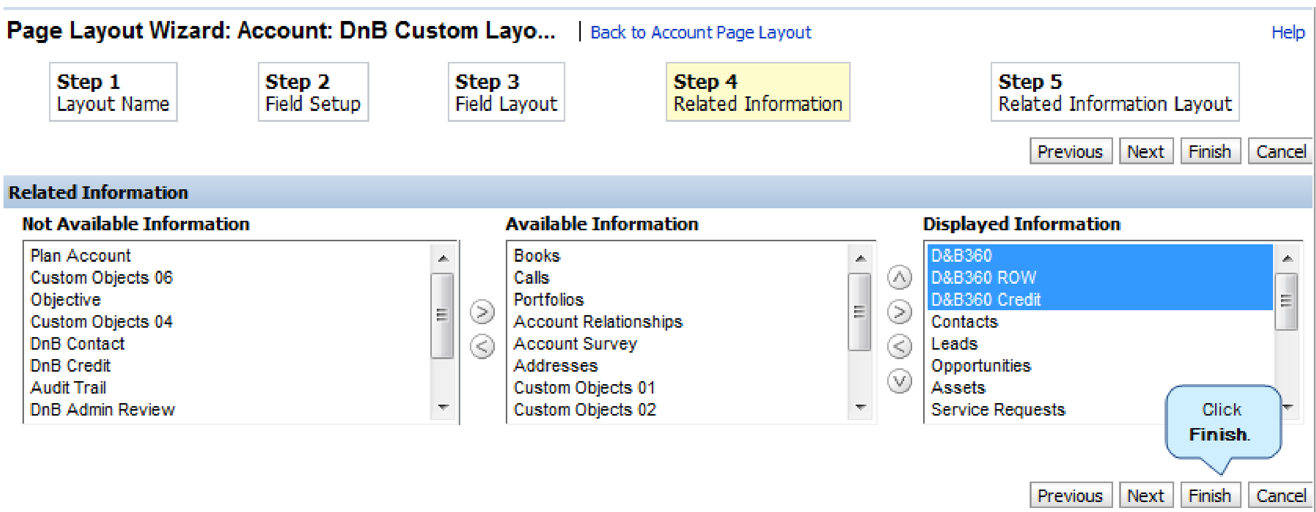
For navigation instructions to this point in the process,see "Navigating in the Admin Homepage Window to Configure Accounts" on page 4-3.

1. In the **Admin Homepage** window, click **Application Customization.**
2. In the **Record Type Setup** area, click **Account.**
3. In the **Account Application Customization** window, **Page Layout Management** area, click **Account Page Layout.**
4. Next to **DnB Custom Layout**, click **Edit**.



5. Click **Step 4.**

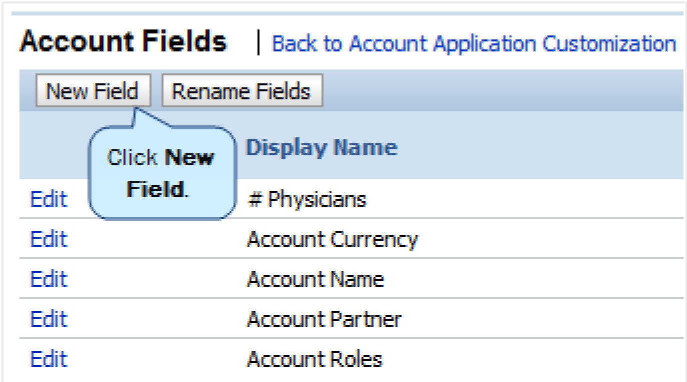
6. Add the **D&B360**, **D&B360 ROW**, and **D&B360 Credit** applets so that they are listed in the **Displayed Information** list, and then click **Finish.**



Configuring the D&B Date Custom Field

1. In the **Admin Homepage** window, click **Application Customization.**
2. In the **Record Type Setup** area, click **Account.**
3. In the **Account Application Customization** window, **Field Management** area, click **Account Field Setup.**
4. In the **Account Fields** window, click **New Field.**

> **Note:** Special characters are not allowed in the field name. For example, instead of using &, use n, as in DnB.

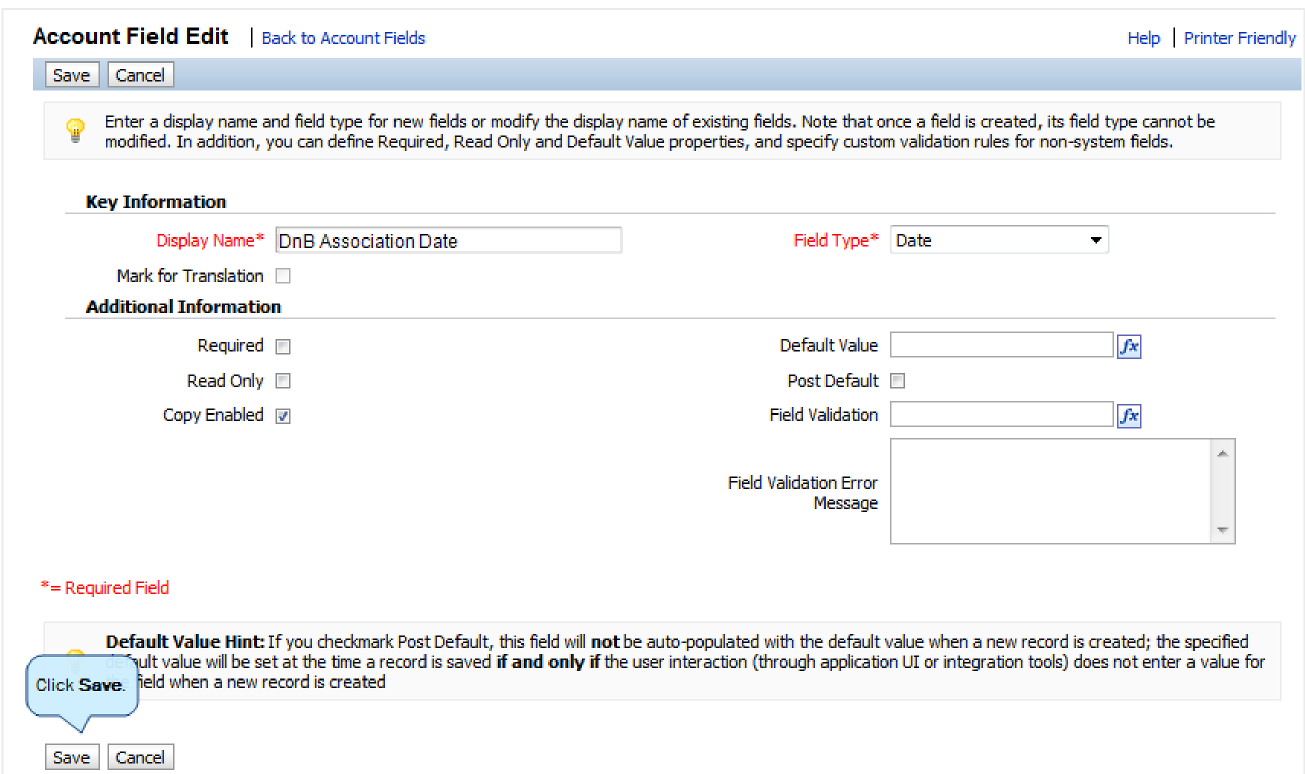


5. In the **Account Field Edit** window:

   a. In the **Display Name** field, type **DnB Association Date.**

   b. In the **Field Type** field, select **Date.**

   c. Click **Save.**



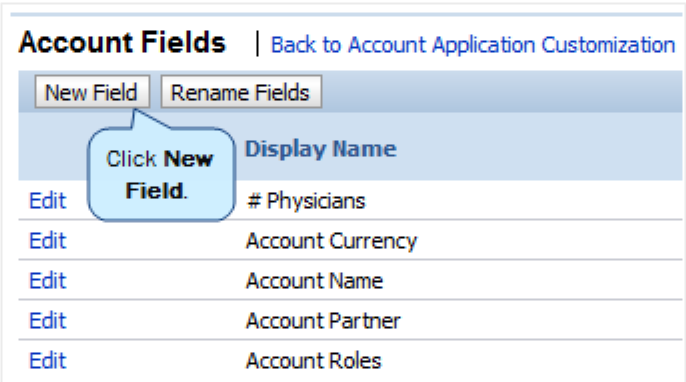
Configuring the D&B Status Custom Field

1. In the **Admin Homepage** window, click **Application Customization.**

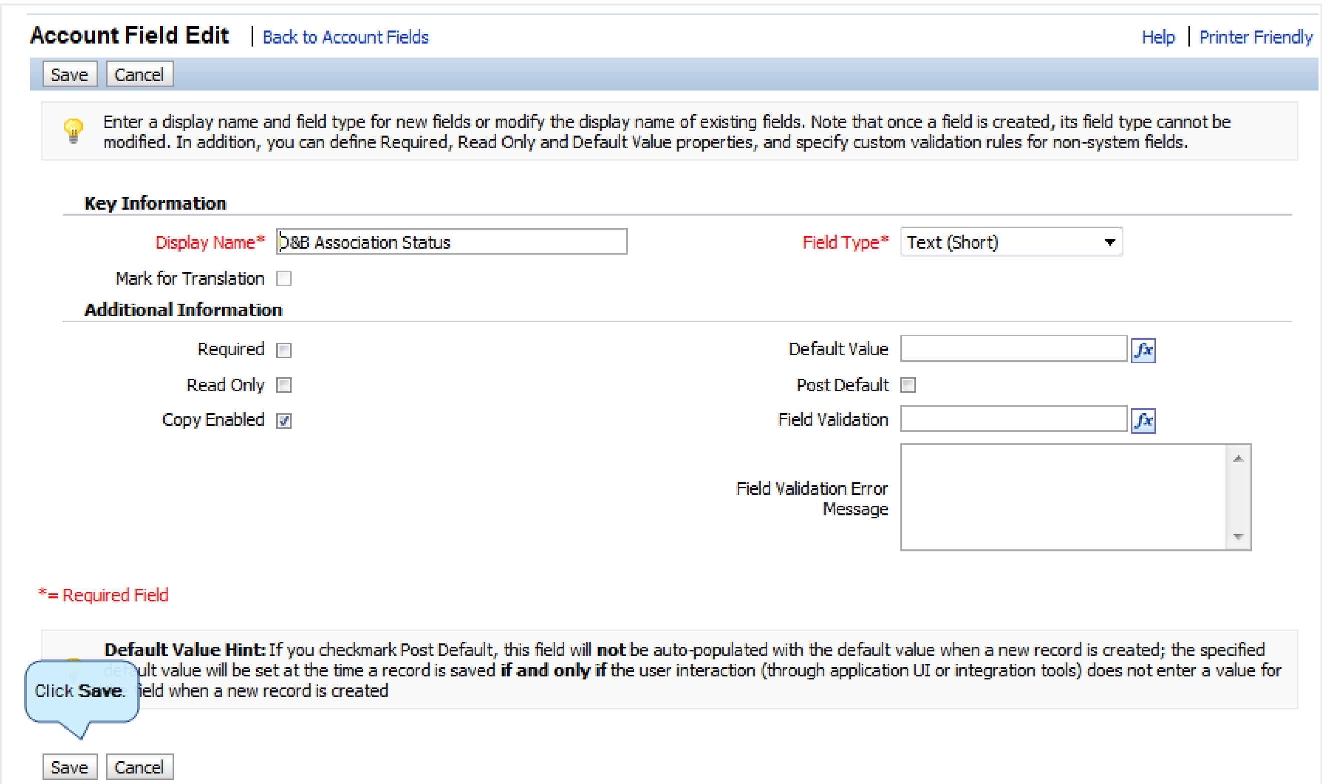
2. In the **Record Type Setup** area, click **Account.**

3. In the **Account Application Customization** window, **Field Management** area, click **Account Field Setup.**
4. In the **Account Fields** window, click **New Field.**

> **Note:** Special characters are not allowed in the field name. For example, instead of using &, use n, as in DnB.



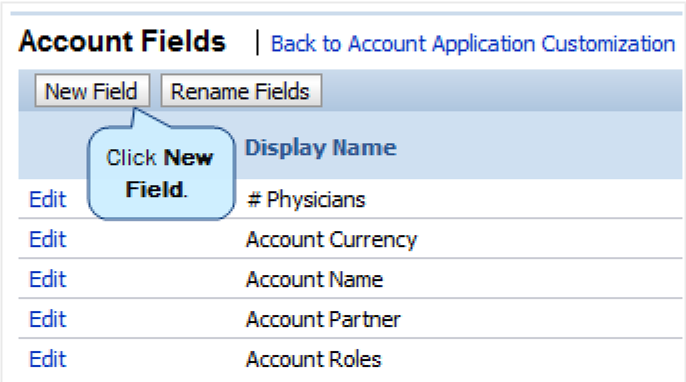
5. In the **Account Field Edit** window:
   a. In the **Display Name** field, type **DnB Association Status.**
   b. In the **Field Type** field, select **Text (Short).**
   c. Click **Save.**



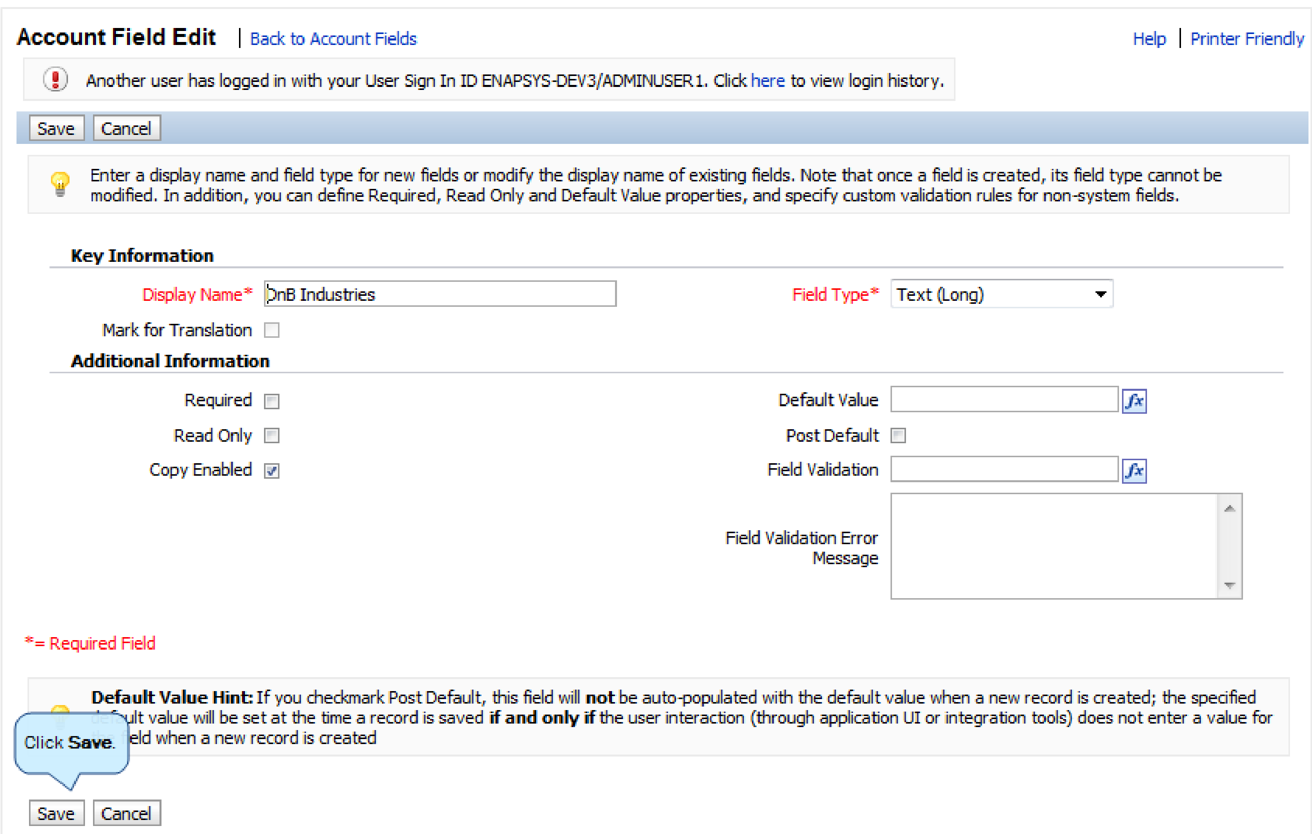
Configuring the D&B Industries Custom Field

1. In the **Admin Homepage** window, click **Application Customization.**
2. In the **Record Type Setup** area, click **Account.**
3. In the **Account Application Customization** window, **Field Management** area, click **Account Field Setup.**
4. In the **Account Fields** window, click **New Field.**

> **Note:** Special characters are not allowed in the field name. For example, instead of using &, use *n*, as in *DnB*.



5. In the **Account Field Edit** window:
   a. In the **Display Name** field, type **DnB Industries.**
   b. In the **Field Type** field, select **Text (Long)**.
   c. Click **Save.**



Verifying Integration Tags

1. In the **Admin Homepage** window, click **Application Customization.**
2. In the **Record Type Setup** area, click **Account.**
3. In the **Account Application Customization** window, **Field Management** area, click **Account Field Setup.**
4. In the **Account Fields** window, click **Rename Field.**
5. Locate the newly created fields: DnB Association Date, DnB Association Status, and DnB Industries
6. In the **Integration Tag** column, make sure that the following data displays:
    - dDB_Association_Date
    - stDB_Association_Status
    - ltDnB_Industries

Display Name	Default Name	Field Type	Integration Tag
DnB Association Date	<Custom Field>	Date	dDB_Association_Date
DnB Association Status	<Custom Field>	Text (Short)	stDB_Association_Status
DnB Industries	<Custom Field>	Text (Long)	ltDnB_Industries

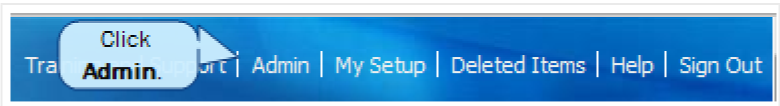
7. If the integration tags do not match, change them to the preceding values.
8. Click **Save.**

Configuring Leads

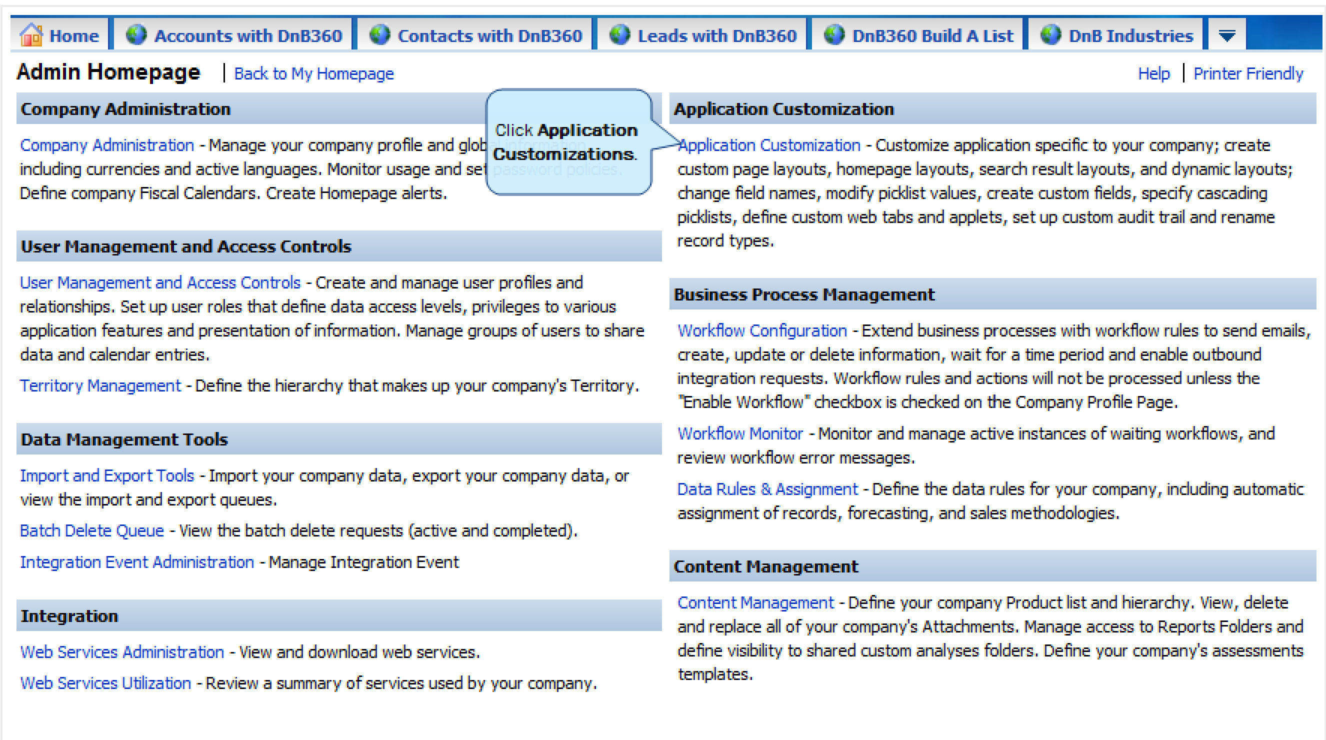
Navigating in the Admin Homepage Window to Configure Leads

To navigate through the user interface as you complete these procedures, refer to the steps that follow:

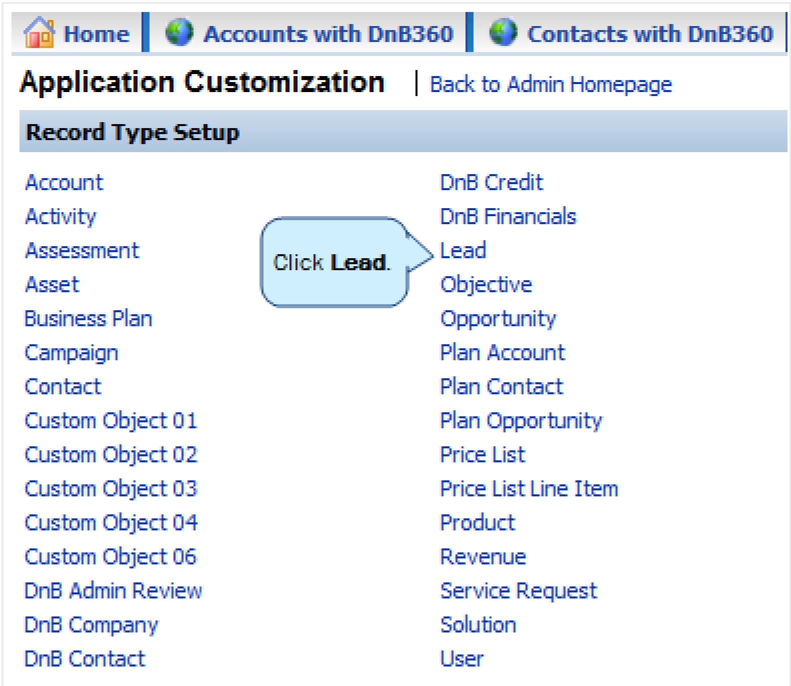
1. Log in to your Oracle instance.
2. In the top menu, click **Admin.**



3. In the **Admin Homepage** window, click **Application Customization.**



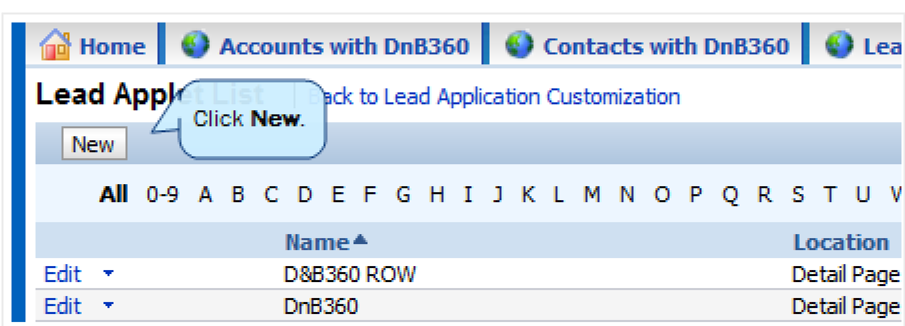
3. In the **Application Customization** window**, Record Type Setup** area, click **Lead**.



Creating the D&B360 Web Applet for Leads

For navigation instructions to this point in the process, see "Configuring Leads" on page 4-14.

1. In the **Lead Application Customization** window, **Page Layout Management** area, click **Lead Web Applet**.
2. In the **Lead Applet List** window, click **New**.



3. In the **Lead Web Applet** window, complete these fields:

   a. In the **Name** field, type **D&B360.**

   b. In the **Location** field,select **Detail Page**.

c. In the **Columns** field,select **Single** or **Double**

d. In the **Type** field,select **URL .**

e. In the **User fields** field,select from the list.

f. In the **URL** field, copy and paste or enter this URL: https://dnb360.dnb.com/oracle/DnBCommonSection.aspx?CRMID=%%%Id%%%&DNBID=%%%CustomObject#DnBCompanyNumber#_External_System_Id%%%&OBJECTTYPE=LEAD&ORGID=%%%User id%%%

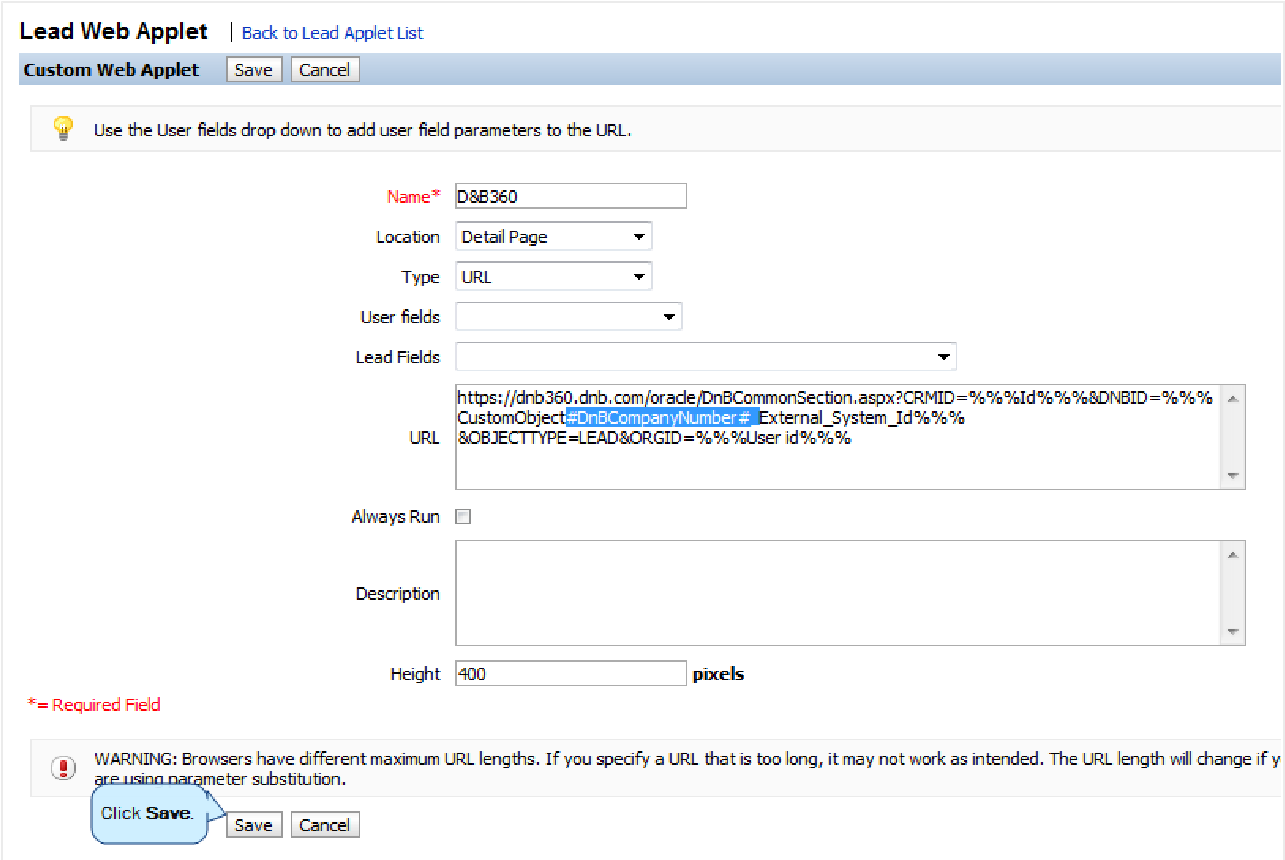
g. In the URL you pasted, replace Replace **#DnBCompanyNumber#** with the **Custom Object Number** you selected for the D&B Company object.

An example is shown in the following illustrations:

h. (Optional) In the **Description** field, type a description for your custom web applet.

i. In the **Height** field, type **400** (pixels).

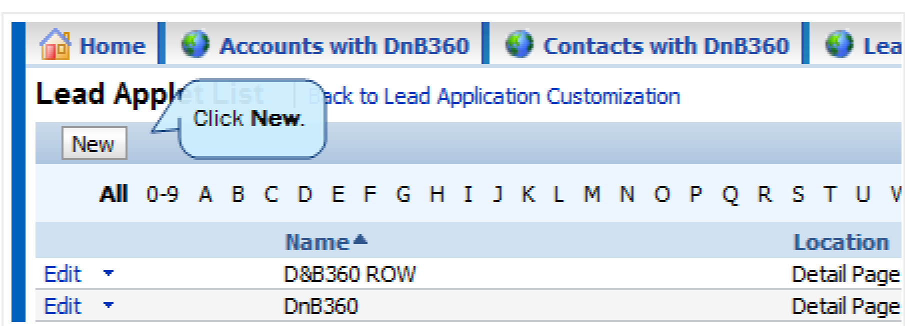
j. Click **Save**.



Configuring the D&B360 ROW Web Applet for Leads

For navigation instructions to this point in the process,see "Navigating in the Admin Homepage Window to Configure Accounts" on page 4-3.

1. In the **Lead Application Customization** window, **Page Layout Management** area, click **Lead Web Applet**.
2. In the **Lead Applet List** window, click **New**.



3. In the **Lead Web Applet** window, complete these fields:

a. In the **Name** field, type **D&B360 ROW**.

b. In the **Location** field,select **Detail Page**.

c. In the **Columns** field,select **Single** or **Double**

d. In the **Type** field,select **URL**

e. In the **User fields** field, select from the list.

f. In the **URL** field, copy and paste or enter this URL: https://dnb360.dnb.com/oracle/DnBROW.aspx?CRMID=%%%Id%%%&DNBID=%%%CustomObject#DnBContactNumber#_External_System_Id%%%&CompanyDnBId=%%%CustomObject#DnBCompanyNumber#_External_System_Id%%%&OBJECTTYPE=LEAD&ORGID=%%%User id%%%

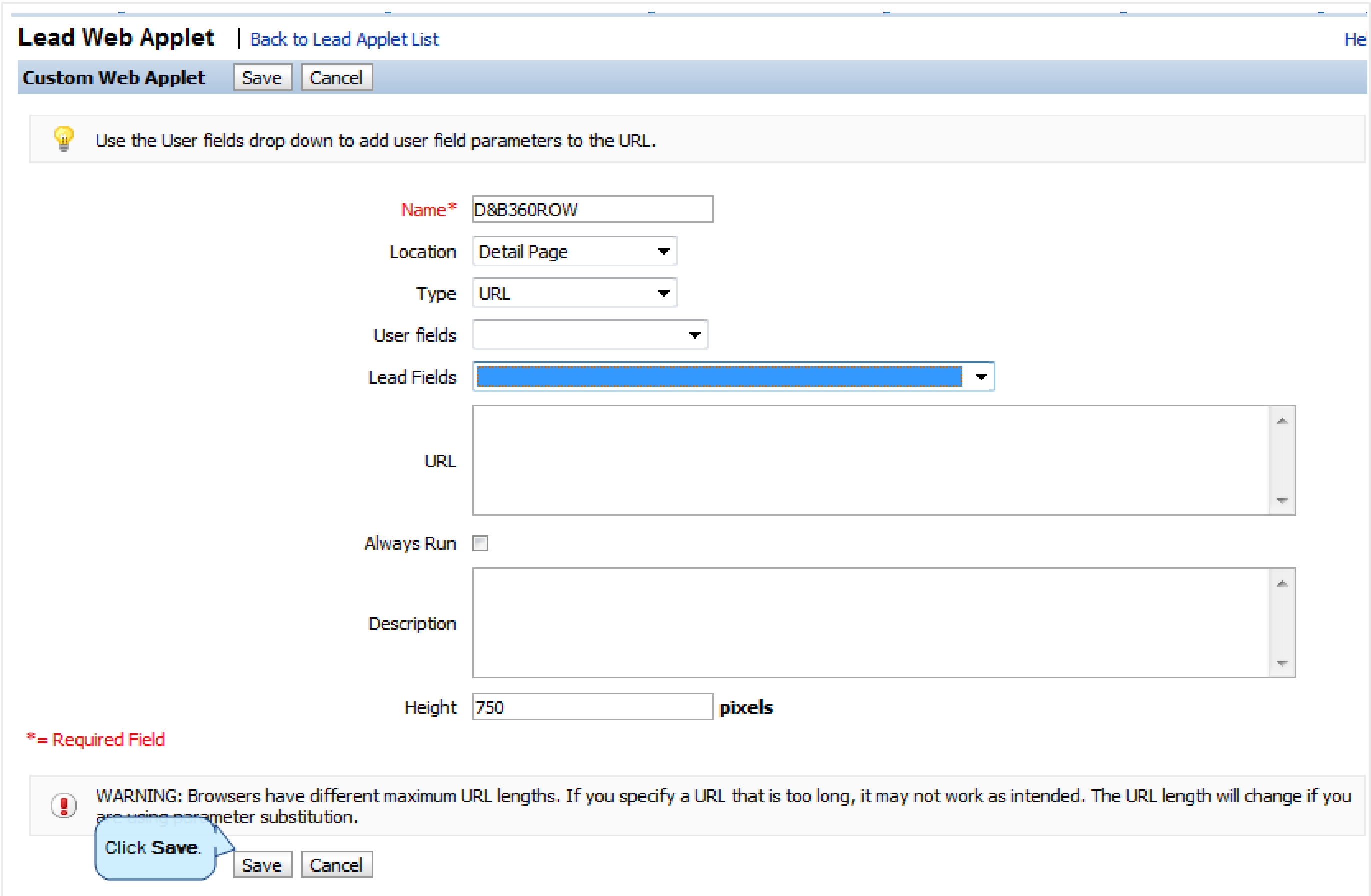
g. After you paste this URL:
— replace **#DnBCompanyNumber#** with the **Custom Object Number** that you selected for the D&B Company object.
— replace **#DnBContactNumber#** with the **Custom Object Number** that you selected for the D&B Contact object.

An example is shown in the following illustrations:

h. (Optional) In the **Description** field, type a description for your custom web applet.

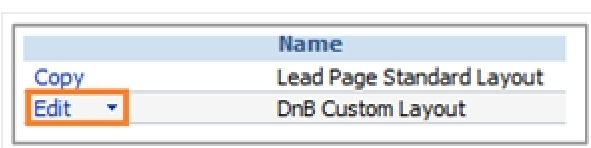
i. In the **Height** field, type **750** (pixels).

j. Click **Save**.



Configuring the D&B Custom Page Layout for Leads

1. In the **Record Type Setup** area, click **Lead.**
2. In the **Lead Application Customization** window, **Page Layout Management** area, click **Lead Page Layout.**
3. Next to **DnB Custom Layout**, click **Edit.**

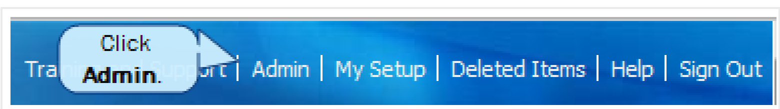


4. Click **Step 4.**
5. Add the **D&B360** and **D&B360 ROW** applets so that they are listed in the **Displayed Information** list, and then click **Finish.**

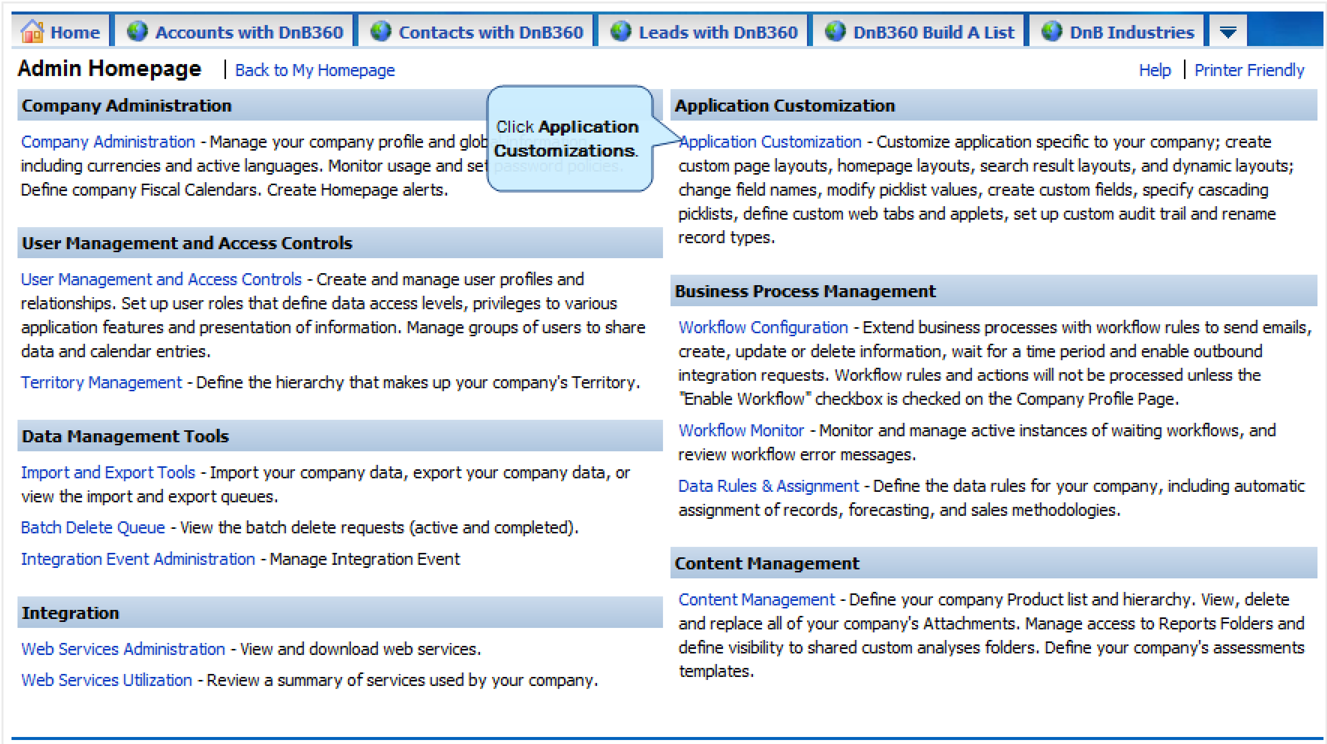
Configuring Contacts

To navigate through the user interface as you complete these procedures, refer to the steps that follow:

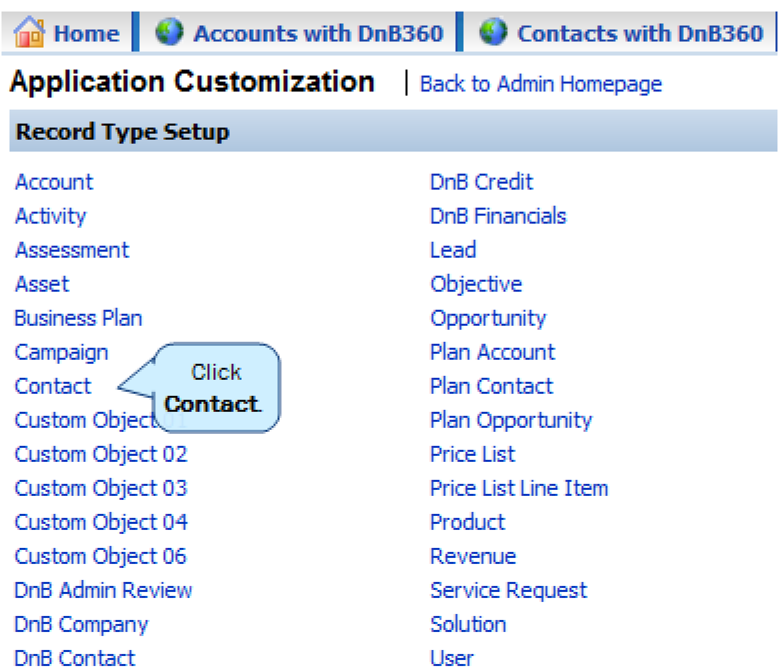
1. Log in to your Oracle instance.
2. In the top menu, click **Admin.**



3. In the **Admin Homepage** window, click **Application Customization.**



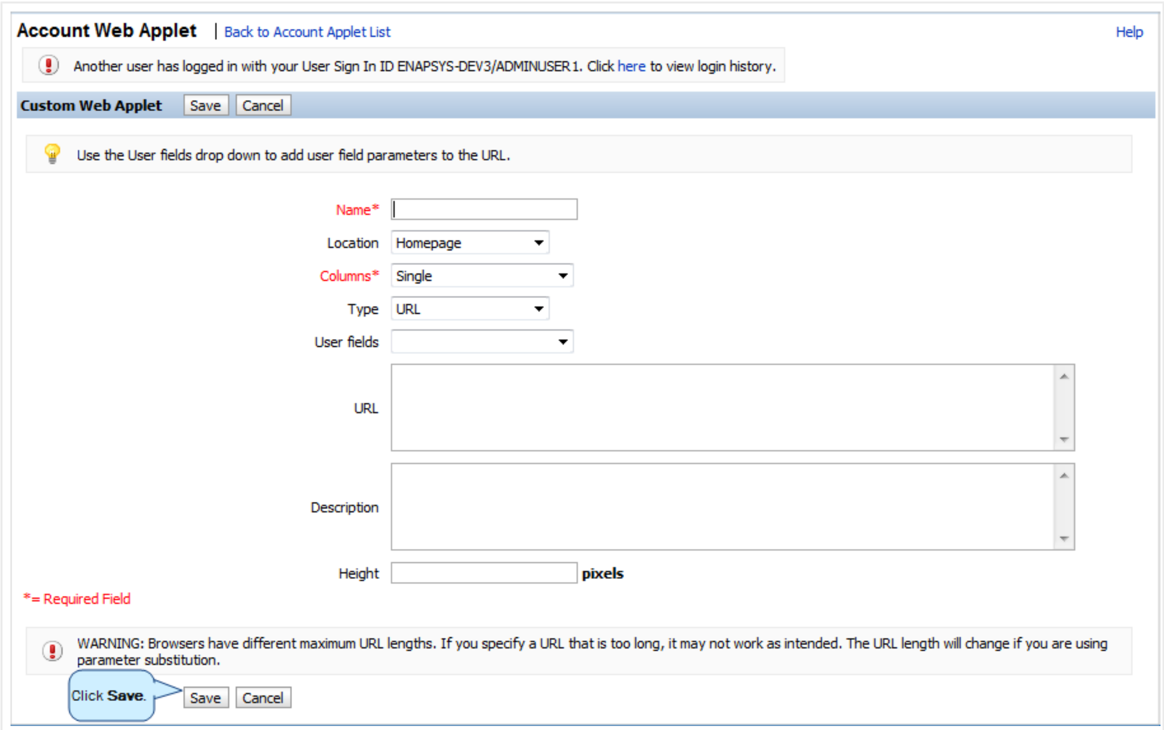
3. In the **Application Customization** window, **Record Type Setup** area, click **Contact.**



Configuring the D&B360 ROW Web Applet for Contacts

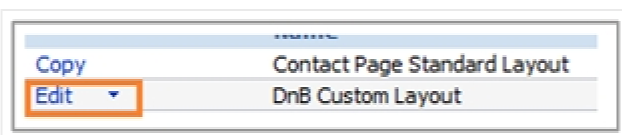
1. In the **Page Layout Management** area, click **Contact Web Applet.**
2. Click **New**.
3. In the **Contact Web Applet** window, complete these fields:
   a. In the **Name** field, type **D&B360 ROW**.
   b. In the **Location** field, select **Detail Page**.
   c. In the **Columns** field, select **Single** or **Double**.
   d. In the **Type** field, select **URL**.
   e. In the **URL** field, copy and paste or enter this URL:
   https://dnb360.dnb.com/oracle/DnBROW.aspx?CRMID=%%%Row_
   Id%%%&DNBID=%%%CustomObject#DnBContactNumber#_External_System_
   Id%%%&OBJECTTYPE=CONTACT&ORGID=%%%User id%%%
   f. Modify the URL by replacing **#DnBContactNumber#** with the **Custom Object Number** that you selected for the D&B Contact object. An example is shown in the following illustrations:

   g. (Optional) In the **Description** field, type a description for your custom web applet.
   h. In the **Height** field, type **750**.
   i. Click **Save**.

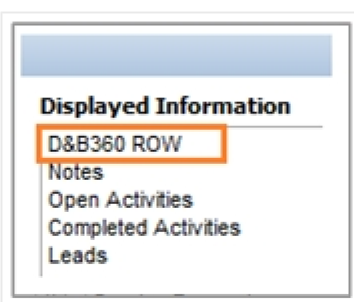


Configuring the D&B Custom Page Layout for Contacts

1. In the **Account Application Customization** window, **Page Layout Management** area, click **Contact Page Layout.**
2. Next to **DnB Custom Layout**, click **Edit.**



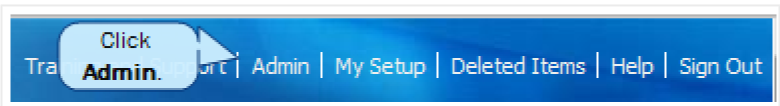
3. Click **Step 4.**
4. Add the **D&B360 ROW** applet so that it is listed in the **Displayed Information** list, and then click **Finish.**



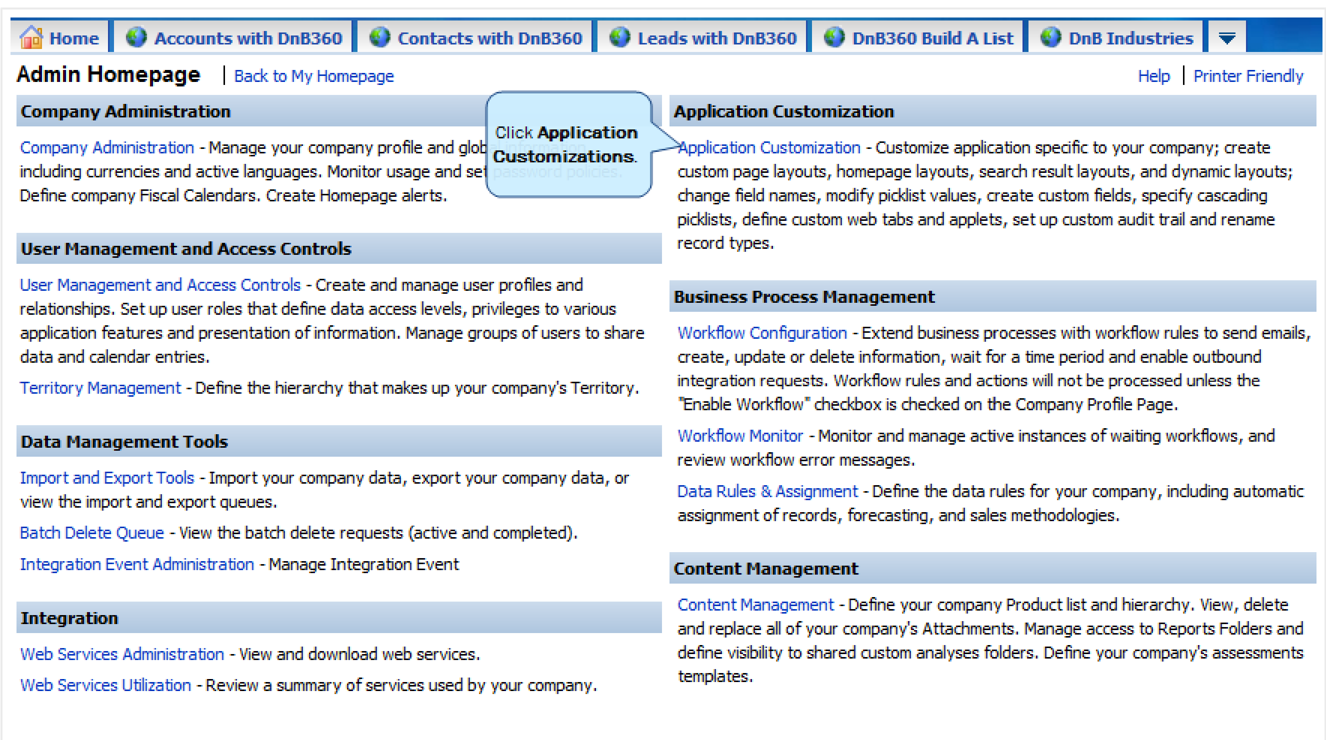
Configuring the Action Bar

To navigate through the user interface as you complete these procedures, refer to the steps that follow:

1. Log in to your Oracle instance.
2. In the top menu, click **Admin**.

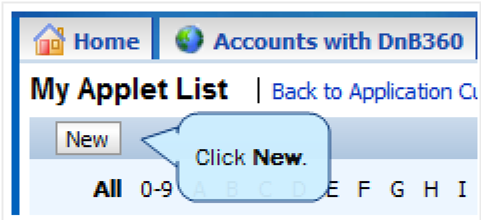


3. In the **Admin Homepage** window, click **Application Customization**.



Creating the D&B360 Web Applet for the Action Bar

1. In the **Application Customization** window**, Application Setup** area, click **Global Web Applets.**
2. In the **My Applet List** window, click **New.**



3. In the **My Web Applet** window (shown in the illustration that follows), complete these fields:

   a. In the **Name** field, type **D&B360.**

   b. In the **Location** field, select **Action Bar.**

   c. In the **Type** field, select **HTML.**

   d. In the **User fields** field, select from the menu.

   e. In the **Web Applet HTML** field, copy this text:

   Accounts with D&B360

   Leads with D&B360

   Contacts with D&B360

   DnB360 Build A List

   DnB360 Administration

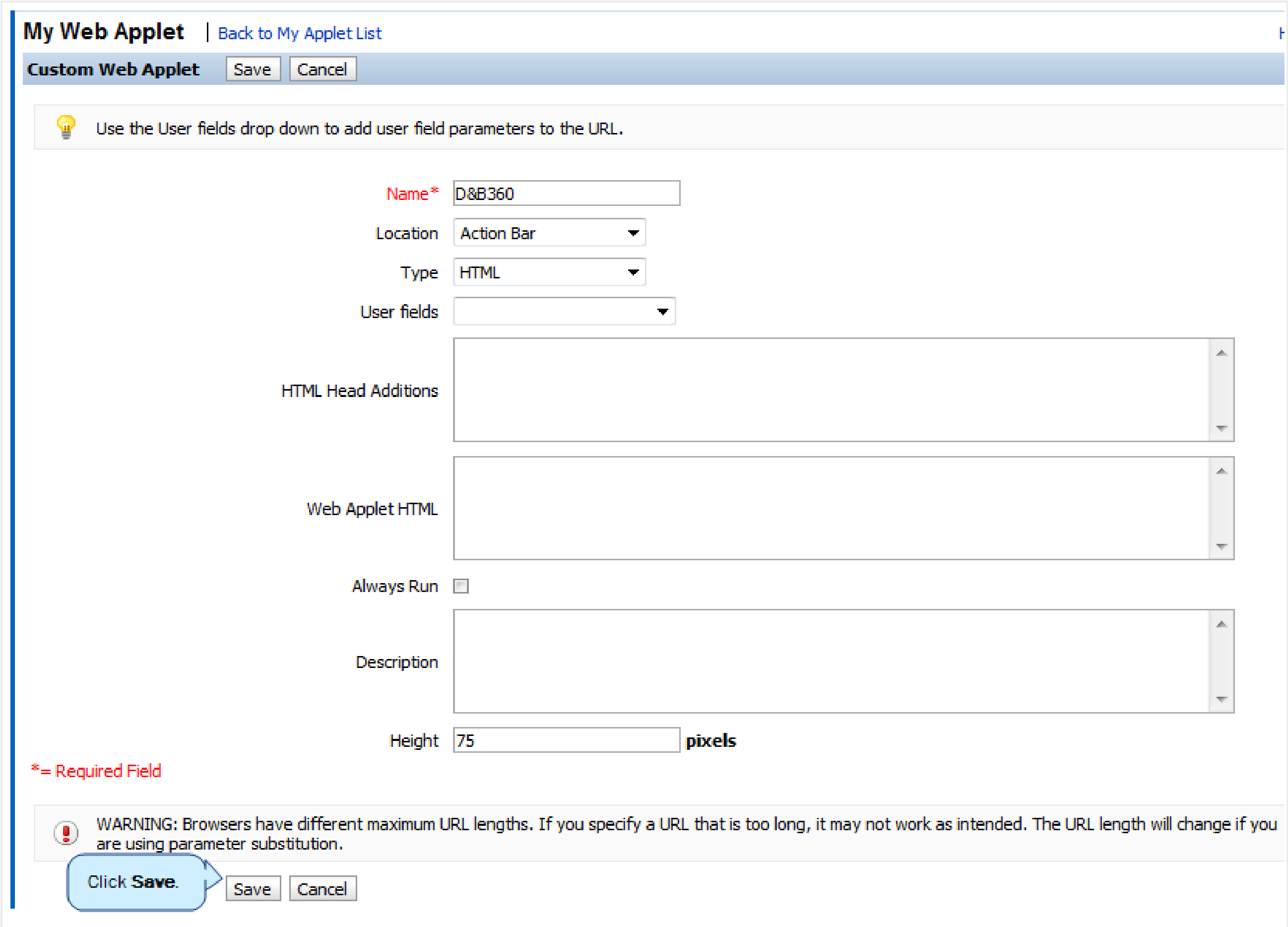
   DnB Industries

   f. In the **Always Run** field, select this check box or leave clear.

   g. In the **Description** field, type a description of the applet.

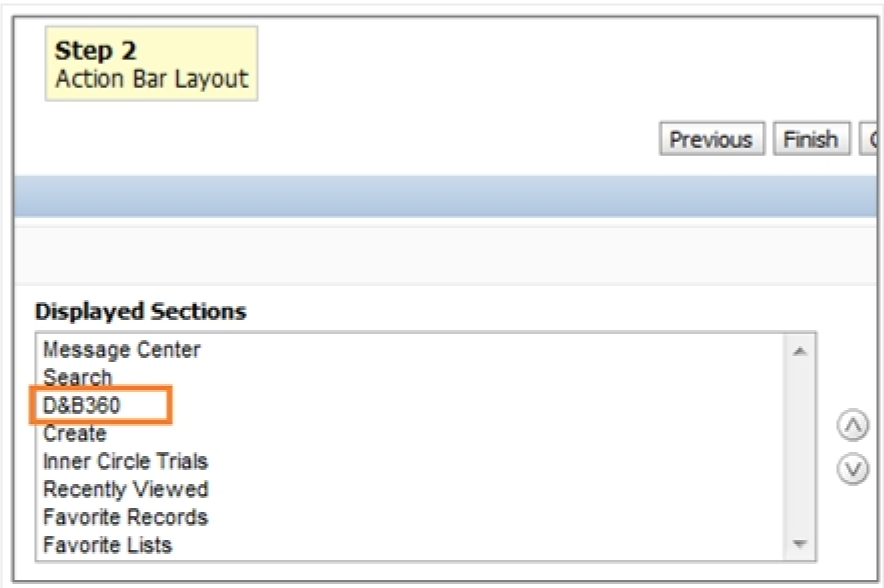
   h. In the Height field, type **75** (pixels).

   i. Click **Save.**

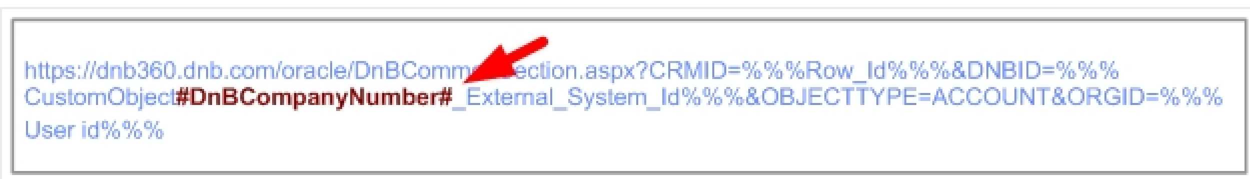

My Web Applet
Back to My Applet List
Custom Web Applet
Save
Cancel
Use the User fields drop down to add user field parameters to the URL.
Name*
D&B360
Location
Action Bar
Type
HTML
User fields
HTML Head Additions
Web Applet HTML
Always Run
Description
Height
75
pixels
*= Required Field
WARNING: Browsers have different maximum URL lengths. If you specify a URL that is too long, it may not work as intended. The URL length will change if you are using parameter substitution.
Click Save.
Save
Cancel

Configuring the Action Bar

1. In the **Application Customization** window**, Application Setup** area, click **Action Bar Layout**.
2. In the **Action Bar Layout** window, next to the Layout you want to configure, click **Edit.**
3. In the **Action Bar Layout Wizard** for that layout, click **Step 2**.
4. Assign the Global Web Applet you created so that it is listed in the **Displayed Sections** list.



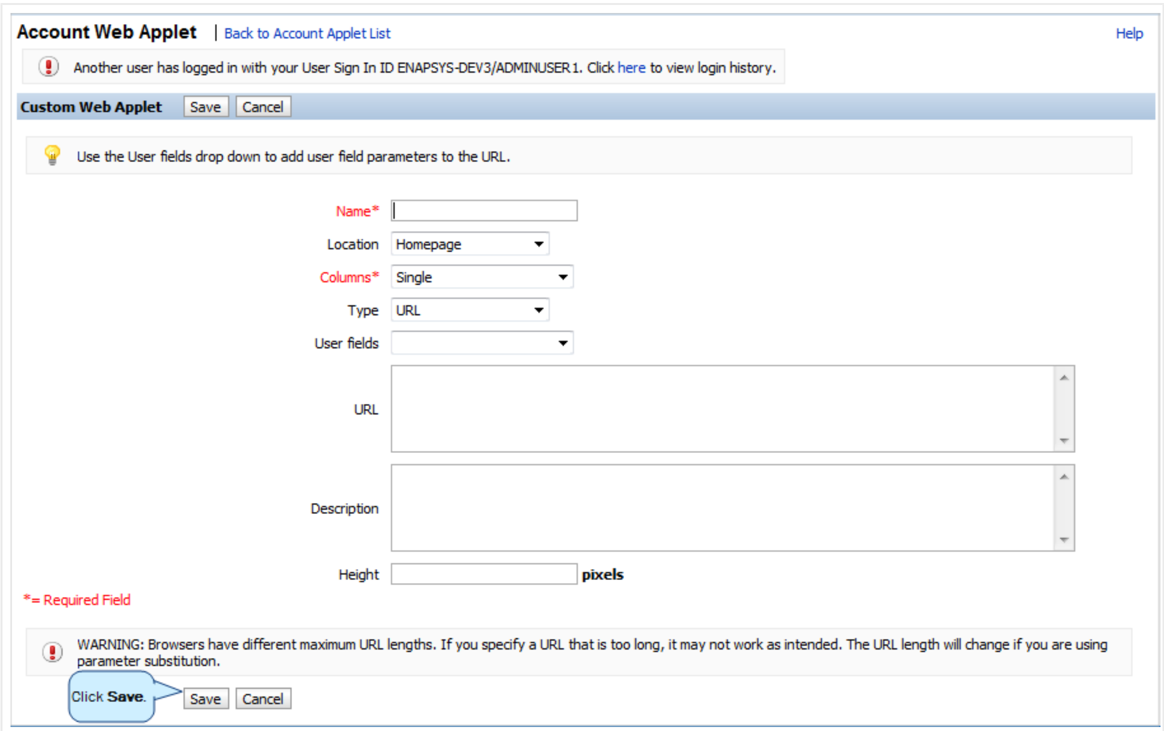
5. In the **Account Web Applet** window, complete these fields:
   a. In the **Name** field, type **D&B360**.
   b. In the **Location** field,select **Detail Page**.
   c. In the **Columns** field,select **Single** or **Double**
   d. In the **Type** field,select **URL** .
   e. In the **User fields** field,select from the list.
   f. In the **URL** field, copy and paste or enter this URL: https://dnb360.dnb.com/oracle/DnBCommonSection.aspx?CRMID=%%%Row_Id%%%&DNBID=%%%CustomObject#DnBCompanyNumber#_External_System_Id%%%&OBJECTTYPE=ACCOUNT&ORGID=%%%User id%%%
   g. In the URL you pasted, replace Replace **#DnBCompanyNumber#** with the Custom Object Number you selected for the D&B Company object. An example is shown in the following illustrations:



h. (Optional) In the **Description** field, type a description for your custom web applet.

i. In the **Height** field, type **400** (pixels).

j. Click **Save**.



Chapter 5: Setting Up Profiles

After you have completed installing the application, you need to assign components of the D&B360 add-in application to selected roles. To do this, you will use Oracle On-Demand user profile management process.

The D&B360 for Oracle installation includes the DnB Access Profile and DnB Role. By default, these profiles and roles provide access to the DnB Company and DnB Contact objects and all of the D&B360 functionality.

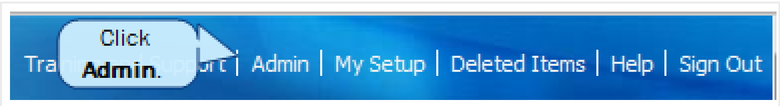
Be aware of these components as you grant Users access to the D&B360 functionality:

- D&B360 and D&B360 ROW Account Web Applets
- D&B360 and D&B360 ROW Lead Web Applets
- D&B360 ROW Contact Web Applet
- DnB Company Custom Object
- DnB Financials Custom Object
- Accounts with DnB360, Contacts with DnB360, Leads with DnB360,DnB360 Build A List, DnB Industries, DnB360 Administration, and About DnB360 Custom Web Tabs

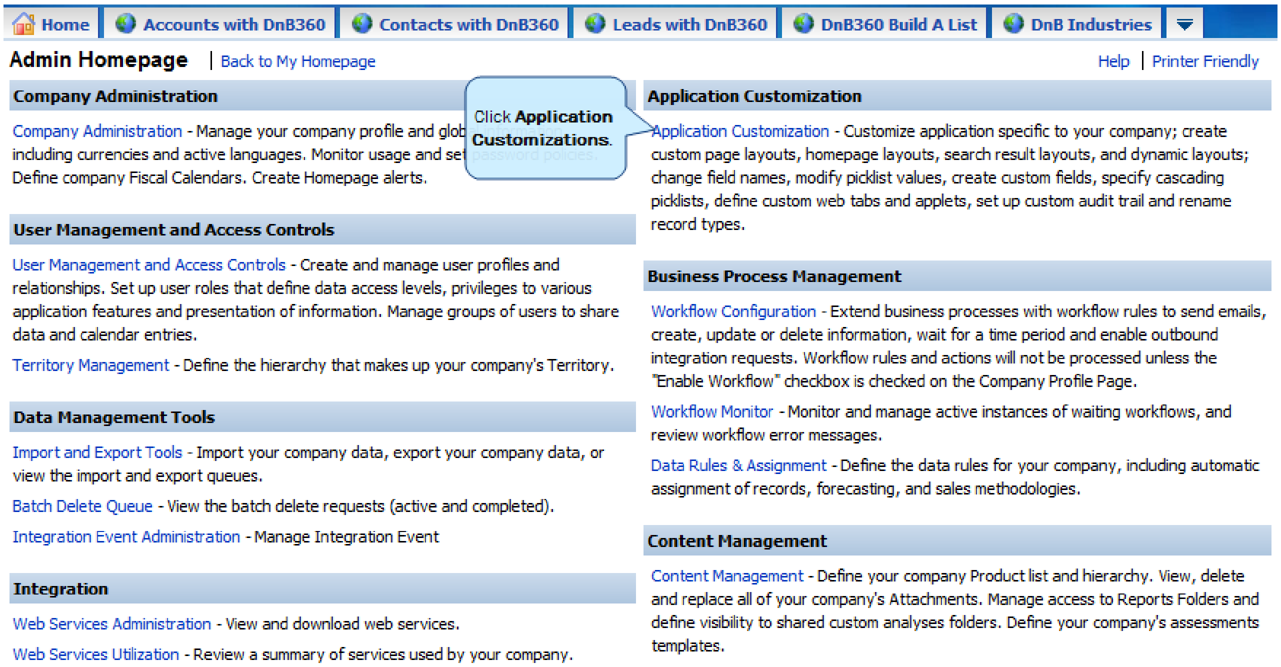
To grant access to D&B360 features, you need to modify each role for which you want to grant access.

Establishing Access for Roles within the Oracle On-Demand CRM

1. In the top menu, click **Admin**.



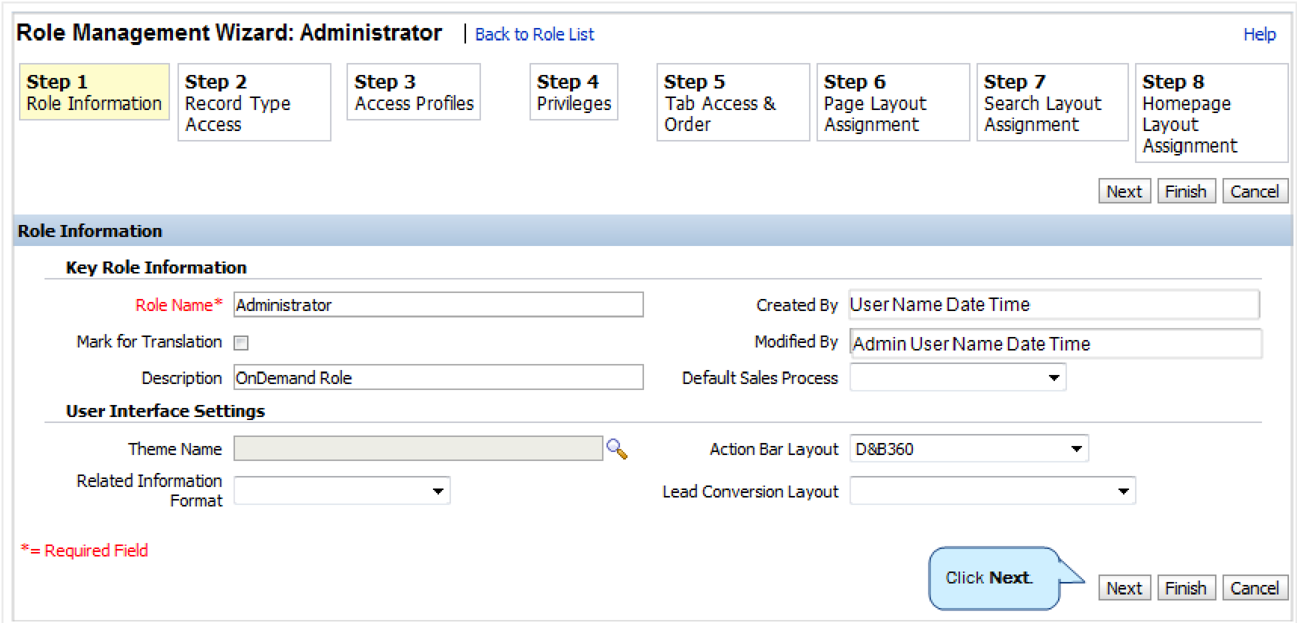
3. In the **Admin Homepage** window, **User Management and Access Controls**, click **User Management and Access Controls.**



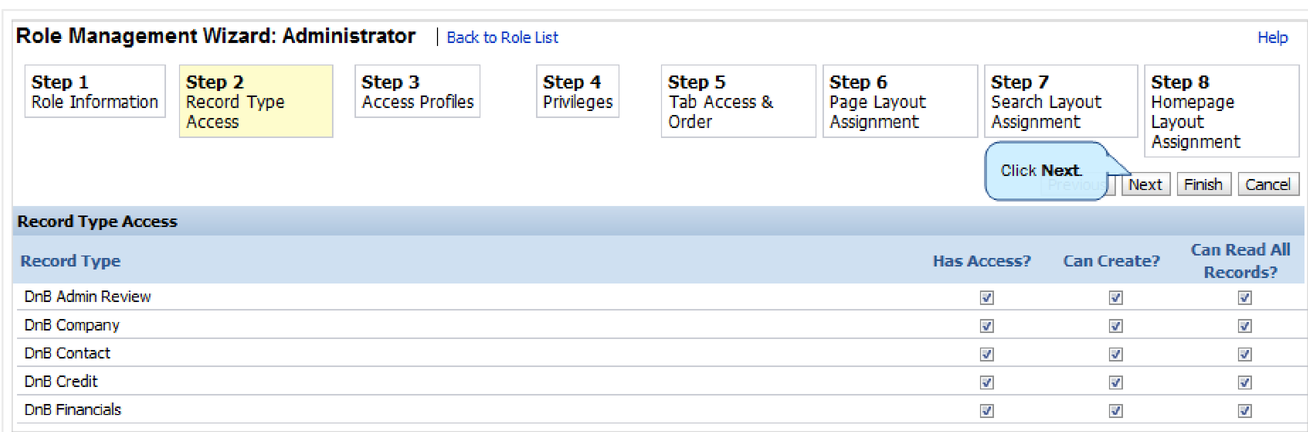
4. In the **Role Management** area, click **Role Management.**
5. In the **Role List** window, next to a role you want to configure, click **Edit.**

The **Role Management Wizard** window guides you through the following steps.

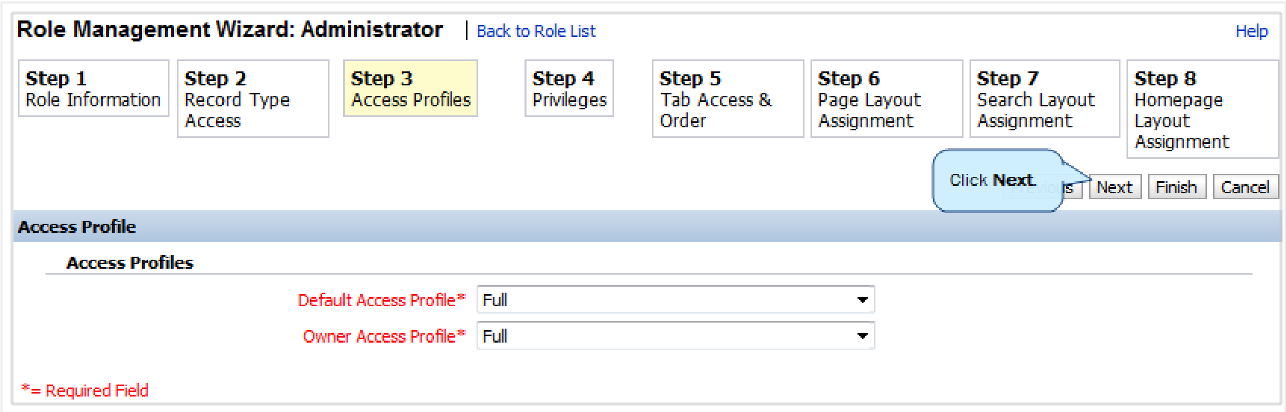
1. In **the Step 1 Role Information** window, **Action Bar Layout** field, select **D&B360.** Click **Next** or **Step 2.**



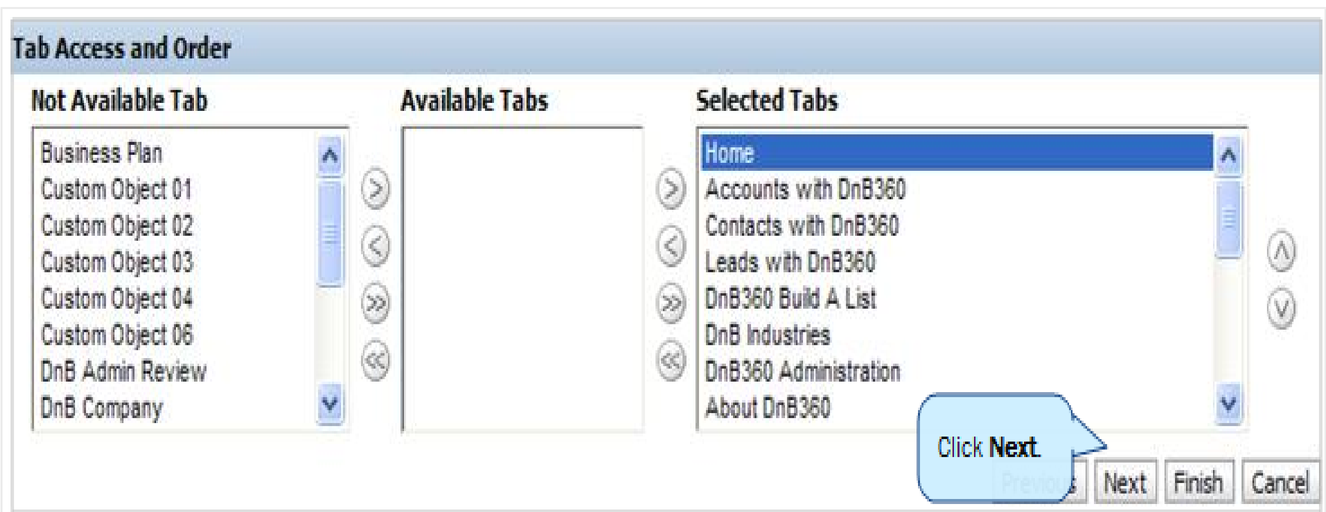
2. In the **Step 2 Record Type Access** window, **Record Types** column, select the check boxes to grant permissions to the various DnB Custom Objects. Click **Next** or **Step 3**.



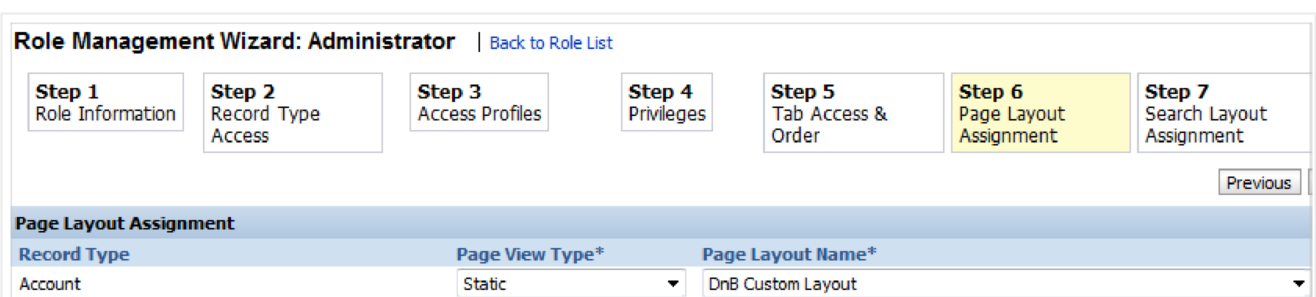
3. In the **Step 3 Access Profiles** window, **Access Profiles** area, select which level of access to the various DnB Custom objects that you want for the profile. You can also select the default DnB Access Profile. Click **Next** or **Step 4**.



4. In the **Step 4 Privileges** window, view the information that displays. No action is required. Click **Next** or **Step 5**.
5. In the **Step 5 Tab Access and Order** window, use the arrows in the columns to assign the D&B Custom We Tabs to the role. The tabs will display on the UI the next time a user logs into his or her account. Click **Next**.



6. In the **Step 6 Page Layout Assignment** window, assign the DnB Custom Layouts that were included with your installation to the various DnB Custom Objects.



Contact	Static	DnB Custom Layout
DnB Admin Review	Static	DnbAdminReview
DnB Company	Static	DnB Custom Layout
DnB Contact	Static	DnB Contact Page Standard Layout
DnB Credit	Static	DnB Credit Page Standard Layout
DnB Financials	Static	DnB Financials Page Standard Layout

The **Step 7 Search Layout Assignment** window and **Step 8 Homepage Layout Assignment** window require no action.

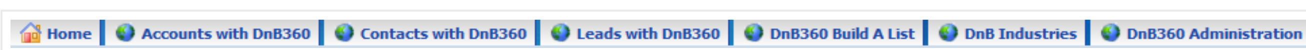
Establishing Permissions for Roles within D&B360

You can configure whether users can turn application-specific features on or off based on specific roles by enabling or disabling features within the application pages such as buttons, links, and check boxes.

Setting Permissions

To set permissions, you must first enable the feature in D&B360. To enable the feature, do the following:

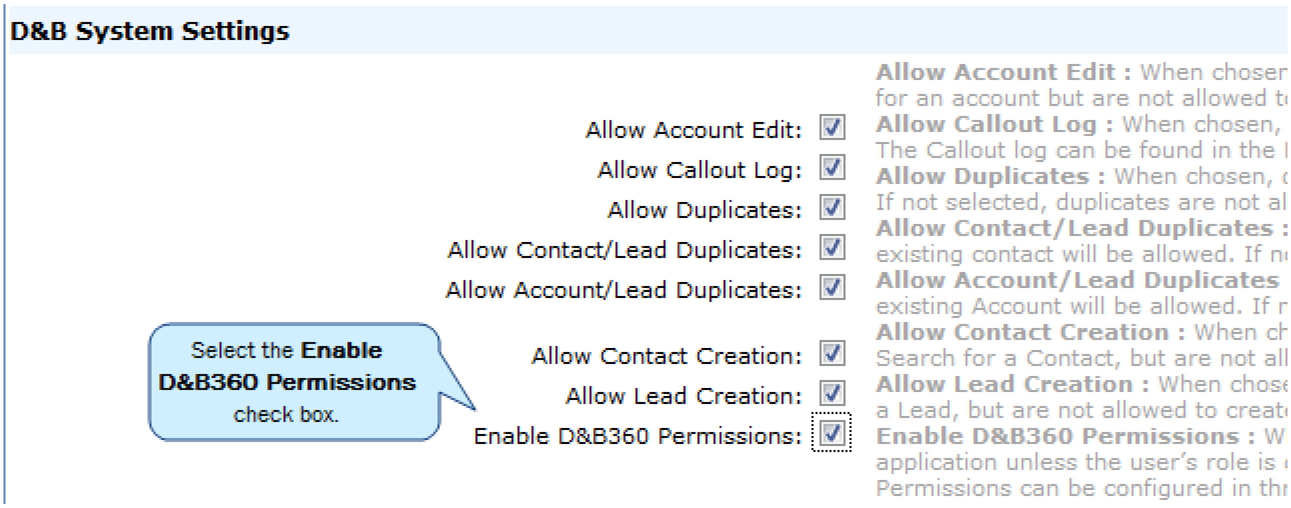
1. In the top menu, click **DnB360 Administration**.



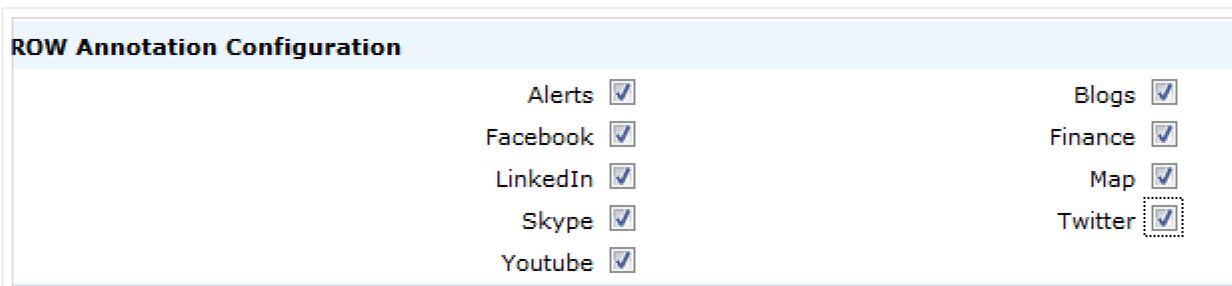
3. In the **D&B Oracle Administration** window, scroll down to the **System Settings** area.
4. In the **D&B System Settings** area, select the **Enable D&B360 Permissions** check box.

Note: Be sure to click **Save** at the top of this window before you navigate away from this window.

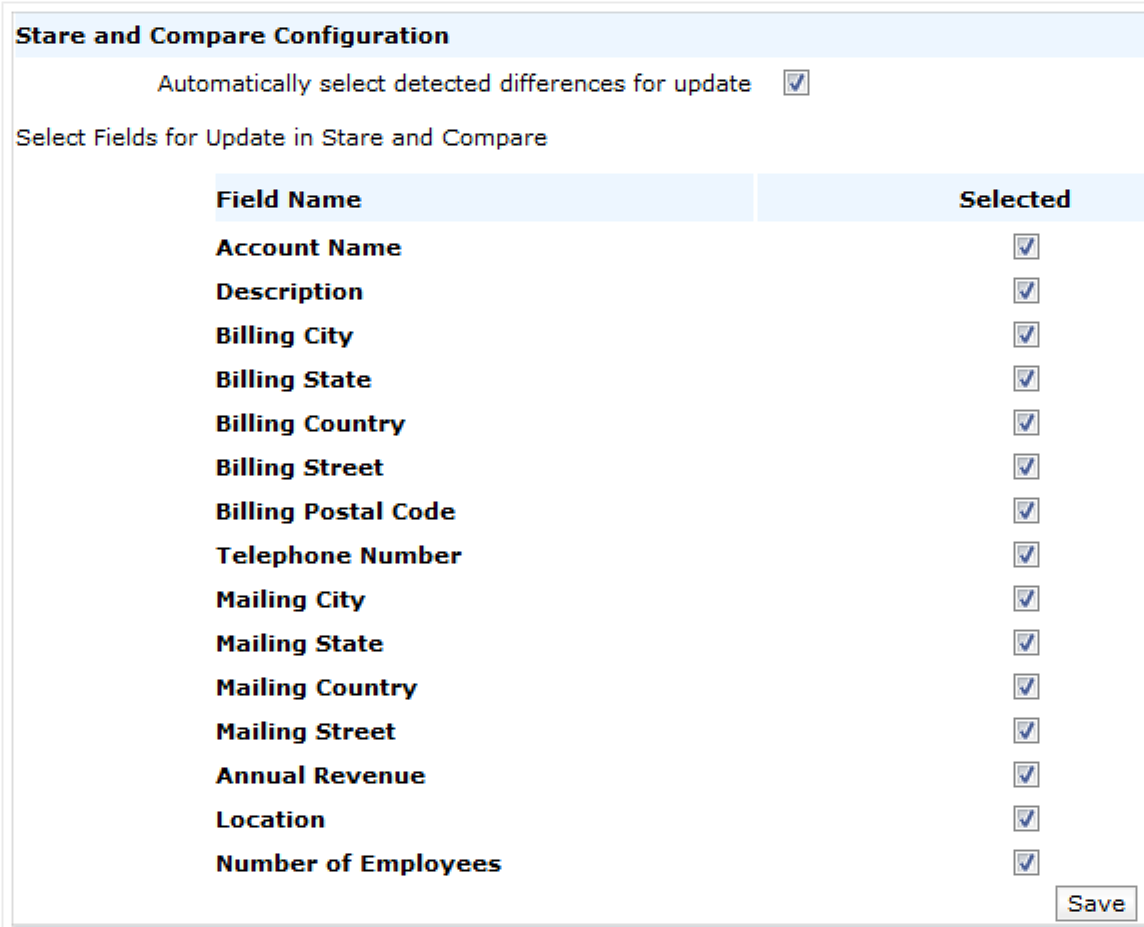
Selecting this check box ensures that only a user role that has been configured to access D&B360 will have access. Later you will be able to establish permissions by role.



5. In the **ROW Annotation Configuration** area, select the ROW items you want users to have access to, generally all ROW elements. Only those ROW elements that you select will display on the user interface. Be sure to click **Save** at the top of the window before you navigate away from this window.

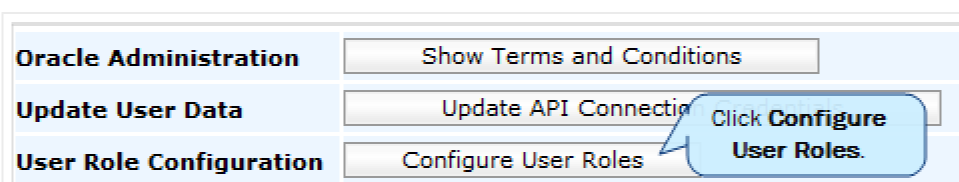


6. In the **Stare and Compare Configuration** area, determine which fields to allow, and then click **Save**.



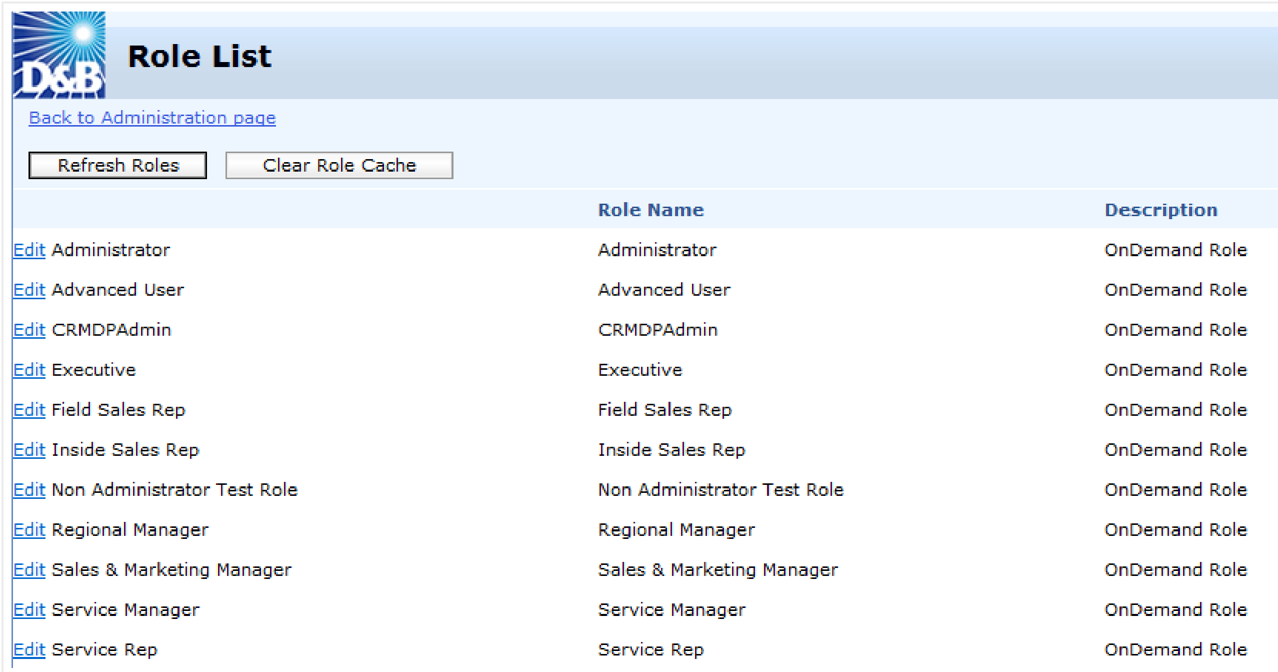
Setting User Roles

1. At the top of the **D&B Oracle Administration** window, **User Role Configuration** field, click **Configure User Roles.**



2. Complete the following steps for each role you want to configure:

   a. In the **Role List** window, next to the role you want to configure, click **Edit.**

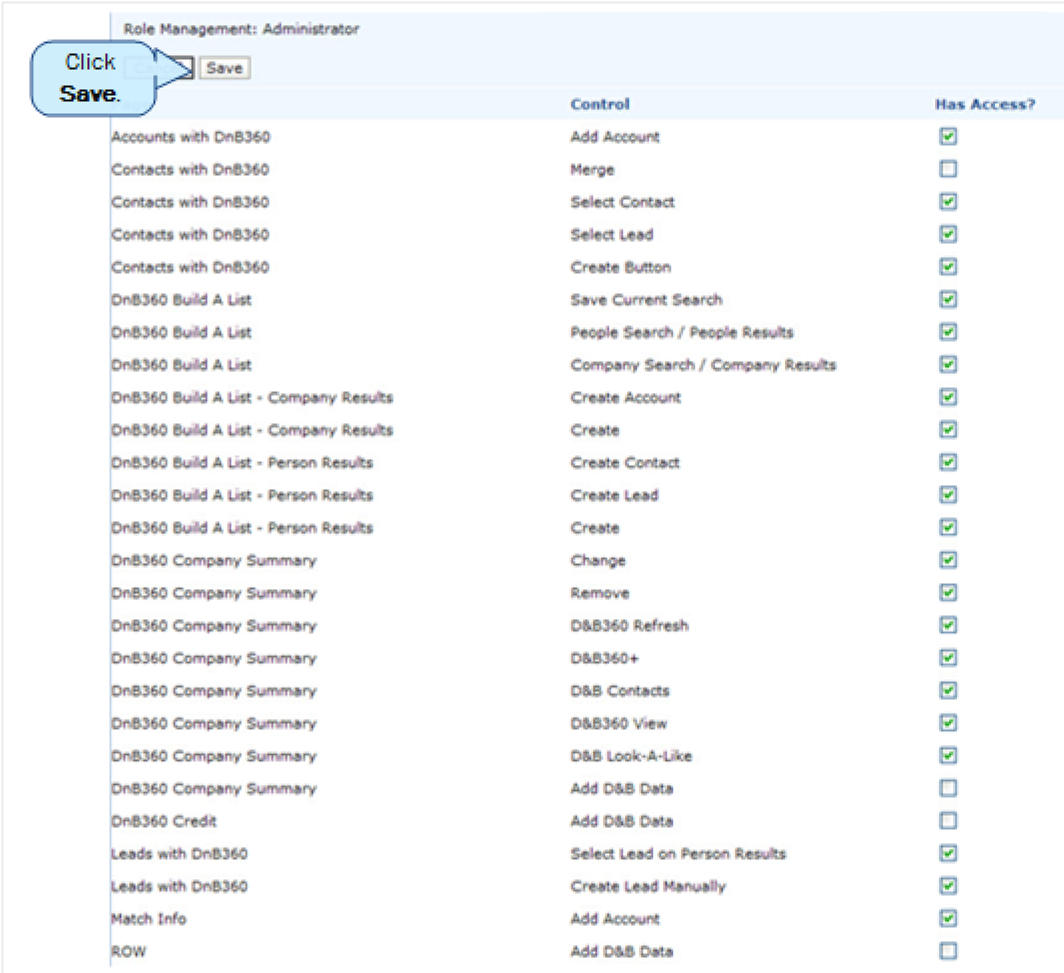


b. In the **Role Management** window for that role, select the check box for each option to grant access.

— or —

To disable access for an option, clear the check box.

3. At the top of the window, click **Save**.



	Control	Has Access?
Accounts with DnB360	Add Account	☑
Contacts with DnB360	Merge	☐
Contacts with DnB360	Select Contact	☑
Contacts with DnB360	Select Lead	☑
Contacts with DnB360	Create Button	☑
DnB360 Build A List	Save Current Search	☑
DnB360 Build A List	People Search / People Results	☑
DnB360 Build A List	Company Search / Company Results	☑
DnB360 Build A List - Company Results	Create Account	☑
DnB360 Build A List - Company Results	Create	☑
DnB360 Build A List - Person Results	Create Contact	☑
DnB360 Build A List - Person Results	Create Lead	☑
DnB360 Build A List - Person Results	Create	☑
DnB360 Company Summary	Change	☑
DnB360 Company Summary	Remove	☑
DnB360 Company Summary	D&B360 Refresh	☑
DnB360 Company Summary	D&B360+	☑
DnB360 Company Summary	D&B Contacts	☑
DnB360 Company Summary	D&B360 View	☑
DnB360 Company Summary	D&B Look-A-Like	☑
DnB360 Company Summary	Add D&B Data	☐
DnB360 Credit	Add D&B Data	☐
Leads with DnB360	Select Lead on Person Results	☑
Leads with DnB360	Create Lead Manually	☑
Match Info	Add Account	☑
ROW	Add D&B Data	☐

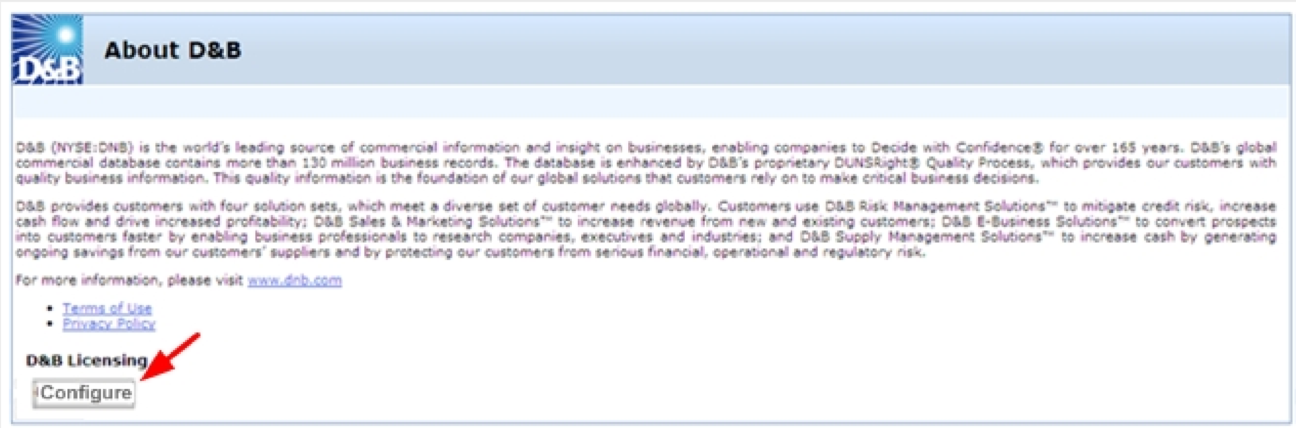
Chapter 6: Activating the Application

The final step in the installation process requires that you provide basic company information for your installation, accept the terms and conditions of the application, and configure some basic default settings.

Completing the Final Installation Steps

To confirm that no software updates are needed, complete the following steps:

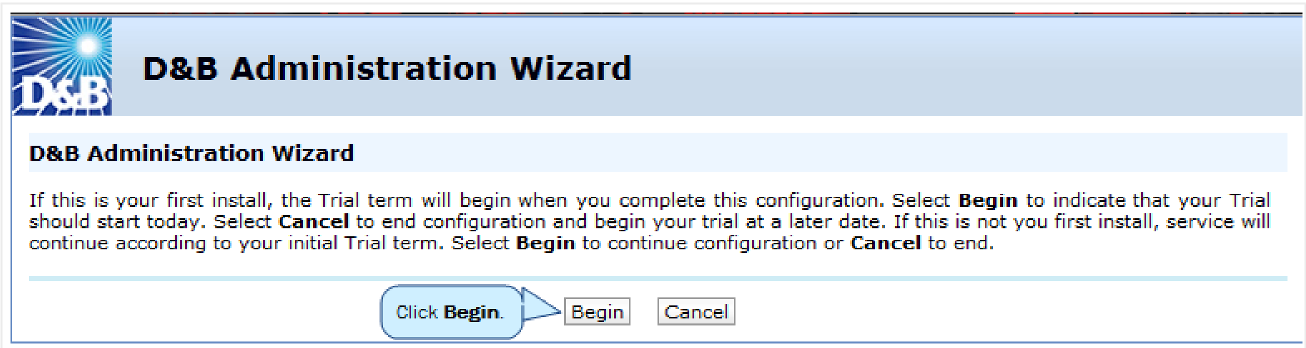
1. Click any of the **DnB** tabs.
2. In the **About D&B** window, **D&B Licensing** area, click **Configure**.



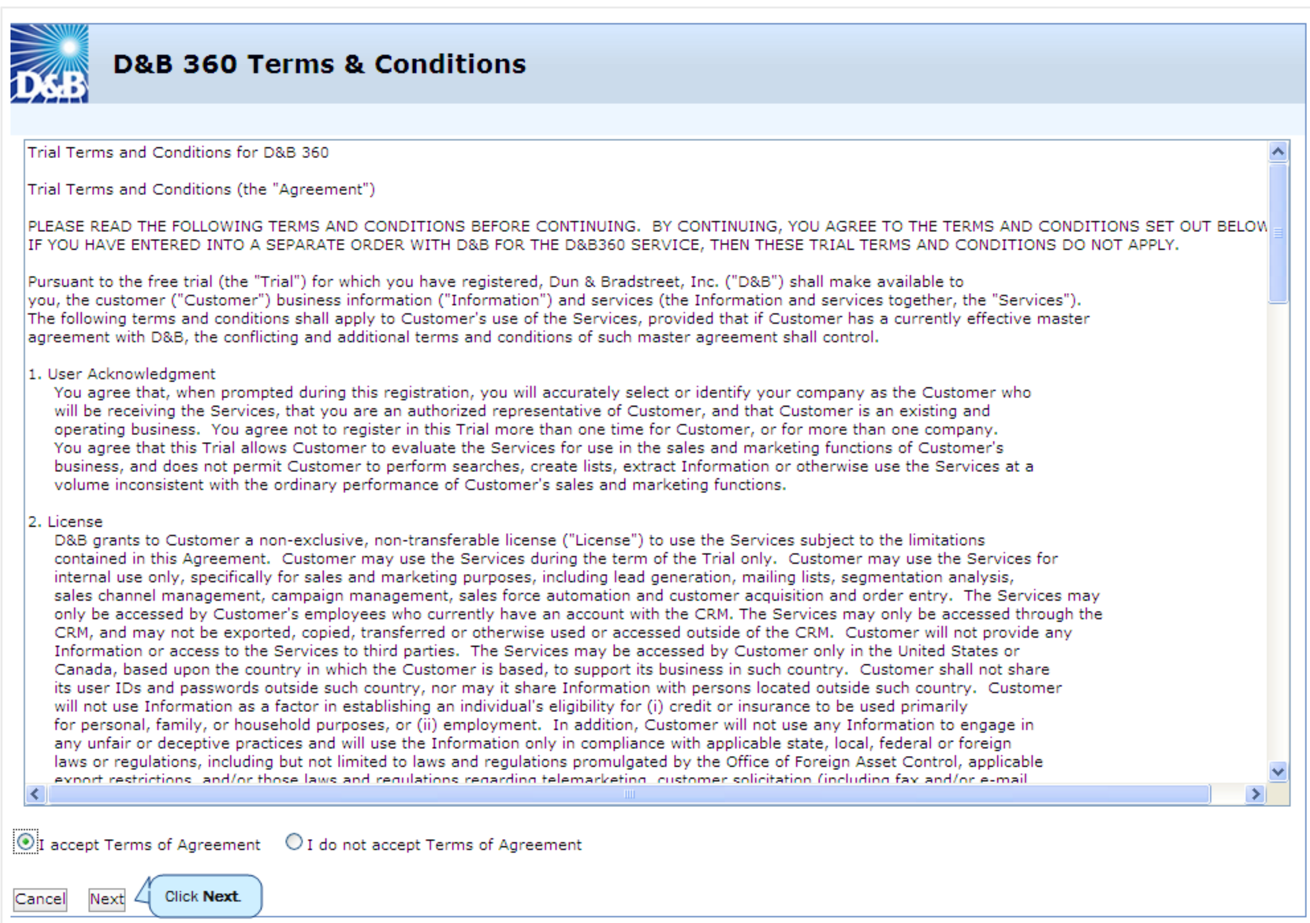
After D&B sent you your Installation Key by email, and you completed your registration and downloaded the remainder of the installation package, you can use your Installation Key in up to 3 environments. This gives you flexibility to test or deploy D&B360 in various environments. Each Installation Key has a specific set of limits that are defined by either your trial terms or your contract. You will be prompted for this as you proceed.

3. In the **D&B Administration Wizard** window, click **Begin**.

Note: Trial customers—Your 60-day trial period begins at the point of installation, as noted in the trial terms. If you are not yet ready to configure D&B360,we recommend that you click **Cancel** and configure your software when you are ready to start using it. This will allow you to take full advantage of your trial period.



4. In the **D&B 360 Terms & Conditions** window, to accept the terms and conditions of the licensing agreement, click **Next.**



5. In the **D&B Install Key** window, complete these steps:

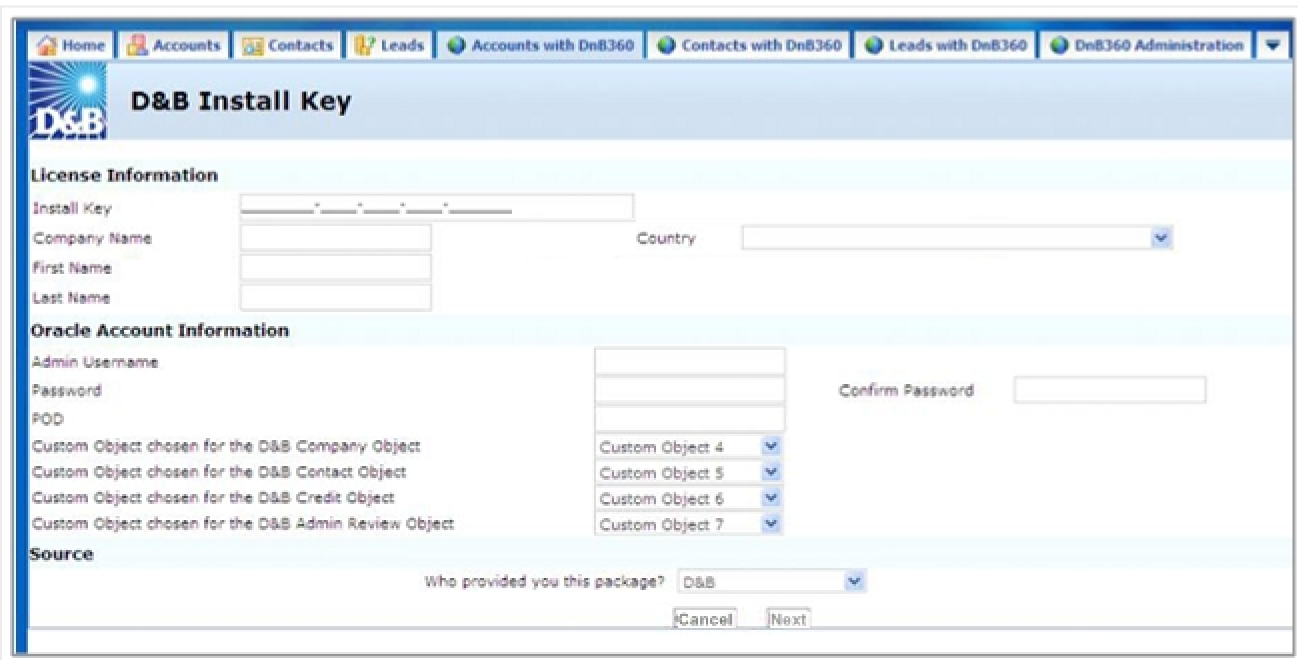
   a. In the **License Information** area, **Install Key** field, type the Installation Key that you received by email.

   b. In the **Company Name**, **Country**, **First Name**, and **Last Name** fields, type the appropriate information.

   c. In the **Oracle Account Information** area, **Admin User Name**, **Password**, and **Confirm Password** fields, type this information to enable stateless web service calls into your system.

   d. In the **Custom Object chosen for the D&B** objects, select to confirm.

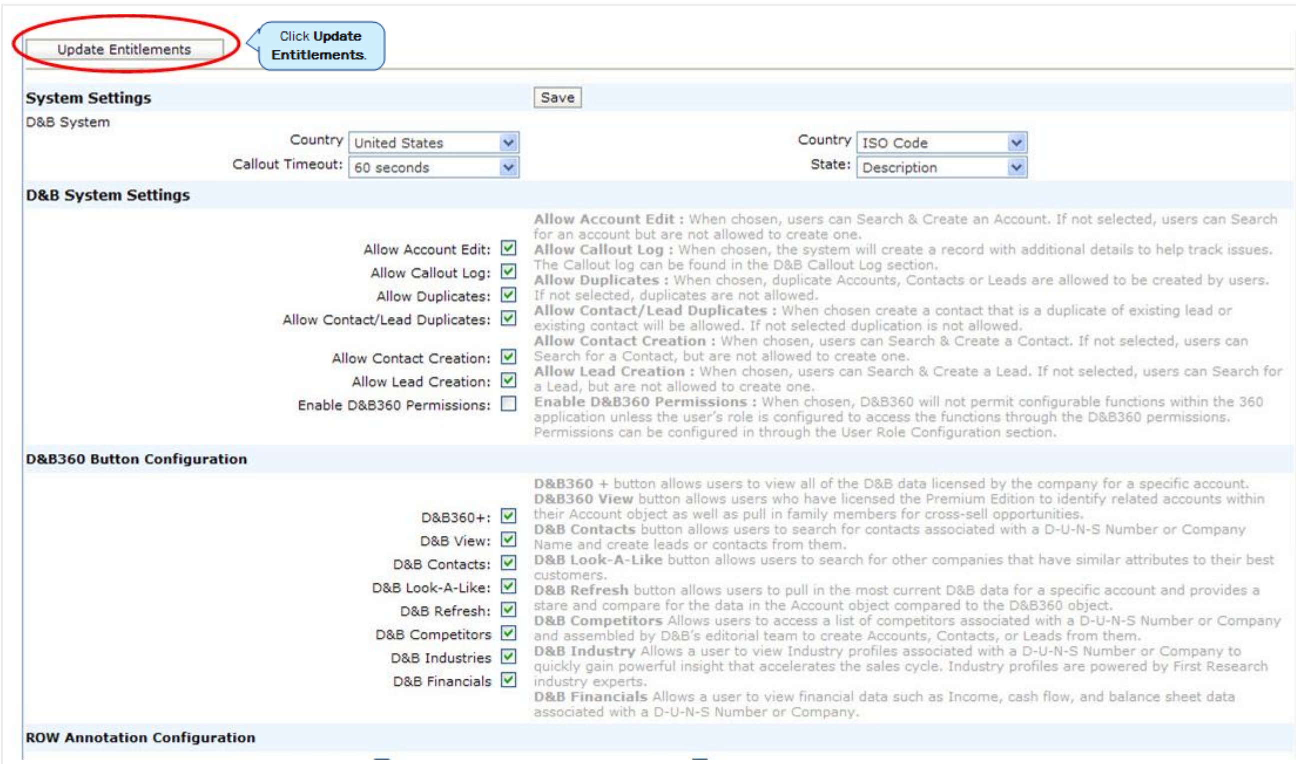
   e. Click **Next**.



Updating Entitlements

(!) Important Note: To ensure your permissions are properly set, we recommend that after every upgrade or change to your configuration, you update your entitlements.

- To update your entitlements, at the top of the **D&B360 Administration** window, click **Update Entitlements**.



Chapter 7: Managing Batches

For information about the availaibility of batch processing by Tier level, see "D&B360 Packages" on page 2-3.

Two batch jobs are available through D&B360:

- **New Batch** — Use to associate existing Oracle accounts with a valid D-U-N-S record. New Batch chooses accounts from Oracle and sends the account name and address to D&B for potential cleanse, match, and append processes. After D&B returns the batch records, the accounts in Oracle are associated with a valid D-U-N-S number.
- **Refresh Batch** — After Oracle accounts are associated with a D-U-N-S number, a Refresh Batch is used once a month, or once a week, to refresh the D-U-N-S data stored in D&B360 Oracle tables.

Understanding Key Features of Batch Jobs

The three key features of D&B360 Batch jobs are:

- Record Eligibility
- Confidence Code Threshold Facts
- Validating D-U-N-S Numbers

Record Eligibility

Every record picked for New Batch processing goes through a data quality check procedure. To pass this quality check, a record must have a Company Name and one of the following:

This field:	Phone
2 of these fields:	Billing City, Billing State, Billing Postal Code
5 of these fields:	Billing Address, Billing City, Billing State, Billing Postal Code, Billing Country, Phone

Note: If none of the three criteria is met, the records will get pushed to the Admin Review List.

Confidence Code Threshold Facts

- The range of Confidence Code is: 1 to 10
- Any number above 8 is considered to result in accurate match records.
- The setting can be adjusted by a D&B360 Administrator in the Batch Setup screen.

Records from D&B that fail to meet the defined Confidence Code Threshold are moved to the Admin Review List. They are not automatically re-processed in the next batch run. As the Administrator, you must manually process these records.

Validating D-U-N-S Numbers

An event such as a merger or acquisition can result in changes to the D-U-N-S number for a record.

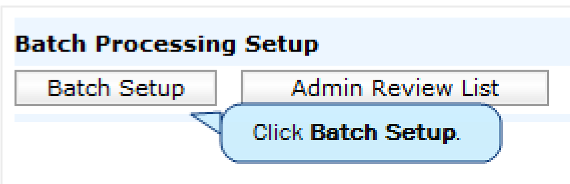
Note: A Recertified D-U-N-S has occurred when we send records to D&B in a Refresh Batch job, and the returned records have a new D-U-N-S Number.

In the case of a Merger or Acquisition, re-certified D-U-N-S records will be updated within the D&B360 table with the following:

- Re-cert reason code
- Re-cert description
- DATS date when the new DUNS Number was assigned

Scheduling New and Refresh Batch Jobs

- In the **D&B Oracle Administration** window, scroll down to the **Batch Processing Setup** area, and click **Batch Setup**.



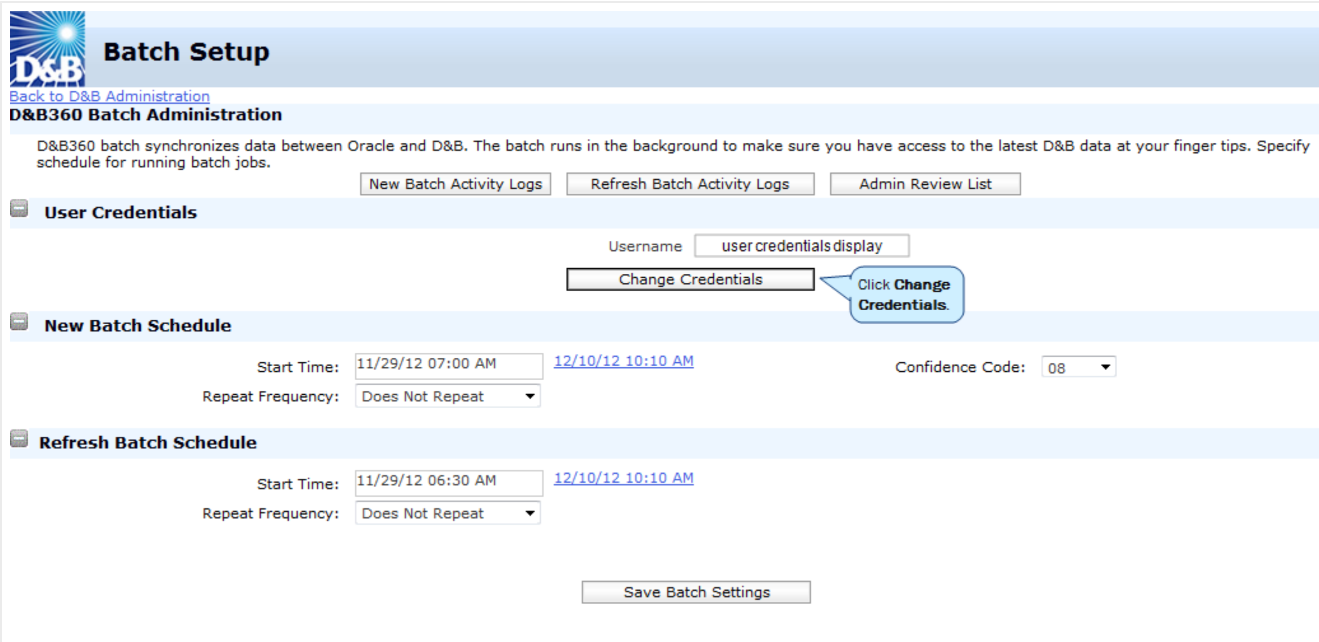
In the **D&B Batch Setup** window, **User Credentials** area, your Oracle user name displays.

Each batch job has its own distinct schedule:

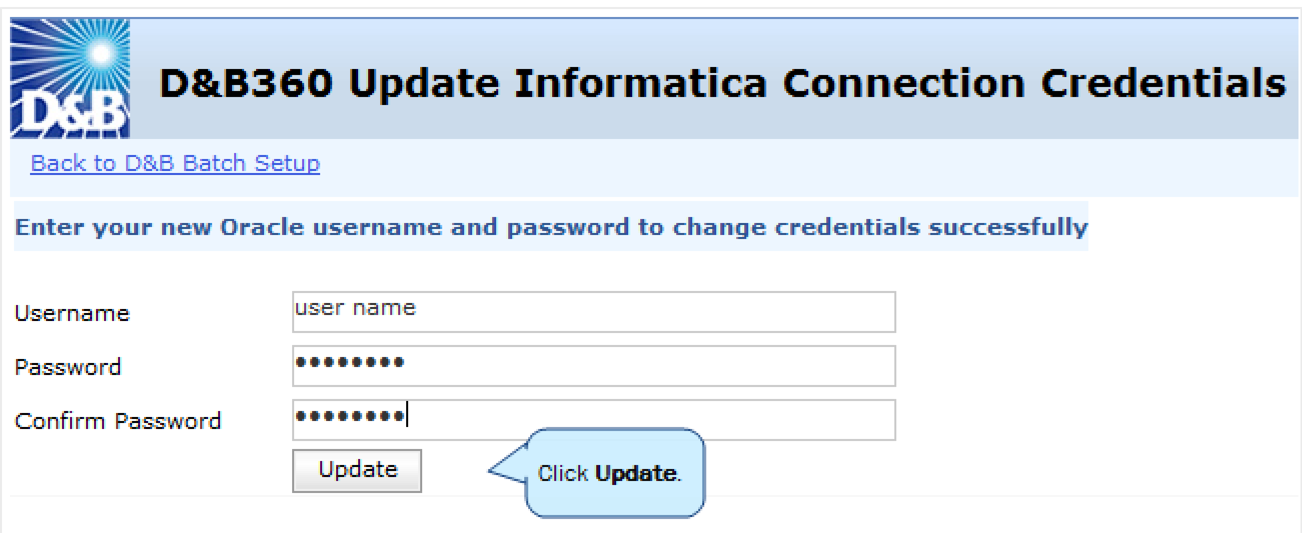
New Batch	When you are ready to execute a batch job for the first time, you must run the New Batch Job.
Refresh Batch	You can run Refresh Batch only after you have run New Batch at least once.

Changing Credentials

1. To allow another user to run batches, click **Change Credentials.**



2. In the **D&B360 Update Informatica Connection Credentials** window, type the information for the user who will run batches, and then click **Update.**

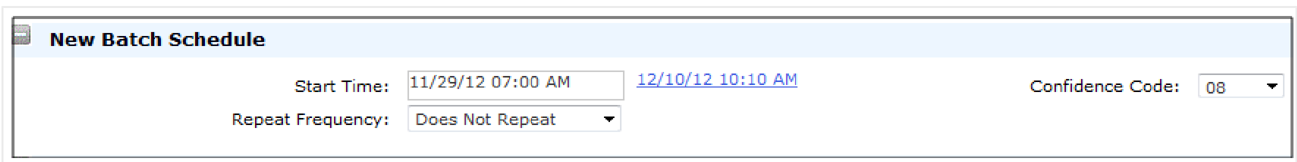


Scheduling a New Batch

If you've logged in and your user credentials display correctly, you are ready to run a new batch.

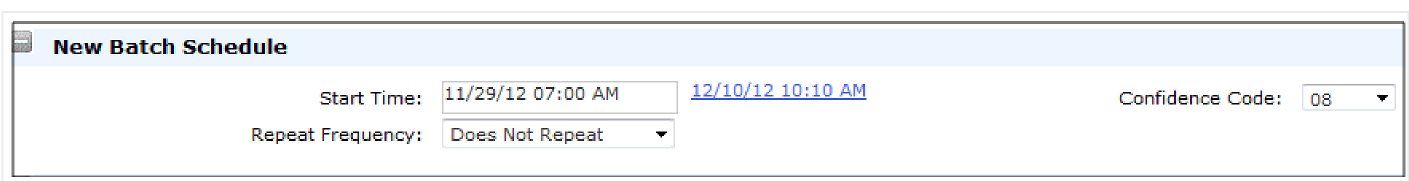
1. In the **New Batch Schedule** area, **Start Time** field, select the date and time you want the batch to run.
2. In the **Repeat Frequency** field, select the repeat frequency. See the Repeat Frequency table that follows for more information.
3. In the **Confidence Code** field, select from 1 to 10. We recommend 8.

   D&B uses confidence codes to attach a match code to the resulting company records. Records with an 8 or higher confidence code return higher quality matches.The batch process uses this code to determine whether to update the matched records directly to the D&B360 Account table, or reject them to the Admin Review List.
4. Click **Save Batch Settings**.



Repeat Frequency				
	Does Not Repeat	Daily	Weekly	Monthly
Run the Task	No options	Select from 1 to 30	Select from 1 to 5.	Select from 1 to 12.

Note: Depending on the number of records in the batch being processed, results will be provided between 24 to 72 hours after submission. Smaller files will typically process in 24-48 hours.

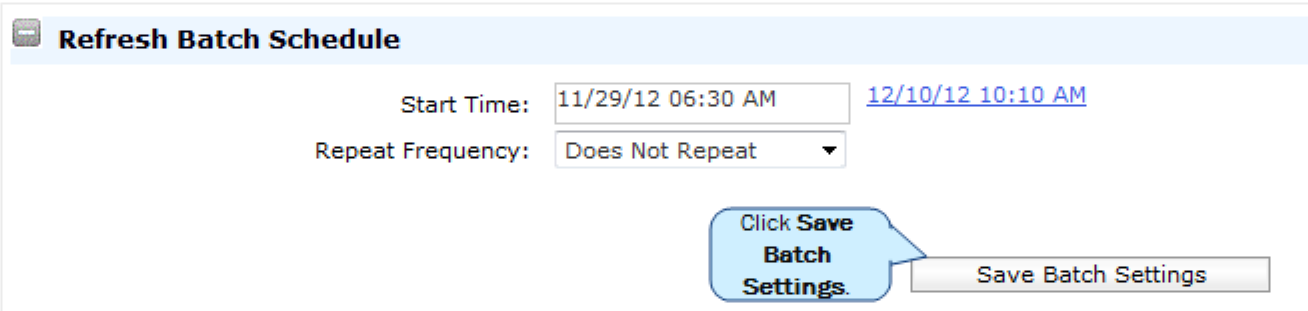


Scheduling a Refresh Batch

If you've logged in and your user credentials display correctly, you are ready to schedule a refresh batch.

1. In the **Refresh Batch Schedule** area, **Start Time** field, select the date and time you want the batch to run.

2. In the **Repeat Frequency** field, select the repeat frequency. See the Repeat Frequency table that follows for more information.
3. Click **Save Batch Settings**.



Repeat Frequency				
	Does Not Repeat	Daily	Weekly	Monthly
Run the Task	No options	Select from 1 to 30	Select from 1 to 5.	Select from 1 to 12.

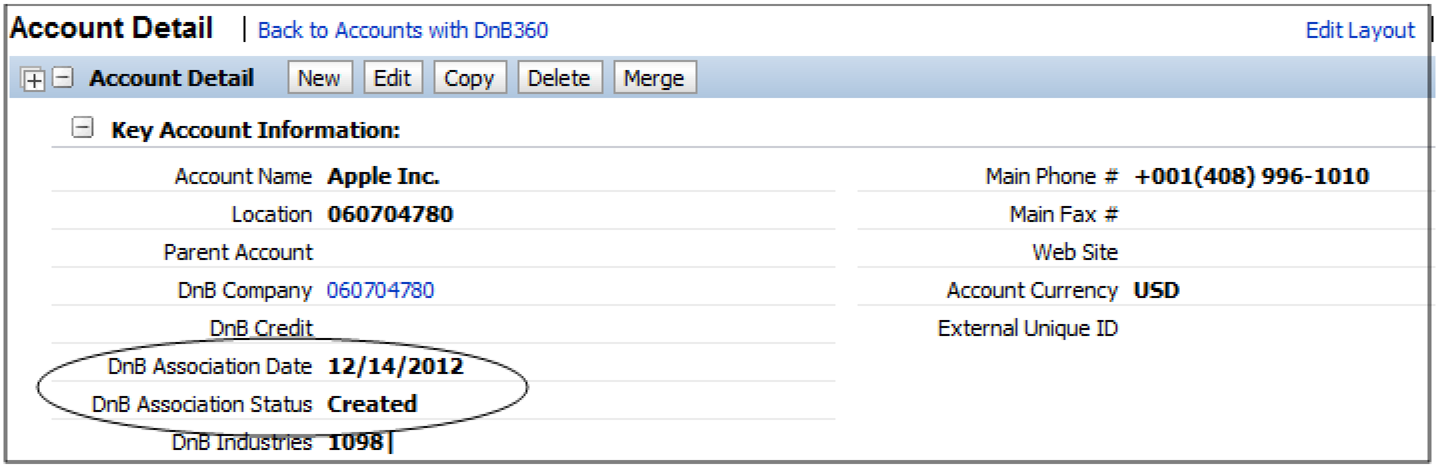
Note: Depending on the number of records in the batch being processed, results will be provided between 24 to 72 hours after submission. Smaller files will typically process in 24-48 hours.

Chapter 8: Reviewing Logs and Reports

Viewing Expanded Reporting Options

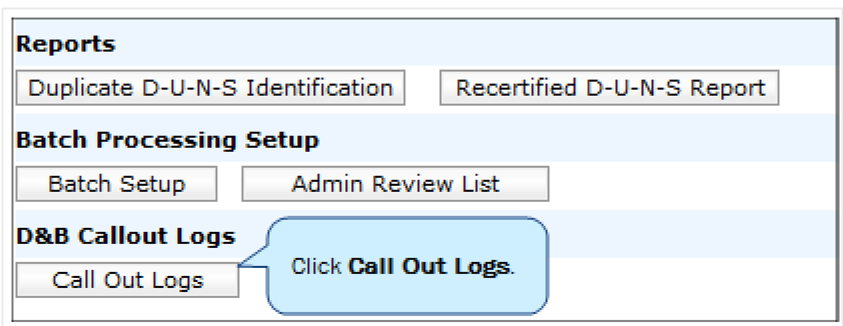
In the Account Detail window, Key Account Information area, D&B360 includes two fields that you can add to a record and use for reporting:

- DNB Initial Association Date
- DNB Initial Association Status



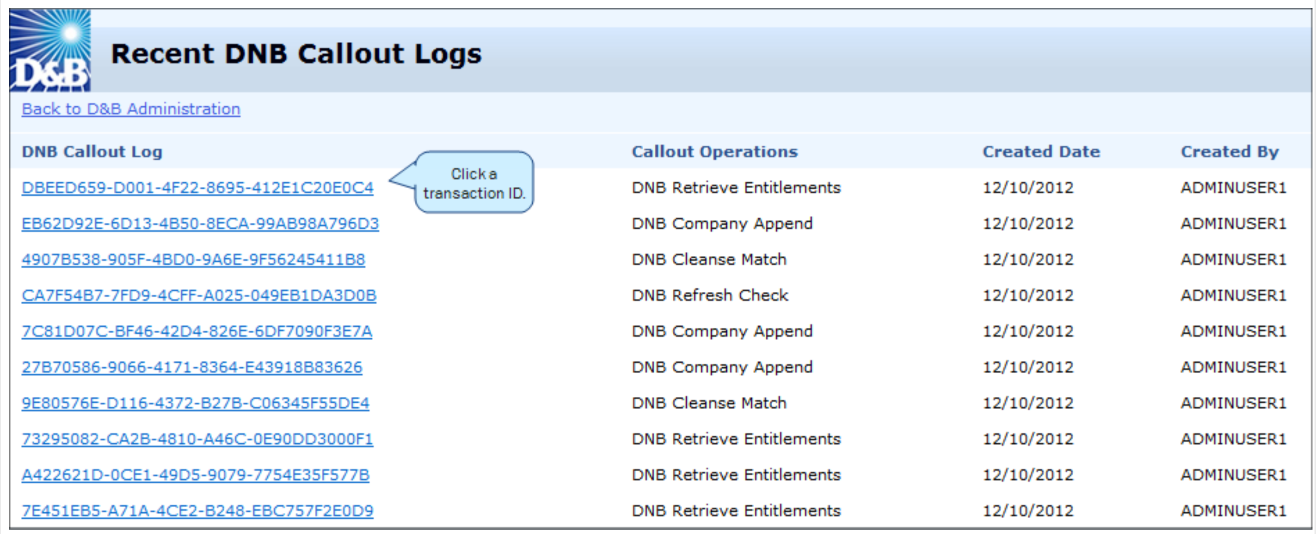
Viewing Callout Logs

1. In the **D&B Oracle Administration** window, scroll down to the **D&B Callout Logs** area, and click **Call Out Logs**.



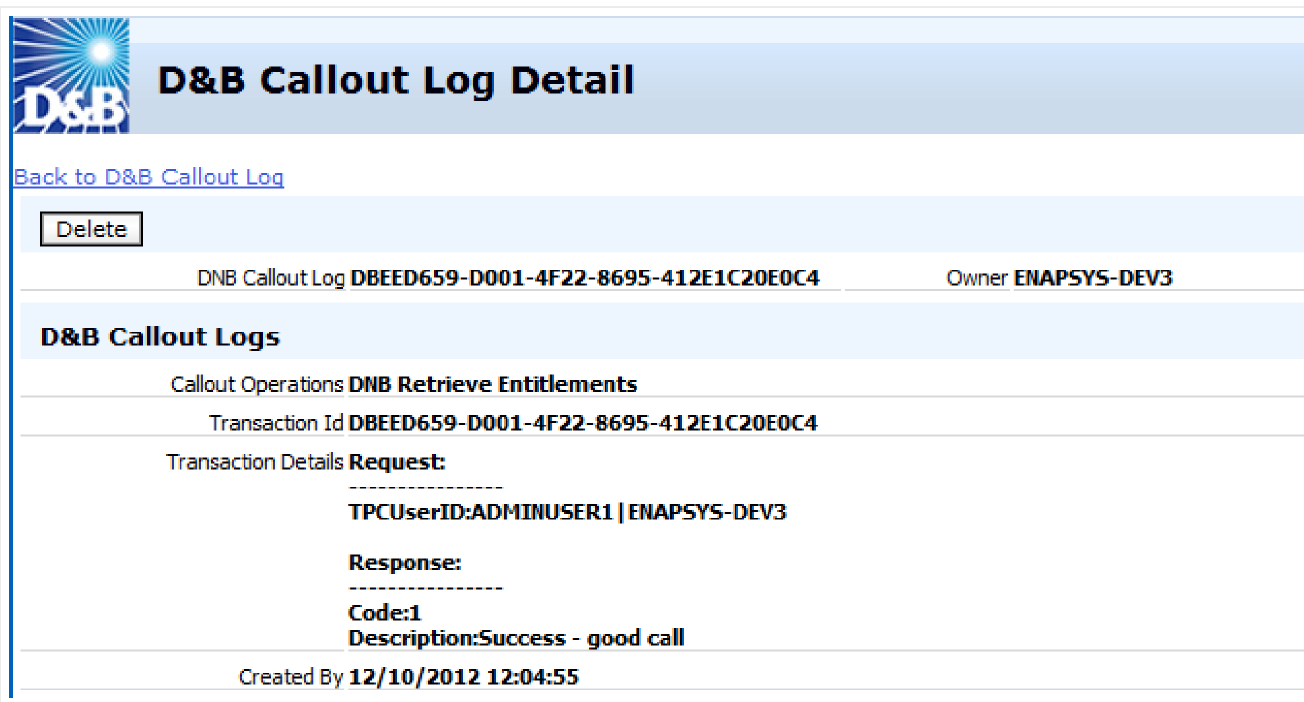
The **Recent DNB Callout Logs** window displays the logs that D&B360 tracks for all calls made between your CRM system and D&B.

2. In the **DNB Callout Log** column, click a transaction ID for a DNB Callout Log you want to view.



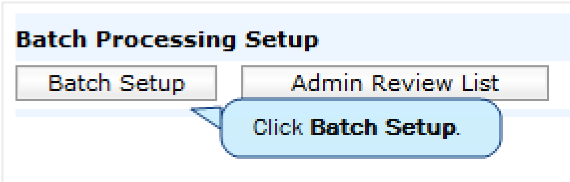
DNB Callout Log	Callout Operations	Created Date	Created By
DBEED659-D001-4F22-8695-412E1C20E0C4	DNB Retrieve Entitlements	12/10/2012	ADMINUSER1
EB62D92E-6D13-4B50-8ECA-99AB98A796D3	DNB Company Append	12/10/2012	ADMINUSER1
4907B538-905F-4BD0-9A6E-9F56245411B8	DNB Cleanse Match	12/10/2012	ADMINUSER1
CA7F54B7-7FD9-4CFF-A025-049EB1DA3D0B	DNB Refresh Check	12/10/2012	ADMINUSER1
7C81D07C-BF46-42D4-826E-6DF7090F3E7A	DNB Company Append	12/10/2012	ADMINUSER1
27B70586-9066-4171-8364-E43918B83626	DNB Company Append	12/10/2012	ADMINUSER1
9E80576E-D116-4372-B27B-C06345F55DE4	DNB Cleanse Match	12/10/2012	ADMINUSER1
73295082-CA2B-4810-A46C-0E90DD3000F1	DNB Retrieve Entitlements	12/10/2012	ADMINUSER1
A422621D-0CE1-49D5-9079-7754E35F577B	DNB Retrieve Entitlements	12/10/2012	ADMINUSER1
7E451EB5-A71A-4CE2-B248-EBC757F2E0D9	DNB Retrieve Entitlements	12/10/2012	ADMINUSER1

The **DNB Callout Log Detail** window displays additional information that can help you resolve any issues that might arise.

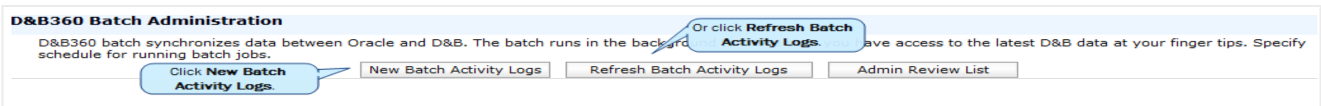


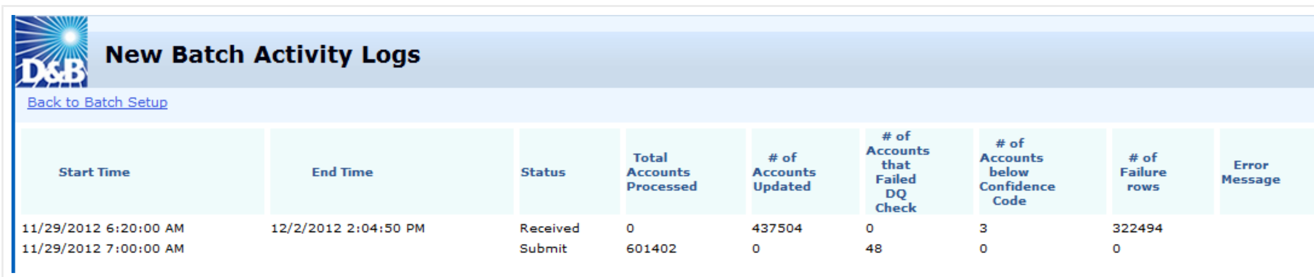
Viewing Activity Logs for Batches

1. In the **D&B Oracle Administration** window, scroll down to the **Batch Setup** area, and click **Batch Setup.**

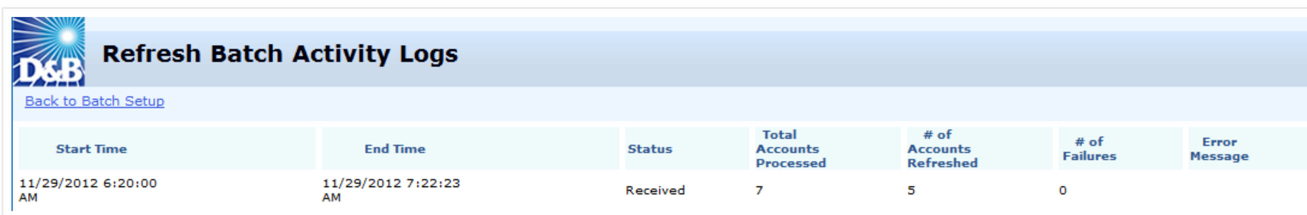


2. In the **D&B Batch Administration** window, click **New Batch Activity Logs** or **Refresh Batch Activity Logs** to view the logs for the batch you ran.





Start Time	End Time	Status	Total Accounts Processed	# of Accounts Updated	# of Accounts that Failed DQ Check	# of Accounts below Confidence Code	# of Failure rows	Error Message
11/29/2012 6:20:00 AM	12/2/2012 2:04:50 PM	Received	0	437504	0	3	322494	
11/29/2012 7:00:00 AM		Submit	601402	0	48	0	0	



Start Time	End Time	Status	Total Accounts Processed	# of Accounts Refreshed	# of Failures	Error Message
11/29/2012 6:20:00 AM	11/29/2012 7:22:23 AM	Received	7	5	0	

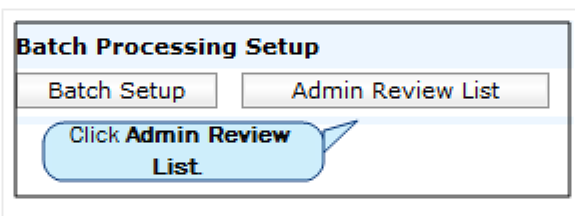
In the **New Batch Activity Logs** and **Refresh Batch Activity Logs** windows, a table displays with information about your batch. The first line of the table displays the **Received Status** and the number of accounts that D&B returns back to you. The second line displays the **Submit Status** and the number of accounts you submitted to D&B. The rows in the table are described in the following table:

Column Name	Displays ...
Start Time	Job start time
End Time	Job end time
Status	Activity related to those records
Total Accounts Processed	Count of records involved in a Submit or Receive task

# of Accounts Updated	The number of accounts sent to D&B for Submit task type. For a Receive task type, this column displays the number of records that were updated with D&B data in D&B360 table.
# of Accounts Failing DQ Check	The number of records that failed initial data quality (DQ) check. This column will be populated only for a New Batch Submit type of task.
# of Accounts below Confidence Code	The number of records that had a confidence code below the organization's set value. This column is populated only for a New Batch Receive type of task.
# of Failure Rows	The number of errors found.
Error Message	The last error message.
# of Records Refreshed	The number of records that were refreshed with D&B data in D&B360 table. This column is populated only for a Refresh Batch Receive type of task.
# of Recertified Records	The number of records that had new D-U-N-S Numbers assigned. This column is populated only for Refresh Batch receive type of task.

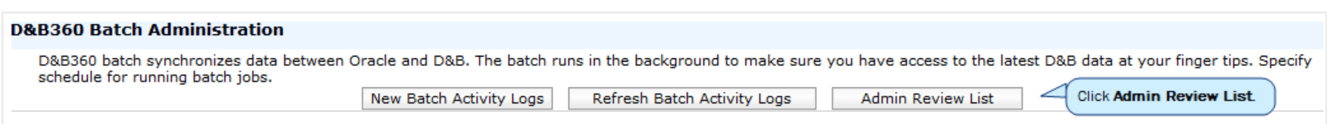
Viewing the Admin Review List

- In the **D&B Oracle Administration** window, scroll down to the **Batch Setup** area, and click **Admin Review List**.



— or —

In the **D&B Batch Administration** window, click **Admin Review List.**



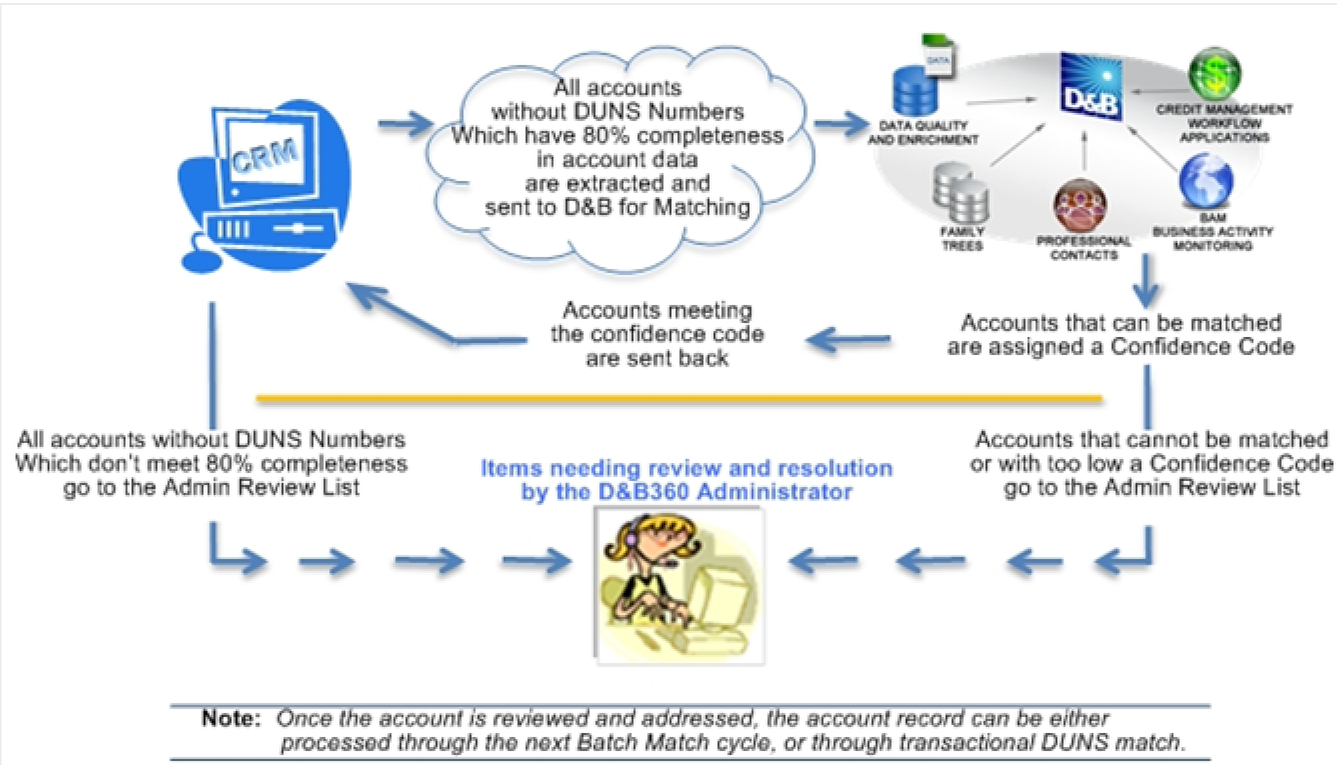
Viewing and Processing Failed Batch Records in the Admin Review List.

Accounts without a D-U-N-S Numbers are batched and sent to D&B for matching with D&B's D-U-N-S data. Some accounts cannot be sent because they don't meet 80% completeness. These accounts are listed in the Admin Review List for review and resolution.

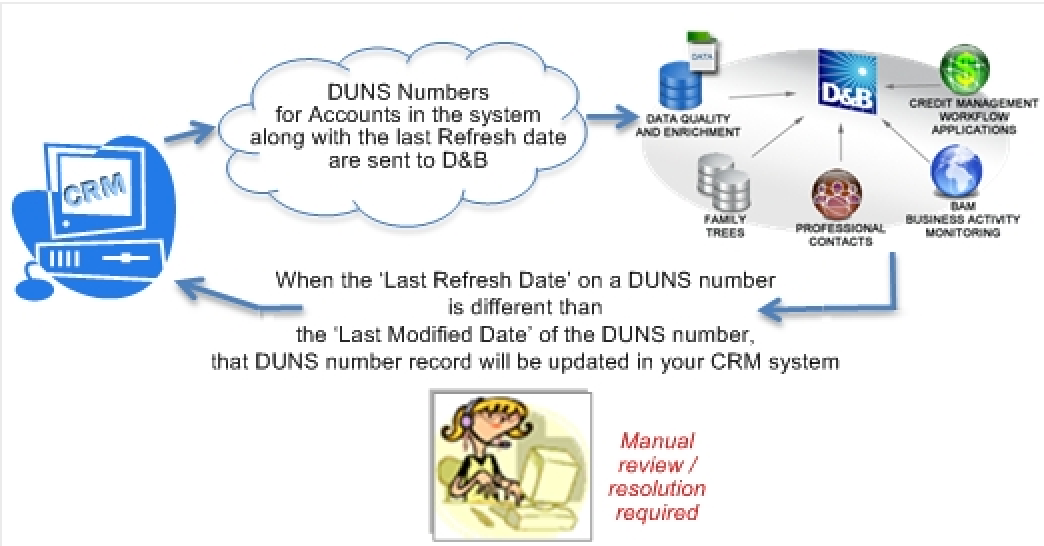
When the information is returned from D&B, most of the accounts will have been matched with D-U-N-S Numbers. Some accounts will be sent to the Admin Review List for one of the following reasons:

- They were unable to be matched.
- They were matched, but the confidence code is below the default.

Whenever accounts are on the Admin Review List, you must review the information and correct it so that these accounts can be successfully processed.



Refresh batch results can also produce items that you must manually review and resolved. For example, you need to change or accept the modified data.



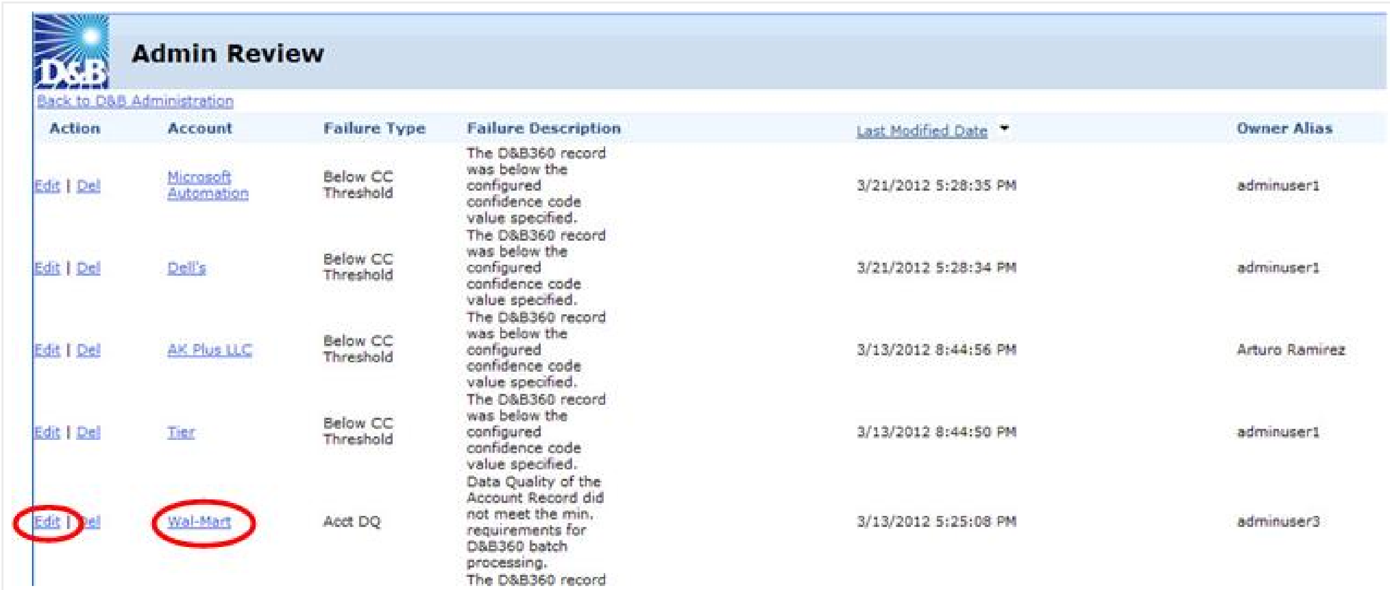
Using the Admin Review List

In the **Admin Review** window, a list of failure types displays. Next to the **Failure Type** you want to see more information about:

- To open the **Account Search** window, click **Edit**.
- To open the Account record from which you can run an account search, click **Account.**

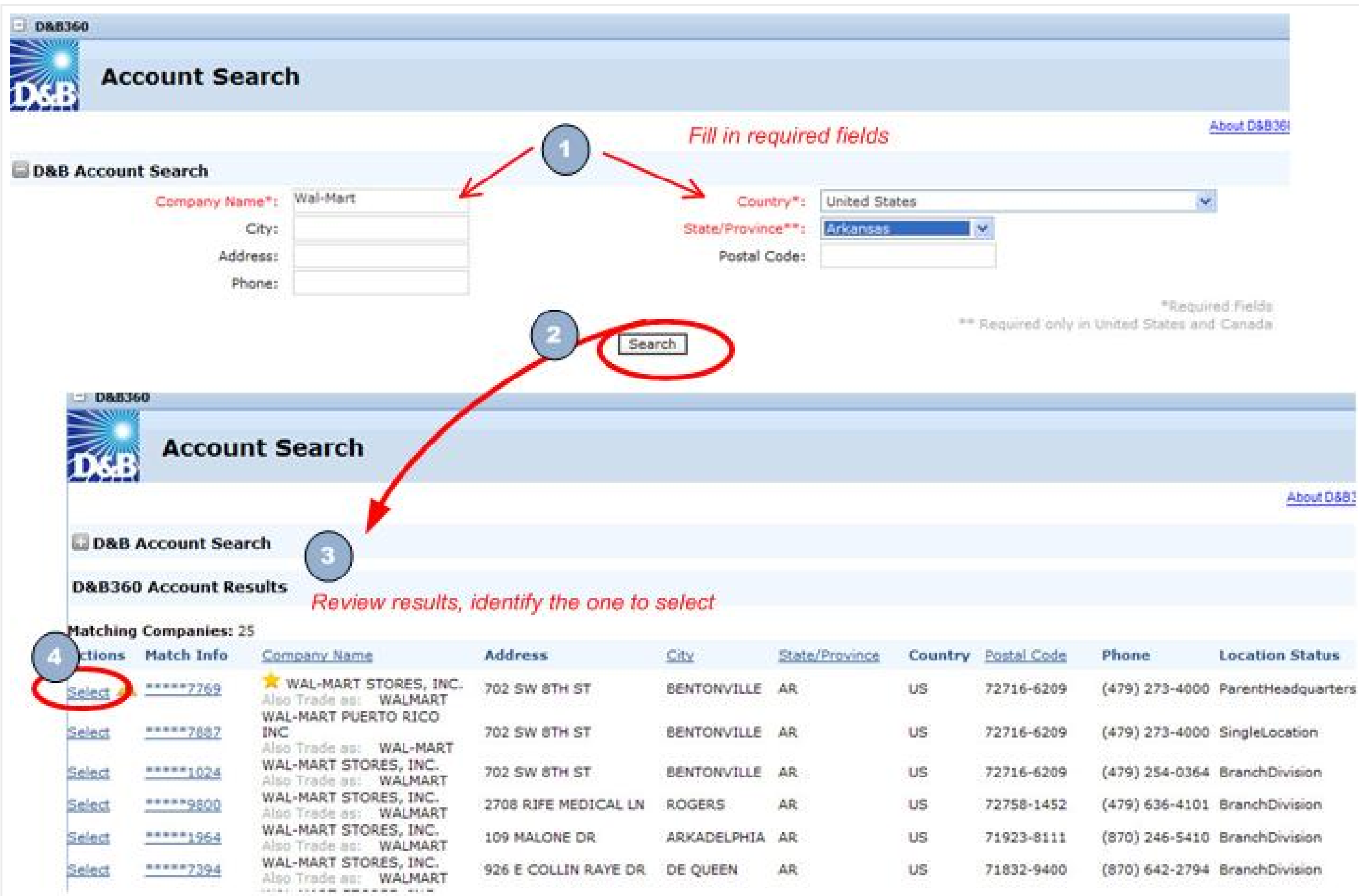
The two failure types reported include:

Failure Type	Means ...
Data Quality	The Data Quality of the Account Record did not meet the minimum requirements set for D&B360 Batch processing.
Below CC Threshold	The D&B record matched to your input record was below the customer-assigned confidence code.


Admin Review
Back to D&B Administration
Action
Account
Failure Type
Failure Description
Last Modified Date
Owner Alias
Edit | Del
Microsoft Automation
Below CC Threshold
The D&B360 record was below the configured confidence code value specified.
3/21/2012 5:28:35 PM
adminuser1
Edit | Del
Dell's
Below CC Threshold
The D&B360 record was below the configured confidence code value specified.
3/21/2012 5:28:34 PM
adminuser1
Edit | Del
AK Plus LLC
Below CC Threshold
The D&B360 record was below the configured confidence code value specified.
3/13/2012 8:44:56 PM
Arturo Ramirez
Edit | Del
Tier
Below CC Threshold
The D&B360 record was below the configured confidence code value specified.
3/13/2012 8:44:50 PM
adminuser1
Edit | Del
Wal-Mart
Acct DQ
Data Quality of the Account Record did not meet the min. requirements for D&B360 batch processing.
3/13/2012 5:25:08 PM
adminuser3
The D&B360 record

Using the Account Search Window

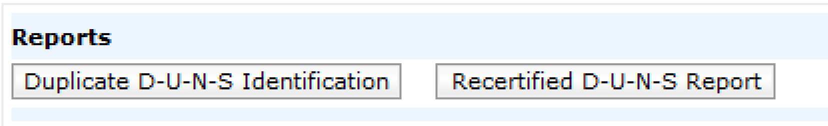
1. In the **Account Search** window, **D&B360 Account Search** area, fill in the required fields
2. Click **Search.**
3. In the **D&B Account Results** window, find the relevant company name based on the search results
4. In the **Actions** column next to that account, click **Select.**



After you have found the match for the correct company and added it into the D&B360 object, the failed record will be removed from the Admin Review List.

Viewing D&B360 Reports

The Duplicate D-U-N-S Report and the Recertification D-U-N-S Report are valuable for reviewing and resolving some common situations. To access these reports, in the **D&B Oracle Administration** window, scroll down to the **Reports** area.



Duplicate DUNS Reports

If more than one account with the same D-U-N-S Number exists, it is listed on the Duplicate DUNS report.

Access to Reports by Tier Level

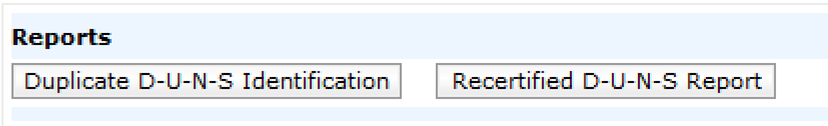
Access to reports depends on the tier level of your License, as follows:

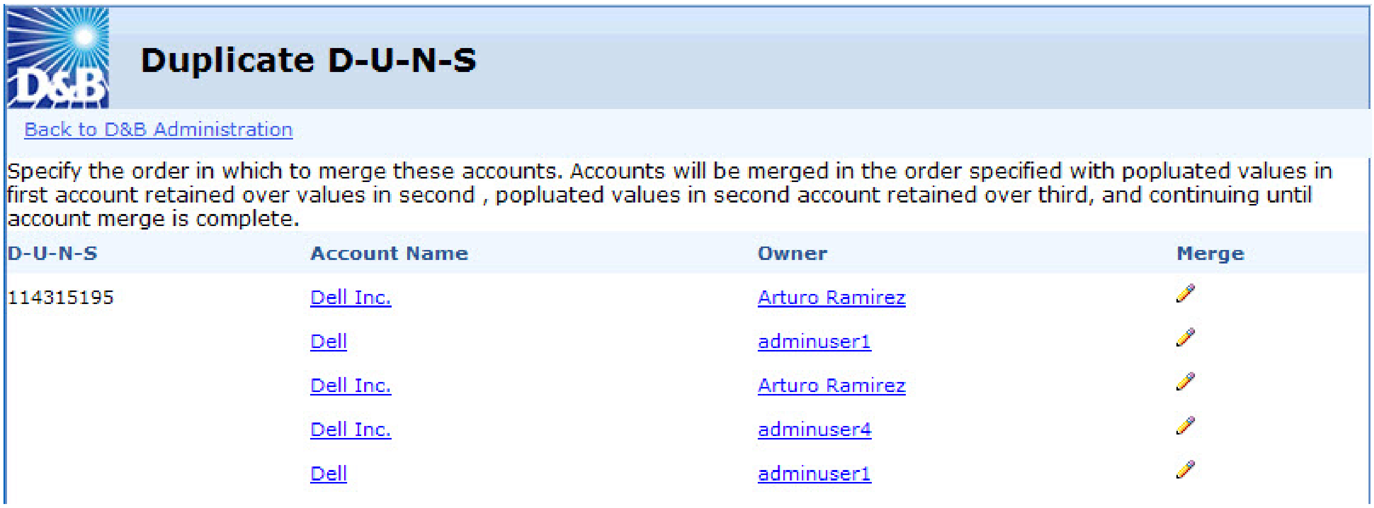
Tier	Description
1	Access to report, but cannot merge accounts
2	Access to report, but cannot merge accounts
3	Access to report, can merge accounts, and can prevent duplicates from being created in the first place. (For more information, see "Establishing Permissions for Roles within D&B360" on page 5-5.)

Note: If you would like a feature you don't currently have, contact your D&B sales representative.

Using the Duplicate D-U-N-S Report

1. In the **D&B Oracle Administration** window, scroll down to the **Reports** area, and **click Duplicate D-U-N-S Identification.**





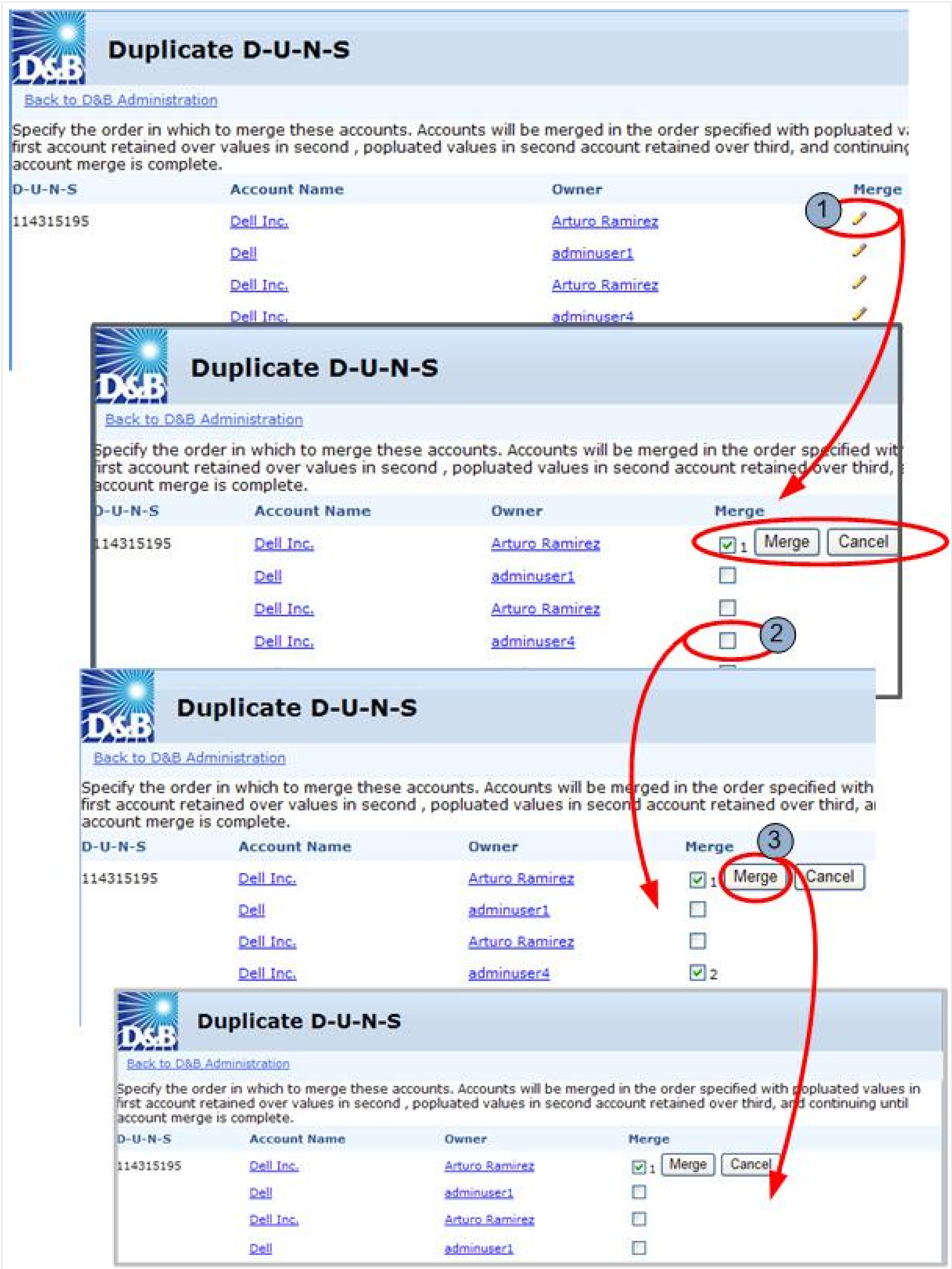
2. In the **Duplicate D-U-N-S** window, review the information in each of the duplicates and then:
   a. Decide which one is the master – that is, which one should be the primary selection.
   b. Select an account with information you want to merge into the master.

> **Note:** If you have three or more accounts with the same D-U-N-S Number, you can merge the information for more than one account into the master. However, you must perform the merge operations one at a time because the merge function merges information from two sources at a time.

Merging Duplicate D-U-N-S Reports

1. Next to the account you want to merge, click the pencil in the **Merge** column.
2. Select the account you want to select as the Master. The **Merge** and **Cancel** buttons display.
3. Click **Merge**. The second account merges with the first account.

   See the following illustration:


Duplicate D-U-N-S
Back to D&B Administration
Specify the order in which to merge these accounts. Accounts will be merged in the order specified with popluated v
first account retained over values in second , popluated values in second account retained over third, and continuin
account merge is complete.
D-U-N-S
Account Name
Owner
Merge
1
114315195
Dell Inc.
Arturo Ramirez
Dell
adminuser1
Dell Inc.
Arturo Ramirez
Dell Inc.
adminuser4
Duplicate D-U-N-S
Back to D&B Administration
Merge
Cancel
2
Duplicate D-U-N-S
Back to D&B Administration
3
Merge
Cancel
Duplicate D-U-N-S
Back to D&B Administration
Specify the order in which to merge these accounts. Accounts will be merged in the order specified with popluated values in
first account retained over values in second , popluated values in second account retained over third, and continuing until
account merge is complete.
D-U-N-S
Account Name
Owner
Merge
114315195
Dell Inc.
Arturo Ramirez
Merge
Cancel
Dell
adminuser1
Dell Inc.
Arturo Ramirez
Dell
adminuser1

Recertified D-U-N-S Report

Periodically, information about a company changes. This triggers a change in the D-U-N-S Number. Use this report to identify these issues, so that you understand, and if necessary, can modify your account information. The Recertified D-U-N-S Report window is shown in the following illustration.

D-U-N-S Number	DATS Date	Recertified Reason Code	Recertified Reason
2222222	01/02/2011	A	D-U-N-S Number changed due to being identified as a duplicate in D&B's database
11111111	07/09/2011	M	D-U-N-S Number changed due to a Merger or Acquisition.
43432432	01/02/2011	C	D-U-N-S Number changed due to a branch location becoming a separate legal entity.

This feature is available only for Tier 2 licenses and higher. If you want to add this feature, request that your Administrator contact your D&B sales representative.

Note: If you would like a feature you don't currently have, contact your D&B sales representative.

Chapter 9: Troubleshooting

Frequently Asked Questions (FAQ's)

Question	Answer
Can D&B360 for Oracle CRM be installed once and accessed by multiple instances (or ORGs) of Oracle CRM?	No. During the installation, the Oracle CRM ORG ID is used to create a unique key to access our DaaS platform. A separate D&B360 for Oracle CRM installation will be needed for each Oracle CRM instance (or ORG) that needs access to D&B360.
What steps should I take if our existing implementation of D&B360 for Oracle CRM has expired?	Follow these steps to re-install D&B360 after it has expired: 1. Verify that the existing D&B360 application has expired. 2. If expired, contact D&B360 Support and ask them to re-activate your Oracle CRM ORGID (Administration Setup / Company Profile / Company Information) **Note:** If there's a reason D&B Support is unable to comply immediately, they will let you know at that time and assist you in getting the issue resolved as quickly as possible. 3. Install the latest D&B360 application

Dun and Bradstreet is committed to a high level of customer satisfaction. An efficient support process is combined with a communication service level agreement to give our customers quality support.

The communication SLA (Service Level Agreement) is as follows:

Initial Response	The maximum timeframe for initial response for all inbound issues is 4 hours.
Ongoing Communication	SLA Determined with the customer. Based on mutual agreement of the severity of the issue.

The communication SLA is based on normal business hours, which are considered to be:

- 8 A.M. – 6 P.M. local time, Monday through Friday
- Excluding D&B holidays

To submit a ticket, go to this URL: http://dnbus.force.com/support?prod=dnb360. You will be prompted to enter your e-mail address and then fill out a form.

Installed Components

The following table contains a list of all components created or updated during the installation process. To remove the product from your CRM instance:

1. Remove all installed components except custom tables. You can re-purpose custom tables from Oracle if required, but you cannot be remove them.
2. Replace any reference to D&B Page Layouts in the CRM profiles.
3. Purge any D&B data in the D&B Company, Contact, and Custom Objects.

Name	Item Type	Created or Updated	Created or Updated By
Custom Object# DnB Company	Custom Object	Updated	Migration Tool
Custom Object# DnB Contact	Custom Object	Updated	Migration Tool
Custom Object# DnB AdminReview	Custom Object	Updated	Migration Tool
Custom Object# DnB Financials	Custom Object	Updated	Migration Tool
DnB Custom Layout	Account Page Layout	Created	Migration Tool
DnB Custom Layout	Lead Page Layout	Created	Migration Tool
DnB Custom Layout	Contact Page Layout	Created	Migration Tool
About DnB360	Custom Web Tab	Created	Migration Tool
Accounts with DnB360	Custom Web Tab	Created	Migration Tool

Contacts with DnB360	Custom Web Tab	Created	Migration Tool
DnB360 Administration	Custom Web Tab	Created	Migration Tool
DnB360 Build A List	Custom Web Tab	Created	Migration Tool
Leads with DnB360	Custom Web Tab	Created	Migration Tool
DnB Industries	Custom Web Tab	Created	Migration Tool
DnB Access Profile	Access Profile	Created	Migration Tool
DnB Role	User Role	Created	Migration Tool
D&B360	Account Web Applet	Created	Installation User
D&B360 ROW	Account Web Applet	Created	Installation User
DnB360 Custom Layout	Account Page Layout	Updated	Installation User
DnB Association Date	Account Custom Field	Created	Installation User
DnB Association Status	Account Custom Field	Created	Installation User
DnB Industries	Account Custom Field	Created	Installation User
DnB360	Lead Web Applet	Created	Installation User
DnB360 ROW	Lead Web Applet	Created	Installation User
DnB360 Custom Layout	Lead Page Layout	Updated	Installation User
DnB360 ROW	Contact Web Applet	Created	Installation User
DnB360 Custom Layout	Contact Page Layout	Updated	Installation User
DnB360	Global Web Applet	Created	Installation User
Action Bar Layout	Action Bar Layout	Updated	Installation User

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