



D&B360 Administration and Installation Guide

for Oracle CRM

Version 2.2

Document Revised May 2013

©2013 Dun & Bradstreet, Incorporated. All rights reserved.

D&B360 is a trademark or registered trademark of Dun and Bradstreet, Incorporated. Other trademarks used herein are the trademarks or registered trademarks of their respective owners.

This document is a work of authorship that belongs to Dun and Bradstreet, Incorporated and is protected by United States and foreign copyright laws and international copyright treaties. The use of the software and this Documentation is governed by the Dun and Bradstreet Incorporated software license agreement.

Table of Contents

| | |
|--|------------|
| About this Guide | vii |
| Audience and Purpose | vii |
| Conventions | vii |
| Navigating in the PDF | vii |
| Related Documentation | viii |
| Chapter 1: Introduction | 1-1 |
| Product Benefits | 1-1 |
| Guide Objectives | 1-2 |
| Guide Organization | 1-2 |
| Access to Features | 1-2 |
| Chapter 2: Getting Started | 2-1 |
| About D&B360 | 2-1 |
| Considerations for Administrators | 2-2 |
| Specifying the Requirements for Your CRM Environment | 2-2 |
| D&B360 Packages | 2-3 |
| Using Rest of World | 2-4 |
| Rest of World Applications | 2-4 |
| Setting Alerts | 2-6 |

| | |
|---|------------|
| Chapter 3: Installing Oracle Using the Migration Tool | 3-1 |
| Preparing for the Migration Steps | 3-1 |
| Migration Checklist | 3-1 |
| Completing the Migration Steps | 3-2 |
| Chapter 4: Manually Configuring Oracle | 4-1 |
| Creating the Manual Installation Check List | 4-2 |
| Configuring Accounts | 4-2 |
| Navigating in the Admin Homepage Window to Configure Accounts | 4-3 |
| Creating the D&B360 Web Applet for Accounts | 4-4 |
| Configuring the D&B360 ROW Web Applet for Accounts | 4-6 |
| Configuring the D&B Custom Page Layout for Accounts | 4-8 |
| Configuring the D&B Date Custom Field | 4-9 |
| Configuring the D&B Status Custom Field | 4-10 |
| Configuring the D&B Industries Custom Field | 4-12 |
| Verifying Integration Tags | 4-14 |
| Configuring Leads | 4-14 |
| Navigating in the Admin Homepage Window to Configure Leads | 4-15 |
| Creating the D&B360 Web Applet for Leads | 4-16 |
| Configuring the D&B360 ROW Web Applet for Leads | 4-18 |
| Configuring the D&B Custom Page Layout for Leads | 4-20 |
| Configuring Contacts | 4-21 |
| Configuring the D&B360 ROW Web Applet for Contacts | 4-23 |
| Configuring the D&B Custom Page Layout for Contacts | 4-24 |
| Configuring the Action Bar | 4-25 |



| | |
|---|------------|
| Creating the D&B360 Web Applet for the Action Bar | 4-25 |
| Configuring the Action Bar | 4-28 |
| Chapter 5: Setting Up Profiles | 5-1 |
| Establishing Access for Roles within the Oracle On-Demand CRM | 5-1 |
| Establishing Permissions for Roles within D&B360 | 5-5 |
| Setting Permissions | 5-5 |
| Setting User Roles | 5-7 |
| Chapter 6: Activating the Application | 6-1 |
| Completing the Final Installation Steps | 6-1 |
| Updating Entitlements | 6-4 |
| Chapter 7: Managing Batches | 7-1 |
| Understanding Key Features of Batch Jobs | 7-2 |
| Record Eligibility | 7-2 |
| Confidence Code Threshold Facts | 7-2 |
| Validating D-U-N-S Numbers | 7-2 |
| Scheduling New and Refresh Batch Jobs | 7-3 |
| Changing Credentials | 7-4 |
| Scheduling a New Batch | 7-5 |
| Scheduling a Refresh Batch | 7-5 |
| Chapter 8: Reviewing Logs and Reports | 8-1 |
| Viewing Expanded Reporting Options | 8-1 |
| Viewing Callout Logs | 8-2 |
| Viewing Activity Logs for Batches | 8-4 |
| Viewing the Admin Review List | 8-5 |

| | |
|--|------------|
| Viewing and Processing Failed Batch Records in the Admin Review List. | 8-5 |
| Using the Admin Review List | 8-7 |
| Using the Account Search Window | 8-9 |
| Viewing D&B360 Reports | 8-10 |
| Duplicate DUNS Reports | 8-10 |
| Access to Reports by Tier Level | 8-10 |
| Using the Duplicate D-U-N-S Report | 8-11 |
| Merging Duplicate D-U-N-S Reports | 8-11 |
| Recertified D-U-N-S Report | 8-13 |
| Chapter 9: Troubleshooting | 9-1 |
| Frequently Asked Questions (FAQ's) | 9-1 |
| Installed Components | 9-2 |
| Index | I-1 |

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 | 1-1 |
| Guide Objectives | 1-2 |
| Guide Organization | 1-2 |
| Access to Features | 1-2 |

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 | <p>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.</p> <p>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.</p> |

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.

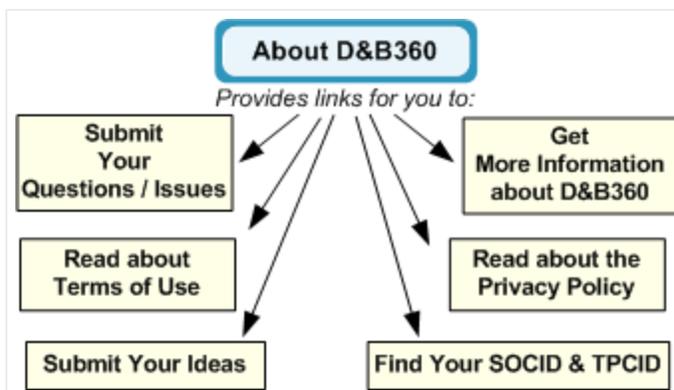
Chapter 2: Getting Started

| | |
|--|-----|
| About D&B360 | 2-1 |
| Considerations for Administrators | 2-2 |
| Specifying the Requirements for Your CRM Environment | 2-2 |
| D&B360 Packages | 2-3 |
| Using Rest of World | 2-4 |
| Rest of World Applications | 2-4 |
| Setting Alerts | 2-6 |

Note: For more information about the user interface and other features of the Oracle 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

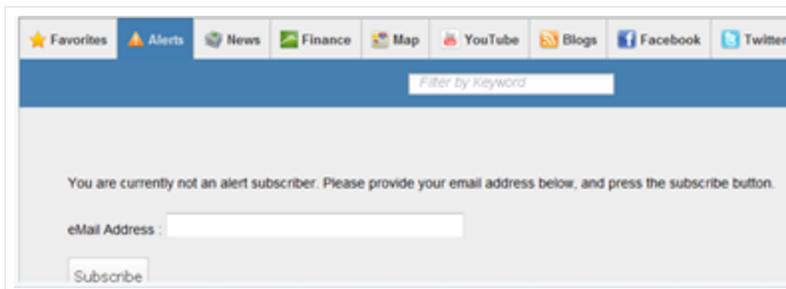
D&B360 currently supports the social and news media applications listed in the following table. From a D&B360 Account page, click **D&B360 ROW** to display the ROW tabs. To navigate through the ROW applications, click the tabs.

| ROW Icons | Description |
|---|--|
|  Favorites | <p>Allows you to save items of interest to you and stores them in this tab.</p> <p>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.</p> |
|  Alerts | <p>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</p> |
|  News | <p>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.</p> |
|  Finance | <p>Displays stock feeds and financial news feeds about a company from a variety of sources.</p> |
|  Map | <p>The Map icon pre-populates the Account Billing address and connects to Google Maps to show the address location.</p> |
|  YouTube | <p>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.</p> |
|  Blogs | <p>Blogs display a list of authorized blogs from companies in your D&B360 accounts.</p> |
|  Facebook | <p>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.</p> <p>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.</p> |

| ROW Icons | Description |
|---|--|
|  | <p>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.</p> <p>In D&B360, when you click the Twitter tab, a list of that company's official tweets displays.</p> |
|  | <p>LinkedIn is a business-oriented social networking site where you can connect with trusted contacts and exchange knowledge, ideas, and opportunities.</p> <p>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.</p> |
|  | <p>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.</p> |

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**.

Please select the types of alerts you are interested in.

| | |
|---|---|
| <input type="checkbox"/> Restructure | <input type="checkbox"/> Regulation or Litigation |
| <input type="checkbox"/> Reduction | <input type="checkbox"/> Awards |
| <input type="checkbox"/> Bankruptcy | <input type="checkbox"/> Earnings Release |
| <input type="checkbox"/> Executive Activity | <input type="checkbox"/> Executive Announcement |
| <input type="checkbox"/> Executive Quote | <input type="checkbox"/> Expansion |
| <input type="checkbox"/> Financial News | <input type="checkbox"/> Funding |
| <input type="checkbox"/> Management Change | <input type="checkbox"/> Merger and Acquisition |
| <input type="checkbox"/> New Alliance | <input type="checkbox"/> New Product |
| <input type="checkbox"/> Wins | |
| <input type="checkbox"/> Select All | |

Monitor  Click **Monitor**.



Chapter 3: Installing Oracle Using the Migration Tool

| | |
|---|-----|
| Preparing for the Migration Steps | 3-1 |
| Migration Checklist | 3-1 |
| Completing the Migration Steps | 3-2 |

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.

- 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.

- Click **Install**.

D&B360 for Oracle 2.2
Installation Setup

Please pick a Custom Object to use for the D&B Company and D&B Contact Objects

D&B Company: Custom Object 4
 D&B Contact: Custom Object 5
 D&B Admin Review: Custom Object 6
 D&B Credit: Custom Object 7
 D&B Financials: ---None Selected---

Enter your Oracle OD username, password and POD to continue (the user must have an Administrator role and full Access Profile to process successfully)

Username: DEV/DJOE
 Password:
 Confirm Password:
 POD: apa

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 | 4-2 |
| Configuring Accounts | 4-2 |
| Navigating in the Admin Homepage Window to Configure Accounts | 4-3 |
| Creating the D&B360 Web Applet for Accounts | 4-4 |
| Configuring the D&B360 ROW Web Applet for Accounts | 4-6 |
| Configuring the D&B Custom Page Layout for Accounts | 4-8 |
| Configuring Leads | 4-14 |
| Navigating in the Admin Homepage Window to Configure Leads | 4-15 |
| Creating the D&B360 Web Applet for Leads | 4-16 |
| Configuring the D&B360 ROW Web Applet for Leads | 4-18 |
| Configuring the D&B Custom Page Layout for Leads | 4-20 |
| Configuring Contacts | 4-21 |
| Configuring the D&B360 ROW Web Applet for Contacts | 4-23 |
| Configuring the D&B Custom Page Layout for Contacts | 4-24 |
| Configuring the Action Bar | 4-25 |
| Creating the D&B360 Web Applet for the Action Bar | 4-25 |
| Configuring the Action Bar | 4-28 |

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 | |

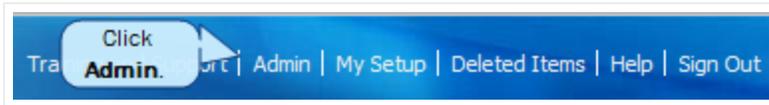
Configuring Accounts

| | |
|---|-----|
| Navigating in the Admin Homepage Window to Configure Accounts | 4-3 |
| Creating the D&B360 Web Applet for Accounts | 4-4 |
| Configuring the D&B360 ROW Web Applet for Accounts | 4-6 |
| Configuring the D&B Custom Page Layout for Accounts | 4-8 |

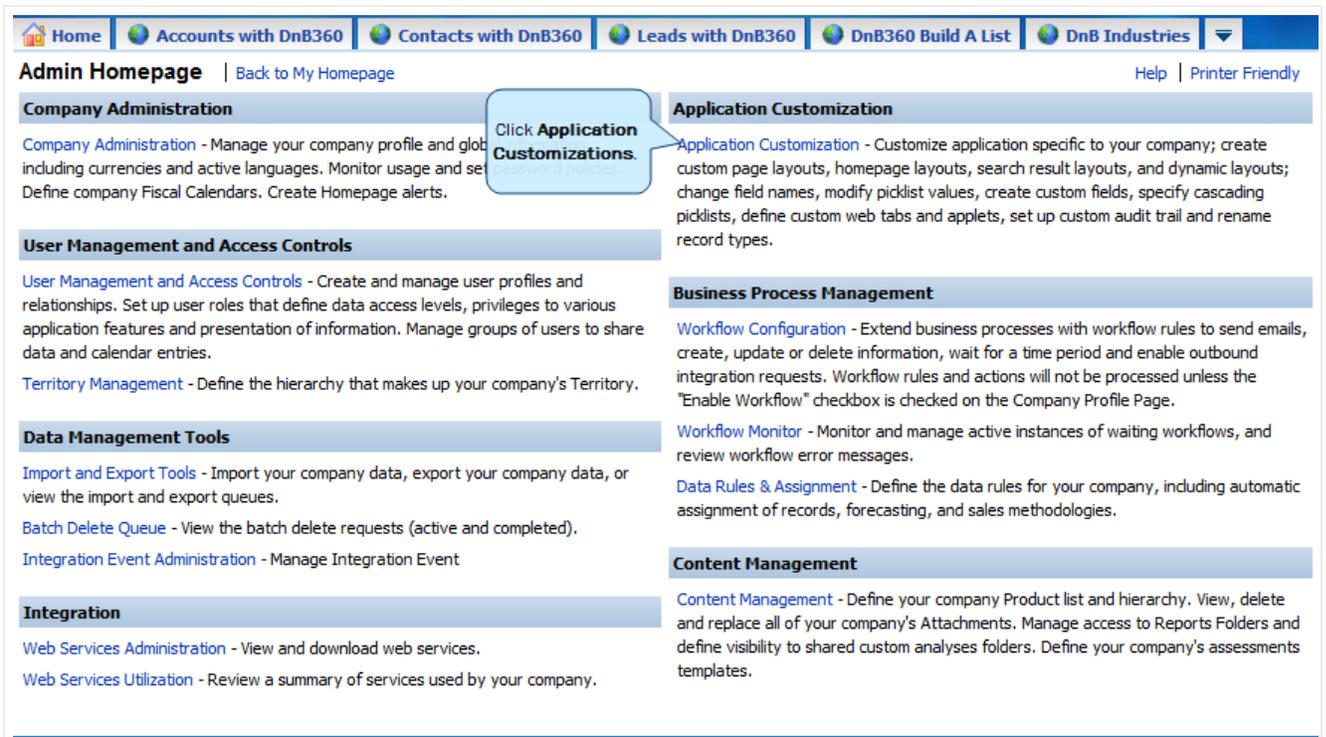
Navigating in the Admin Homepage Window to Configure Accounts

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

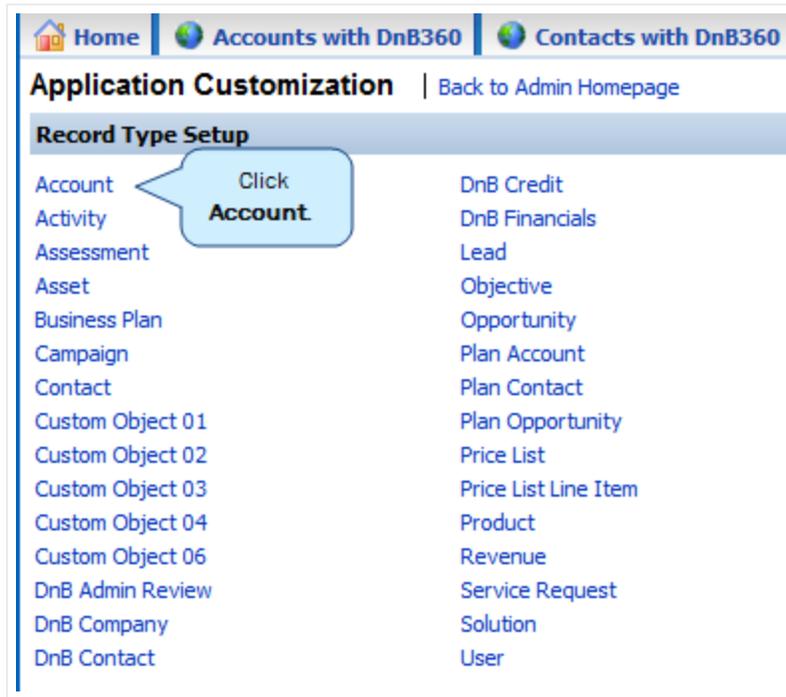
1. Log in to your Oracle instance.
2. In the top menu, click **Admin**.



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



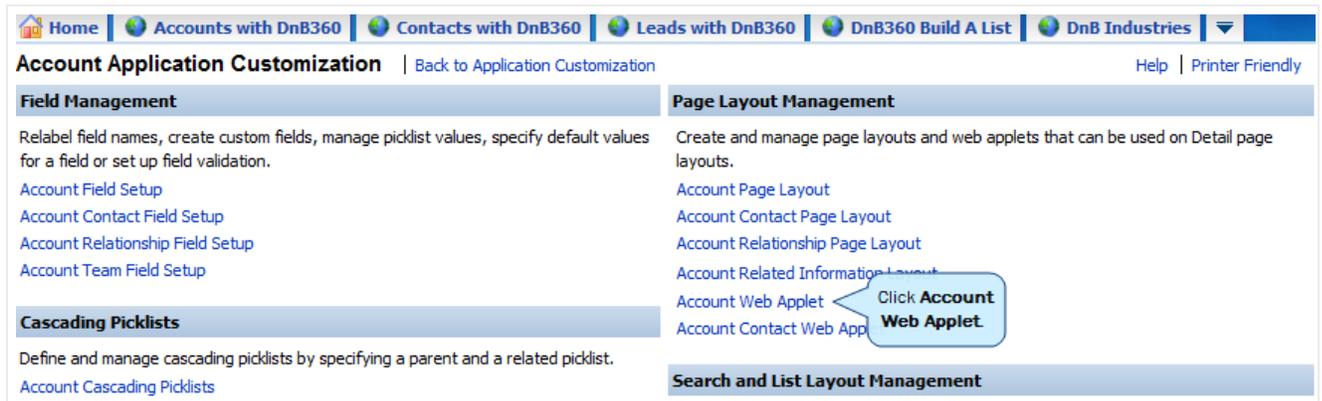
3. In the **Application Customization** window, **Record Type Setup** area, click **Account**.



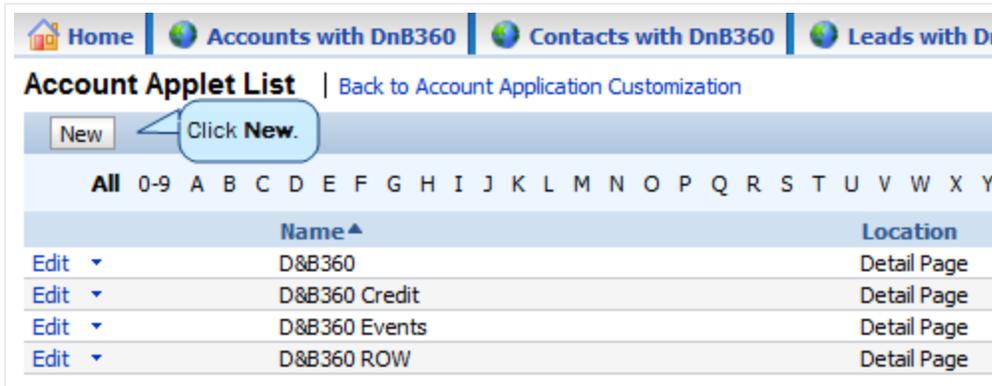
Creating the D&B360 Web Applet for Accounts

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**.



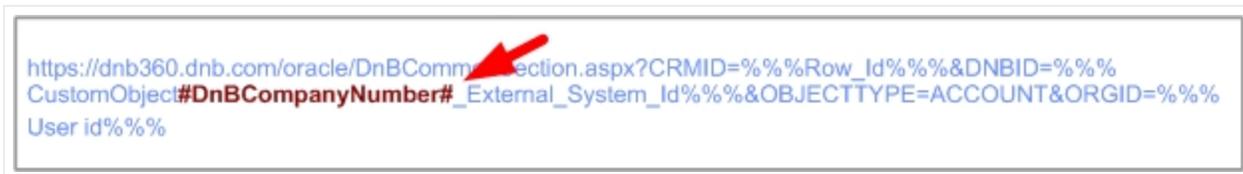
3. In the **Account Web Applet** window, complete these fields:

- 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 **#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:



`https://dnb360.dnb.com/oracle/DnBCommonSection.aspx?CRMID=%%%Row_Id%%&DNBID=%%% CustomObject#DnBCompanyNumber#_External_System_Id%%&OBJECTTYPE=ACCOUNT&ORGID=%%% User id%%`



`https://dnb360.dnb.com/oracle/DnBCommonSection.aspx?CRMID=%%%Row_Id%%&DNBID=%%% CustomObject9_External_System_Id%%&OBJECTTYPE=ACCOUNT&ORGID=%%%User id%%`

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

Account Web Applet | [Back to Account Applet List](#)
Help

! Another user has logged in with your User Sign In ID ENAPSYS-DEV3/ADMINUSER1. [Click here](#) to view login history.

Custom Web Applet Save Cancel

💡 Use the User fields drop down to add user field parameters to the URL.

Name*

Location Homepage

Columns* Single

Type URL

User fields

URL

Description

Height pixels

* = Required Field

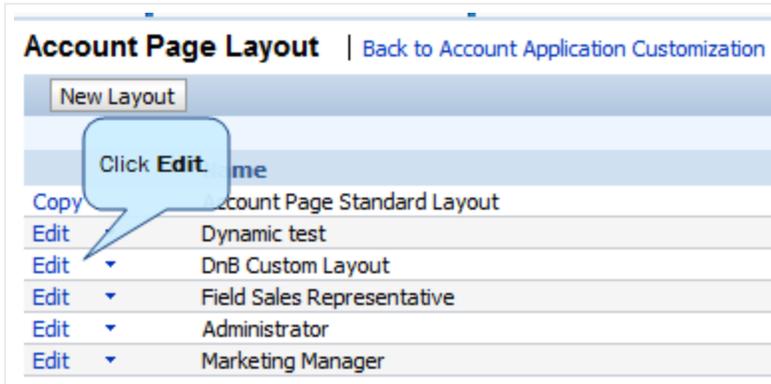
! **WARNING:** Browsers have different maximum URL lengths. If you specify a URL that is too long, it may not work as intended. The URL length will change if you are using parameter substitution.

Click **Save**.
Save
Cancel

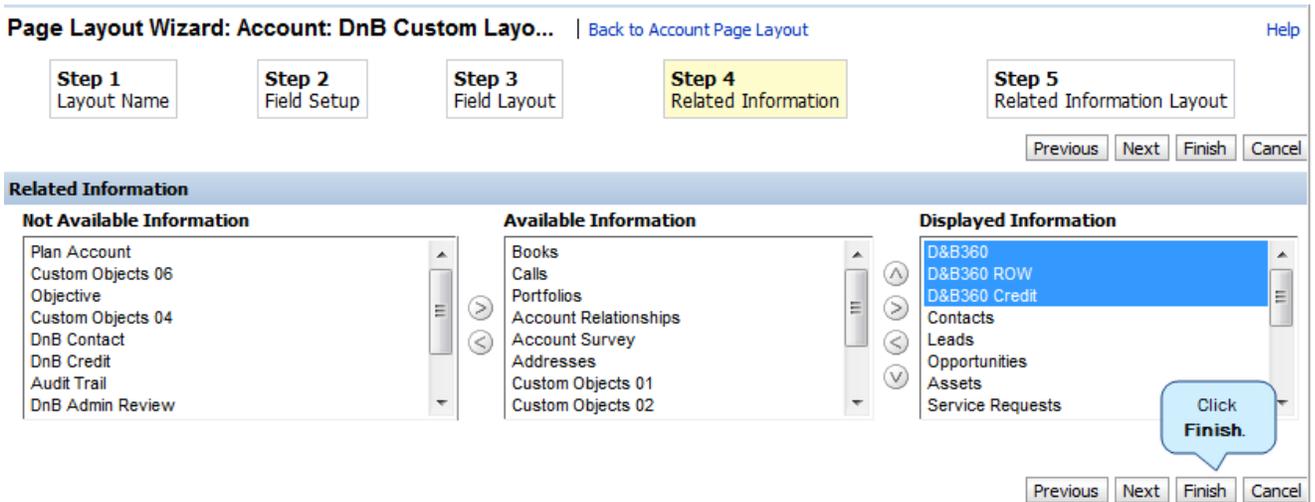
Configuring the D&B Custom Page Layout for Accounts

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**.

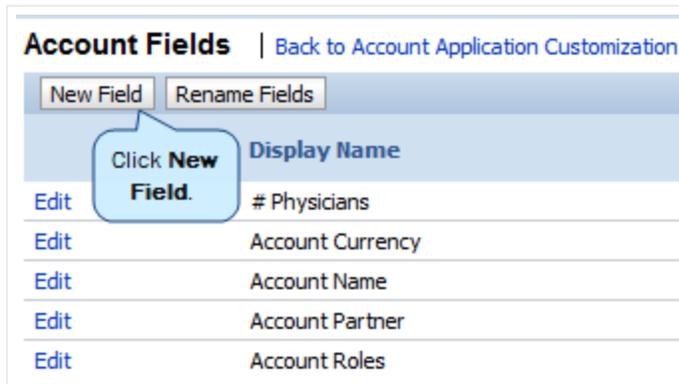


Configuring the D&B Date Custom Field

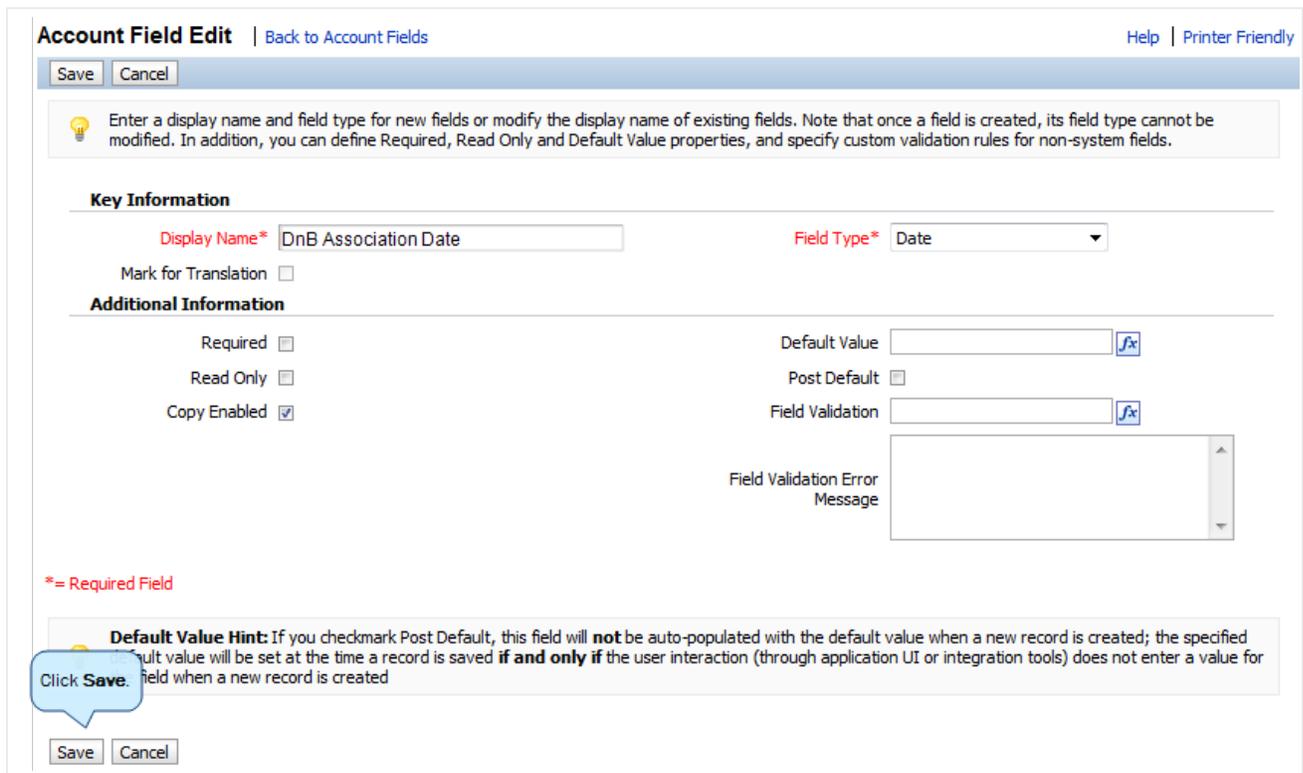
1. In the **Admin Homepage** window, click **Application Customization**.
2. In the **Record Type Setup** area, click **Account**.
3. In the **Account Application Customization** window, **Field Management** area, click **Account Field Setup**.
4. In the **Account Fields** window, click **New Field**.

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**.

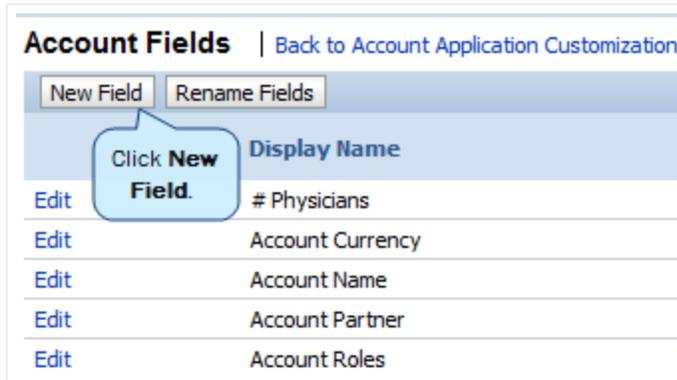


Configuring the D&B Status Custom Field

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**.

Account Field Edit | [Back to Account Fields](#) [Help](#) | [Printer Friendly](#)

Enter a display name and field type for new fields or modify the display name of existing fields. Note that once a field is created, its field type cannot be modified. In addition, you can define Required, Read Only and Default Value properties, and specify custom validation rules for non-system fields.

Key Information

Display Name* **Field Type***

Mark for Translation

Additional Information

Required Default Value

Read Only Post Default

Copy Enabled Field Validation

Field Validation Error Message

* = Required Field

Default Value Hint: If you checkmark Post Default, this field will **not** be auto-populated with the default value when a new record is created; the specified default value will be set at the time a record is saved **if and only if** the user interaction (through application UI or integration tools) does not enter a value for field when a new record is created

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**.

| Account Fields Back to Account Application Customization | |
|--|---------------------|
| New Field Rename Fields | |
| Edit | Display Name |
| Edit | # Physicians |
| Edit | Account Currency |
| Edit | Account Name |
| Edit | Account Partner |
| Edit | Account Roles |

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.

Account Field Edit | [Back to Account Fields](#) [Help](#) | [Printer Friendly](#)

Another user has logged in with your User Sign In ID ENAPSYS-DEV3/ADMINUSER1. [Click here](#) to view login history.

[Save](#) [Cancel](#)

Enter a display name and field type for new fields or modify the display name of existing fields. Note that once a field is created, its field type cannot be modified. In addition, you can define Required, Read Only and Default Value properties, and specify custom validation rules for non-system fields.

Key Information

Display Name* Field Type*

Mark for Translation

Additional Information

Required Default Value [fx](#)

Read Only Post Default

Copy Enabled Field Validation [fx](#)

Field Validation Error Message

***= Required Field**

Default Value Hint: If you checkmark Post Default, this field will **not** be auto-populated with the default value when a new record is created; the specified default value will be set at the time a record is saved **if and only if** the user interaction (through application UI or integration tools) does not enter a value for the field when a new record is created.

[Click Save.](#)

[Save](#) [Cancel](#)

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
 - ItDnB_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) | ItDnB_Industries |

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

Configuring Leads

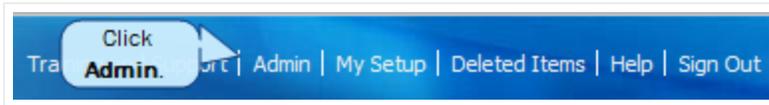
| | |
|--|------|
| Navigating in the Admin Homepage Window to Configure Leads | 4-15 |
| Creating the D&B360 Web Applet for Leads | 4-16 |
| Configuring the D&B360 ROW Web Applet for Leads | 4-18 |
| Configuring the D&B Custom Page Layout for Leads | 4-20 |



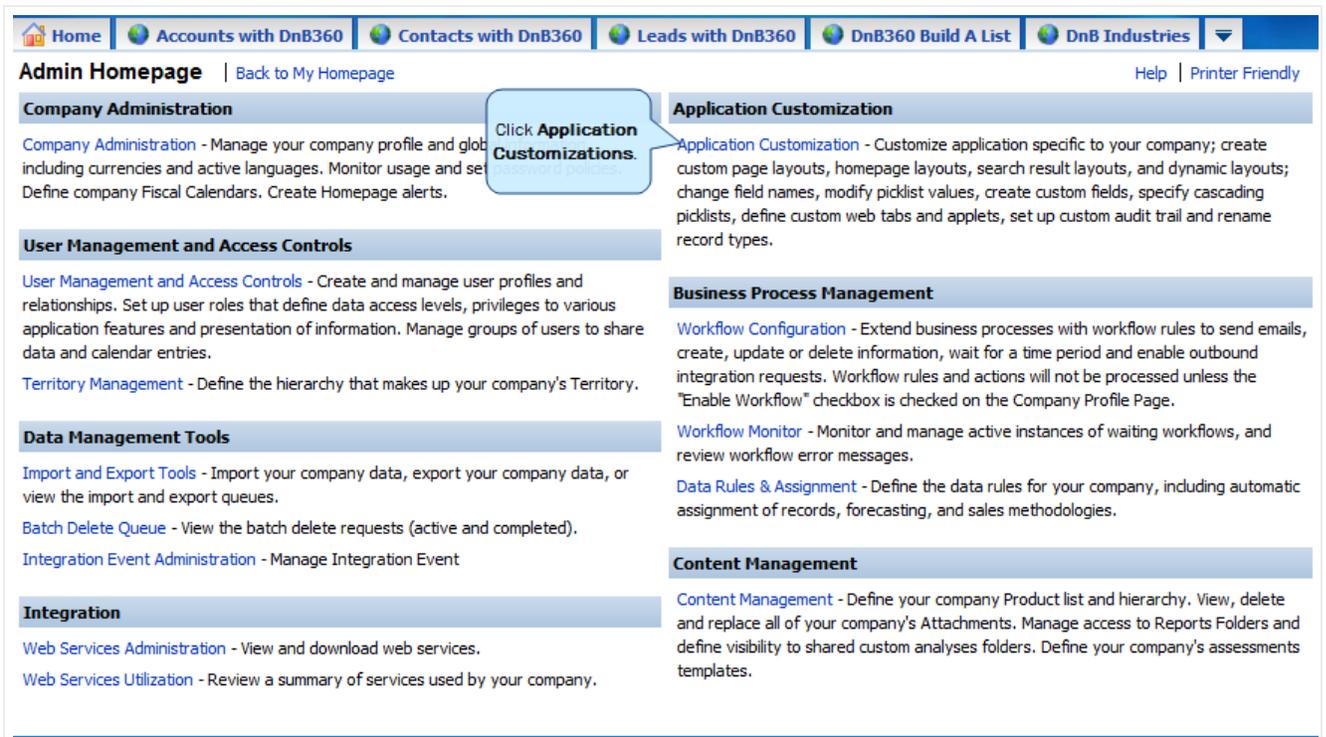
Navigating in the Admin Homepage Window to Configure Leads

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

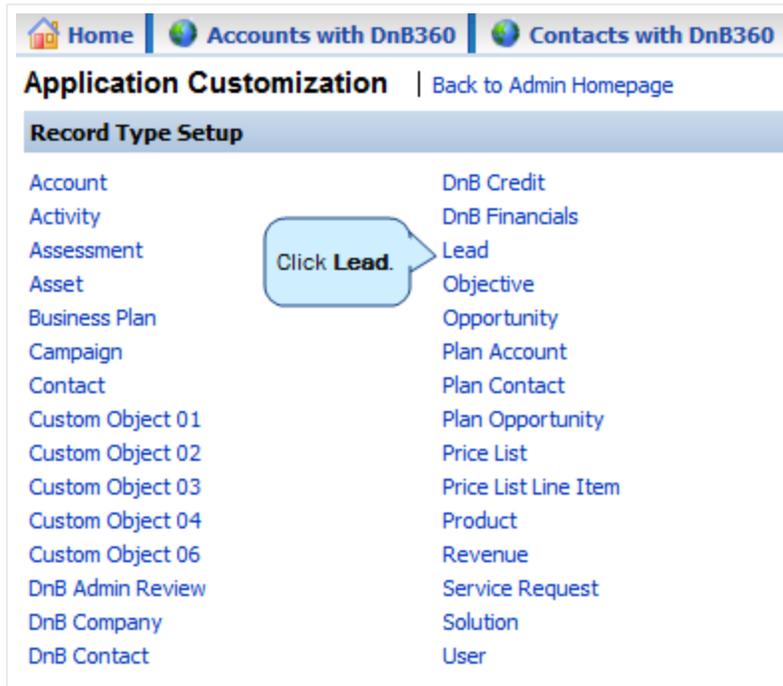
1. Log in to your Oracle instance.
2. In the top menu, click **Admin**.



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



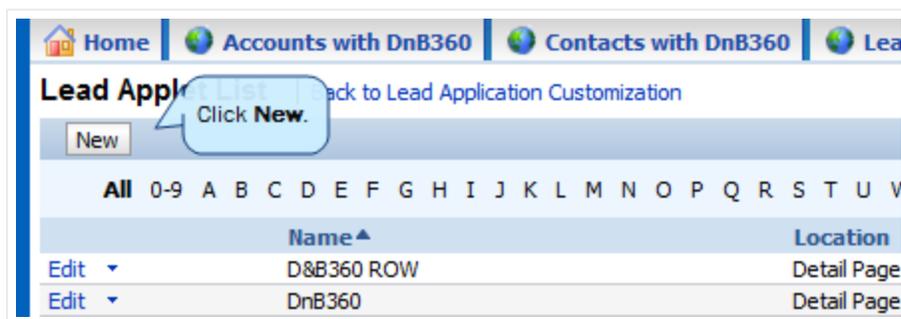
3. In the **Application Customization** window, **Record Type Setup** area, click **Lead**.



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 **#DnBCompanyNumber#** with the **Custom Object Number** you selected for the D&B Company object.

An example is shown in the following illustrations:



```
https://dnb360.dnb.com/oracle/DnBCommonSection.aspx?CRMID=%Id%&DNBID=%CustomObject#DnBCompanyNumber#_External_System_Id%&OBJECTTYPE=LEAD&ORGID=%User id%
```



```
https://dnb360.dnb.com/oracle/DnBCommonSection.aspx?CRMID=%Id%&DNBID=%CustomObject9_External_System_Id%&OBJECTTYPE=LEAD&ORGID=%User id%
```

- 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**.

Lead Web Applet | [Back to Lead Applet List](#)

Custom Web Applet

Use the User fields drop down to add user field parameters to the URL.

Name*

Location

Type

User fields

Lead Fields

URL

Always Run

Description

Height pixels

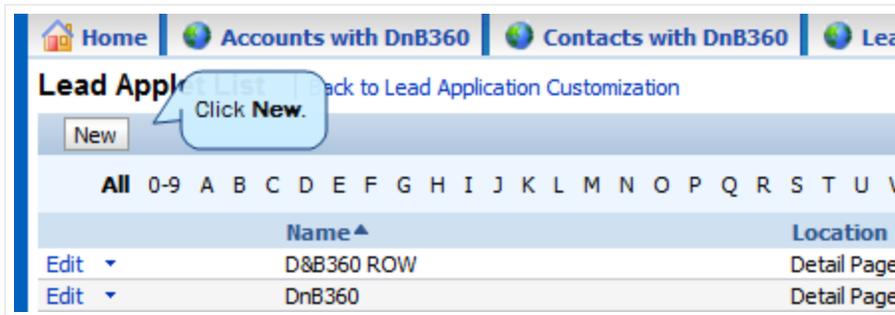
*= Required Field

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.

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:



`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%%`



`https://dnb360.dnb.com/oracle/DnBROW.aspx?CRMID=%%Id%%&DNBID=%%CustomObject#8_External_System_Id%%&CompanyDnBId=%%CustomObject#9_external_System_Id%%&OBJECTTYPE=LEAD&ORGID=%%User id%%`

- 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**.

Lead Web Applet | [Back to Lead Applet List](#)

Custom Web Applet

 Use the User fields drop down to add user field parameters to the URL.

Name*

Location

Type

User fields

Lead Fields

URL

Always Run

Description

Height **pixels**

***= Required Field**

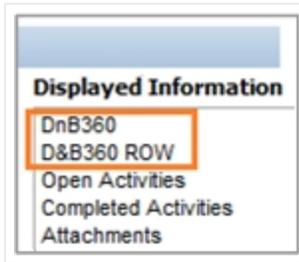
 **WARNING:** Browsers have different maximum URL lengths. If you specify a URL that is too long, it may not work as intended. The URL length will change if you are using parameter substitution.

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**.

| | Name |
|-------------------------------------|---------------------------|
| <input type="button" value="Copy"/> | Lead Page Standard Layout |
| <input type="button" value="Edit"/> | DnB Custom Layout |

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**.



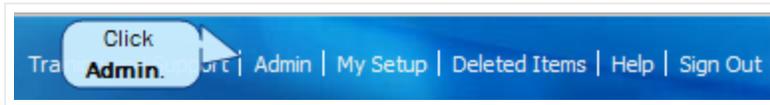
Configuring Contacts

Configuring the D&B360 ROW Web Applet for Contacts 4-23

Configuring the D&B Custom Page Layout for Contacts 4-24

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**.

The screenshot shows the Admin Homepage with a navigation bar at the top containing links for Home, Accounts with DnB360, Contacts with DnB360, Leads with DnB360, DnB360 Build A List, and DnB Industries. The main content area is divided into several sections:

- Company Administration**: Manage your company profile and global settings including currencies and active languages. Monitor usage and set up company Fiscal Calendars. Create Homepage alerts.
- User Management and Access Controls**: Create and manage user profiles and relationships. Set up user roles that define data access levels, privileges to various application features and presentation of information. Manage groups of users to share data and calendar entries. Territory Management - Define the hierarchy that makes up your company's Territory.
- Data Management Tools**:
 - Import and Export Tools - Import your company data, export your company data, or view the import and export queues.
 - Batch Delete Queue - View the batch delete requests (active and completed).
 - Integration Event Administration - Manage Integration Event
- Integration**:
 - Web Services Administration - View and download web services.
 - Web Services Utilization - Review a summary of services used by your company.
- Application Customization**: Application Customization - Customize application specific to your company; create custom page layouts, homepage layouts, search result layouts, and dynamic layouts; change field names, modify picklist values, create custom fields, specify cascading picklists, define custom web tabs and applets, set up custom audit trail and rename record types.
- Business Process Management**:
 - Workflow Configuration - Extend business processes with workflow rules to send emails, create, update or delete information, wait for a time period and enable outbound integration requests. Workflow rules and actions will not be processed unless the "Enable Workflow" checkbox is checked on the Company Profile Page.
 - Workflow Monitor - Monitor and manage active instances of waiting workflows, and review workflow error messages.
 - Data Rules & Assignment - Define the data rules for your company, including automatic assignment of records, forecasting, and sales methodologies.
- Content Management**: Content Management - Define your company Product list and hierarchy. View, delete and replace all of your company's Attachments. Manage access to Reports Folders and define visibility to shared custom analyses folders. Define your company's assessments templates.

A callout bubble points to the 'Application Customizations' link in the Application Customization section.

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

The screenshot shows the Application Customization window with a navigation bar at the top containing links for Home, Accounts with DnB360, and Contacts with DnB360. The main content area is titled 'Application Customization' and includes a 'Record Type Setup' section with a list of record types:

- Account
- Activity
- Assessment
- Asset
- Business Plan
- Campaign
- Contact
- Custom Object
- Custom Object 02
- Custom Object 03
- Custom Object 04
- Custom Object 06
- DnB Admin Review
- DnB Company
- DnB Contact
- DnB Credit
- DnB Financials
- Lead
- Objective
- Opportunity
- Plan Account
- Plan Contact
- Plan Opportunity
- Price List
- Price List Line Item
- Product
- Revenue
- Service Request
- Solution
- User

A callout bubble points to the 'Contact' link in the list.

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:

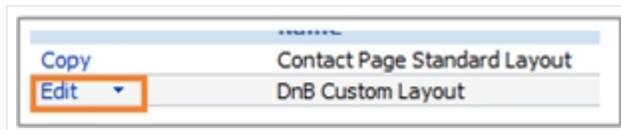
https://dnb360.dnb.com/oracle/DnBROW.aspx?CRMID=%%Id%%&DNBID=%%CustomObject
#DnBContactNumber#_External_System_Id%%&OBJECTTYPE=CONTACT&ORGID=%%User id%%

https://dnb360.dnb.com/oracle/DnBROW.aspx?CRMID=%%Id%%&DNBID=%%CustomObject
8_External_System_Id%%&OBJECTTYPE=CONTACT&ORGID=%%User id%%

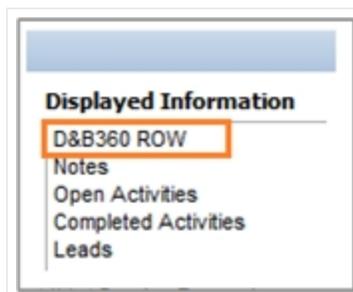
- g. (Optional) In the **Description** field, type a description for your custom web applet.
- h. In the **Height** field, type **750**.
- i. Click **Save**.

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

| | |
|---|------|
| Creating the D&B360 Web Applet for the Action Bar | 4-25 |
| Configuring the Action Bar | 4-28 |

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**.



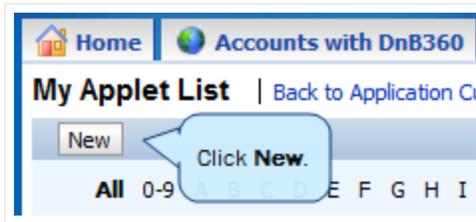
3. In the **Admin Homepage** window, click **Application Customization**.

The screenshot shows the Admin Homepage with a navigation bar at the top containing links for Home, Accounts with DnB360, Contacts with DnB360, Leads with DnB360, DnB360 Build A List, and DnB Industries. Below the navigation bar, the 'Admin Homepage' title is followed by a 'Back to My Homepage' link and 'Help | Printer Friendly' options. The main content area is divided into several sections:

- Company Administration**: Manage your company profile and global settings, including currencies and active languages. Monitor usage and set up alerts. Define company Fiscal Calendars. Create Homepage alerts.
- User Management and Access Controls**: Create and manage user profiles and relationships. Set up user roles that define data access levels, privileges to various application features and presentation of information. Manage groups of users to share data and calendar entries. Territory Management - Define the hierarchy that makes up your company's Territory.
- Data Management Tools**:
 - Import and Export Tools - Import your company data, export your company data, or view the import and export queues.
 - Batch Delete Queue - View the batch delete requests (active and completed).
 - Integration Event Administration - Manage Integration Event
- Integration**:
 - Web Services Administration - View and download web services.
 - Web Services Utilization - Review a summary of services used by your company.
- Application Customization**: Customize application specific to your company; create custom page layouts, homepage layouts, search result layouts, and dynamic layouts; change field names, modify picklist values, create custom fields, specify cascading picklists, define custom web tabs and applets, set up custom audit trail and rename record types.
- Business Process Management**:
 - Workflow Configuration - Extend business processes with workflow rules to send emails, create, update or delete information, wait for a time period and enable outbound integration requests. Workflow rules and actions will not be processed unless the "Enable Workflow" checkbox is checked on the Company Profile Page.
 - Workflow Monitor - Monitor and manage active instances of waiting workflows, and review workflow error messages.
 - Data Rules & Assignment - Define the data rules for your company, including automatic assignment of records, forecasting, and sales methodologies.
- Content Management**: Define your company Product list and hierarchy. View, delete and replace all of your company's Attachments. Manage access to Reports Folders and define visibility to shared custom analyses folders. Define your company's assessments templates.

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:

```
<a href="/OnDemand/user/CustomTab?Tab.Name=[Accounts+with+DnB360]">Accounts with D&B360</a><br/>
<a href="/OnDemand/user/CustomTab?Tab.Name=[Leads+with+DnB360]">Leads with D&B360</a><br/>
<a href="/OnDemand/user/CustomTab?Tab.Name=[Contacts+with+DnB360]">Contacts with D&B360</a><br/>
<a href="/OnDemand/user/CustomTab?Tab.Name=[DnB360+Build+A+List]">DnB360 Build A List</a><br/>
<a href="/OnDemand/user/CustomTab?Tab.Name=[DnB360+Administration]">DnB360 Administration</a>
<a href="/OnDemand/user/CustomTab?Tab.Name=[DnB+Industries]">DnB Industries</a>
```

- 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

 Use the User fields drop down to add user field parameters to the URL.

Name*

Location

Type

User fields

HTML Head Additions

Web Applet HTML

Always Run

Description

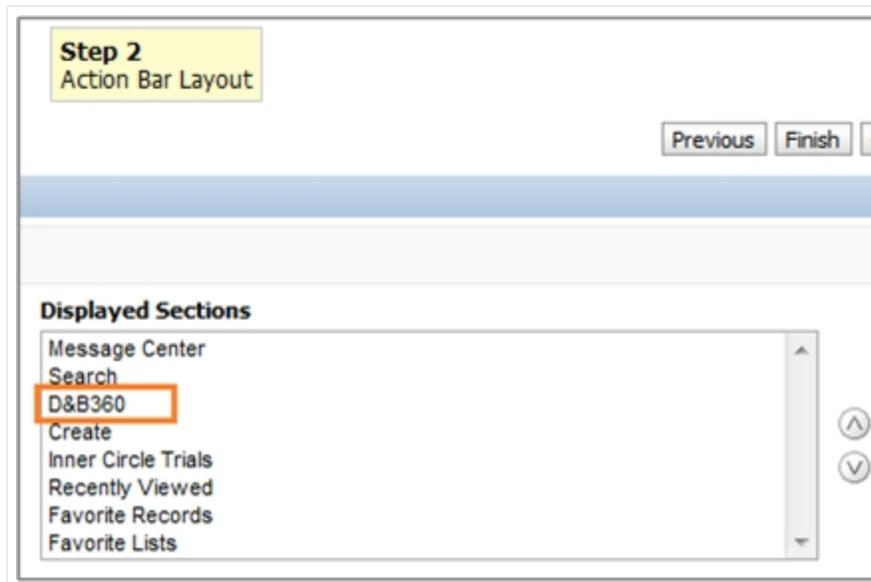
Height pixels

***= Required Field**

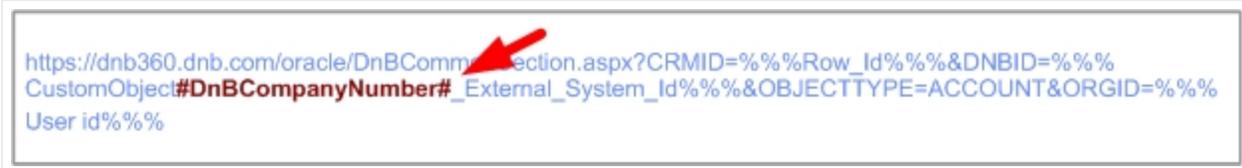
 **WARNING:** Browsers have different maximum URL lengths. If you specify a URL that is too long, it may not work as intended. The URL length will change if you are using parameter substitution.

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 **#DnbCompanyNumber#** with the Custom Object Number you selected for the D&B Company object. An example is shown in the following illustrations:



```
https://dnb360.dnb.com/oracle/DnbCommonSection.aspx?CRMID=%%%Row_ Id%%&DNBID=%%%CustomObject#DnbCompanyNumber#_External_System_ Id%%&OBJECTTYPE=ACCOUNT&ORGID=%%%User id%%%
```



```
https://dnb360.dnb.com/oracle/DnbCommonSection.aspx?CRMID=%%%Row_ Id%%&DNBID=%%%CustomObject9_External_System_ Id%%&OBJECTTYPE=ACCOUNT&ORGID=%%%User id%%%
```

- 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**.

Account Web Applet | [Back to Account Applet List](#) [Help](#)

 Another user has logged in with your User Sign In ID ENAPSYS-DEV3/ADMINUSER1. [Click here](#) to view login history.

Custom Web Applet

 Use the User fields drop down to add user field parameters to the URL.

Name*

Location

Columns*

Type

User fields

URL

Description

Height **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.

Chapter 5: Setting Up Profiles

| | |
|---|-----|
| Establishing Access for Roles within the Oracle On-Demand CRM | 5-1 |
| Establishing Permissions for Roles within D&B360 | 5-5 |
| Setting Permissions | 5-5 |
| Setting User Roles | 5-7 |

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.

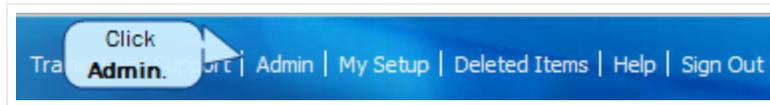
Be aware of these components as you grant Users access to the D&B360 functionality:

- 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**.

Admin Homepage | [Back to My Homepage](#) [Help](#) | [Printer Friendly](#)

Company Administration
[Company Administration](#) - Manage your company profile and global currencies and active languages. Monitor usage and set up company Fiscal Calendars. Create Homepage alerts.

User Management and Access Controls
[User Management and Access Controls](#) - Create and manage user profiles and relationships. Set up user roles that define data access levels, privileges to various application features and presentation of information. Manage groups of users to share data and calendar entries.
[Territory Management](#) - Define the hierarchy that makes up your company's Territory.

Data Management Tools
[Import and Export Tools](#) - Import your company data, export your company data, or view the import and export queues.
[Batch Delete Queue](#) - View the batch delete requests (active and completed).
[Integration Event Administration](#) - Manage Integration Event

Integration
[Web Services Administration](#) - View and download web services.
[Web Services Utilization](#) - Review a summary of services used by your company.

Application Customization
[Application Customization](#) - Customize application specific to your company; create custom page layouts, homepage layouts, search result layouts, and dynamic layouts; change field names, modify picklist values, create custom fields, specify cascading picklists, define custom web tabs and applets, set up custom audit trail and rename record types.

Business Process Management
[Workflow Configuration](#) - Extend business processes with workflow rules to send emails, create, update or delete information, wait for a time period and enable outbound integration requests. Workflow rules and actions will not be processed unless the "Enable Workflow" checkbox is checked on the Company Profile Page.
[Workflow Monitor](#) - Monitor and manage active instances of waiting workflows, and review workflow error messages.
[Data Rules & Assignment](#) - Define the data rules for your company, including automatic assignment of records, forecasting, and sales methodologies.

Content Management
[Content Management](#) - Define your company Product list and hierarchy. View, delete and replace all of your company's Attachments. Manage access to Reports Folders and define visibility to shared custom analyses folders. Define your company's assessments templates.

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**.

Role Management Wizard: Administrator | [Back to Role List](#) [Help](#)

Step 1
Role Information

Step 2
Record Type Access

Step 3
Access Profiles

Step 4
Privileges

Step 5
Tab Access & Order

Step 6
Page Layout Assignment

Step 7
Search Layout Assignment

Step 8
Homepage Layout Assignment

Role Information

Key Role Information

Role Name* Administrator Created By: User Name Date Time

Mark for Translation Modified By: Admin User Name Date Time

Description: OnDemand Role Default Sales Process:

User Interface Settings

Theme Name: Action Bar Layout: D&B360

Related Information Format: Lead Conversion Layout:

*= Required Field

- 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**.

Role Management Wizard: Administrator | [Back to Role List](#) [Help](#)

Step 1
Role Information

Step 2
Record Type Access

Step 3
Access Profiles

Step 4
Privileges

Step 5
Tab Access & Order

Step 6
Page Layout Assignment

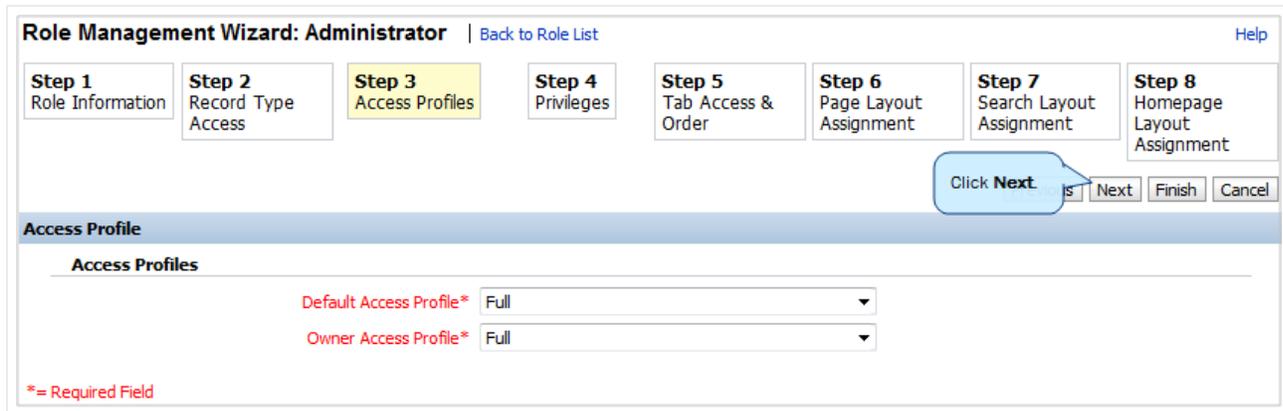
Step 7
Search Layout Assignment

Step 8
Homepage Layout Assignment

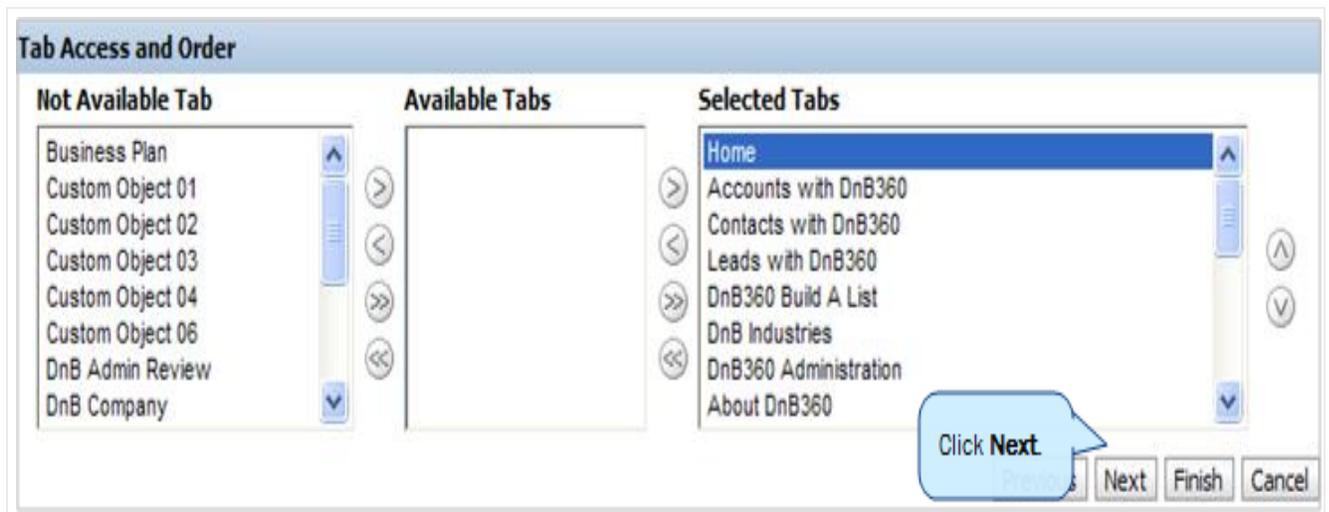
Record Type Access

| Record Type | Has Access? | Can Create? | Can Read All Records? |
|------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| DnB Admin Review | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| DnB Company | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| DnB Contact | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| DnB Credit | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| DnB Financials | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

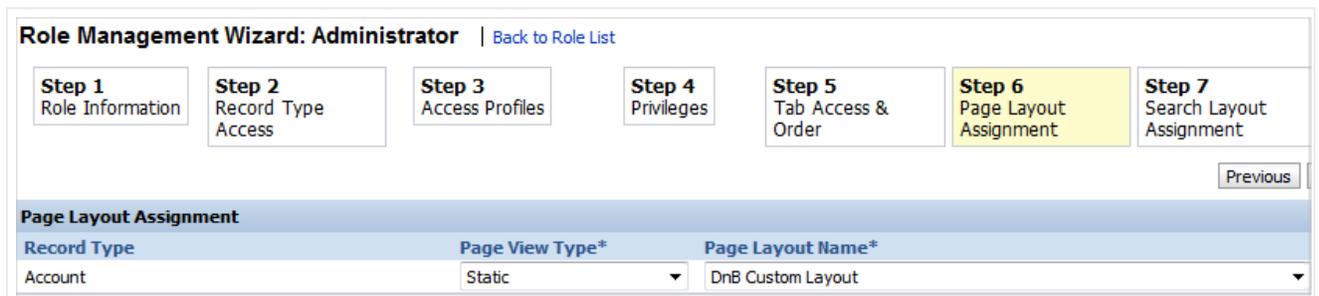
- In the **Step 3 Access Profiles** window, **Access Profiles** area, select which level of access to the various DnB Custom objects that you want for the profile. You can also select the default DnB Access Profile. Click **Next** or **Step 4**.



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.

D&B System Settings

Allow Account Edit: **Allow Account Edit** : When chosen for an account but are not allowed to

Allow Callout Log: **Allow Callout Log** : When chosen, The Callout log can be found in the I

Allow Duplicates: **Allow Duplicates** : When chosen, (If not selected, duplicates are not al

Allow Contact/Lead Duplicates: **Allow Contact/Lead Duplicates** : existing contact will be allowed. If n

Allow Account/Lead Duplicates: **Allow Account/Lead Duplicates** : existing Account will be allowed. If r

Allow Contact Creation: **Allow Contact Creation** : When ch Search for a Contact, but are not all

Allow Lead Creation: **Allow Lead Creation** : When chose a Lead, but are not allowed to creat

Enable D&B360 Permissions: **Enable D&B360 Permissions** : W application unless the user's role is i Permissions can be configured in thr

Select the **Enable D&B360 Permissions** check box.

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.

ROW Annotation Configuration

Alerts Blogs

Facebook Finance

LinkedIn Map

Skype Twitter

Youtube

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



Stare and Compare Configuration

Automatically select detected differences for update

Select Fields for Update in Stare and Compare

| Field Name | Selected |
|---------------------|-------------------------------------|
| Account Name | <input checked="" type="checkbox"/> |
| Description | <input checked="" type="checkbox"/> |
| Billing City | <input checked="" type="checkbox"/> |
| Billing State | <input checked="" type="checkbox"/> |
| Billing Country | <input checked="" type="checkbox"/> |
| Billing Street | <input checked="" type="checkbox"/> |
| Billing Postal Code | <input checked="" type="checkbox"/> |
| Telephone Number | <input checked="" type="checkbox"/> |
| Mailing City | <input checked="" type="checkbox"/> |
| Mailing State | <input checked="" type="checkbox"/> |
| Mailing Country | <input checked="" type="checkbox"/> |
| Mailing Street | <input checked="" type="checkbox"/> |
| Annual Revenue | <input checked="" type="checkbox"/> |
| Location | <input checked="" type="checkbox"/> |
| Number of Employees | <input checked="" type="checkbox"/> |

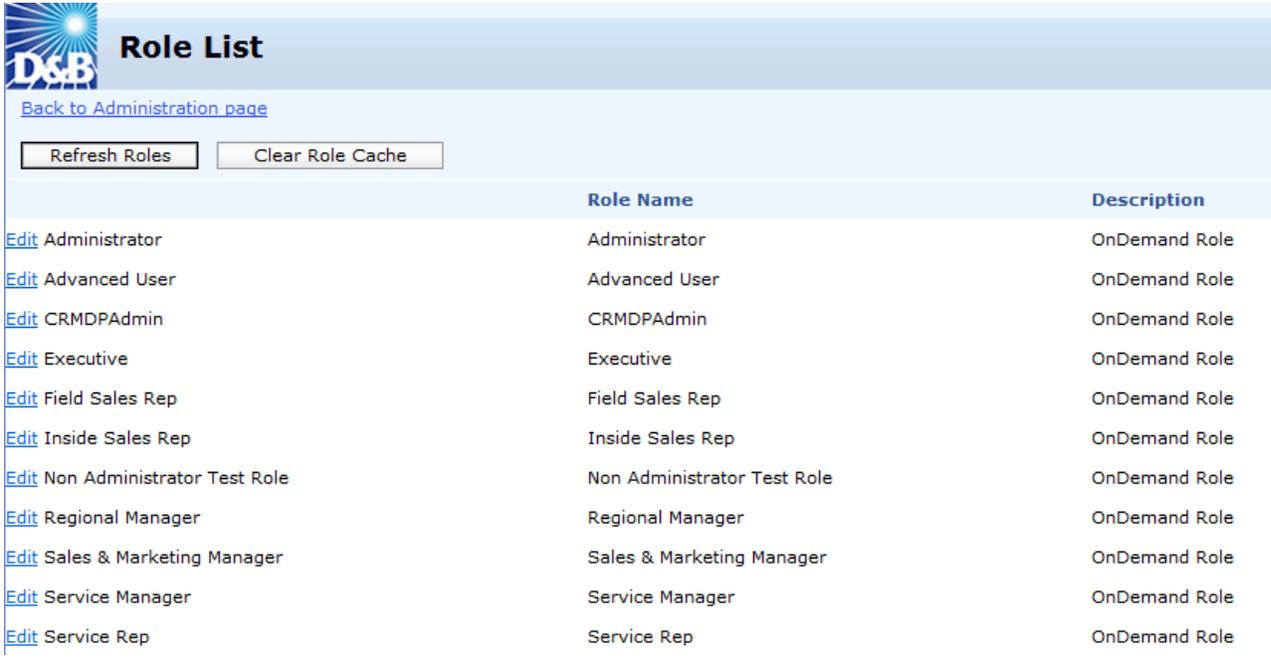
Setting User Roles

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

| | |
|--------------------------------|--|
| Oracle Administration | <input type="button" value="Show Terms and Conditions"/> |
| Update User Data | <input type="button" value="Update API Connection"/> |
| User Role Configuration | <input type="button" value="Configure User Roles"/> |

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**.



| | Role Name | Description |
|----------------------|-----------------------------|---------------|
| Edit | Administrator | OnDemand Role |
| Edit | Advanced User | OnDemand Role |
| Edit | CRMDPAdmin | OnDemand Role |
| Edit | Executive | OnDemand Role |
| Edit | Field Sales Rep | OnDemand Role |
| Edit | Inside Sales Rep | OnDemand Role |
| Edit | Non Administrator Test Role | OnDemand Role |
| Edit | Regional Manager | OnDemand Role |
| Edit | Sales & Marketing Manager | OnDemand Role |
| Edit | Service Manager | OnDemand Role |
| Edit | Service Rep | OnDemand Role |

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**.

Role Management: Administrator

Click Save.

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



Chapter 6: Activating the Application

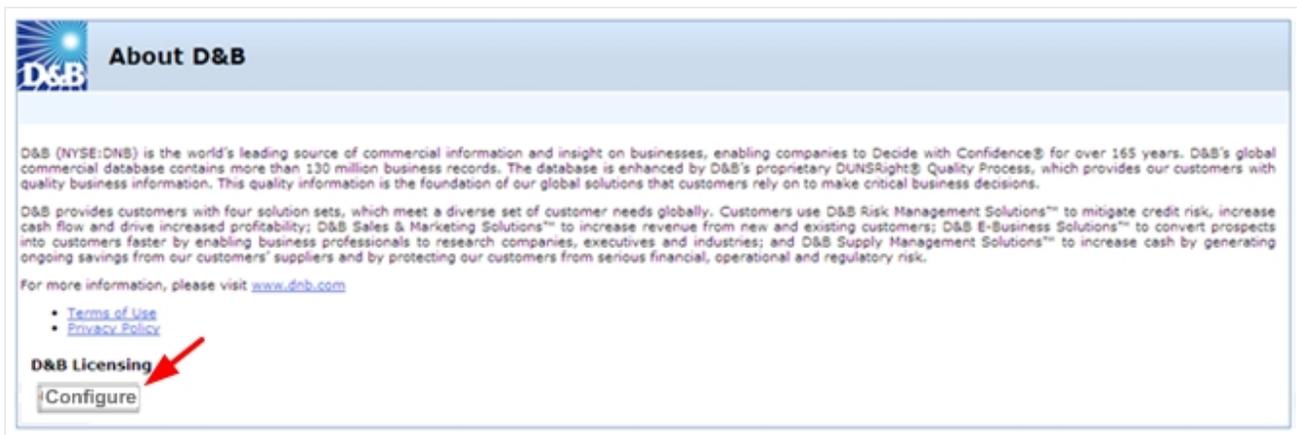
The final step in the installation process requires that you provide basic company information for your installation, accept the terms and conditions of the application, and configure some basic default settings.

| | |
|---|-----|
| Completing the Final Installation Steps | 6-1 |
| Updating Entitlements | 6-4 |

Completing the Final Installation Steps

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

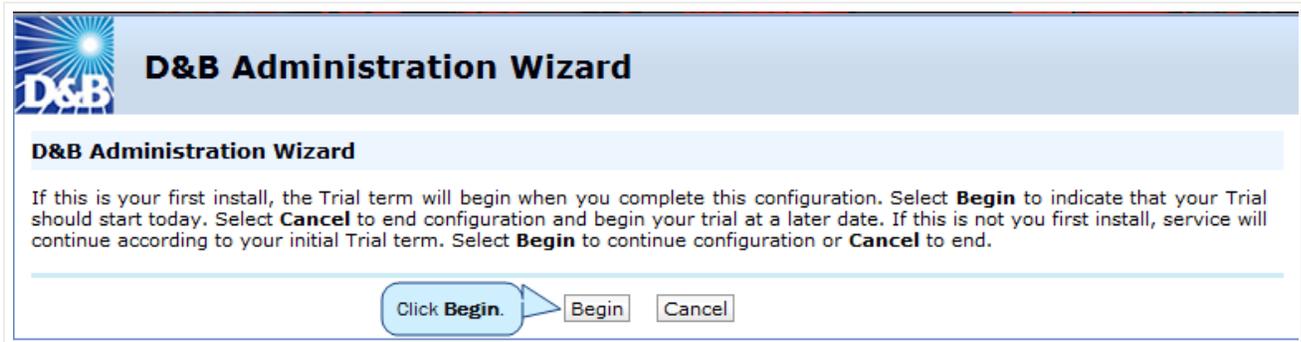
1. Click any of the **DnB** tabs.
2. In the **About D&B** window, **D&B Licensing** area, click **Configure**.



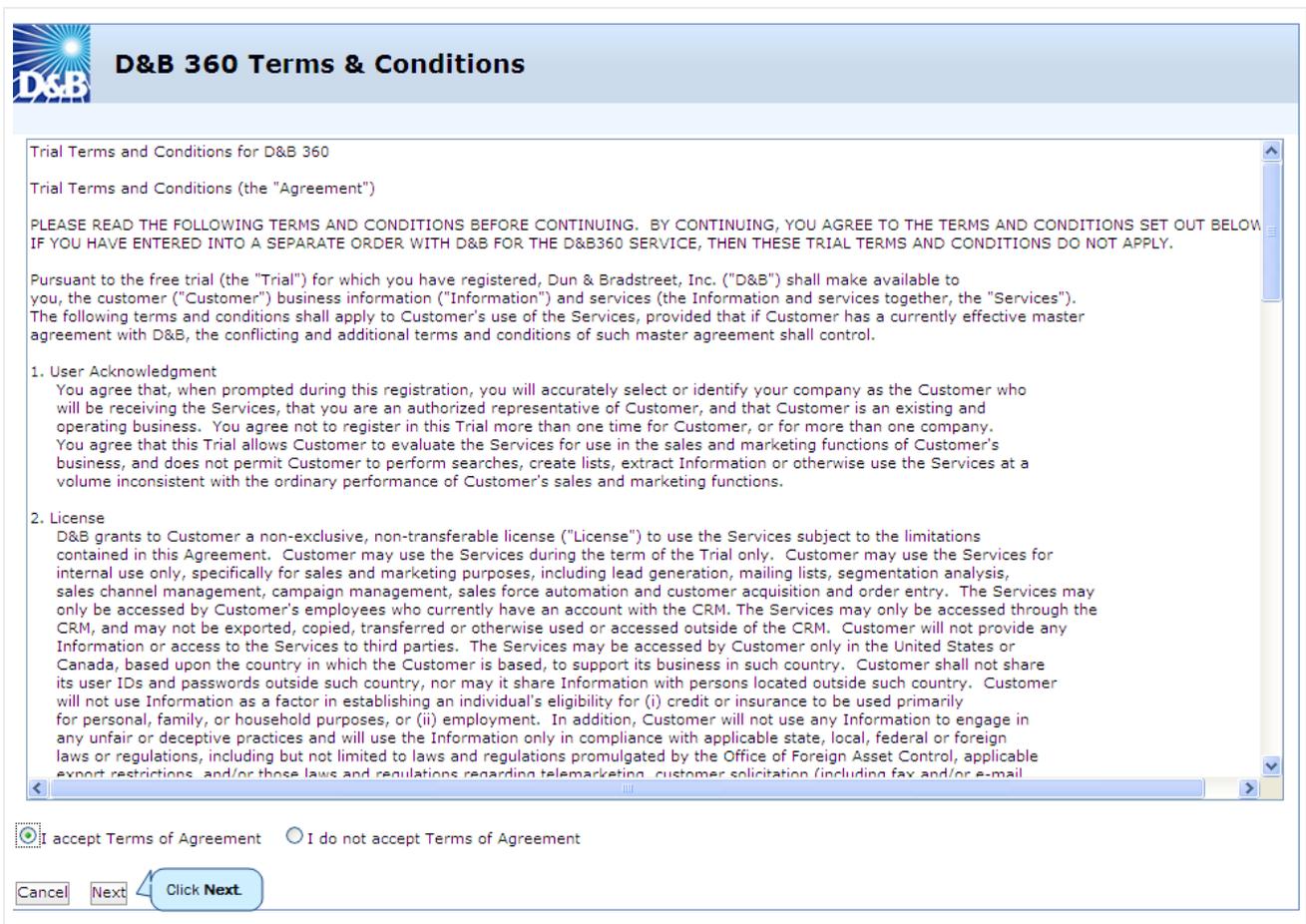
After D&B sent you your Installation Key by email, and you completed your registration and downloaded the remainder of the installation package, you can use your Installation Key in up to 3 environments. This gives you flexibility to test or deploy D&B360 in various environments. Each Installation Key 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**.

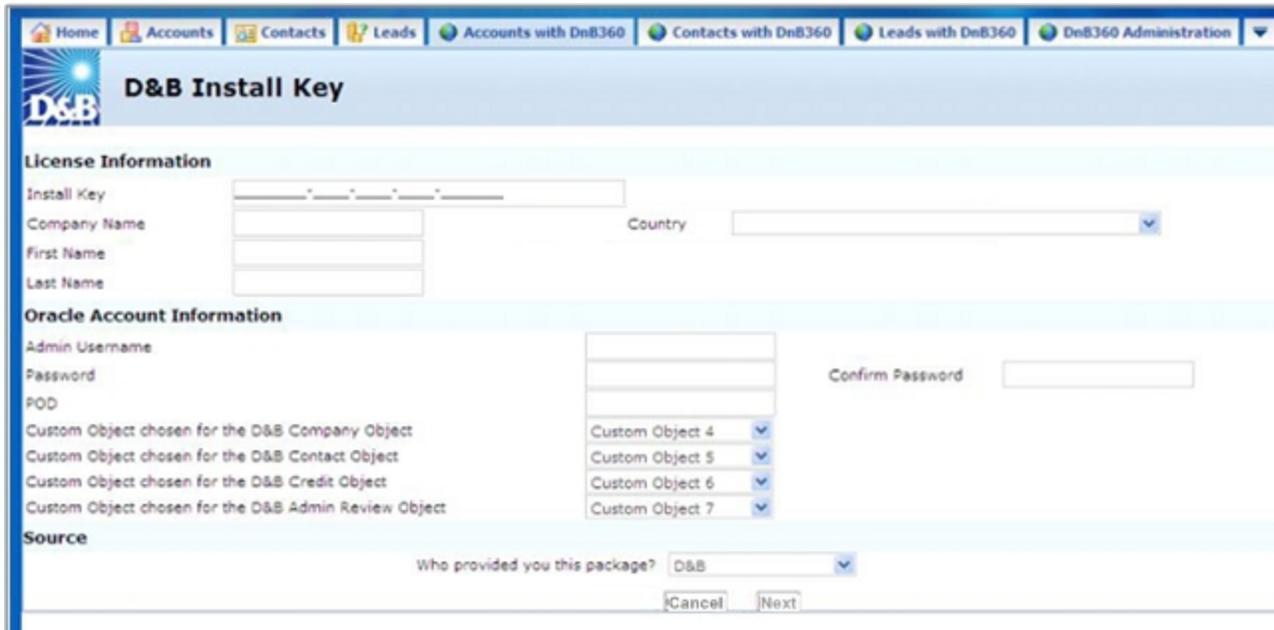
Note: Trial customers—Your 60-day trial period begins at the point of installation, as noted in the trial terms. If you are not yet ready to configure D&B360, we recommend that you click **Cancel** and configure your software when you are ready to start using it. This will allow you to take full advantage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



- 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**.



The screenshot displays the 'D&B Install Key' window. At the top, there is a navigation bar with tabs for Home, Accounts, Contacts, Leads, Accounts with DnB360, Contacts with DnB360, Leads with DnB360, and DnB360 Administration. The main title is 'D&B Install Key'. The form is divided into three sections: 'License Information', 'Oracle Account Information', and 'Source'. The 'License Information' section includes fields for 'Install Key', 'Company Name', 'First Name', 'Last Name', and a 'Country' dropdown menu. The 'Oracle Account Information' section includes fields for 'Admin Username', 'Password', 'Confirm Password', 'POD', and four dropdown menus for 'Custom Object' (Custom Object 4, 5, 6, and 7). The 'Source' section includes a dropdown menu for 'Who provided you this package?' with 'D&B' selected. At the bottom right, there are 'Cancel' and 'Next' buttons.

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**.

The screenshot shows the D&B360 Administration interface. At the top left, the 'Update Entitlements' button is circled in red. A callout box with a blue border and white background points to this button, containing the text 'Click Update Entitlements.' Below this, the 'System Settings' section includes a 'Save' button and dropdown menus for 'Country' (United States), 'Callout Timeout' (60 seconds), 'Country' (ISO Code), and 'State' (Description). The 'D&B System Settings' section lists various permissions with checkboxes: 'Allow Account Edit' (checked), 'Allow Callout Log' (checked), 'Allow Duplicates' (checked), 'Allow Contact/Lead Duplicates' (checked), 'Allow Contact Creation' (checked), 'Allow Lead Creation' (checked), and 'Enable D&B360 Permissions' (unchecked). Each checkbox is accompanied by a descriptive text block. The 'D&B360 Button Configuration' section lists buttons like 'D&B360+', 'D&B View', 'D&B Contacts', 'D&B Look-A-Like', 'D&B Refresh', 'D&B Competitors', 'D&B Industries', and 'D&B Financials', all with checked checkboxes and descriptive text. The 'ROW Annotation Configuration' section is partially visible at the bottom.



Chapter 7: Managing Batches

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

| | |
|--|-----|
| Understanding Key Features of Batch Jobs | 7-2 |
| Record Eligibility | 7-2 |
| Confidence Code Threshold Facts | 7-2 |
| Validating D-U-N-S Numbers | 7-2 |
| Scheduling New and Refresh Batch Jobs | 7-3 |
| Changing Credentials | 7-4 |
| Scheduling a New Batch | 7-5 |
| Scheduling a Refresh Batch | 7-5 |

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.

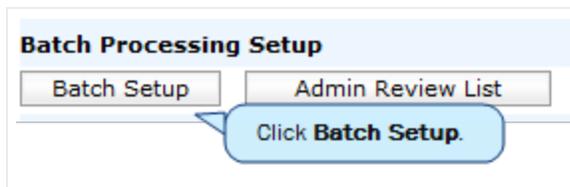
Note: A Recertified D-U-N-S has occurred when we send records to D&B in a Refresh Batch job, and the returned records have a new D-U-N-S Number.

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**.

The screenshot shows the 'Batch Setup' page in the D&B360 administration interface. The page title is 'Batch Setup' with a 'D&B' logo. Below the title is a link 'Back to D&B Administration' and the section 'D&B360 Batch Administration'. A descriptive paragraph explains that the batch synchronizes data between Oracle and D&B. There are three buttons: 'New Batch Activity Logs', 'Refresh Batch Activity Logs', and 'Admin Review List'. The 'User Credentials' section is expanded, showing a 'Username' field with the value 'user credentials display' and a 'Change Credentials' button. A blue callout bubble points to the 'Change Credentials' button with the text 'Click Change Credentials.'. Below this are sections for 'New Batch Schedule' and 'Refresh Batch Schedule', each with 'Start Time' and 'Repeat Frequency' fields. At the bottom is a 'Save Batch Settings' button.

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

The screenshot shows the 'D&B360 Update Informatica Connection Credentials' window. It features the 'D&B' logo and a title bar. Below the title is a link 'Back to D&B Batch Setup' and a blue instruction: 'Enter your new Oracle username and password to change credentials successfully'. There are three input fields: 'Username' with the value 'user name', 'Password' with masked characters, and 'Confirm Password' with masked characters. An 'Update' button is located below the 'Confirm Password' field. A blue callout bubble points to the 'Update' button with the text '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**.

Refresh Batch Schedule

Start Time: [12/10/12 10:10 AM](#)

Repeat Frequency: ▼

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 | 8-1 |
| Viewing Callout Logs | 8-2 |
| Viewing Activity Logs for Batches | 8-4 |
| Viewing the Admin Review List | 8-5 |
| Viewing and Processing Failed Batch Records in the Admin Review List. | 8-5 |
| Using the Admin Review List | 8-7 |
| Viewing D&B360 Reports | 8-10 |
| Duplicate DUNS Reports | 8-10 |
| Recertified D-U-N-S Report | 8-13 |

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

Account Detail | [Back to Accounts with DnB360](#) [Edit Layout](#)

Account Detail [New] [Edit] [Copy] [Delete] [Merge]

Key Account Information:

| | |
|--|--|
| Account Name Apple Inc. | Main Phone # +001(408) 996-1010 |
| Location 060704780 | Main Fax # |
| Parent Account | Web Site |
| DnB Company 060704780 | Account Currency USD |
| DnB Credit | External Unique ID |
| DnB Association Date 12/14/2012 | |
| DnB Association Status Created | |
| DnB Industries 1098 | |

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**.

Reports

[Duplicate D-U-N-S Identification](#) [Recertified D-U-N-S Report](#)

Batch Processing Setup

[Batch Setup](#) [Admin Review List](#)

D&B Callout Logs

[Call Out Logs](#) 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.

|  Recent DNB Callout Logs | | | | |
|--|---------------------------|--------------|------------|--|
| Back to D&B Administration | | | | |
| 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 | |

Click a transaction ID.

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



D&B Callout Log Detail

[Back to D&B Callout Log](#)

Delete

DNB Callout Log **DBEED659-D001-4F22-8695-412E1C20E0C4** Owner **ENAPSYS-DEV3**

D&B Callout Logs

Callout Operations **DNB Retrieve Entitlements**

Transaction Id **DBEED659-D001-4F22-8695-412E1C20E0C4**

Transaction Details **Request:**

TPCUserID:ADMINUSER1 | ENAPSYS-DEV3

Response:

Code:1

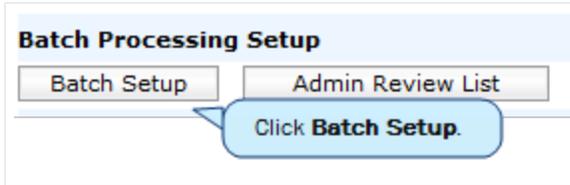
Description:Success - good call

Created By **12/10/2012 12:04:55**

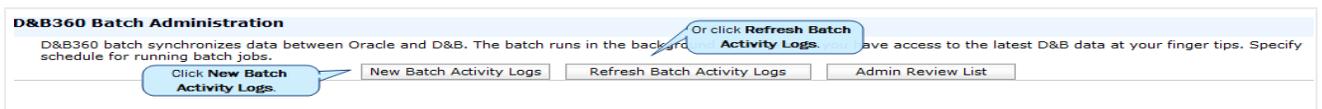


Viewing Activity Logs for Batches

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.



New Batch Activity Logs

[Back to Batch Setup](#)

| 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 | |

Refresh Batch Activity Logs

[Back to Batch Setup](#)

| 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:

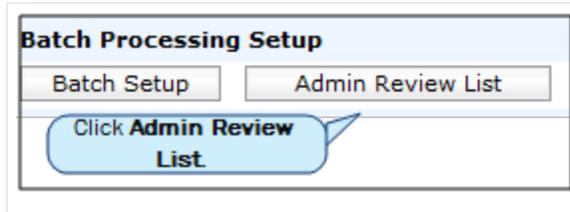
| Column Name | Displays ... |
|--------------------------|---|
| Start Time | Job start time |
| End Time | Job end time |
| Status | Activity related to those records |
| Total Accounts Processed | Count of records involved in a Submit or Receive task |



| | |
|-------------------------------------|---|
| # 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. |

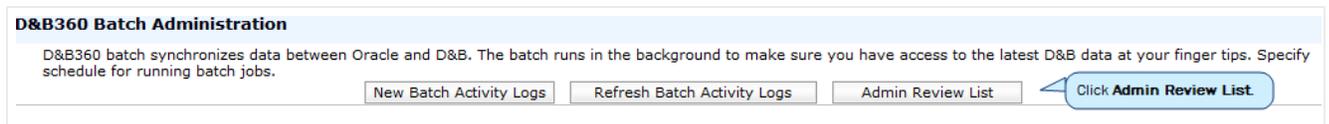
Viewing the Admin Review List

- 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**.



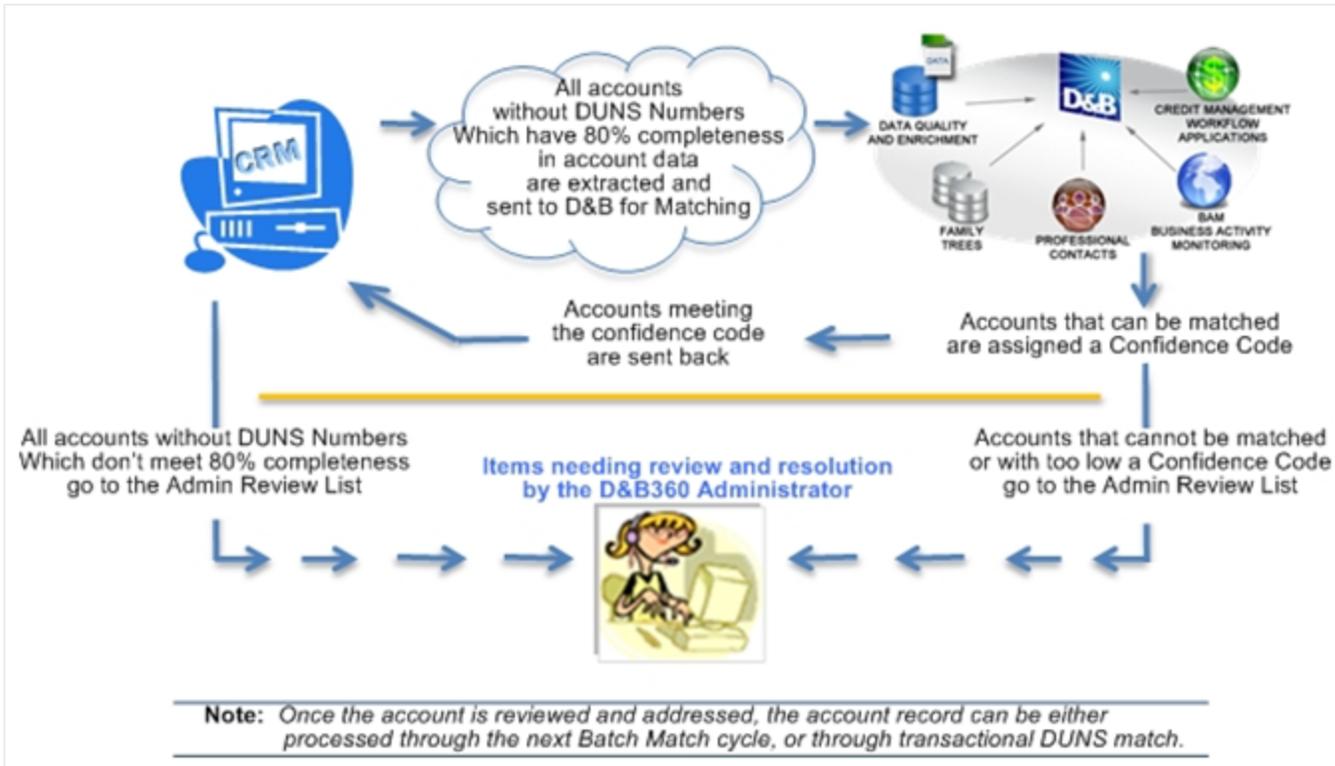
Viewing and Processing Failed Batch Records in the Admin Review List.

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.

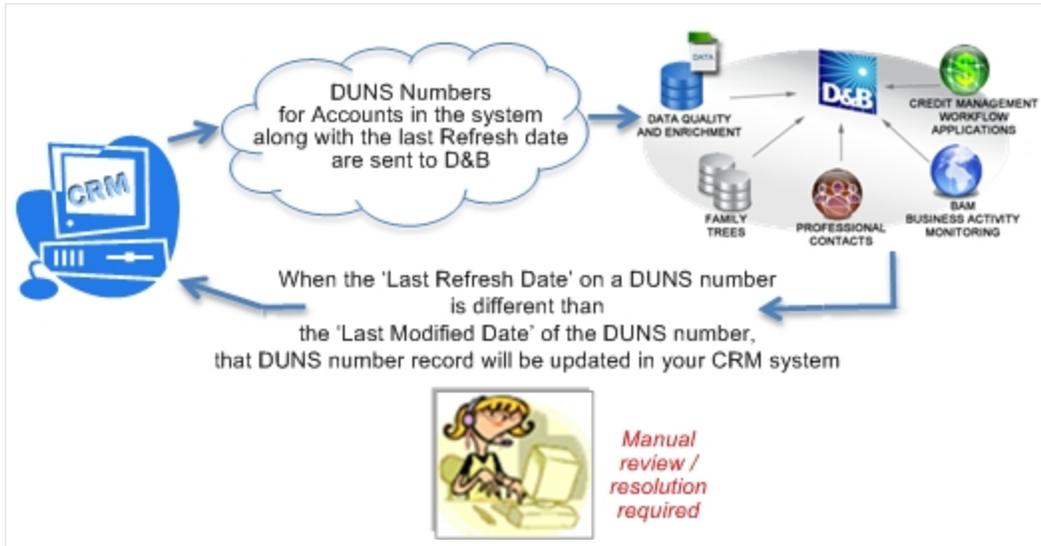
When the information is returned from D&B, most of the accounts will have been matched with D-U-N-S Numbers. Some accounts will be sent to the Admin Review List for one of the following reasons:

- 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 | Wai-Mart | Acct DQ | Data Quality of the Account Record did not meet the min. requirements for D&B360 batch processing. The D&B360 record | 3/13/2012 5:25:08 PM | adminuser3 |

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**.

The screenshot illustrates the D&B360 Account Search process in two stages. The top stage shows the search form with fields for Company Name, City, Address, Phone, Country, State/Province, and Postal Code. A red arrow labeled '1' points to the form with the text 'Fill in required fields'. A red circle labeled '2' highlights the Search button. The bottom stage shows the search results table with a red arrow labeled '3' pointing to the table and a red circle labeled '4' highlighting the Select button in the Actions column.

D&B360 Account Search

Company Name*: Wal-Mart
 City:
 Address:
 Phone:

Country*: United States
 State/Province**: Arkansas
 Postal Code:

Search

D&B360 Account Results

Matching Companies: 25

| Actions | Match Info | Company Name | Address | City | State/Province | Country | Postal Code | Phone | Location Status |
|------------------------|------------|---|----------------------|-------------|----------------|---------|-------------|----------------|--------------------|
| Select | *****7769 | ★ WAL-MART STORES, INC. Also Trade as: WALMART | 702 SW 8TH ST | BENTONVILLE | AR | US | 72716-6209 | (479) 273-4000 | ParentHeadquarters |
| Select | *****7887 | WAL-MART PUERTO RICO INC | 702 SW 8TH ST | BENTONVILLE | AR | US | 72716-6209 | (479) 273-4000 | SingleLocation |
| Select | *****1024 | WAL-MART STORES, INC. Also Trade as: WALMART | 702 SW 8TH ST | BENTONVILLE | AR | US | 72716-6209 | (479) 254-0364 | BranchDivision |
| Select | *****9800 | WAL-MART STORES, INC. Also Trade as: WALMART | 2708 RIFE MEDICAL LN | ROGERS | AR | US | 72758-1452 | (479) 636-4101 | BranchDivision |
| Select | *****1964 | WAL-MART STORES, INC. Also Trade as: WALMART | 109 MALONE DR | ARKADELPHIA | AR | US | 71923-8111 | (870) 246-5410 | BranchDivision |
| Select | *****7394 | WAL-MART STORES, INC. Also Trade as: WALMART | 926 E COLLIN RAYE DR | DE QUEEN | AR | US | 71832-9400 | (870) 642-2794 | BranchDivision |

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

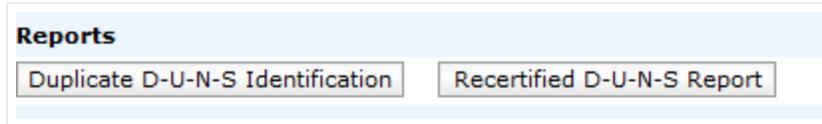
Access to reports depends on the tier level of your License, as follows:

| 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**.





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 populated values in first account retained over values in second, populated 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 |  |
| | Dell | adminuser1 |  |
| | Dell Inc. | Arturo Ramirez |  |
| | Dell Inc. | adminuser4 |  |
| | Dell | adminuser1 |  |

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:

The image displays four sequential screenshots of the 'Duplicate D-U-N-S' merge process in Oracle CRM. Each screenshot shows a table of accounts with columns for 'D-U-N-S', 'Account Name', 'Owner', and 'Merge'. The process involves selecting accounts to merge and specifying the order in which they will be merged.

Screenshot 1: Shows the initial state where the 'Merge' column contains edit icons. A red circle labeled '1' highlights the first edit icon.

| D-U-N-S | Account Name | Owner | Merge |
|-----------|---------------------------|--------------------------------|-------|
| 114315195 | Dell Inc. | Arturo Ramirez | |
| | Dell | adminuser1 | |
| | Dell Inc. | Arturo Ramirez | |
| | Dell Inc. | adminuser4 | |

Screenshot 2: Shows the first account selected for merging. A red circle labeled '2' highlights the 'Merge' column. The first row has a checked checkbox and '1' next to it, with 'Merge' and 'Cancel' buttons.

| D-U-N-S | Account Name | Owner | Merge |
|-----------|---------------------------|--------------------------------|--|
| 114315195 | Dell Inc. | Arturo Ramirez | <input checked="" type="checkbox"/> 1 Merge Cancel |
| | Dell | adminuser1 | <input type="checkbox"/> |
| | Dell Inc. | Arturo Ramirez | <input type="checkbox"/> |
| | Dell Inc. | adminuser4 | <input type="checkbox"/> |

Screenshot 3: Shows the second account selected for merging. A red circle labeled '3' highlights the 'Merge' column. The first row has a checked checkbox and '1' next to it, and the fourth row has a checked checkbox and '2' next to it. Both rows have 'Merge' and 'Cancel' buttons.

| D-U-N-S | Account Name | Owner | Merge |
|-----------|---------------------------|--------------------------------|--|
| 114315195 | Dell Inc. | Arturo Ramirez | <input checked="" type="checkbox"/> 1 Merge Cancel |
| | Dell | adminuser1 | <input type="checkbox"/> |
| | Dell Inc. | Arturo Ramirez | <input type="checkbox"/> |
| | Dell Inc. | adminuser4 | <input checked="" type="checkbox"/> 2 |

Screenshot 4: Shows the final state where all four accounts are selected for merging. The first row has a checked checkbox and '1' next to it, and the fourth row has a checked checkbox and '2' next to it. Both rows have 'Merge' and 'Cancel' buttons.

| D-U-N-S | Account Name | Owner | Merge |
|-----------|---------------------------|--------------------------------|--|
| 114315195 | Dell Inc. | Arturo Ramirez | <input checked="" type="checkbox"/> 1 Merge Cancel |
| | Dell | adminuser1 | <input type="checkbox"/> |
| | Dell Inc. | Arturo Ramirez | <input type="checkbox"/> |
| | Dell Inc. | adminuser1 | <input checked="" type="checkbox"/> 2 |



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) | 9-1 |
| Installed Components | 9-2 |

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? | <p>Follow these steps to re-install D&B360 after it has expired:</p> <ol style="list-style-type: none"> 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) <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>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.</p> </div> <ol style="list-style-type: none"> 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 |



Index

A

about D&B360 2-1

alerts 2-5

B

batch jobs

 changing user credentials 7-4

blogs, from companies 2-5

C

changing user credentials for batches 7-4

client operating systems 2-2

CRM

 environment 2-2

 user interface 2-1

D

D&B360

 packages 2-3

 tiers 2-3

E

environment requirements 2-2

F

facebook, for companies 2-5

favorites 2-5

finance, news 2-5

G

graphical user interface for CRM 2-1

GUI see graphical user interface 2-1

I

installing D&B360

 first time 7-3

L

linkedin 2-6

M

maps 2-5

N

news, financial, feeds 2-5

R

requirements

 browser 2-2

 client operating systems 2-2

 platform version 2-2

rest of world 2-4

S

setting alerts 2-6

skype 2-6

social media applications 2-4

stocks, news 2-5

T

tiers, description 2-3

twitter 2-6

U

user interface 2-1

users

 credentials, changing in Batch Setup 7-4

V

videos 2-5

Y

YouTube 2-5