





D&B360 Administration and Installation Guide

for Microsoft Dynamics CRM

Version 2.3

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Table of Contents

About this Guide	vii
Audience and Purpose	vii
Conventions	vii
Navigating in the PDF	vii
Related Documentation	viii
1 Introduction	1-1
Product Benefits	1-1
Guide Objectives	1-2
Guide Organization	1-2
Access to Features	1-2
2 Getting Started	2-1
About D&B360	2-1
Considerations for Administrators	2-2
Pre-Requisite	2-2
Specifying the Requirements for Your CRM Environment	2-4
Hardware Requirements	2-4
Microsoft Dynamics CRM Server 2011	2-4
Microsoft SQL Server for Microsoft Dynamics Server 2011	2-5
Other Requirements	2-5
D&B360 Packages	2-7

	Using Rest of World	2-8
	Rest of World Applications	2-8
	Setting Alerts	.2-10
3	Installing D&B360	3-1
	Downloading and Initiating the D&B360 Installation	3-2
	Initial Steps: for Installing D&B360 for the First Time, for Upgrading D&B360, and for Re-installing D&B360	3-3
	Installing D&B360: Steps that Differ Between First Time Installation, Upgrades, and Re-Installations	3-6
	Steps Unique to a First Time D&B360 Installation	3-7
	Completing Your First Time Installation	.3-10
	Post Installation: Re-installing or Upgrading D&B360	.3-11
	Configuring Outlook to Integrate with the MSD CRM	.3-17
4	Configuring D&B360	4-1
	Providing D&B Access to Microsoft Dynamics CRM Users	4-1
	Ensuring the D&B360 Application is Available	4-2
	Viewing Available D&B360 Roles	4-3
	D&B360 Administrator Permissions	4-5
	D&B360 User Permissions	4-7
	Assigning Roles to Users	4-9
	Entering D&B System Settings	4-9
	Configuring the D&B System Settings	4-9
	Configuring the D&B Button Settings	.4-11
	Configuring Rest of World (ROW) Settings	.4-12
	Configuring D&B Stare and Compare Settings	.4-12

5	Managing Batches and Installing the Informatica Cloud Secure Agent	5-1
	Overview of Batch Processing	5-4
	Understanding the Key Features of D&B360 Batch Jobs	5-4
	Record Eligibility	5-4
	Confidence Code Threshold Facts	5-4
	Validating D-U-N-S Numbers	5-5
	Configuring Microsoft Dynamics	5-5
	Registering the Secure Agent for an On-Demand Installation	5-6
	Configuring the Secure Agent for an On-Premise Installation	5-8
	Installing the VC++ Redistributable Package (x86)	5-8
	Steps for Configuring the Secure Agent for an On-Premise Installation	5-11
	Logging in to the Informatica Cloud Secure Agent	5-12
	Running the Informatica Cloud Secure Agent Installation Program	. 5-14
	Preparing Your Microsoft Dynamics and Active Directory for the Informatica Cloud Secure Agent .	. 5-19
	Specify the Identify for CRMAppPool	5-20
	Identify the Port for Your CRM Dynamics Instance	5-20
	Identify the Service Principal Name (SPN) for the Environment.	5-21
	Setting Delegation	. 5-22
	Post-Installation Steps	5-26
	Adjusting the Settings for Your System	5-28
	Completing the Optional Steps	5-30
	Optional Step for Only When the MSD Application is Accessed using HTTPS	. 5-30
	Optional Step When the DNS Is Unable to Perform Host Resolution	5-30
	Restarting the Secure Agent	5-31

6 Scheduling Batch Jobs	6-1
Scheduling New and Refresh Batch Jobs	6-1
Scheduling a New Batch Job	6-1
Scheduling a Refresh Batch Job	6-3
7 Reviewing Logs, Admin Review Lists, and D&B360 Reports	7-1
Accessing the Callout Logs	7-1
Accessing the Administrator Review List	7-3
Using the Admin Review List	7-3
Viewing and Processing Failed Batched Records Listed in the Administrator Review List	7-4
Viewing D&B360 Reports	7-6
Duplicate DUNS Report	7-6
Using the Duplicate DUNS Report to Merge Duplicate Accounts	7-6
Recertified DUNS Report	7-7
8 Troubleshooting	8-1
Enabling D&B360 Administration on a Customized SiteMap	8-1
Finding Your SOCID and TPCID	8-10
Processing Batches — Standard Level Expectation	8-10
Resolving Installation Issues	8-11
Resolving Problems	8-12
Index	IN-1



About this Guide

Audience and Purpose

This guide is for Microsoft Dynamics 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 commandline interface.

Navigating in the PDF

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

- 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 Microsoft Dynamics CRM, refer to the CRM documentation.



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 Microsoft Dynamics CRM.

Product Benefits	1-1
	1.0
	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	With D&B360, you have a powerful tool that helps you to better understand your customers pain points, respond to their needs, and ultimately positions you to win more business. The D&B360 platform features On-demand access to D&B data, automatic refresh and synchronization with the D&B database, and seamless integration of rest-of-world data.

Guide Objectives

The D&B360 Administration and Installation Guide*for* Microsoft Dynamics 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.



2 Getting Started

About D&B360
Considerations for Administrators
Pre-Requisite
Specifying the Requirements for Your CRM Environment2-4
Hardware Requirements
Other Requirements
D&B360 Packages2-7
Using Rest of World
Rest of World Applications
Setting Alerts

Note: For more information about the user interface and other features of theMicrosoft Dynamics 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 Microsoft Dynamics CRM 2011 (On Demand or On Premise). Take time to familiarize yourself with the operations of your Microsoft Dynamics CRM environment and the location of the documentation. This information will help you successfully complete your tasks as a D&B360 Administrator.

If you are an existing D&B 360 user with Batch enabled, you need to complete the following steps:

- 1. Un-install the Informatica Cloud Secure Agent.
- 2. Contact Informatica Support (<u>support@informatica.com</u>) to request deletion of the existing Org ID. All users that belong to this Org ID will also be deleted.

Note: During auto-registration, the Org ID will most likely be different from your previous Org ID. Org IDs are generated automatically for all registrations.

- 3. On the D&B360 window, navigate to the D&B360 Administration page and click **Batch Setup** to register the new Org ID with Informatica.
- 4. After this is completed, click **Download Secure Agent** and install the Secure Agent.

Pre-Requisite

To prepare for the eventuality that a user might want to install or upgrade D&B360, as the admin, you need to add that users (or users) as a deployment administrator.

• In the **Select User** window, type the appropriate information to add the user as a deployment administrator, and then click **OK**.

	_ 8
Mcrosoft Dynamics CRM Mcrosoft Dynamics CRM Select User Select User Select this object type: User Comparisons Select this object type: User Comparisons Select this object type: User Comparisons Export Line object Types From this location: Instrume to select (examples): Check Names Advanced DK Cancel	t Administrators

Specifying the Requirements for Your CRM Environment

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

Hardware Requirements

Microsoft Dynamics CRM Server 2011

The following table lists the minimum and recommended hardware requirements for Microsoft Dynamics CRM Server 2011 running in a Full Server configuration. These requirements assume that additional components such as Microsoft SQL Server, Microsoft SQL Server Reporting Services, SharePoint, or Microsoft Exchange Server are not installed or running on the system.

Component	Minimum	Recommended
Processor	x64 architecture or compatible dual core 1.5 GHz processor	Quad-core x64 architecture 2 GHz CPU or higher such as AMD Opteron or Intel Xeon systems
Memory	2 GB of RAM	8 GB or more of RAM
Hard Disk	10 GB of available hard disk space	40 GB or more of available hard disk space
	Note: Computers with more than 16 GB of RAM require more disk space for paging, hibernation, and dump files.	Note: Computers with more than 16 GB of RAM require more disk space for paging, hibernation, and dump files.

Note: Actual requirements and product functionality might vary based on your system configuration and operating system. Running Microsoft Dynamics CRM on a computer that has less than the recommended requirements might result in inadequate performance. The minimum and recommended requirements are based on 320-user load simulation tests.

For more information see: <u>http://technet.microsoft.com/en-us/library/hh699840.aspx</u>

Microsoft SQL Server for Microsoft Dynamics Server 2011

Microsoft SQL Server database engine and Microsoft SQL Server Reporting Services are required to install and run on premises versions of Microsoft Dynamics CRM 2011. The following table lists the minimum and recommended hardware requirements for Microsoft SQL Server. These requirements assume that additional components such as Microsoft Dynamics CRM Server 2011, Microsoft SQL Server Reporting Services, SharePoint, or Microsoft Exchange Server are not installed or running on the system.

Component	Minimum	Recommended
Processor	x64 architecture or compatible dual- core 1.5 GHz processor	Quad-core x64 architecture 2 GHz CPU or higher such as AMD Opteron or Intel Xeon systems
Memory	4 GB of RAM	16 GB or more of RAM
Hard Disk	SAS RAID 5 or RAID 10 hard disk array	SAS RAID 5 or RAID 10 hard disk array

Note: Actual requirements and product functionality might vary based on your system configuration and operating system. Maintaining Microsoft Dynamics CRM databases on a computer that has less than the recommended requirements may result in inadequate performance. The minimum and recommended requirements are based on 320-user load simulation tests.

For more information, see: <u>http://technet.microsoft.com/en-us/library/hh699808.aspx</u>

Other Requirements

Client Operating Systems	Windows 7, Windows Server 2008 R2, Windows Server 2008 Service Pack 2, Windows Vista Service Pack 2	
Browser	Internet Explorer 7, 8	
Other Applications	Microsoft Silverlight 5	
Server Operating Systems	 On Premise Only: Microsoft Windows Server 2008 Standard x64 SP2 or later Microsoft Windows Server 2008 R2 	
Databases	 On Premise Only: Microsoft SQL Server 2008 Standard x64 SP1 or later Microsoft SQL Server 2008 R2 	

MS Dynamics Configuration	 The Microsoft Dynamics CRM Deployment Manager allows administrators to set the web addresses for the: Web Application Server Organization Web Service Discovery Web Service Deployment Web Service For D&B360, these services need to be set to the same URL: All machines and users that will access the MSD CRM should be able to resolve this URL. As a best practice, D&B recommends that all of the URLs in the deployment manager be the same as the URL that users will use to access the CRM.
On Premise Only: IP addresses to be open on the firewall	206.80.52.0 to 206.80.53.255 209.34.91.0 to 209.34.91.255
	209.62.157.0 to 209.62.157.255
Server Operating Systems	Microsoft Windows server 2008 (Standard, Enterprise, Datacenter) x64 SP2 or later; Microsoft Windows Web Server 2008 x64 SP2 or later; Microsoft Windows Small Business Server 2008 (Standard, Premium) x64 or later*

The following applications must reside on the machine where you install D&B360 for Microsoft Dynamics CRM:

- .Net Framework 4.0 <u>http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=17851</u>
- Windows Identity Foundation http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=17331
- Select the appropriate version for your machine:
 - x86 = 32-bit, x64 = 64-bit
 - Windows6.0 = Vista/Server 2008, Windows6.1 = Windows 7/Server 2008 R2

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

D&B360 Packages

The D&B360 features are available in these packages.

Note: Tier 1 packages are available only for on-demand CRM applications. Tier 2 packages are available for on-premise CRM configurations.

Tier Level	Features Supported			
Tier 1 applies only to the Microsoft Dynamics On- Demand CRM and is available for 5 to 100 seats.	 Company and Contact Data Company Search Company Record Creation Contact Search Contact Record Creation Build A List Prospecting/List Building Rest of World Data 			
Tier 2 is available for 250 per-seat Premium Contact credits per year (per user license) and unlimited Standard Contacts.	 Company Search Company Record Creation Record Refresh (Transactional) D&B360 and D&B360 Plus Company Append Corporate Linkage Contact Search Contact Record Creation Build-A-List Company Look-A-Likes Industry Information Competitors Information Advanced Financial Information Contextual Social Media News 			

Note: Batch Match Records per Seat, Batch Refresh Records, and 250 contacts per seat are included in Tier 2. Additional contacts are available as an add-on package. Contact your Sales Representative to include this in your package.

Note: De-duplication Check, De-duplication Fix, De-duplication Prevention, and Duplicate DUNS reports are included. However, these features perform optimally only if you use Batch Match or the DUNS Import Tool to append DUNS numbers.

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 "Entering D&B System Settings" on page 4-9. By linking to ROW applications in D&B360, users can get a fully aggregated information view of their customers from several social and news media sources — all within the CRM application.

Rest of World Applications

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

ROW Icons	Description
🚖 Favorites	Allows you to save items of interest to you and stores them in this tab.
	To add an item as a favorite, such as a news story, click the Star icon. When you see your cursor pointer change into a little hand, click Mark as a Favorite.
Alerts	Allows you to track news so you can create customized alerts targeted to your specific areas of interest. These e-mail alerts include relevant news articles, press releases, company Web site updates, and blog posts, and are delivered overnight to your email in-box. Use alerts to stay up-to-date about the most recent company news, reach out to prospects or customers, create sales opportunities, and follow events of both public and private companies. For more information, see "Setting Alerts" on page 2-10

ROW Icons	Description
News	Displays aggregated headlines from many of the world's news sources. In D&B360, the News tab displays overall news about the account name with links to related articles. To open an article, click its link.
	Displays stock feeds and financial news feeds about a company from a variety of sources.
🊰 Мар	The Map icon pre-populates the Account Billing address and connects to Microsoft Bing Maps to show the address location.
ᡖ YouTube	YouTube is a video-sharing website where users can upload, share, and view videos. A list of YouTube videos displays from companies in your D&B360 accounts. Only company-authorized videos display.
🔂 Blogs	Blogs display a list of authorized blogs from companies in your D&B360 accounts.
Facebook	Facebook is a social utility that facilitates communication. Only company authorized Facebook pages display for each company. To view Facebook information about people and companies from within D&B360, you need to have a Facebook account.
	A Facebook window opens to the account page you are currently viewing if it exists in the database. To view the company Facebook information, if you are not already logged in to Facebook, log in to your Facebook account.
Twitter	Twitter operates a free digital service site that blends social networking with the ability to post short messages (or micro-blogs) limited to 140 characters or less, commonly known by users as Tweets. The Twitter service is designed for use on personal computers and through mobile devices such as smart phones. Tweets are published on a poster's personal web page, and can be restricted to select viewers, or viewed by anyone. In D&B360, when you click the Twitter tab, a list of that company's official tweets displays.

ROW Icons	Description
in LinkedIn	LinkedIn is a business-oriented social networking site where you can connect with trusted contacts and exchange knowledge, ideas, and opportunities.
	If you are not already logged in to LinkedIn, you will need to log in when it opens in a browser window. If the account you are viewing is in the database, a LinkedIn window for that company opens. If that company is not found, a LinkedIn search window opens with that company name pre-populated. Or you can use the LinkedIn search window to define your search.
S Skype	Click to make voice calls over the Internet. If you have Skype installed in on your computer, you can use the Skype icon listed next to phone number to make a Skype call. If phone numbers for companies, contacts, or leads are in your D&B360 account information, you can make Skype calls to them.

Setting Alerts

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

🔶 Favorites	🔺 Alerts	News	Finance	🚼 Map	😸 YouTube	🔂 Blogs	Facebook	C Twitter
				7	iter by Keyword			
You are	currently no	t an alert sut	bscriber. Please	e provide yo	our email addres	s below, and	press the subscr	ibe button.
You are eMail A	currently no	t an alert sut	bscriber. Please	e provide yo	our email addres	s below, and	press the subscr	ibe button.

- 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 i	in.
 Restructure Reduction Bankruptcy Executive Activity Executive Quote Financial News Management Change 	 Regulation or Litigation Awards Earnings Release Executive Announcement Expansion Funding Merger and Acquisition
New AllianceWinsSelect All	New Product
Monitor Click Monitor.	



3 Installing D&B360

The following instructions guide you through the installation, set-up, and configuration of D&B360 in your company's instance of Microsoft Dynamics CRM.

Downloading and Initiating the D&B360 Installation	. 3-2
Initial Steps: for Installing D&B360 for the First Time, for Upgrading D&B360, and for Re-installing D&B360	. 3-3
Installing D&B360: Steps that Differ Between First Time Installation, Upgrades, and Re-Installations	. 3-6
Steps Unique to a First Time D&B360 Installation	. 3-7
Post Installation: Re-installing or Upgrading D&B360	3-11
Configuring Outlook to Integrate with the MSD CRM	3-17

Downloading and Initiating the D&B360 Installation

You should have already received an email message that contains your installation key, user ID, and password. After you access the D&B360 registration site and complete your registration, you will receive the remainder of the installation package.

- 1. Download the D&B360 executable and configuration installer files and save them to your computer.
- 2. In the Open File Security Warning window, click Run.



Initial Steps: for Installing D&B360 for the First Time, for Upgrading D&B360, and for Re-installing D&B360

These initial steps are the same whether you are installing D&B360 for the first time, upgrading your software, or re-installing your software:

1. In the **D&B360** window, click **Next**.



2. In the About D&B360 window, click Next.



3. In the Authenticate window, enter the following information, then click Next.

out D&B Authenticate
Country where the product is being installed:
Microsoft Dynamics CRM Online
Current user Specify user
Connect
Click Next.

These fields are described in the following table:

Field	Action
Select Country/Region	Use the menu to select your default country/region for support links. Choose from: United States/Canada, Germany, United Kingdom.
Connect via	Use the menu to select Microsoft CRM 2011, Microsoft CRM Online, or Microsoft CRM Office 365 as your application.

Field	Action
Connect as	Select Microsoft CRM 2011, Microsoft CRM Online, or Microsoft CRM Office 365.
	D&B360 for Microsoft Dynamics CRM
	D&B360 About D&B Authenticate
	Please, select Country where the product is being installed:
	· · ·
	Connect via: Microsoft Dynamics CRM Online
	Connect as: Microsoft Dynamics CRM 2011
	User Name: Microsoft Dynamics CRM Online Microsoft Dynamics CRM Office 365
	Password:
	Server URL:
	Organization:
	Connect
	D&B360 Previous Next Cancel
	 If your CRM is hosted locally (also known as on premise), select Microsoft
	Dynamics CRM 2011.
	• If you have an online account to sign in with that you uses where as part of the user name, select Microsoft Dynamics CRM Online (also known as on demand).
	 If you have an online account that uses an Office 365 username, select Microsoft
	Dynamics CRM Office 365.
	Click Next.
Server URL	Enter the URL of the server where the CRM is installed or the URL that you will use to
	access CRM Online.
	- For CPM On Demand the UPL will be comething like
	https://somecompany.crm.dynamics.com
	 For CRM On Premise, the URL will be something like https://servername

Field	Action
Organization	Type the name of the CRM organization that you want to install to.
	 For normal CRM 2011 deployments, you can get the org name from the URL such as: http://someserver/someorg
	 For IFD deployments, you can get org name from the URL such as: http://someorg.someserver
	 For CRM Online, you can get the URL such as: https://somecompany.crm.dynamics.com

Installing D&B360: Steps that Differ Between First Time Installation, Upgrades, and Re-Installations

The steps will differ somewhat depending on whether you are installing D&B360 for the first time, upgrading your software, or re-installing your software.

Steps Unique to a First Time D&B360 Installation

1. In the Trial Terms 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.

2. In the Trial Terms and Conditions window, read the terms, and then click Accept.



3. In the **D&B Key** window, type the installation key that D&B emailed to you.

Note: To facilitate flexibility in testing or deploying in various environments, we allow you to use this Installation Key in up to 3 environments. Each Installation Key has a specific set of limits defined by either your trial terms or your contract.

- 4. In the **Provided By** field, click **D&B** or **Microsoft** to specify who provided the link to the installation software.
- 5. Click Register Key.

D&B360 for Microsoft	Dynamics CRM			0 0 ×
D&8360 About D&8	Authenticate	Trial Terms	Terms & Conditions	D&B Key
Installation Key:				
Provided By:	8 O Microsoft			
		R	egister Key	
	(Click R	egister Key.	
			President	Next Cascal
Neg Contraction			Tierious	Concer

6. If you did not choose to delete default data, in the **Options** window, select **Install D&B Managed Solutions**.

— or —

If you deleted default data, in the **Options** window, select **Install Default Data**.

7. Click Next.

D&B360 for Microsoft Dynamics CRM	
D&8360 About D&8 Authenticate Trial Terms Terms	& Conditions D&B Key Options
Install Delsi Managed Solution Install Default Data	
	Click Next
D&B360	Previous Next Cancel

Completing Your First Time Installation

To complete a first-time installation:

1. In the Final Review window, click Install.



Note: Depending on your network connection, the application will take about 5 to 7 minutes to install.

2. In the final installation window, click Finish.



For help with errors after you have installed D&B360, see "Resolving Installation Issues" on page 8-11.

Post Installation: Re-installing or Upgrading D&B360

(!) Important Note: If for some reason you need to delete your default data, you must do that first before you re-install or upgrade the software. For more information, see "Processing Batches — Standard Level Expectation" on page 8-10.

If you deleted default data, you can reinstall the default data by selecting the **Install Default Data** check box. For more information, see this step on page 3-9.



3. In the Trial Terms window, click Begin.



You should have the installation key in the email message that D&B sent to you. After you complete the registration process, access the D&B360 registration site to download the remainder of the installation package.

Note: To facilitate flexibility in testing or deploying in various environments, we allow you to use this Installation Key in up to 3 environments. Each Installation Key has a specific set of limits defined by either your trial terms or your contract.

1. In the Terms & Conditions window, click Accept.



Note: The Installation Key is pre-populated.

- 2. In the **Provided By** field, click **D&B** or **Microsoft** to specify who provided the link to the installation software.
- 3. In the **D&B Key** window, click **Register Key**.

	About D&B Authenticate Trial Terms & Conditions D&B Key
Installation	Key Bootstee help sign also assessed
Provided By	y D&B Microsoft
	Register Key
	Key registration was successful.
	Click Register Key.

Note: The Installation Key is pre-populated.

- 4. After the software successfully registers, in the D&B Key window, click Next.
- 5. If you did not choose to delete default data, make sure Install D&B Managed Solution is selected.

— or —

If you did choose to delete default data, make sure Install Default Data is selected.

6. In the **Options** window, click **Next**.

Note: If you deleted your data, you must click **Install Default Data** instead of using the default setting, **Install D&B Managed Solution**.



7. In the **Solution Settings** window, leave the default **Maintain Unmanaged Customizations**, or click to select **Overwrite Unmanaged Customizations**, then click **Next**.


8. To complete the installation, in the Final Review window, click Install.

D&B3	60 for Microso	ft Dynamics CRM				
ticate	Trial Terms	Terms & Conditions	D&B Key	Options	Solution Settings	Final Review
4				-		
Instal	tall to begin th I D&B Manage	e installation. d Solution				
						_
						tall.
)xB	360			(Previous Install	Cancel

Depending on your network connection, the application might take anywhere from 5 to 7 minutes to install.

- 9. After the re-installation or upgrade has successfully completed, click Finish.
- 10. If your CRM is open in a browser window, refresh or reload your page to see the changes.



Configuring Outlook to Integrate with the MSD CRM

The Microsoft Dynamics CRM2011 configuration wizard should already be installed. See Start -> Programs -> Microsoft Dynamics CRM 2011. If it is not, download and install it from this web site: http://www.microsoft.com/en-us/download/details.aspx?id=27821

- 1. Close Outlook.
- 2. From your Start menu, select Programs -> Microsoft Dynamics CRM 2011 -> Configuration Wizard.



In the **Microsoft Dynamics CRM 2011 for Outlook Configuration Wizard** window, the default URL and organization display.

3. Click Add.

Manage Microsoft Dynamics CRM (manizations		
Define the Microsoft Dynamics CRM organ synchronizing organization. However, you	izations that you want to sign in to from Outlook. Outlook will be able to view and work with records for all the organi	will synchronize information only with the izations.	
Server URL	Organization Name	Click Add. Add	
🕗 https://dnb360	DnB360_2.3	Edit	
		Delete	,
		Synchron	izing

- 4. In the Microsoft Dynamics CRM 2011 for Outlook Configuration Wizard window:
 - a. In the Server Information area, verify that the Server URL is correct, and click Test Connection.
 - b. Verify that the connection was successful.
 - c. In the **Organization Information** area, type your **Organization** name and **Display Name**.
 - d. Click OK.

nter the information	for the Microsoft Dynamics CRM server.
Server Informat	ion
Server URL:	CRM Online 🗸
Authenticated as:	Test Connection
	Change
Organization In	formation
Organization:	· · · · · · · · · · · · · · · · · · ·
Display Name:	
Synchronize	with this Organization



4 Configuring D&B360

Providing D&B Access to Microsoft Dynamics CRM Users	.4-1
Ensuring the D&B360 Application is Available	.4-2
Viewing Available D&B360 Roles	.4-3
D&B360 Administrator Permissions	4-5
D&B360 User Permissions	4-7
Assigning Roles to Users	.4-9
Entering D&B System Settings	4-9
Configuring the D&B System Settings	4-9
Configuring the D&B Button Settings4	ŀ-11
Configuring Rest of World (ROW) Settings4	ŀ-12
Configuring D&B Stare and Compare Settings4	l-12

Providing D&B Access to Microsoft Dynamics CRM Users

By default, all Microsoft Dynamics CRM administrators have access to D&B360. Two security roles are always included in the D&B360 application:

D&B360 Administrator	Features and Administration Page: This role has full access to all D&B360 features including access to the D&B360 Administration page.
D&B360 User	Features Only: This role has full access to all D&B360 features excluding access to the D&B360 Administration page.

For existing users who need access to the D&B360 application to complete any required configurations, as the Microsoft Dynamics CRM administrator, you need to add the D&B360 Administrator security role to their current security role assignments.

For existing users who have responsibilities within D&B360, you need to assign the D&B User role.

Ensuring the D&B360 Application is Available

1. From the left menu, below Settings, select Settings -> Customization -> Solutions.



2. To verify that the application is installed, verify that it displays in the **Solutions** area.

You can verify the version number and installation date in this window.



3. To view the application components, on the **Solutions** window, double-click **D&B360**.

The Information window opens and displays the components.

File 🛛 Close 📑 📩 Ac	tions *		@ <u>H</u> e
Solution: D&B360 for N	licrosoft Dynamics CRM		
You cannot directly edit the co allow customization, you can	omponents within a managed solution. If edit them in the Customizations area or f	the managed properties for soluti rom another unmanaged solution.	on components are set t
olution: D&B360 for Microsoft	Component Type All	•	
🦻 Information 🔄			
Components	Display Name 🔺	Name	Type 🔮
Option Sets	🔲 📴 Account	account	Entity 🔺
Client Extensions	🔲 🛃 Activity	activitypointer	Entity
Web Resources	: 🔲 🔤 Application Ribbons		Client Extensions
Rocesses	Confidence Code	dnb_confidencecode	Option Set
+ Plug-in Assemblies	Contact	contact	Entity
Service Endpoints	Country	dnb_country	Option Set
Dashboards	🔲 🅪 D&B Admin Review	dnb_adminreview	Entity
Reports	DR.P. Callout Log	deb colloution	Entity
Connection Roles	1 - 50 of 289 (0 selected)		I¶ ◀ Page 1 ►
itus: Existing			

Viewing Available D&B360 Roles

- 1. From the left menu, select **System -> Administration**.
- 2. To display the security roles available to you, click Security Roles.



The Security Roles window opens and displays the roles available to you.

Security Roles	
	Business Unit: DNB Training
🎯 New 🛛 🎯 🔳 🖌 🕹 More Actions 🕶	
Name 🔺	Business Unit
🗌 🎯 CEO-Business Manager	DNB_Training
🗌 🎯 CSR Manager	DNB_Training
🗌 🎯 Customer Service Representative	DNB_Training
🛛 💱 🛛 D&B360 Administrator	DNB_Training
🗌 🎯 D&B360 Administrator - BU Only	DNB_Training
🛛 🎯 D&B360 User	DNB_Training
🛛 🎯 D&B360 User - BU Only	DNB_Training
🛛 🐉 Delegate	DNB_Training
🛛 🐉 🛛 Marketing Manager	DNB_Training
🗌 🎯 Marketing Manager - BU Only	DNB_Training
🗌 🎡 Marketing Professional	DNB_Training

You can select from these 8 possible tasks that are permitted for a variety of components:

Create	Read	Write	Delete
Append	Append To	Assign	Share

To view which tasks are permitted for the components of each role:

1. In the Security Roles window, select the name of the role you want to review.



2. In the **Security Role D&B Administrator** window, click **Customization** to display permissions associated with this role.

Details	Core Rec	ords	Marketing	Sales	Service	Business Management	Service	Management	Customization	Custom Entities
Role Nar	ne*	D&B3(50 Administrat	or		Business	Unit *	Click C	ustomization.)

3. To view remaining permissions, click Custom Entries.

D&B360 Administrator Permissions

In the **Security Role: D&B Administrator** window, **Customization** tab, administrator permissions are indicated by green (user type) circles.

Security Role:	D&B360	Admini	strator					working o	on solution: Default	3010
etails Core Records	Marketing	Sales	Service	Business Mar	nagement	Service Manage	ement	Customization	Custom Entities	
intity	Create	Read	Write	Delete	Append	Append To	Assign	Share		
ttribute Map	0	•	0	0	0	0				
ustomizations	0	•	0	0						
ialog Session		•	\bigcirc		\bigcirc		\sim			
ntity	0	•	0	0						
ntity Map	0	•	0	0		0				
eld	0	•	0	0						
nport Job		0	0	0						
ption Set	0	•	0	0						
ug-in Assembly	0	•	0	0						
ug-in Type	0	•	0	0						
ocess	<u> </u>	•	\bigcirc			•	\odot			
ublisher	0	0	0	0	0	0				
elationship	0	•	0	0						
dk Message	0	•	0	0						
dk Message ocessing Step	0	•	0	0						
dk Message ocessing Step	0	•	0	0						

In the **Security Role: D&B Administrator** window, **Custom Entries** tab, administrator permissions are also indicated by green (user type) circles.

ile X <u>C</u> lose	<u>∳ A</u> ctions →							Working on colut	@ <u>H</u> el
Details Core Re	ole: D&B	360 Adm	es Service	Business	Management	Service Ma	nagement	Customization	Custom Entitie
	_	-			-		-		
Entity D&B Admin Review	Create	Read	Write	Delete	Append	Append To	Assign	Share	
D&B Callout Log	•	•	0	•	•	•			
D&B Company	•	•	•	•	•	•			
D&B Contact	•	•	•	•	•	•			
D&B Credit	0	•	0	0	0	0			
D&B Entitlement	•	•	•	•	•	•			
D&B Financial	•	•	•	•	•	•			
D&B IndxRef	•	•	•	•	•	•	•	•	
D&B Lookup	•	•	•	•	•	•			
D&B Saved Search	$\overline{\mathbf{Q}}$	\odot	$\overline{\mathbf{Q}}$	\odot	•	$\overline{\mathbf{Q}}$	0	0	
D&B Score	0	•	0	0	0	0			
D&B Settings	•	•	•	٠	•	•			
D&B Web Service	•	•		0	0	0			
Key O None Selected	i 💊	User 😑	Business Unit	ç	Parent: Child	l Business Uni	ts	I Orga	nization

D&B360 User Permissions

In the **Security Role: D&B User** window, **Customization** tab, administrator permissions are indicated by green (user type) circles.

Security R	ole: D&B	360 User						Working on so
Details Core Re	cords Mar	keting Sales	Service	Business N	lanagement	Service Man	agement	Customization
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
tribute Map	0	•	0	0	0	0		
ustomizations	0	•	0	0				
ialog Session		•	\bigcirc	\bigcirc			\bigcirc	
ntity	0		0	0				
ntity Map	0	•	0	0		0		
eld	0	•	0	0				
nport Job		0	0	0				
ption Set	0	•	0	0				
ug-in Assembly	0	•	0	0				
ug-in Type	0	•	0	0				
cess		•	\bigcirc	•	<u> </u>	•	\bigcirc	\sim
blisher	0	0	0	0	0	0		
lationship	0	•	0	0				
k Message	0		0	0				
k Message ocessing Step	0	•	0	0				
k Message ocessing Step age	0	•	0	0				
k Message ocessing Step cure nfiguration	0	0	0	0				
-	-	_	-	-				

In the **Security Role: D&B User** window, **Custom Entries** tab, administrator permissions are also indicated by green (user type) circles.

le 🛛 🔀 <u>C</u> lose	<u>∕</u> <u>A</u> ction	15 🔻								0
Security R	ole: D8	≵B360 Us	ser						Working on soluti	ion: Default
Details Core Re	cords I	Marketing	Sales	Service	Business	Management	Service Ma	nagement	Customization	Custom E
Entity	Create	Read	Wr	ite	Delete	Append	Append To	Assign	Share	
D&B Admin Review	0	0	C		0	0	0			
D&B Callout Log	•	•	0)	0	•	•			
D&B Company	•	•			•	•	•			
D&B Contact	٠	•			•	•	•			
D&B Credit	0	•	0)	0	0	0			
D&B Entitlement	0	•)	0	0	0			
D&B Financial	•	•			•	•	•			
D&B IndxRef	•	•			•	•	•	•	•	
D&B Lookup	0	•	0) (0	•	•			
D&B Saved Search	\bigcirc	•	9		\bigcirc	\bigcirc	$\overline{\mathbf{Q}}$	0	0	
D&B Score	0	•	0)	0	0	0			
D&B Settings	0	•	C	D	0	0	0			
Key										
O None Selecter			O Purin	acc Linit	6	Daranti Child	Rusiness Uni	•~	• Orm	nization

Assigning Roles to Users

Follow your standard process for applying security roles to users. You can assign these roles to users: D&B360 Administrator and D&B360 User.

Role Name	Business Unit	1
Activity Feeds	OnDemand	-
CEO-Business Manager	OnDemand	
CSR Manager	OnDemand	
Customer Service Representative	OnDemand	
✓ D&B360 Administrator	OnDemand	
D&B360 User	OnDemand	
Delegate	OnDemand	
Marketing Manager	OnDemand	
Marketing Professional	OnDemand	
Sales Manager	OnDemand	

Note: Only someone who is assigned the role of administrator is authorized to configure settings. After you have been assigned the role of D&B360 Administrator, you can configure the D&B360 settings.

Entering D&B System Settings

After you have verified that the D&B360 application is ready to use and that you are assigned the Administrator role, you are ready to set the required configurations.

Configuring the D&B System Settings

1. From the left menu below Settings, select D&B360 -> D&B360 Administration.



2. In the D&B360 Administration window, scroll to System Settings -> D&B System.

Collapse the Welcome to D&B360 and D&B Licensing sections to have more space on the window.

Administration				
• Welcome to D&B360!				
D&B Licensing				
▼ System Settings				

- 3. Expand System Settings, and in the D&B System area, use the menus to configure these settings:
 - a. Select the **Default Country** that you want to use when you search for accounts.
 - b. In the **Country** and **State** fields, select either **Description** or **ISO Code** to determine how the system returns searches by country. You can change this setting later, but it will only affect new or refreshed records.
 - c. In the **Callout Timeout** field, select either **30 seconds** or **60 seconds** to specify the amount of time the system waits for a response from web services.
- 4. For the **Allow** fields, generally keep the default settings.
- 5. Click Save.

Administrati	on				About D&B:
• Welcome to D&B36	0!				
D&B Licensing					Show Terms and Conditions
• System Settings D&B System					Click Save. Save
Default Country 🔍		•	Country 🖤	Description	
Callout Timeout 🌗	30 Seconds	-	State 🌗	Description	•
Allow Duplicates 🔍	• Yes 🔘 No		Allow Account Edit 🛞	• Yes 🔘 No	
Allow Callout Log 🎐	• Yes 🔘 No		Allow Contact Creation 🎐	• Yes 🔘 No	
Allow Lead Creation 🌗	• Yes O No		Allow Contact/Lead Duplicates	• Yes 🔘 No	
Allow Plugin Log 🌖	⊙ Yes ◯ No		Allow Account/Lead Duplicates	🕅 💽 Yes 🔘 No	

Configuring the D&B Button Settings

1. In the **System Settings**, **D&B Button Configuration** area, click the **Yes** or **No** radio buttons to select which buttons you want to display on the CRM window D&B 360 menu. See the button descriptions below.

D&B Button Configuration				
D&B360 + 🔍	💿 Yes 🔘 No	D&B360 View 🌗 💿	res 🔘 No	
D&B Contacts 🔍	💿 Yes 🔘 No	D&B Look-A-Like 🔍 💿	/es 🔘 No	
D&B Refresh 🌗	💿 Yes 🔘 No	D&B Competitors 🌗 💿	(es 🔘 No	
D&B Financials 🔍	💿 Yes 🔘 No	D&B Industries ④	/es 🔘 No	

2. Click Save.

D&B360 Options	Description
D&B Data	Allows you to change or remove D&B data (including company, contact, and lead data) about an existing account, or to add D&B data to an account in your database that does not yet include D&B data.
D&B Refresh	Imports the most current D&B data for a specific account and performs a stare and compare for the data in the Account object compared to the D&B360 object.
D&B360+	Displays all of the D&B data licensed by the company for a specific account. Data is only for the company and does not include contact or lead information.
D&B360 Contacts	Searches for contacts associated with a D-U-N-S Number or Company Name and create leads or contacts from them.
D&B360 View	Identifies related accounts within your Account object. You can also bring in family members for cross-sell opportunities.
D&B Look A Like	Searches for other companies that have similar attributes to their best customers.
D&B Competitors	Accesses a list of competitors, assembled by D&B's editorial team, that are associated with a D-U-N-S Number or Company. You can use this list for creating accounts, contacts, or leads.
D&B Industry	Searches for industry profiles associated with a D-U-N-S Number or Company to quickly gain powerful insight that accelerates the sales cycle. Industry profiles are powered by First Research industry experts
D&B Financial	Searches for additional financial data specific to your D&B360 accounts such as annual income statements, growth rates, per share data, and more associated with a D-U-N-S Number or Company.

Configuring Rest of World (ROW) Settings

- 1. In the **System Settings**, **ROW Annotation Configuration** area, click to select the check boxes for each of the Rest-of-World options that you want to make available to your users.
- 2. Click Save.

Note: If you clear a check box, none of your users will be able to use that ROW option within the D&B360 application.

ROW Annotation Configuration				
Facebook 🔍	\checkmark	Alerts 🕀	\checkmark	
Blogs 🔍	\checkmark	Skype 🌗	\checkmark	
YouTube ⁽³⁾	\checkmark	Finance 🗐	\checkmark	
LinkedIn 🎐	\checkmark	Мар 🕀	\checkmark	
Twitter 🔍	\checkmark			

For more information about the ROW options, see "Using Rest of World" on page 2-8.

Configuring D&B Stare and Compare Settings

- 1. In the **System Settings**, **D&B360 Stare and Compare** area, click to select the check boxes for each of the stare-and-compare options that you want to make available to your users.
- To allow your users to update the CRM DATA values for the fields in the Select Fields for update in Stare and Compare section, click Preselect Differences.
- 3. Click Save.

D&B360 Stare and Compare				
Preselect Differences 🔍	V			
Select Fields for update in	Stare and Compare			
Account Name	\checkmark	Account Description	\checkmark	
Address 1: Street 1	\checkmark	Address 2: Street 1	\checkmark	
Address 1: City	\checkmark	Address 2: City	\checkmark	
Address 1: State/Province	\checkmark	Address 2: State/Province	\checkmark	
Address 1: Zip/Postal Code	\checkmark	Address 2: Zip/Postal Code	\checkmark	
Address 1: Country/Region	\checkmark	Address 2: Country/Region	\checkmark	
Address 1: Phone	\checkmark	Number of Employees	\checkmark	
Revenue	\checkmark	SIC	\checkmark	



5 Managing Batches and Installing the Informatica Cloud Secure Agent

Overview of Batch Processing	5-4
Understanding the Key Features of D&B360 Batch Jobs	5-4
Record Eligibility	5-4
Confidence Code Threshold Facts	5-4
Validating D-U-N-S Numbers	.5-5
Configuring Microsoft Dynamics	5-5
Registering the Secure Agent for an On-Demand Installation	5-6
Configuring the Secure Agent for an On-Premise Installation	5-8
Installing the VC++ Redistributable Package (x86)	5-8
Steps for Configuring the Secure Agent for an On-Premise Installation5	-11
Logging in to the Informatica Cloud Secure Agent5	-12
Running the Informatica Cloud Secure Agent Installation Program5	-14
Preparing Your Microsoft Dynamics and Active Directory for the Informatica Cloud Secure Agent5	-19
Post-Installation Steps5	-26
Adjusting the Settings for Your System5	-28
Completing the Optional Steps5	-30
Restarting the Secure Agent5	-31

Note: If you are installing Microsoft Dynamics CRM for On Premise, also known as CRM Active Directory, see "Registering the Secure Agent for an On-Demand Installation" on page 5-6.

Note: If you are installing Microsoft Dynamics CRM for On Demand, also known as CRM Live, see "Configuring the Secure Agent for an On-Premise Installation" on page 5-8.

For an overview of the steps needed for each type of installation, see the following flowchart.



Overview of Batch Processing

Two batch jobs are available through D&B360:

- New Batch Use to associate existing Microsoft Dynamics accounts with a valid D-U-N-S record. New Batch chooses accounts from Microsoft Dynamics 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 Microsoft Dynamics are associated with a valid D-U-N-S number.
- **Refresh Batch** After Microsoft Dynamics 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 Microsoft Dynamics tables.

Understanding the Key Features of D&B360 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:Phone2 of these fields:Billing City, Billing State, Billing Postal Code5 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

Configuring Microsoft Dynamics

The configurations available for Microsoft Dynamic CRM, and their specific required modifications, include the following.

Note: Microsoft Dynamics CRM On Demand is also known as CRM Online or CRM Live. Microsoft Dynamics On Premise is also known as CRM Active Directory.

Microsoft Dynamics CRM On Demand	 Requires: Configuration of Batch Job Connection. Registration of Informatica Cloud Secure Agent (see "Registering the Secure Agent for an On-Demand Installation" on page 5-6).
Microsoft Dynamic CRM On Premise	 Requires: Installation of Informatica Cloud Secure Agent (see "Configuring the Secure Agent for an On-Premise Installation" on page 5-8). Installation of Batch Job Initialization Files. Configuration of Secure Agent. Configuration of Batch Job Connection.

(!) Important Note: Make note of these requirements:

- To identify the type of configuration for your CRM, contact your System Administrator. For instructions on how to configure your CRM, see "Configuring the Secure Agent for an On-Premise Installation" on page 5-8.
- To install the Informatica Secure Agent, the user must be an admin user for the CRM, a system administrator for the server where the secure agent is to be installed, and an administrator for the Domain Name Server (DNS) in the network.
- To install the Informatica Secure Agent, the user must be an admin user.
- Before you can set up and run batches, you must install the Informatica Secure Agent for Microsoft Dynamics. For instructions on installing the Secure Agent, see "Registering the Secure Agent for an On-Demand Installation" on page 5-6, or see "Configuring the Secure Agent for an On-Premise Installation" on page 5-8.

Registering the Secure Agent for an On-Demand Installation

Note: On Demand is also known as online or CRM Live.

- 1. On the CRM left menu, click **Settings** to display the D&B360 choices.
- 2. Select D&B360 -> D&B 360 Administration.



3. In the Batch Processing Setup area, click Batch Setup.

•	Batch Proces Batch Processi	click Batch Setup.
	Batch Setup	Admin Review List

In the D&B360 Batch Administration window, the system generates your Username and Password.

(!) Important Note: Make a note of the Username and Password the system generates for you. You will need to have these for steps that follow.

4. In the **Deployment Type** field, select **Online**, and then click **Register**.

User Regist	ration and Sec	cure Agent Installation		About D&B360
User Registration			_	
Username:		Your User Name]	
Password:		Your Password]	
Deployment Type:	Select Online.	On Premise Internet Facing Deployment Online		
				Click Register. Register

5. In the **CRM Connection Credentials** area, type the user name and password you were given in the previous step, then click **Save**.

D&B360 Batcl	h Administration			About D&B360
D&B360 batch syn D&B360 access to the latest	chronizes data between Microsoft Dyr t D&B data at your fingertips. Specify s	namics CRM and D&B. The ba schedule for running batch jol	tch runs in the background to make sure you have bs.	
New Batch Activity Logs	Refresh Batch Activity Logs	Admin Review List		
	lentials			
User	dnb360_1@live.com	CRM Service URL 🜗	https://dnbdemo.crm.dynamics.com	
Password	••••••			
• New Batch Schedule				
Refresh Batch Schedu	le			
			Click Save	
				Save

After you have completed these steps, you are ready to schedule new and refresh batch jobs (see "Scheduling Batch Jobs" on page 6-1).

Configuring the Secure Agent for an On-Premise Installation

Before you configure the secure agent for an on-premise installation, you need to install the VC++ Redistributable Package (x86).

Installing the VC++ Redistributable Package (x86)

- 1. Open http://www.microsoft.com/download/en/confirmation.aspx?id=29.
- 2. Click Start download.



3. When you are prompted to run or save the .exe file, click Run.

Do you want to run or save vcredist_x86.exe (1.73 MB) from download.microsol	t.com?			×
	Run	Save	▼ Cancel	

The Welcome to Microsoft Visual C++ 2008 Redistributable Setup wizard opens.

4. In the first wizard window, click Next.



- 5. In the License Terms window, I have read and accept the license terms field, select the check box.
- 6. Click Install.

Microsoft Visual C++ 2008 Redistributable Setup	_ 🗆 🗙
icense Terms	
e sure to carefully read and understand all the rights and restrictions described in the cense terms. You must accept the license terms before you can install the software.	
MICROSOFT SOFTWARE LICENSE TERMS	-
MICROSOFT VISUAL C++ 2008 RUNTIME LIBRAJEES (X86, IA64 AND X64)	_
These license terms are an agreement between Microsoft Corporation (or based on where you live, one of its affiliates) and you. Please read them. They apply to the	
software named above, which includes the media on which you received it, if any. The terms also apply to any Microsoft	-
Print	
ress the Page Down key to see more text.	
 I have read and accept the accept terms. 	
< Back Install > Cano	el

As the installation is in progress, the Setup window displays the status.



7. In the Setup Complete window, click Finish after the installation is complete



Steps for Configuring the Secure Agent for an On-Premise Installation

If you have multiple Microsoft Dynamics organizations on a site, for each organization to have connectivity, you must install the Secure Agent on a separate machine for each organization.

- 1. On the CRM left menu, click Settings to display the D&B360 choices.
- 2. Select D&B360 -> D&B 360 Administration.



3. In the Batch Processing Setup area, click Batch Setup.

•	Batch Proces Batch Processi	ng Click Batch Setup.
	Batch Setup	Admin Review List

4. In the User Registration and Secure Agent Installation window, type your user name and password.

(!) Important Note: Make a note of this because you will use these later to register the Secure Agent.

5. In the **Deployment Type** field, select **On Premise**, and then click **Register**.

User Registration and Sec	ure Agent Installation	About D&B360
D&B360		
User Registration		
Username:	Your User Name	
Password:	Your Password	
Deployment Type: Select On Premise .	On Premise Internet Facing Deployment Online	
		Click Register. Register

Logging in to the Informatica Cloud Secure Agent

- 1. Access the Informatica Cloud window at this URL: https://icosp2.informaticacloud.com/saas.
- 2. In the **Informatica Cloud** window, type the user name and password for the CRM that you made note of previously, and then click **Login**.

i 🕒 - Jan merson	ons camping capacito company cognic		Informatica Cloud X
INFORMATICA	Cloud		
User Name:	ogin on't have an account? orgot your password?		ata Synchronization pad data and integrate applications, icludes add-on functionality such as ns. ontact Validation alidate postal addresses, email addr umbers in your CRM environment or
Resources			ata Assessment easure and monitor data quality of start and Opportunity objects will

3. In the Informatica Cloud window, click the Configuration tab, then click the Agents tab.

Informatica	Cloud - Windows Inte	ernet Explorer			
G • 	https://coss1.informa	ticacloud.com/saas/app/	connections.d ,O 💌	🔒 🖻 🐓 🗙	(1) Informatica Cloud
	ATICA Cloud				
Home	Data Services	Configuration	Administra	ation	
Agents	Connections	Schedules Ta:	sk Flows Plu	ig-ins Custom	Sources
Connect	ions				
List of all icon. To v	connections in your o iew the details of a co	rganization. Use a cor onnection, click the co	nnection to conne nnection name.	ect to a database, fil	e or Salesforce. To add a
New					
Home Agents Connect List of all icon. To v	Data Services Connections ions connections in your o new the details of a co	Configuration Schedules Tas rganization. Use a connection, click the co	Administra ik Flows Plu nnection to conne nnection name.	ation ag-ins Custom ect to a database, fil	Sources e or Salesforce. To add

4. Click Download Agent.

NFORM	ATICA Cloud	d				
Home	Data Services	Configu	ration Ad	Iministration		
Agents	Connections	Schedules	Task Flows	Plug-ins	Custom Sources	
Agents						
				. Information Com	un Annat is a Eabhuai	inht colf upper disc

5. In the Download Agent dialog box, click Windows, then click Download.



6. At the prompt to run or save the .exe file, click **Run**.

Do you want to run or save agent_install.exe (122 MB) from icoss1.informaticacloud.com?	Run	Save	•	Cancel	×

Running the Informatica Cloud Secure Agent Installation Program

- 1. In the **Informatica Cloud Secure Agent Setup** window, **Choose Installation Folder** area, leave the default program directory or click **Choose** to specify a different location.
- 2. To install the secure agent, click **Next**.



3. In the Pre-Installation Summary window, review the settings and if everything is correct, click Install.



The **Installing** window displays the progress of the installation process.

Note: The Advance of A	it Setup
INFORMATICA Cloud	Installing Informatica Cloud Secure Agent
Choose Installation Folder Pre-Installation Summary Installing Installation Complete	The Informatica Cloud Secure Agent is a lightweight program that runs all tasks and enables secure communication across the firewall between your organization and Informatica Cloud.
	Installing
InstallAnywhere by Macrovision	
Cancel	

4. In the Installation Complete window, review the summary of the installation, and then click Done.

Informatica Cloud Secure Agent	Setup Installation Complete
 Choose Installation Folder Pre-Installation Summary Installing Installation Complete 	Congratulations! the Informatica Cloud Secure Agent has been successfully installed to: C:\Program Files (x86)/Informatica Cloud Secure Agent Please note that the Secure Agent must be configured for use with your Informatica Cloud organization. Click Done to close this setup wizard and start the Informatica Cloud Secure Agent.
stallAnywhere by Macrovision -	Click Done. Done

5. In the **Informatica Cloud Secure Agent** registration window, type the user name and password that you made note of when you registered through the CRM, and then click **Register**.

A Informatica Cloud Secure Agent	
INFORMATICA Cloud Secure Agent	() Help
() The Secure Agent has not been registered.	
To register the Secure Agent, enter your Informatica Cloud login information below. User Name: • Password: • Click Register.	Register

The **Informatica Cloud Secure Agent** window displays a message that it is starting up and upgrading. After the upgrade process is complete, a message displays that the secure agent is up and running. D&B360 Administration and Installation Guide 5 Managing Batches and Installing the Informatica Cloud Secure Agent

) The Secure Ag	ent is up and running.	
Restart	Shuts down the Secure Agent if it is running, then starts it up again.	
Stop	Shuts down the Secure Agent.	
Proxy	Enter or edit your proxy server information.	

6. In the **Informatica Cloud** window, type the user name and password that you made note of earlier. The **Configuration** window displays the log in credentials you entered previously.

	Data Serv	rices Con	figuration	Adm		1		
Agents	Connectio	ns Sched	dules					
Agents								
List of al database	l Informatica S e or file located	ecure Agents ir on your netwo	n your organ ork. The pag	ization. A a automal	n Informatice tically refresh	a Secure Agent is a l les every 5 seconds	lightweight, self-upgrading	g program that runs on a machin
List of al database Downlos	I Informatica S e or file located ad Agent	ecure Agents in on your netwo	n your organ ork. The pag	ization. A e automal	n Informatice tically refresh	a Secure Agent is a l hes every 5 seconds	lightweight, self-upgrading	g program that runs on a machin
List of a database Downlos Actions	II Informatica S or file located d Agent Name	ecure Agents ir on your netwo Host Name	n your organ ork. The pag Platform	ization. A e automal Status	n Informatica tically refresh Version	a Secure Agent is a les every 5 seconds Upgrade Status	lightweight, self-upgrading Last Upgrade Check	g program that runs on a machi Last Status Change

- 7. In the D&B360 User Registration and Secure Agent Installation window, Deployment Type field, select On Premise, then click Next.
- 8. Type the user name and password you entered in previous steps.

User Registrat	on and Secure Agent Installation	About D8
User Registration		
Username:	Your User Name	
Password:	Your Password	
Deployment Type:	n Premise Internet Facing Deployment Online	
		Click Next.

If you have correctly registered the CRM, the CRM Connection Credentials window displays.

9. To connect to the CRM, in the **D&B Batch Administration** window, **CRM Connection Credentials** area, type your **User** and **Password** information.

D&B360 Batch Administration D&B360 batch synchronizes data between Microsoft Dynamics CRM and D&B. The batch runs in the background to make sure you have access to D&B360 latest D&B data at your fingertips. Specify schedule for running batch jobs.	About D&B360
New Batch Activity Logs Refresh Batch Activity Logs Admin Review List	
User CRM Service URL 3	
Password	
New Batch Schedule	
Refresh Batch Schedule	

If the Secure Agent fails to successfully associate with the CRM, an error message displays. If you get this error message, try re-typing your user name and password. If you get the error message again, click the link in the error message to download and install the Secure Agent.

User Registration and Secure Agent Installation	About D&B360
Secure Agent Installation	
You are required to download and install the Informatica secure agent before you can begin batch processing with D&B: further details. Download and install the Secure Agent from the following link: Secure Agent Installation Username: Password: Try re-typing your user name and password.	360. Please refer to the D&B360 Admin Guide, if you need
	Next

If you have correctly registered the CRM, the CRM Connection Credentials window displays.

Preparing Your Microsoft Dynamics and Active Directory for the Informatica Cloud Secure Agent

(!) Important Note: If the CRMAppPool is running as Network Service, watch for and read the Important Notes that precede some of the following steps. To avoid problems with your installation, it is important that you skip any steps preceded by an Important Note stating that you skip that step.

Specify the Identify for CRMAppPool

• Log in to your MSD Application server.

CRM2011LOCAL	 Application Pools 					
File View Help						
onnections	Application	on Pool	s			
CRM2011LOCAL (MSDVM\Admin Application Pools Stes	This page lets you view are associated with work among different applicat	and manage ker processe tions.	the list of s, contain	application pools one or more applic	on the server. Application p cations, and provide isolatio	ools n
	Filter:	- 8	Go 🔹 😼	Show All Grou	ip by:	
	Filter: Name A	* 🖟 Status	Go v 😺	Show All Grou Managed Pip	p by: Identity	A
	Filter: Name ^ CASP.NET v4.0	Status Started	Go v v .NET v4.0	Show All Grou Managed Pip Integrated	p by: Identity ApplicationPoolIdentity	A
	Filter: Name ^ ASP.NET v4.0 ASP.NET v4.0 Cl	Status Started Started	Go - C .NET v4.0 v4.0	Show All Grou Managed Pip Integrated Classic	p by: Identity ApplicationPoolIdentity ApplicationPoolIdentity	
	Filter: Name ^ ASP.NET v4.0 ASP.NET v4.0 Cl Classic .NET App	Status Started Started Started	Go • • • .NET v4.0 v4.0 v2.0	Show All Grou Managed Pip Integrated Classic Classic	p by: Identity ApplicationPoolIdentity ApplicationPoolIdentity ApplicationPoolIdentity	0 0 0
	Filter: Name ^ ASP.NET v4.0 ASP.NET v4.0 Cl Classic .NET App CRMAppPool	Status Started Started Started Started	Go - .NET v4.0 v4.0 v2.0 v4.0 v4.0	Show All Grou Managed Pip Integrated Classic Classic Classic	p by: Identity ApplicationPoolIdentity ApplicationPoolIdentity ApplicationPoolIdentity (MSDVM)CRMDYNAMICS)	4 0 0 0 2
	Filter: Name A ASP.NET V4.0 Classic .NET App CRMAppPool CrmDeploymentS	Status Started Started Started Started Started Started	GO - C .NET v4.0 v4.0 v2.0 v4.0 v4.0 v4.0 v4.0	Show All Grou Managed Pip Integrated Classic Classic Classic Classic Classic	p by: Identity ApplicationPoolIdentity ApplicationPoolIdentity ApplicationPoolIdentity MSDWN/CRMDYNAMICS MSDVM/CRMDYNAMICS	0 0 0 2 1
	Filter: Name ASP.NET v4.0 ASP.NET v4.0 Cl Classic .NET App CRMAppPool CrmDeploymentS DefaultacePool	Status Started Started Started Started Started Started	GO V4.0 V4.0 V4.0 V4.0 V4.0 V4.0 V4.0 V4.0	Show All Grou Managed Pip Integrated Classic Classic Classic Classic Classic Integrated	p by: Identity ApplicationPoolIdentity ApplicationPoolIdentity ApplicationPoolIdentity MSDVM/CRMDYNAMICS MSDVM/CRMDYNAMICS	1

Identify the Port for Your CRM Dynamics Instance

1. On the left side of the MSD CRM window, select Actions -> Edit Site, and click Bindings.

WINTERNET Information Services (IIS	Hanager	X
CRM2011LOCAL >	Sites Microsoft Dynamics CRM	🖬 🖂 🔂 I 🕑 🔹
File View Help		
Connections	Microsoft Dynamics CRM Home	Actions
Start Page	V	Explore
E-GRM2011LOCAL (MSDVM\Admini	Filter:	Edit Permissions
Application Pools	ASP,NET	Bodoos
O Default Web Site Orrors ft Dynamics CBM	📭 📚 🖪 🍨 🗟 🥀	Basic Settings
	.NET .NET .NET Error .NET .NET Profie .NET Trust Authorizati Compilation Pages Globalization Levels	View Applications View Virtual Directories
	FI 💦 臍 🎬 🕵 🔍	Manage Web Site

2. In the **Site Bindings** window, identify the port number that is bound to your Dynamics instances, and click **Close**.

ype	Host Name	Port	IP Address	Binding	Add
http		5555		1	Edit
				1	Remove
				1	Browse

Identify the Service Principal Name (SPN) for the Environment.

(!) Important Note: If the CRMAppPool is running as *Network Service*, skip all of the steps in this section:

1. Log in to the Domain Controller.

The Administrator: Windows Powershell window opens.

2. To identify the name of your Domain Controller host, enter the hostname command.



3. To identify the SPN for your environment, enter the setspn -1 hostname command. This should be a fully qualified domain name (FQDN).



The SPN name starts with HOST and contains the FQDN for the machine.

4. Enter the following command with the values obtained in the previous steps as follows:

```
setspn -A iisadmin/<spn>:<port> <user>
```

- where <spn> is the result from Step 3
- <user> is the result from Step 1
- <port> the result from Step 2

In our example, this is

```
setspn -A iisadmin/crm2011local.msdvm.com:5555 MSDVM\CRMDynamics
```

```
Z Select Administrator: Windows PowerShell

PS C:\Users\Administrator> setspn -A HTTP/crn2011local.nsdun.con:5555 MSDUM\CRMDynamics

Registering ServicePrincipalNames for CM=CRMDynamics,CN=Users,DC=nsdun,DC=con

HTTP/crn2011local.nsdun.con:5555

Updated object

PS C:\Users\Administrator> _
```
5. Enter the command:

setspn -A HTTP/<spn>:<port> <user>

In our example, this is

```
setspn -A HTTP/crm2011local.msdvm.com:5555 MSDVM\CRMDynamics setspn -A
HTTP/<spn> <user>
```

6. Enter the command:

setspn -A HTTP/<spn> <user>

In our example, this is

setspn -A HTTP/crm2011local.sdvm.com MSDVM\CRMDynamics

```
Z Administrator: Windows PowerShell
PS C:\Users\Administrator> setspn -A HTTP/crn2011local.msdvm.com MSDUM\CRMDynamics
Registering ServicePrincipalNames for CN=CRMDynamics,CN=Users,DC=msdvm,DC=com
HTTP/crn2011local.msdvm.com
Updated object
PS C:\Users\Administrator>
```

Setting Delegation

(!) Important Note: If the CRMAppPool is running as Network Service, skip all of the steps in this section.

1. Log in to your Domain Controller and select Active Directory Users and Computers.



2. In the Active Directory Users and Computers window, select msdvm.com/Users.



3. In the **Users** directory, locate the User identified in the Step 1 and double-click it (see this step on page 5-21).

Active Directory Users and Com	puters		
File Action View Help			
(* *) 🖄 📅 🔏 🗖 🗶 🕻	i 🖸 🍺 🚺 🖬	1 🙎 📚 🛍 🎙	1 🖸 🔍
Active Directory Users and Comput	Name	Type	Description
Saved Queries	Administrator	User	Built-in account for admini
msdvm.com	& Allowed ROD	Security Group	Members in this group can
🕀 🛄 Builtin	& Cert Publishers	Security Group	Members of this group are
Computers	SCRM WPG	Security Group	CRM Worker Process Group
Domain Controllers	CRMDynamics	User	
ForeignSecurityPrincipals	Denied ROD	Security Group	Members in this group can
Managed Service Accounts	DnsAdmins	Security Group	DNS Administrators Group
Users	& DnsUpdatePr	Security Group	DNS clients who are permi
	State Domain Admins	Security Group	Designated administrators

4. In the CRMDynamics Properties window, select the Delegation tab.

Member Of Dial- Remote Desktop Serv General Address Ac	in Environment Sessions Remote control vices Profile Personal Vitual Desktop COM+ ccount Profile Telephones Delegation Organization
CRMDyna	amics
First name:	CRMDynamics Initials:
Last name:	
Display name:	CRMDynamics
Description:	
Office:	
Telephone number:	Other
E-mail:	
Web page:	Other

5. Select the **Trust this user for delegation to specified services only** and **Use Kerberos only options**, and then click **Add**.



6. Click Users or Computers.



7. Enter the user name identified in Step 1 and then click **OK** (see this step on page 5-21).



8. Select the HTTP entry whose **Port** column is blank, and then click **OK**.

Add Services To allow services users or compute	s to be delegated for a use rs, and then click the sen	er or comput vices.	r, select the appropriate
To select one or Users or Compute	more user or computer na ers.	mes, click	Users or Computers
Available service	6:		
Service Type	User or Computer	Port	Service Name D
HTTP	cm2011local.msdvm		
HTTP	cm2011local.msdvm	5555	
isadmin	cm2011local.msdvm	5555	
<u> </u>			
			Select All
			K Cancel

Post-Installation Steps

1. In the Informatica Cloud Secure Agent Setup window, click Stop.

The Secure Agent shuts down.



A message displays to inform you that the Secure Agent has been stopped.

2. In the Informatica Cloud window, click the Administration tab.



- 3. Log back in to Informatica Cloud using the user name and password you previously entered.
- 4. In the My Organization window, identify the Organization ID for your installation, for example, Org87.



5. In the Secure Agent ... \Informatica Cloud Secure Agent\main\rdtmDir\dnb360\ directory, create a folder with the Organization ID name.

H dnb360	ica Cloud Secure Agent + main + rdtmDir + dnb360 +	• 🔯	Search dnb360		
Organize 👻 🏹 Open	Include in library - Share with - Burn New fo	lder) 💷 🔹 🛄	0
🚖 Favorites	Name 1	Date modified	Туре	Size	
E Desktop	0rg87	5/14/2012 4:08 PM	File folder		
Downloads	dnb_kp_codes_MSD.dat	5/2/2012 10:51 AM	DAT File	1,151 KB	
Recent Places	DNB360_Dummy_Record_MSD	5/2/2012 10:51 AM	Text Document	1 KB	
Documents					

- Download the Java Security Policy Files from this URL: <u>http://www.oracle.com/technetwork/java/javase/downloads/jce-6-download-429243.html.</u>
- 7. Unzip the zip package and copy:

```
local_policy.jar and US_export_policy.jar
```

🕌 jce						×
	y-6 ▼ jce	- 🔛	Search joe			2
Organize 👻 📄 Open	Share with 👻 Burn New folder			8= -		•
Y Favorites	Name ^	Date modified	Type	Size		
Cesktop	COPYRIGHT	11/16/2006 5:10 PM	HTML Document	3	KB	
Downloads	local_policy.jar	5/15/2012 7:18 AM	JAR File	3	KB	
E Recent Places	README	11/16/2006 5:10 PM	Text Document	9	KB	
📜 Libraries	US_export_policy.jar	5/15/2012 7:18 AM	JAR File	3	KB	
Documents						
J Music						
Pictures						

8. Paste the unzipped files in the

Program Files (x86)\Informatica Cloud Secure Agent\jre\lib\security directory and overwrite the existing files.

🔊 🖉 🕨 🗸	tica Cloud Secure Agent + jre + lib + security	÷ 🔯	Search security	
ganize 👻 📄 Open	Burn New folder) i =
Favorites	Name ^	Date modified	Type	Size
Cesktop	blacklist	5/2/2012 10:49 AM	File	1 KB
Downloads	cacerts	5/2/2012 10:49 AM	File	80 KB
E Recent Places	java.policy	5/2/2012 10:49 AM	POLICY File	3 KB
- Librarian	java.security	5/2/2012 10:49 AM	SECURITY File	11 KB
Documents	javaws.policy	5/2/2012 10:49 AM	POLICY File	1 KB
J Music	local_policy.jar	5/14/2012 1:23 PM	JAR File	3 KB
Fictures	trusted.lbraries	5/2/2012 10:49 AM	LIBRARIES File	14 KB
🚼 Videos	US_export_policy.jar	5/14/2012 1:23 PM	JAR File	3 KB

Adjusting the Settings for Your System

1. In the Administrator Windows PowerShell window, identify your domain name.

In our example, the domain name is MSDVM.



2. Use Notepad to edit the krb5.conf file, which is located in the

Program Files (x86)\Informatica Cloud Secure Agent\main\bin\rdtm\javalib\msdcrm\conf directory, and enter the values for your system.

In our example, the domain is MSDVM.COM, and the machine name where the CRM is located is crm2011local.

The following is an example krb5.conf file.

```
[libdefaults]
default_realm = MSD.SAMPLE.COM
default_tkt_enctypes = rc4-hmac
default_tgs_enctypes = rc4-hmac
permitted_enctypes = rc4-hmac
[realms]
MSD.SAMPLE.COM = {}
kdc = xxx.msd.sample.com
default_domain = MSD.SAMPLE.COM
}
[domain_realm]
.MSD.SAMPLE.COM = MSD.SAMPLE.COM
```

3. Save the file.

(!) Important Note: If the CRMAppPool is running as *Network Service*, skip the following step:

4. Use Notepad to edit the login.conf file, which is located in

```
Program Files (x86)\Informatica Cloud Secure
Agent\main\bin\rdtm\javalib\msdcrm\conf
```

directory, and enter the values for your system.



CRMDynamics is the user under which the MS Dynamics has been installed.

5. Save the file.

Completing the Optional Steps

Optional Step for Only When the MSD Application is Accessed using HTTPS

This step is required only if you are using self-signed certificates.

- 1. Configure the Java Security for Microsoft Dynamics Active Directory (MSD AD) instance.
- 2. Generate the root and intermediate Secure Socket Layer (SSL) certificates for HTTPS URL (.cer files).
- 3. Use the command line to install certificates (certs) for JRE.
 - a. Use CMD and navigate to <agentdir>/jre/bin/
 - b. Type the command: keytool -importcert -alias <certificate alias name> file " <certificate path>\<certificate filename>" -keystore
 ..\lib\security\cacerts -trustcacerts

Where Certificate Alias Name is any unique name and file is the full path to the .cer files

Example: Root certificate = RootCA1.cer

keytool -importcert -alias MSDROOT -file " <file path>\ RootCA1.cer " -keystore ..\lib\security\cacerts -trustcacerts

Default JRD password: changeit

Optional Step When the DNS Is Unable to Perform Host Resolution

If the DNS is improperly set, you might need to add the IP address and hostname to your hosts file to resolve the hosts used for MSD deployment. For example, in Windows 7, the IP address can be found in this directory - C:\Windows\System32\drivers\etc.

Restarting the Secure Agent

• Open the Informatica Cloud Secure Agent window, and click Restart.



The Informatica Cloud Secure Agent starts up.

NFORM	Atica Cloud Secure Agent	0
) The Secure A	gent is starting up	
Restart	Shuts down the Secure Agent if it is running, then starts it up again.	
Stop	Shuts down the Secure Agent.	
Ртаку	Enter or edit your proxy server information.	

A message displays to inform you that the Secure Agent is up and running.



After you have completed these steps, you are ready to schedule new and refresh batch jobs (see "Scheduling Batch Jobs" on page 6-1).



6 Scheduling Batch Jobs

Scheduling New and Refresh Batch Jobs	6-1
Scheduling a New Batch Job	
Scheduling a Refresh Batch Job	

Scheduling New and Refresh Batch Jobs

For batch processing turnaround time, see "Processing Batches — Standard Level Expectation" on page 8-10.

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.

After the first run of New Batch job completes successfully, you can run both jobs in any order or in parallel.

Note: For both New Batch Jobs and Refresh Batch Jobs, the start date and time is a mandatory field. To cancel a job that you've scheduled to run at a future date and time, enter a past date and time. If your job has already started, you cannot cancel it.

Scheduling a New Batch Job

1. In the D&B360 Administration window, click Batch Setup.



2. In the CRM Connection Credentials area, type your User and Password information.

D&B360 Batch Administration	About D&B360
D&B360 batch synchronizes data between Microsoft Dynamics CRM and D&B. The batch runs in the background to make sure you have access to the D&B360 latest D&B data at your fingertips. Specify schedule for running batch jobs.	
New Batch Activity Logs Refresh Batch Activity Logs	
CRM Connection Credentials	
User CRM Service URL 4	
Password	
New Batch Schedule	
Refresh Batch Schedule	

- 3. In the **New Batch Schedule** area, enter the **Start Time** for a new batch:
 - a. To set the date, type it or use the calendar.
 - b. To set the time, type it or use the clock.
- 4. In the **Confidence Code** field, select from 1 to 10. The default is **8**. We recommend using a relatively high confidence code.
- 5. Click Save.

D&B360 Back D&B360 batch D&B360 have access to	atch Administration synchronizes data betwee the latest D&B data at yo	n en Microsoft Dy ur fingertips, Sy	namics CRM and D&B. The to pecify schedule for running b	batch runs in the background to make sure you batch jobs.	<u>.bout D&B360</u>
New Batch Activity Log	s Refresh Batch A	Activity Logs	Admin Review List		
CRM Connection C	redentials				^
+ New Batch Schedu	le				
Start Time	5/23/2012	15 at	12:30 AM 🚔 🕓	Confidence Code 8	-
Repeat Frequency	None	-			_
				Click Save.	•
					Save

6. In the **Repeat Frequency** area, use the menu to specify how often you want to run the batch job, either **None**, **Daily**, or **Monthly** (see "Repeat Frequency" on page 6-3).

Note: The **Start Time** field, which includes the calendar date and time of day, is mandatory.To cancel a job that you've scheduled to run at a future date and time, enter a past date and time. If your job has already started, you cannot cancel it.

In our example, the Repeat Frequency is set to Monthly, and the Repeat Options are set to Repeat Indefinitely.

← Refresh Batch Schedule
Start Time <m d="" yyyy=""> 15 at</m>
Repeat Frequency Monthly
Repeat Frequency Options: Monthly
Run the task:
 Day of every month
◯ The
Repeat Options:
 Repeat indefinitely
○ Repeat until <m d="" yyyy=""> 15 at</m>

	Repeat Frequency				
	None	Daily	Monthly		
Run the Task	Select Start Time and Date	Select Every day or Every weekday	 Select Day of the month, or Select the first, second, third, fourth, or last day of every month 		
Repeat Options	N/A	Select Repeat indefiRepeat until and che	nitely or pose the date and time.		

Scheduling a Refresh Batch Job

Before you can schedule a Refresh Batch Job, which repeats a previous batch job, you must have run a New Batch job at least once (see "Scheduling a New Batch Job" on page 6-1).

- 1. In the D&B360 Batch Administration window, click Refresh Batch Schedule.
- 2. Follow the instructions in the previous section for setting the **Start Time**, **Repeat Frequency**, and **Repeat Options**.

Note: The **Start Time** field, which includes the calendar date and time of day, is mandatory.To cancel a job that you've scheduled to run at a future date and time, enter a past date and time. If your job has already started, you cannot cancel it.

For example, if you want to set the Repeat Frequency to Monthly, you can specify which day of the month and which day of the week to repeat the job as shown in the following illustrations:

New Batch Activity Logs	Refresh 8a	nch Activity Logs	Admin Review List		
RM Connection Cre	dentials				
New Batch Schedule					
Start Time	M/(P)000/P	15 at	00	Confidence Code	8.4
Repeat Frequency	Vone				
lefresh Batch Sched	ule				
start line	/28/2012	15 at	750 AM ()		
Repeat Frequency	Vorithly				
Repeat Frequency C	ptions: Month	y			
O Day *	of every month				
0.					
• The first		 of every month 			
Repeat Optic second					
Repear third fourth					
C Repeat last	415/10721	(15) at	÷ 0		
D&B360 Bat	ch Administra nchronizes data be	tion etween Microsoft Dyna	mics CRM and D&B. The batch runs in	the background to make sure y	you have acc
D&B360 Batt DB8360 batch sy BB360	ch Administra nchronices data bi	tion etween Microsoft Dyna	mics CRM and D&B. The batch runs in	the background to make sure y	ou have acc
D&B360 Batt D&B360 batch sy New Batch Activity Logs	ch Administra nchronizes data br	tion etween Microsoft Dyna tich Activity Logs	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y	you have acc
D&B360 Bat D&B360 batch sy AB360 New Batch Activity Logs CRM Connection Cre	ch Administra nchronizes data br Refresh Ba odentials	tion etween Microsoft Dyna etch Activity Logs	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure ;	you have acc
D&B360 Bat DB8350 batch sy Sisson New Batch Activity Logs CRM Connection Cre New Batch Schedule	ch Administra nchronizes data br Refresh Ba identials	tion tween Microsoft Dyna tich Activity Logs	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure ;	you have acc
D&B360 Bat DB8360 batch sy RE350 New Batch Activity Logs CRM Connection Cre New Batch Schedule Start Time	ch Administra nchronices data be Refresh Ba edentials	tion etween Microsoft Dyna tich Activity Logs	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y Confidence Code	rou have acc
D&B360 Bat DB8360 batch sy B3360 New Batch Activity Logs CRM Connection Cre New Batch Schedule Start Time Repeat Frequency	ch Administra nchronices data bu Refresh Ba Indentials	tion etween Microsoft Dyna tich Activity Logs	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y Confidence Code	you have acc
D&B360 Bat D&B360 batch sy b30300 New Batch Activity Logs CRM Connection Cre New Batch Schedule Start Time Repeat Frequency Refresh Batch Sched	ch Administra nchronizes data bu Refresh Ba sidentials (M/Wyyy)= None ule	tion etween Microsoft Dyna fich Activity Logs	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y	you have acc
D&xB360 Bat D&B350 batch sy Esison New Batch Activity Logs CRM Connection Cre New Batch Schedule Start Time Repeat Frequency Refresh Batch Sched Start Time	ch Administra nchronizes data br Refresh Ba sidentials M/W/Wyyye None ule W28/2012	tion etween Microsoft Dyna tch Activity Logs	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y	sou have acc
D&B360 Bat DB8360 batch sy 85350 New Batch Activity Logs CRM Connection Cre New Batch Schedule Start Time Repeat Frequency Refresh Batch Sched Start Time	ch Administra nchronizes data br Refresh Ba rdentials rd/d//////////////////////////////////	tion etween Microsoft Dyna tich Activity Logs at tich at tich at	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y	sou have acc
D&B360 Bat DB8360 batch sy BE350 New Batch Activity Logs CRM Connection Cre New Batch Schedule Start Time Repeat Frequency Refresh Batch Sched Start Time Repeat Frequency	ch Administra mohonizes data bi Refresh Ba cdentials (M/d/)yyyo None ule b/28/2012 Monthly	tion etween Microsoft Dyna tich Activity Logs	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y Confidence Code	su have acc
D&B360 Bat DB8360 batch sy BB360 New Batch Activity Logs CRM Connection Cre New Batch Schedule Start Time Repeat Frequency Refresh Batch Sched Start Time Repeat Frequency Repeat Frequency	ch Administra mchronizes data bi Refresh Ba clentials cl//d/yyyr= None ule v28/2012 Monthly Options: Monthly	tion etween Microsoft Dyna tich Activity Logs	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y	s v
D&B360 Bat DB8360 batch sy B3360 New Batch Activity Logs CRM Connection Cre New Batch Schedule Start Time Repeat Frequency Refresh Batch Sched Start Time Repeat Frequency Repeat Frequency Run the task	ch Administra mehronizes data bi Refresh Ba identials (M/Wyyy)* None ule v28/2012 Monthly Options: Monthly	tion etween Microsoft Dyna fich Activity Logs 155 at 155 at	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y	s v
D&B360 Bat DB8360 batch sy AB360 New Batch Activity Logs CRM Connection Cre New Batch Schedule Start Time Repeat Frequency Refresh Batch Sched Start Time Repeat Frequency Repeat Frequency Run the task: Day *	ch Administra meheonizes data be Refresh Ba identials (M/Wyyy)= None ule v28/2012 Monthly Options: Monthly of every month	tion etween Microsoft Dyna nch Activity Logs	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y	s v
D&B360 Bat DB8360 batch sy based New Batch Activity Logs CRM Connection Cre New Batch Schedule Start Time Repeat Frequency Refresh Batch Sched Start Time Repeat Frequency Repeat Frequency Repeat Frequency Run the task: Day The	ch Administra mchronizes data be Refresh Ba scientials M/0/yyyse None ule V28/2012 Monthly Options: Monthly of every month •	tion etween Microsoft Dyna tch Activity Logs 15 at v y v of every month	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y	su have acc
Base Activity Logs D&B360 batch sy Base Activity Logs CRM Connection Cre New Batch Activity Logs CRM Connection Cre Start Time Repeat Frequency Refresh Batch Sched Start Time Repeat Frequency Repeat Frequency Run the task: Day The	ch Administra mchronizes data be Refresh Ba scientials M/W/Wyyye None ule W28/2012 Monthly Options: Monthly of every month day	tion etween Microsoft Dyna tch Activity Logs 15 at v y of every month	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y	su have acc
D&B360 Bat DB8360 batch sy B3300 New Batch Activity Logs CRM Connection Cro New Batch Schedule Start Time Repeat Frequency Refresh Batch Sched Start Time Repeat Frequency Repeat Frequency Run the task Day The Repeat Options:	ch Administra mchronizes data be Metresh Ba cdentials MVWyyyye None ule V28/2012 Monthly Options: Monthly of every month day Sourcey Monday	tion etween Microsoft Dyna tch Activity Logs 15 at v v v of every month	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y	s v
D&B360 Bat DB8360 batch sy AB360 New Batch Activity Logs CRM Connection Cru New Batch Schedule Start Time Repeat Frequency Refresh Batch Sched Start Time Repeat Frequency Repeat Frequency Run the task Day The Repeat Options: Repeat Options: Repeat Options:	ch Administra mchronizes data bi Refresh Ba identials idential	tion etween Microsoft Dyna tch Activity Logs 15 at v v v of every month	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y	su have acc
D&B360 Bat D&B360 batch sy basso New Batch Activity Logs CRM Connection Cru New Batch Schedule Start Time Repeat Frequency Refresh Batch Sched Start Time Repeat Frequency Repeat Frequency Repeat Frequency Day Day Day Day Day Day	ch Administra inchronizes data bi Refresh Ba indentials MM/M/M/M/ None ule M28/2012 Monthly Options: Monthly of every month i Sunday ely Monday	tion etween Microsoft Dyna tich Activity Logs	mics CRM and D&B. The batch runs in Admin Review List	the background to make sure y	sou ha

3. To save these batch settings, click **Save**.



7 Reviewing Logs, Admin Review Lists, and D&B360 Reports

After you have scheduled batches, you need to monitor the batch processes and be alert for incomplete results. You also need to review the results from batch jobs.

Accessing the Callout Logs	. 7-1
Accessing the Administrator Review List	7-3
Using the Admin Review List	7-3
Viewing and Processing Failed Batched Records Listed in the Administrator Review List	7-4
Viewing D&B360 Reports	7-6
Duplicate DUNS Report	7-6
Using the Duplicate DUNS Report to Merge Duplicate Accounts	7-6
Recertified DUNS Report	. 7-7

Accessing the Callout Logs

Callout logs track all WebService calls made between your CRM system and D&B.

1. In the left menu, select D&B360 -> D&B Callout Logs.



		Deb Canour Logs. Active Canour Logs +		Isearci	TOTIECOLUS
Solutions Dynamics Marketplace		Transaction Id	Callout Operations	Created By	Created On 🔻
Dynamics XRM Tools		🗏 🌄 DE151680-1DED-450A-832A-875BCD45ACFC	DNB Build a List	Product Team	8/27/2012 8:50
X Start		🗌 🌄 3A50E5A6-FC18-42AE-8451-E5A60F10812B	DNB Contact Search	Product Team	8/27/2012 8:50
Process Center		🗌 🌄 2B519E83-9B86-458E-A0C3-0EDC3F28C999	DNB Build a List	Product Team	8/27/2012 8:48
🛃 Processes		EA0AEE11-8B8D-4E86-BB94-59AC25324848	DNB Contact Search	Product Team	8/27/2012 8:48
D&B360		🗌 🌄 DA6FD5F8-F4CC-4A5E-9534-9ABE9BC5CD86	DNB Build a List	Product Team	8/27/2012 8:48
D&B360 Administrati		🗌 🌄 🛛 F7FA4271-7824-49CA-B161-9AF519E26EA7	DNB Contact Search	Product Team	8/27/2012 8:48
💐 D&B Callout Logs	1	🗏 🌄 516DE6E1-3C77-40D6-A438-C80A18EBC695	DNB Build a List	Product Team	8/27/2012 8:48
💐 D&B Lookups	-1	🗆 🌄 70B65DD0-159E-4796-AE41-80CB040C54D2	DNB Build a List	Product Team	8/27/2012 8:48
Workplace		🗏 🌄 B4528A38-0894-4AA4-A7FD-4C0564C76D8F	DNB Contact Search	Product Team	8/27/2012 8:48
		🗏 🌄 267FB6E4-265C-4DBB-8E31-4D6C332A1AE9	DNB Contact Search	Product Team	8/27/2012 8:48
Sales		🗏 🌄 86E6DC28-2CB8-4480-BF8A-A86FA419D9C8	DNB Build a List	Product Team	8/27/2012 8:48
🏷 Marketing		🗏 🌄 B0378FCE-E951-4D9F-A1F7-988672ADBC7A	DNB Build a List	Product Team	8/27/2012 8:48
🚳 Service		🗌 🌄 2DC77365-4ED8-4D82-904F-4275976A97A7	DNB Contact Search	Product Team	8/27/2012 8:48
		٠ [

2. To get additional information about a transaction, click the Transition Id.

Information about this transaction displays in a new window.

D&B Callout L DE151680	.og D-1DED-450A-832A-875BCD	45ACFC	D&B Callout Logs 🔻 🛊 🌷
General			
mansaction to	DE151680-1DED-450A-832A-875BCD45AC	FC _	
Callout Operations	DNB Build a List	Created By	September 2015 Product Team
Request	Partner Area: Sender: TPAccountID : 00000000000000000 TPCUserID : dnb360_product@dnb.com Data Area: OrderRequest: BAL: MaxRecords : 1 SpecialtyCriteria: DUNS: 114315195	Response	Status Code: 1 Description: Success - good call

Accessing the Administrator Review List

• In the D&B360 Administration window, select Batch Processing Setup -> Admin Review List. You can also click Admin Review List in the D&B360 Batch Administration window.

▼ Batch Process Batch Processin	sing Setup	Sele Rev	ct Admin iew List.	$\Big]$
Batch Setup	Admin Review List			

Using the Admin Review List

Two failure types are reported after batch processing:

Failure Type	Means that
Data Quality	the Data Quality of the Account Record failed to 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

Note: Records that fall below the defined Confidence Code Threshold are moved to the Admin Review List. They are not automatically re-processed in the next batch run. You must manually process these records.

1. In the D&B360 Admin Review window, next to each failed record that you need to resolve, click Select.

D&B D&B360	D&B360 Admin Review		
Action	Account	Failure Type	Failure Description
Select	Designer Goods (sample)	Below CC Threshold	The DNB360 record was below the configured confidence code value specified
Select	Elemental Goods (sa <u>pple)</u>	Below CC Threshold	The DNB360 record was below the configured confidence code value specified
Select	Click Select.	Below CC Threshold	The DNB360 record was below the configured confidence code value specified
Select	Blue Company (sample)	Below CC Threshold	The DNB360 record was below the configured confidence code value specified
Select	Advanced Components (sample)	Below CC Threshold	The DNB360 record was below the configured confidence code value specified
Select	A Store (sample)	Below CC Threshold	The DNB360 record was below the configured confidence code value specified
Select	Affordable Equipment (sample)	Below CC Threshold	The DNB360 record was below the configured confidence code value specified
Select	Grand Store (sample)	Below CC Threshold	The DNB360 record was below the configured confidence code value specified
Select	Best o' Things (sample)	Below CC Threshold	The DNB360 record was below the configured confidence code value specified
Select	Litware Inc. (sample)	Below CC Threshold	The DNB360 record was below the configured confidence code value specified
Select	Magnificent Store (sample)	Below CC Threshold	The DNB360 record was below the configured confidence code value specified
Select	Recreation Supplies (sample)	Below CC Threshold	The DNB360 record was below the configured confidence code value specified
Select	Unusual Store (sample)	Below CC Threshold	The DNB360 record was below the configured confidence code value specified
Select	Variety Store (sample)	Below CC Threshold	The DNB360 record was below the configured confidence code value specified

2. In the D&B Account Search window, click Select to view the results.

ompany Name *	Ferguson Masonry Inc		Country *	United States			
ty	Austin		State/Province *	Texas			
idress	Pecan Park Rd		Postal Code	78750			
one							
👔 = Existing /	Account 🔥 = Existing Contact 🔥	= Existing Lead					
Existing A	Account 🛕 = Existing Contact 🛕	= Existing Lead Address	City	State/Province	Country	Postal Code	Phone
	Account 🛕 = Existing Contact 🛕	= Existing Lead Address 11201 THORNY BROOK TRL	City AUSTIN	State/Province TX	Country US	Postal Code 78750-1040	Phone (512) 33
= Existing / Match Info *****1808 *****7307	Account 🛕 = Existing Contact 🛕	Existing Lead Address 11201 THORNY BROOK TRL 10807 LITTLE THICKET RD	City AUSTIN AUSTIN	State/Province TX TX TX	Country US US	Postal Code 78750-1040 78736-7440	Phone (512) 33 (512) 29
= Existing / Match Info *****1808 *****7307 *****8418	Account	Existing Lead Address 11201 THORNY BROOK TRL 10807 LITTLE THICKET RD 504 INDUSTRIAL BLVD	City AUSTIN AUSTIN AUSTIN	State/Province TX TX TX TX	Country US US US	Postal Code 78750-1040 78736-7440 78745-1211	Phone (512) 33 (512) 29 (512) 44
= Existing / Match Info *****1808 *****7307 *****8418 *****4576	Account	Existing Lead Address 11201 THORNY BROOK TRL 10807 LITTLE THICKET RD 504 INDUSTRIAL BLVD 98 SAN JACINTO BLVD STE 1810	City AUSTIN AUSTIN AUSTIN AUSTIN	State/Province TX TX TX TX TX	Country US US US US US	Postal Code 78750-1040 78736-7440 78745-1211 78701-4237	Phone (512) 33 (512) 29 (512) 44 (512) 43
Existing / Match Info *****1808 *****8418 *****8418 *****4576 *****9421	Account	Existing Lead Address 11201 THORNY BROOK TRL 10807 LITTLE THICKET RD 504 INDUSTRIAL BLVD 98 SAN JACINTO BLVD STE 1810 9513 BROWN LN STE A	City AUSTIN AUSTIN AUSTIN AUSTIN AUSTIN	State/Province TX TX TX TX TX TX TX	Country US US US US US US	Postal Code 78750-1040 78736-7440 78745-1211 78701-4237 78754-4055	Phone (512) 33 (512) 29 (512) 44 (512) 47 (512) 96
Existing A Match Info ******1808 ******8418 ******8418 ******8418 ******8418 ******8418	Account	Existing Lead Address 11201 THORNY BROOK TRL 10807 LITTLE THICKET RD 504 INDUSTRIAL BLVD 98 SAN JACINTO BLVD STE 1810 9513 BROWN LN STE A 3701 N HILLS DR	City AUSTIN AUSTIN AUSTIN AUSTIN AUSTIN AUSTIN	State/Province TX TX TX TX TX TX TX TX TX	Country US US US US US US US	Postal Code 78750-1040 78736-7440 78745-1211 78701-4237 78754-4055 78731-3021	Phone (512) 33 (512) 29 (512) 44 (512) 47 (512) 96 (512) 34

After you find the match for the correct company and add it to the D&B360 object, the failed record is removed from the Admin Review List.

Viewing and Processing Failed Batched Records Listed in the Administrator 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.



Viewing D&B360 Reports

The two D&B360 reports that are valuable in the review and resolution of some common situations include:

- Duplicate DUNS Report
- Recertification Report

Duplicate DUNS Report

If more than one account with the same D-U-N-S Number exists, it is listed on the Duplicate DUNS report.7.

Note: The tier level of your license agreement determines the type of access you have: Tier 1: Access to report, but cannot merge accounts.

To resolve duplicates, you need to review the information in each of the duplicates and then:

- Decide which one is the master that is, which one should be the primary selection.
- 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 from more than one account into the master. However, you must do the merge operations one at a time since the merge function merges information from two sources at a time.

Using the Duplicate DUNS Report to Merge Duplicate Accounts

You can merge a maximum of two accounts at a time.

1. In the D&B360 Duplicate D-U-N-S window, select the two account records you want to merge.

Duplicate D-U Click on Merge icon	-N-S to select Master Account for merge process. The Master	Record selected will retain read-only and hidden f	field values.
D-U-N-S	Duplicate Accounts		
001344746	Account Name Ford Motor Company Ford Motor Company Ford Motor Company Ford Motor Company - HQ	Owner Marcia Kubersky Marcia Kubersky Marcia Kubersky Monica Sluyter	Click Merge Merge.
	Account Name	Owner	Merpe

- 2. Above the check boxes, click **Merge**.
- 3. In the Merge Records window, select the data you want to retain after the merge is complete.

4. Select which of the accounts will be the Master record. You can select which fields on which records you want to take precedence.

Master Record and Field Sele	ection				
Master Record :	C	Brond Motor Company		•	Ford Motor Company - HQ
	C	Select all fields in this section			Select all fields in this section
Account Name *	C	Ford Motor Company		œ	Ford Motor Company - HQ
Address	(•	Select all fields in this section		C	Select all fields in this section
Street 1	¢	1 American Rd		C	1 American Rd
City	(·	Dearborn		C	Dearborn
State/Province	•	MI		C	MI
ZIP/Postal Code	•	48126-2701		C	48126-2701
Country/Region	۲	US		C	US
Phone		(313) 322-3000		C	(313) 322-3000
Description	C	Select all fields in this section			Select all fields in this section
Description	0	Ford Motor began a manufacturing revolution with mass production assembly lines in the early 20th century, but today, it is one of the world's largest automakers.	4		Ford Motor began a manufacturing revolution with mass production assembly lines in the early 20th century, but today, it is one of the world's largest automakers.
	0	Select all fields in this section		•	Select all fields in this section
D&B Company	0	Ford Motor Company		•	Ford Motor Company
Update Available	0	No		•	No
Professional Information	C	Select all fields in this section		•	Select all fields in this section
Annual Revenue	0	\$128,954,000,000.00		•	\$128,954,000,000.00
No. of Employees	0	198,000			198,000

(!) Important Note: After accounts are merged, all contacts, opportunities, attachments, notes, and so forth from the subordinate account are moved to the master account record. It is recommended that you carefully evaluated the fields in the Merge Records window before merging the accounts.

5. To complete the merge process, click **OK**.

Recertified DUNS Report

Information about a company might change periodically, which triggers a change in the D-U-N-S Number.

Use the recertified DUNS Report to identify these issues so that you understand. If necessary, you can modify your account information.

This feature is avilable only for Tier 2 licenses.

Click on the D-U-N-S N	umber link to see associ	ated accounts.	
D-U-N-S Number	Recentified Date -	Reason Code =	Description
024505324	01/01/2010	A	D-U-N-S Number changed due to being identified as a duplicate in D&B's d
027595375	03/26/2004	R	D-U-N-S Number has been reinstated in D&B's global database.
883524413	04/01/2006	т	D-U-N-S Number changed within D&B's global database.
134255244	04/18/2001	E	D-U-N-S Number changed due to being identified as a duplicate in D&B's d
130042778	07/18/2002	м	D-U-N-S Number changed due to a Merger or Acquisition.
195020895	09/12/2007	T.	D-U-N-5 Number changed within D&B's global database.



8 Troubleshooting

Enabling D&B360 Administration on a Customized SiteMap	8-1
Finding Your SOCID and TPCID	8-10
Processing Batches — Standard Level Expectation	8-10
Resolving Installation Issues	8-11
Resolving Problems	8-12

Enabling D&B360 Administration on a Customized SiteMap

If you customized your site map (SiteMap), but you are not seeing the D&B360 Site Map options, use these steps to add it.

1. Open the SiteMap Editor window and connect to your CRM.



2. In the SiteMap window, right-click Area (Settings) and select Add Group.

¼ SiteMap Editor for Mi	crosoft Dynamics CRM 2011 (v1.1	.1300.391)
SiteMap Editor for Microsoft Dynamics CRM 2011		
📳 Load SiteMap 🛛 😪 Upd	late SiteMap 🛛 📳 Open SiteMap 🛛 🚽 S	ave SiteMap More actions +
- SiteMap		
- C O X 🖻	2	
SiteMap Area (Workplace Area (SFA) Area (SFA) Area (CS) Area (CS) Area (CS) Area (CS) Area (CS) Area (Res Area (Res X	e) Add default SiteMap Group Add Group Add Descript Add Titles Cut Copy Paste Delete	

- 3. In the **Properties** window:
 - a. In the Id field, type DnB360.
 - b. In the **Title** field, type **D&B360**.

Properties Click Save.	
ld *	DnB360
Uil	
Is Profile	
Resource Id	
Description Resource Id	
Deprecated attributes	
Title	D&B360
Description	

4. In the Site Map Editor window, right-click Group (DnB360) and select Add SubArea.



- 5. In the **Properties** window:
 - a. In the Id field, type dnb_administration.
 - b. In the Entity field, type dnb_settings.
 - c. In the Url field, enter:

\$webresource:dnb_/WebResources/DnB360.Crm.WebResources.Administration.html

- d. In the Title field, type D&B360 Administration.
- e. Click Save.

Properties Click Save.		
ld *	dnb_administration	
Available Offline		
Pass Params		
Client	All 🔲 Outlook 🔲 Outlook Laptop Client	
	Web Outlook Workstation Client	
Entity	dnb_settings Select entity	
Get Started Pane Path		
Get Started Panel Path Admin Outlook		
Get Started Pane Path Admin		
Get Started Pane Path Outlook		
lcon		
Outlook Shortcut Icon		
Sku	🗖 All 🗖 OnPremise 🗖 Live 🗖 SPLA	
Uil	ces/DnB360.Cm.WebResources.Administration.html	
Resource Id		-
Description Resource Id		-
Deprecated attributes		
Title	D&B360 Administration	

6. In the Site Map Editor window, right-click SubArea (dnb_administration) and select Add Privilege.

SiteMap Editor for Microsoft Dynamics CRM 2011 (v1.1.1300.391)		
SiteMap Editor for Microsoft Dynamics CRM 2011		
📰 Load SiteMap 🚼 Update SiteMap 🛛 📰 Open SiteMap 🚽 Save SiteMap 🖉	ore actions	
_ SiteMap		
i 🕲 💿 🔀 🔛 🖻		
⊡. SiteMap		
⊡ Area (Workplace)		
E Area (SFA)		
E Area (CS)		
- Area (Settings)		
⊡ Group (Business_Setting)		
H. Group (System_Setting)		
Group (Costemizations) Er Group (ProcessCenter)		
Group (DnB360)		
SubArea (dnb_administration)		
Add Titles		
Add Privilege		
X Out	ge.	
Paste		
× Delete		

7. In the **Properties** window, **Entity** field, type **dnb_settings**, select **Create**, and then click **Save**.

Properties Click Save.		
Entity	dnb_settings	
Privileges	Create	□ Share
	Read	Assign
	Write	All
	Delete	Allow Quick Campaign
	Append	Use Internet Marketing
	Append to	

8. In the Site Map Editor window, right-click Group (DnB360), and select Add SubArea.



- 9. In the **Properties** window:
 - a. In the **Id** field, type **dnb_calloutlog**.
 - b. In the **Entity** field, type **dnb_calloutlog**.
 - c. Click Save.

Properties Click Save.	
ld *	dnb_calloutlog
Available Offline	
Pass Params	
Client	All 🔲 Outlook 🔲 Outlook Laptop Client
	🔲 Web 📃 Outlook Workstation Client
Entity	dnb_calloutlog Select entity
Get Started Pane Path	
Get Started Panel Path Admin Outlook	
Get Started Pane Path Admin	
Get Started Pane Path Outlook	
lcon	
Outlook Shortcut Icon	
Sku	🗖 All 🗖 OnPremise 🗖 Live 🗖 SPLA
Uil	
Resource Id	
Description Resource Id	
Deprecated attributes	
Title	

10. In the Site Map Editor window, right-click Group (D&B360) and select Add SubArea.



- 11. In the **Properties** window:
 - a. In the **Id** field, type **dnb_lookup**.
 - b. In the **Entity** field, type **dnb_lookup**.
 - c. Click Save.

Properties Click Save.	
ld *	dnb_lookup
Available Offline	
Pass Params	
Client	All 🗖 Outlook 🗖 Outlook Laptop Client
	🗖 Web 🛛 Outlook Workstation Client
Entity	dnb_lookup Select entity
Get Started Pane Path	
Get Started Panel Path Admin Outlook	
Get Started Pane Path Admin	
Get Started Pane Path Outlook	
Icon	
Outlook Shortcut Icon	
Sku	🗖 All 🗖 OnPremise 🗖 Live 🗖 SPLA
Url	
Resource Id	
Description Resource Id	
Deprecated attributes	
Title	

12. Click Update SiteMap.



For on-demand (Live) environments, it might take a few minutes for the settings to take effect. You might want to publish all customizations.

Finding Your SOCID and TPCID

If you need to contact D&B Customer Support, you might be asked to provide your SOCID and TPCID. These identification numbers are specific to D&B360 in your Microsoft Dynamics CRM environment. The TPCID may be better known to you as the globally unique identifier (GUID).

1. In the D&B360 Administration window, click About D&B360.

Ndmini 📷	stration	Click About About D&B360
D&B D&B360		D&B360.

2. In the Support Information area, your TPCID and SOCID display.

Support Information
TPCID : MS-OD-TPC-DNB360ACT
SOCID: 409

Processing Batches — Standard Level Expectation

The standard level expectation (SLE), for batch processing turnaround time, is as follows:

Domestic Batches - 12 hour turnaround

- United States and Canada
- Batch sizes of 50,000 or less
- 90% of files

Global Batches - 24 to 48 hour turnaround

- Any batch containing files outside the United States or Canada
- Batch sizes of 50,000 or less
- 90% of files

Note: System maintenance for D&B Systems occurs Saturday 11 P.M. to Sunday 9 A.M. Eastern. Any batches you submit during this time might be delayed.

(!) Important Note: For batch jobs with more than 500 K (500 thousand) records, you will need to open a customer support ticket. For information on contacting Customer Support, see "Resolving Problems" on page 8-12.

Resolving Installation Issues

These are some of the errors that might occur after you have installed D&B360.

1. After you have completed the installation process, you might receive an error such as the one below:



- 2. In the D&B Callout logs, you might see errors similar to the following:
 - Status Code: -1
 - Description: An error occurred. Please try again.
 - Exception: System.ServiceModel.CommunicationException: [CrossDomainError]
 - Arguments: https://dnbinsight.dnb.com/DaaS/services/RetrieveEntitlementsServiceV30

If any of these errors occur, you need to add the site address of your CRM organization to the Local Intranet zone in the Internet Options, by doing the following:

- 1. Go to IE -> Tools -> Internet Options -> Security.
- 2. Select Trusted Sites -> Site.
- 3. Add the site address of your CRM organization.

eneral Security Privacy Content Connections Programs Advance Select a zone to view or change security settings.	ed
Internet Local intranet Trusted sites Restricted sites	tive. Get CRM for Outlook
Trusted sites This zone contains websites that you trust not to damage your computer or your files. You have websites in this zone. Security level for this zone	You can add and remove websites from this zone. All website this zone will use the zone's security settings.
Custom Custom settings. - To change the settings, click Custom level.	Add this website to the zone: http://msduat.hoovers.com Add
- To use the recommended settings, click Default level. Custom level Default level	Websites: http://biztalk. http://biztalk.austin.hoovers.com http://biztalk-qa http://biztalk-staging http://intrashare.dnb.com
Reset all zones to default level	Require server verification (https:) for all sites in this zone

Resolving Problems

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	SLA Determined with the customer.
Communication	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: <u>http://dnbus.force.com/support?prod=dnb360</u>. You will be prompted to enter your e-mail address and then fill out a form.


Index

Α

about D&B360 2-1 accessing admin review list 7-3 active directory requirements 5-5, 7-3 admin review list accessing 2-6, 7-3 viewing failed batches 7-4 administrators accessing Microsoft Dynamics CRM 4-1 assigning roles 4-9 alerts 2-8 assigning roles 4-9 В batches standard level expectation 8-10 submitting 8-10 blogs, from companies 2-9

С

connecting to Microsoft CRM 2011,CRM Online, or Office 365 3-4 CRM

administrators 2-2

environment 2-4, 8-10

on demand and on premise 2-2

user interface 2-1

customer support SLAs 8-12

D

D-U-N-S numbers

merging 7-6

reports 7-6

D&B360

packages 2-7

reports 7-6

duplicate records 7-6

Е

environment requirements 2-4

F

facebook, for companies 2-9

failed batches 7-4	with Outlook 3-17
favorites 2-8	L
finance, news 2-9	linkedin 2-10
G	Μ
graphical user interface for CRM 2-1	maps 2-9
GUI see graphical user interface 2-1	merging duplicate records using D-U-N-S numbers 7-
I	0 Misses of t
Informatica Cloud Secure Agent	MICROSOTT
configuring for on-demand 5-6	configuring on CRM2011, CRM Online, Office 365 3-4
configuring for on-premise 5-11	Microsoft Dynamics
post-installion steps 5-26	configuring 5-5
preparing MSD and Active Directory 5-19	hosted on https [5] 5-30
restarting 5-31	CRM server requirements 2-4
running installation program 5-14	Ν
installation	new releases 3-12
resolving issues 8-11	news, financial, feeds 2-9
installing	0
Informatic Cloud Secure Agent 5-26	Office 365, connecting as 3-4
secure agent 5-8, 5-14	Outlook
VC++ redistributable package (x86) 5-8	configuring, integrating 3-17
installing D&B360	R
downloading 3-2	reports 7-6
first time 3-3, 3-6, 3-10, 6-1	

requirements	skype 2-10
environments 2-4	SLA
servers 2-4	See Service Level Agreements 8-12
rest of world 2-8	SLE
restarting the secure agent 5-31	see standard level expectation 8-10
roles	social media applications 2-8
available roles 4-3	SOCID, finding 8-10
security roles 4-3, 4-9	SQL server 2-5
S	stocks, news 2-9
secure agent	system settings
preparing MSD and active directory 5-19	adjusting 5-28
restarting 5-31	entering 4-9
running installation program 5-14	т
security roles 4-1	tiers, D&B360 features 2-7
users 2-6, 4-1, 4-9	TPCID, finding 8-10
security roles for users 2-2	troubleshooting
servers	contacting customer support 8-12
requirements 2-4, 2-4	D&B360 site map not displaying 8-1
Service Level Agreements 8-12	installation issues 8-11
setting alerts 2-10	twitter 2-9
settings	U
system, entering 4-9	upgrading D&B360 3-12
site map, troubleshooting 8-1	user interface 2-1

users

accessing Microsoft Dynamics CRM 4-1

assigning roles 4-9

assigning roles, security 4-1, 4-3

V

VC++ redistributable package

installing 5-6, 5-8

videos 2-9

Y

YouTube 2-9



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