D&B360 Administration and Installation Guide

for Microsoft Dynamics CRM

Version 2.3

Table of Contents

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 command-line interface.

Navigating in the PDF

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

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

Related Documentation

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

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.

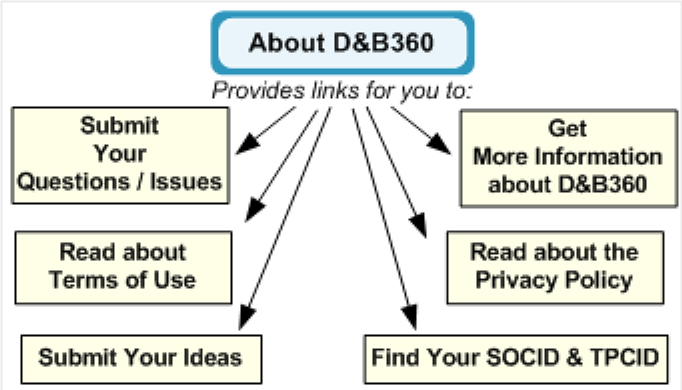
For that reason, this guide is organized by functions or tasks you are trying to accomplish. References to links or menu options that help you navigate your CRM are also included.

2 Getting Started

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 (support@informatica.com) to request deletion of the existing Org ID. All users that belong to this Org ID will also be deleted.

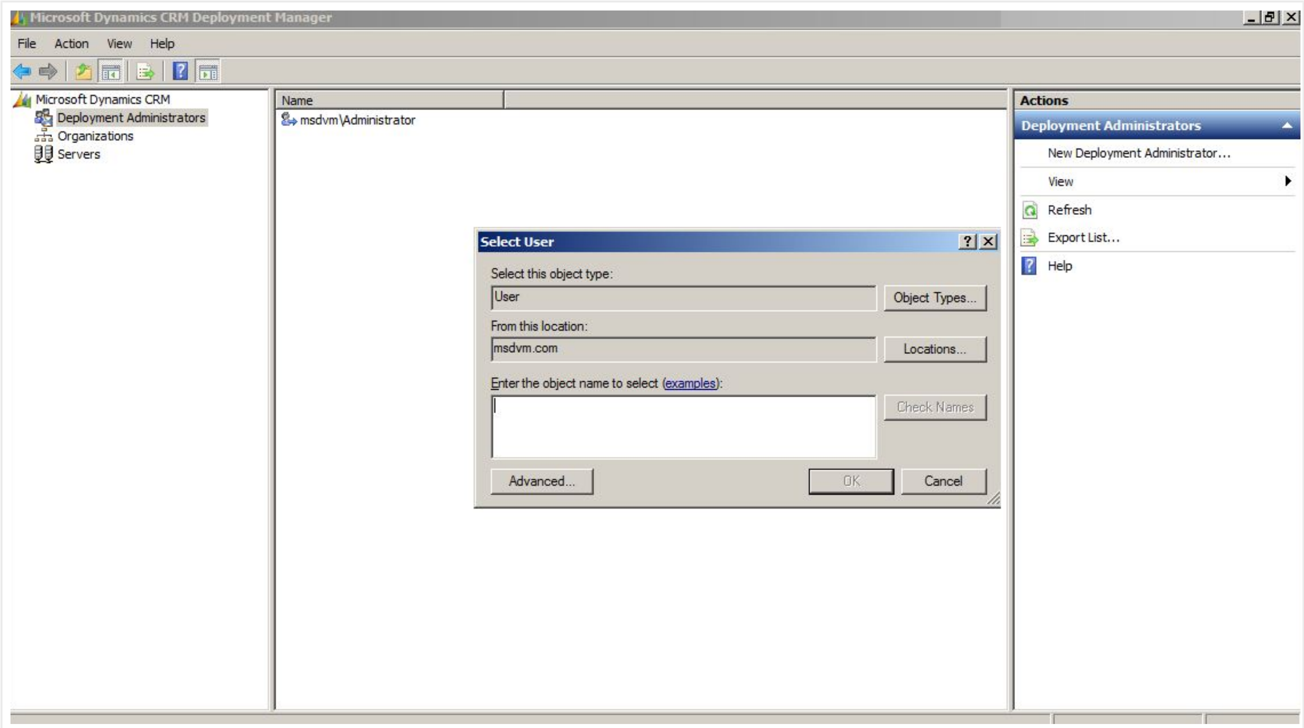
> **Note:** During auto-registration, the Org ID will most likely be different from your previous Org ID. Org IDs are generated automatically for all registrations.

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**.


Microsoft Dynamics CRM Deployment Manager
File Action View Help
Microsoft Dynamics CRM
Deployment Administrators
Organizations
Servers
Name
msdvm\Administrator
Actions
Deployment Administrators
New Deployment Administrator...
View
Refresh
Export List...
Help
Select User
Select this object type:
User
Object Types...
From this location:
msdvm.com
Locations...
Enter the object name to select (examples):
Check Names
Advanced...
OK
Cancel

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 **Note:** Computers with more than 16 GB of RAM require more disk space for paging, hibernation, and dump files.	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: 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: http://technet.microsoft.com/en-us/library/hh699840.aspx

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: http://technet.microsoft.com/en-us/library/hh699808.aspx

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 – http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=17851
- 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.

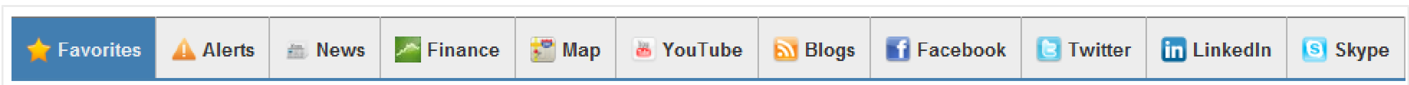
Tier Level	Features Supported
Tier 1 applies only to the Microsoft Dynamics On-Demand CRM and is available for 5 to 100 seats.	• Company and Contact Data • Company Search • Company Record Creation • Contact Search • Contact Record Creation • Build A List • Prospecting/List Building • Rest of World Data • Segmentation 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

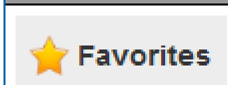
Rest of World, or ROW, refers to social media applications and news feeds about the companies you are interested in. These applications interact with your CRM and D&B360 to provide useful information related to D&B360 data. D&B360 ROW applications display as follows:



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.

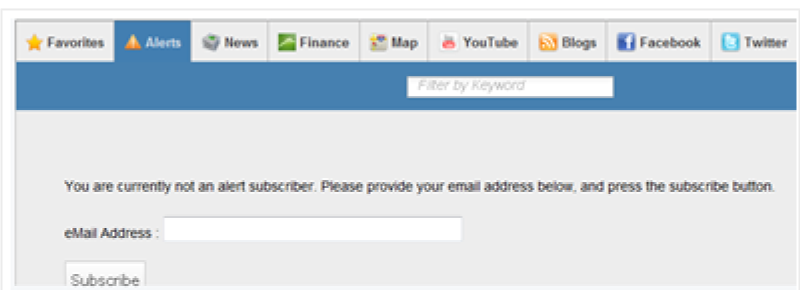
ROW Icons	Description
	Allows you to save items of interest to you and stores them in this tab. To add an item as a favorite, such as a news story, click the **Star** icon. When you see your cursor pointer change into a little hand, click **Mark as a Favorite**.
	Allows you to track news so you can create 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.
Finance	Displays stock feeds and financial news feeds about a company from a variety of sources.
Map	The Map icon pre-populates the Account Billing address and connects to Microsoft Bing Maps to show the address location.
YouTube	YouTube is a video-sharing website where users can upload, share, and view videos. A list of YouTube videos displays from companies in your D&B360 accounts. Only company-authorized videos display.
Blogs	Blogs display a list of authorized blogs from companies in your D&B360 accounts.
Facebook	Facebook is a social utility that facilitates communication. Only company authorized Facebook pages display for each company. To view Facebook information about people and companies from within D&B360, you need to have a Facebook account. A Facebook window opens to the account page you are currently viewing if it exists in the database. To view the company Facebook information, if you are not already logged in to Facebook, log in to your Facebook account.
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.

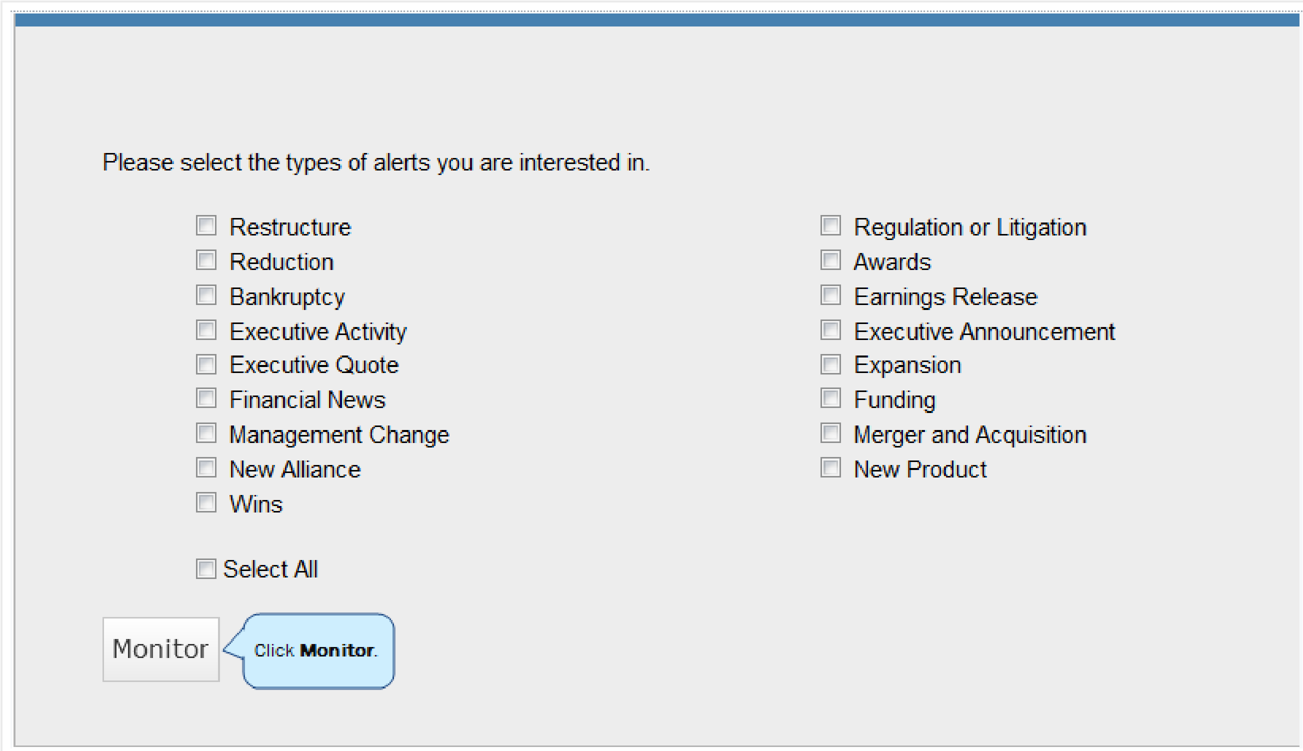
ROW Icons	Description
LinkedIn	LinkedIn is a business-oriented social networking site where you can connect with trusted contacts and exchange knowledge, ideas, and opportunities. If you are not already logged in to LinkedIn, you will need to log in when it opens in a browser window. If the account you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

Setting Alerts

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



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


Please select the types of alerts you are interested in.
Restructure
Reduction
Bankruptcy
Executive Activity
Executive Quote
Financial News
Management Change
New Alliance
Wins
Regulation or Litigation
Awards
Earnings Release
Executive Announcement
Expansion
Funding
Merger and Acquisition
New Product
Select All
Monitor
Click Monitor.

3 Installing D&B360

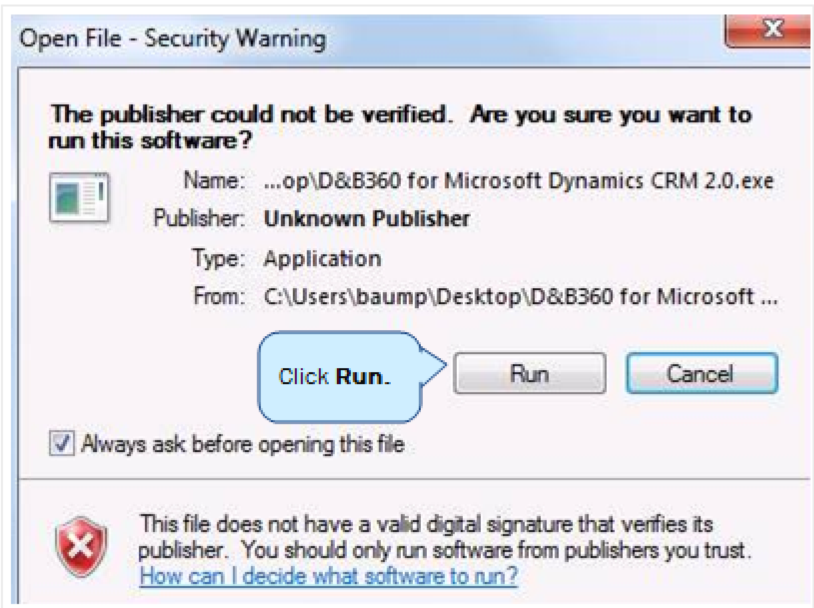
The following instructions guide you through the installation, set-up, and configuration of D&B360 in your company's instance of Microsoft Dynamics CRM.

Downloading and Initiating the D&B360 Installation

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**.

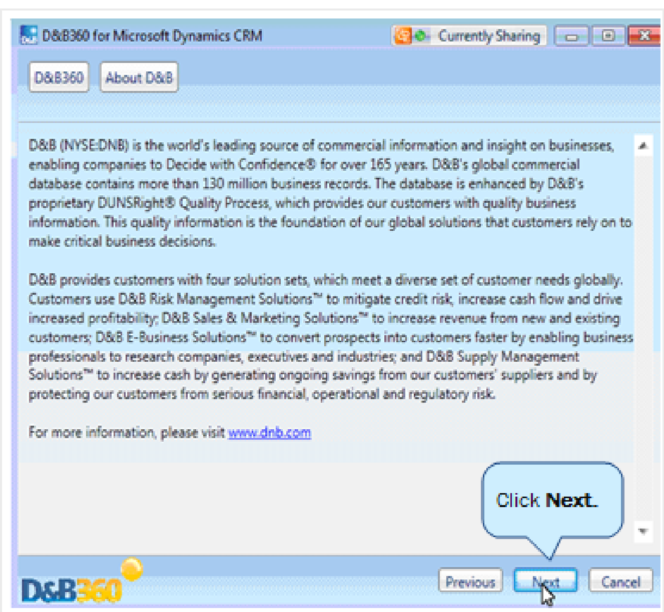


Initial Steps: for Installing D&B360 for the First Time, for Upgrading D&B360, and for Re-installing D&B360

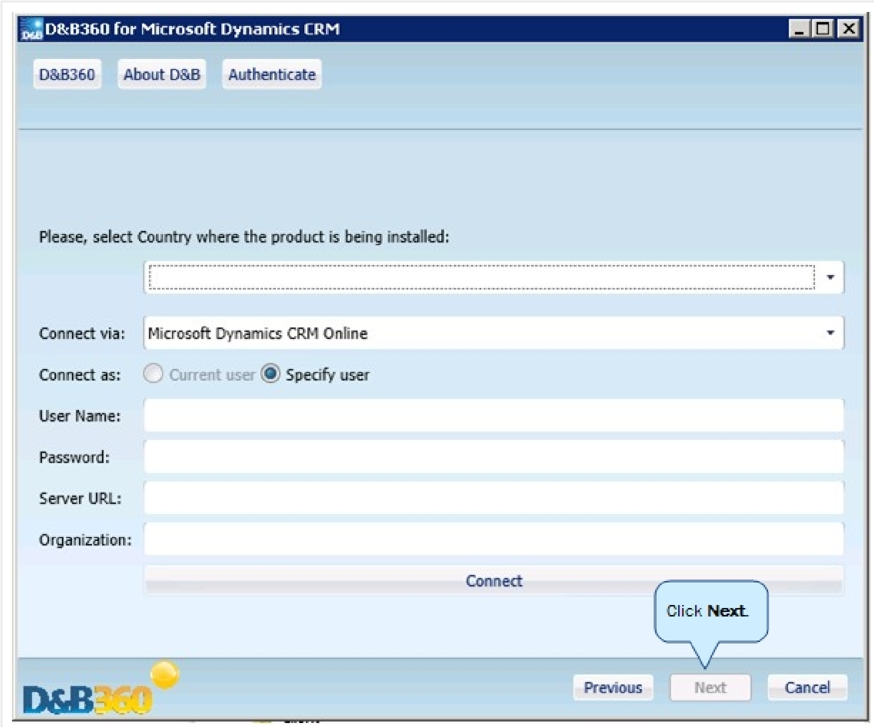
These initial steps are the same whether you are installing D&B360 for the first time, upgrading your software, or re-installing your software:

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

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

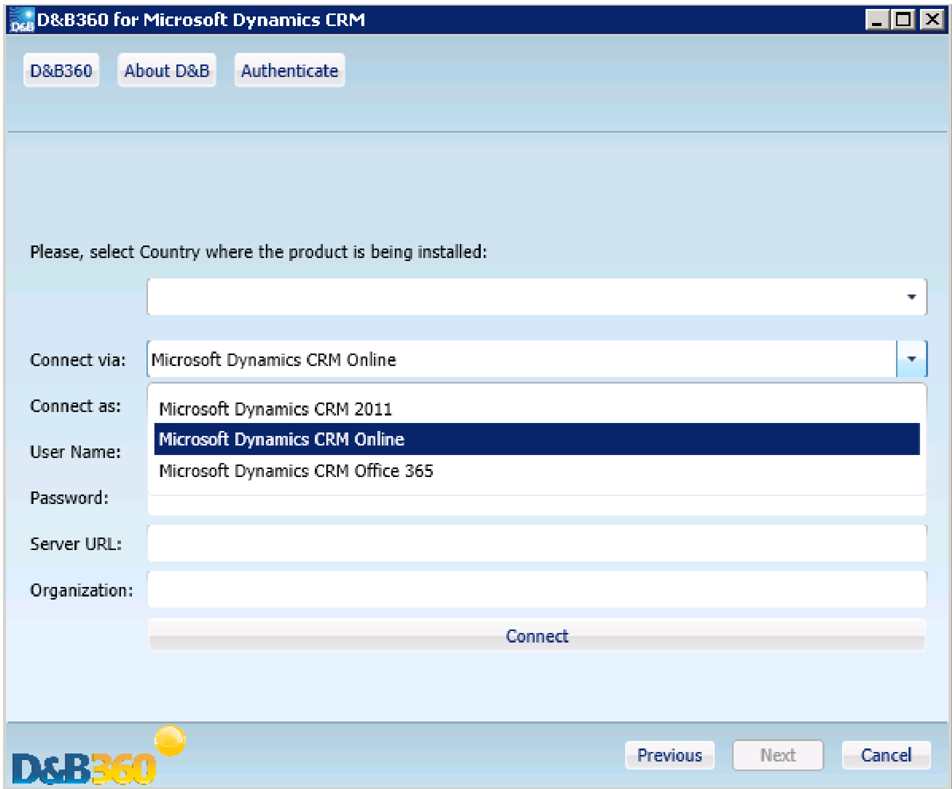


3. In the **Authenticate** window, enter the following information, then click **Next**.



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**.  • 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 **@live** 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 CRM On Demand, the URL will be something like `https://somecompany.crm.dynamics.com` • For CRM On Premise, the URL will be something like `https://servername`

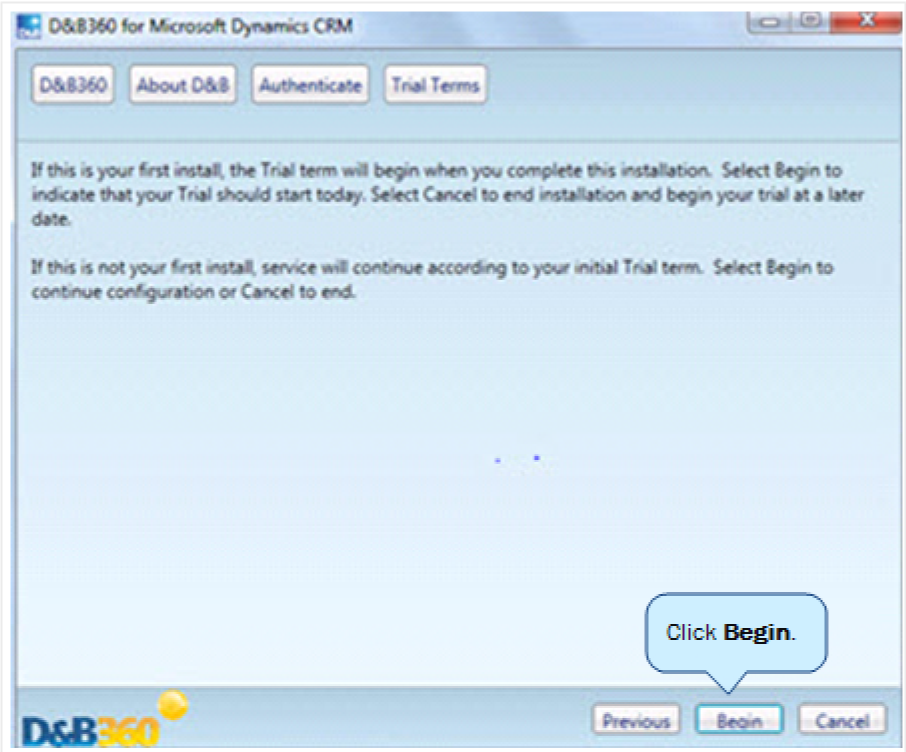
Field	Action
Organization	Type the name of the CRM organization that you want to install to. • For normal CRM 2011 deployments, you can get the org name from the URL such as: `http://someserver/someorg` • For IFD deployments, you can get org name from the URL such as: `http://someorg.someserver` • For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

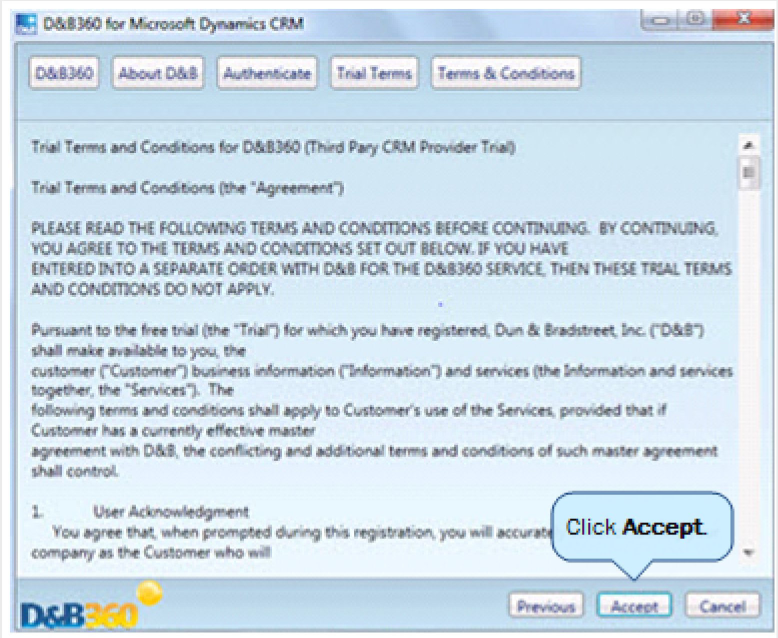
Steps Unique to a First Time D&B360 Installation

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.

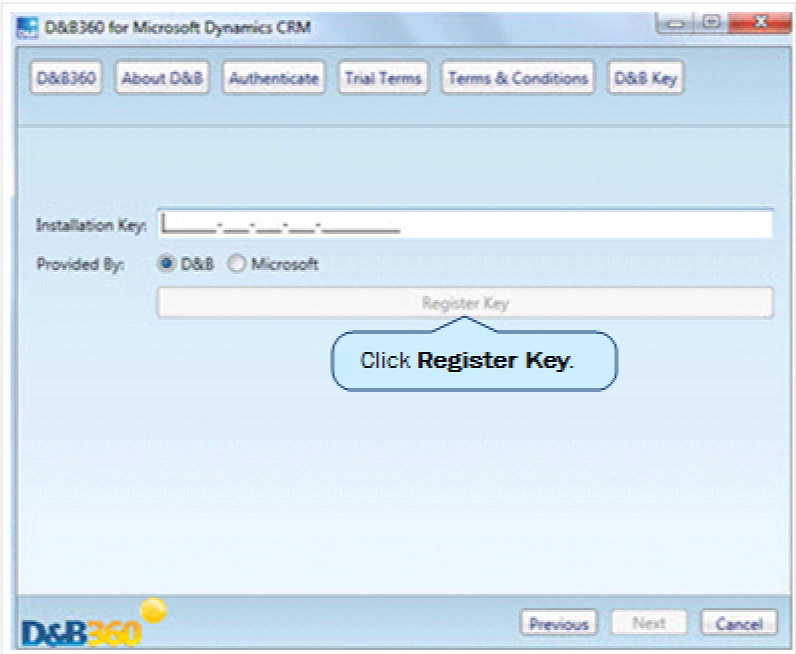
2. In the **Trial Terms and Conditions** window, read the terms, and then click **Accept**.



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**.

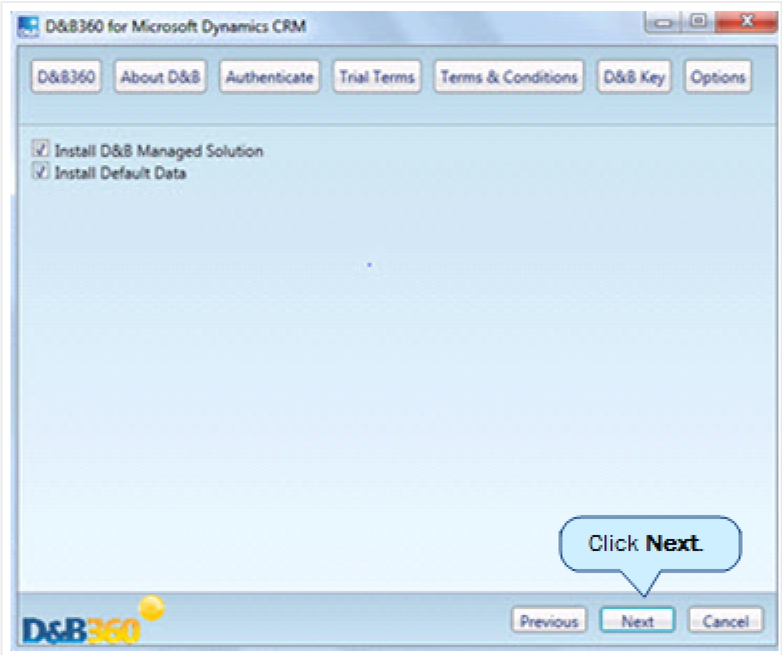


6. If you did not choose to delete default data,in the **Options** window, select **Install D&B Managed Solutions**.

   — or —

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

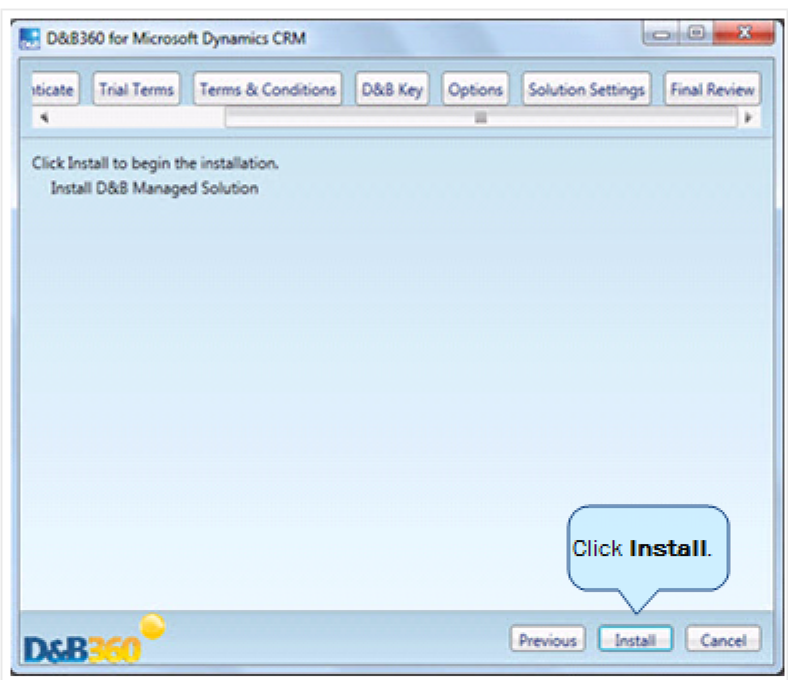
7. Click **Next**.



Completing Your First Time Installation

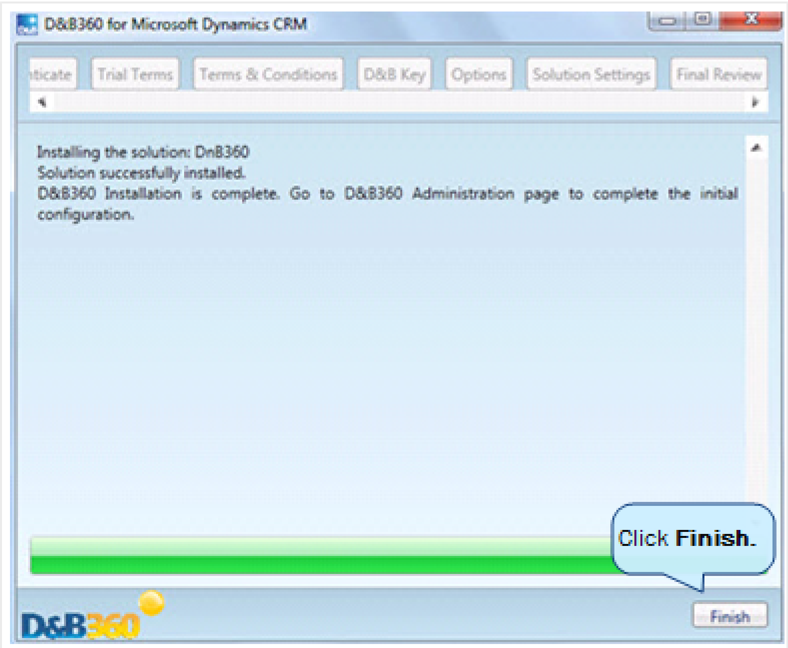
To complete a first-time installation:

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

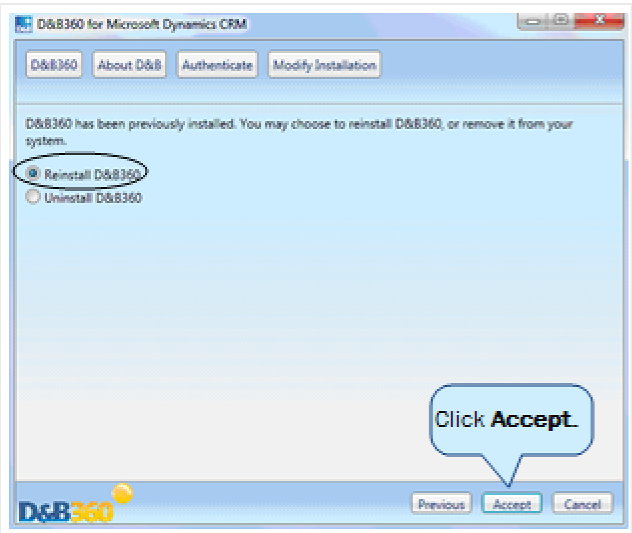
(!) Important Note: If for some reason you need to delete your default data, you must do that first before you re-install or upgrade the software. For more information, see "Processing Batches — Standard Level Expectation" on page 8-10.

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.

<table>
<tr><th>Re-Installing D&B360</th><th>Upgrading D&B360</th></tr>
<tr><td>

Note: You typically only need to re-install D&B360 when updating the Look-Up table.

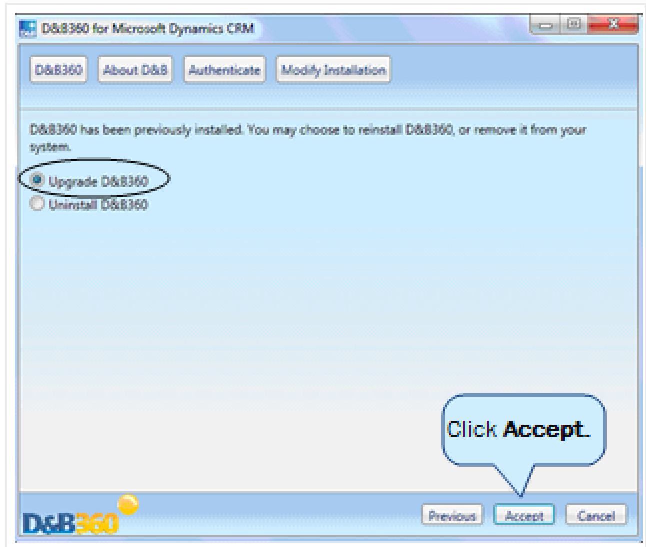
If you are reinstalling the software, the **Modify Installation** window with **Reinstall D&B360** selected opens.



</td><td>

Note: You usually install an upgrade when a new software release is available. This might include new features or bug fixes.

If you are upgrading D&B360, the **Modify Installation** window with **Upgrade D&B360** selected opens.



</td></tr>
<tr><td>

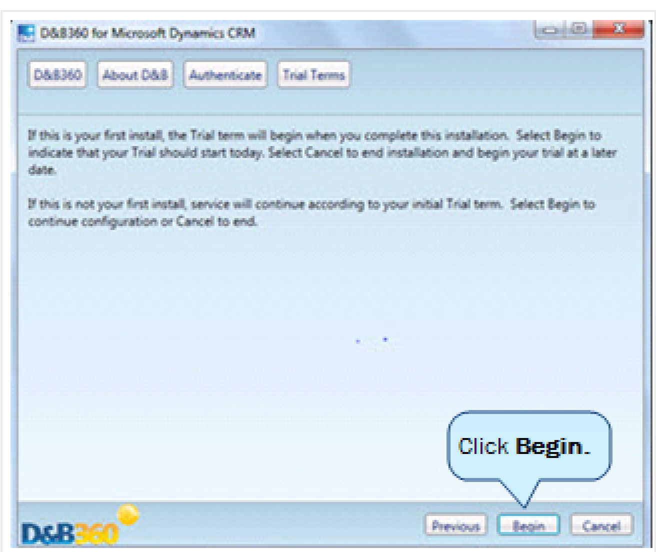
1. In the **Modify Installation** window, make sure **Reinstall D&B360** is selected.
2. Click **Accept**.

</td><td>

1. In the **Modify Installation** window, make sure **Upgrade D&B360** is selected.
2. Click **Accept**.

</td></tr>
</table>

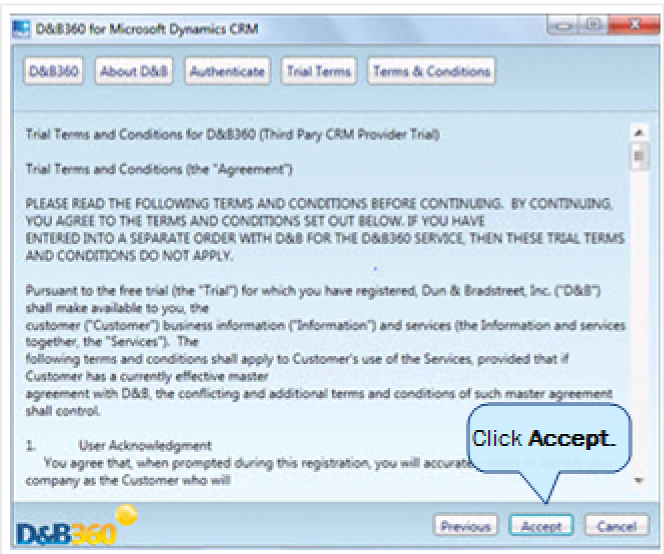
3. In the **Trial Terms** window, click **Begin**.



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.

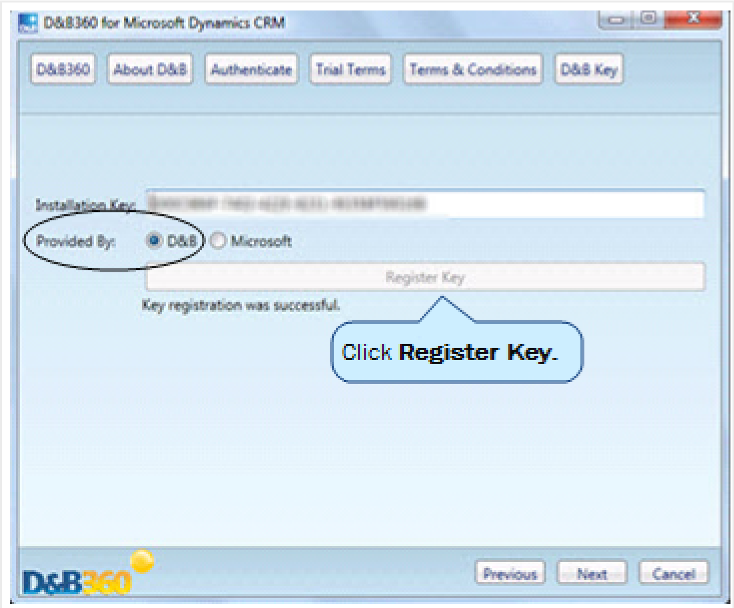
Note: To facilitate flexibility in testing or deploying in various environments, we allow you to use this Installation Key in up to 3 environments . Each Installation Key has a specific set of limits defined by either your trial terms or your contract.

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**.



Note: The **Installation Key** is pre-populated.

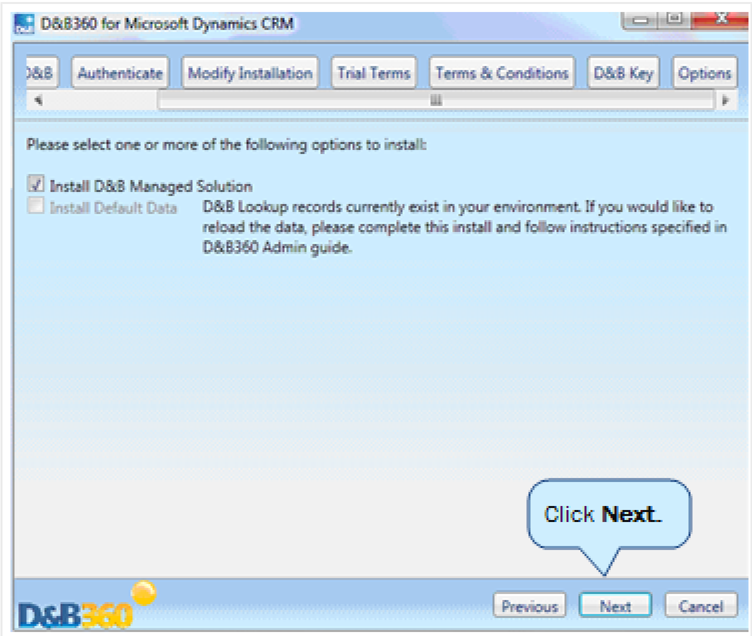
4. After the software successfully registers, in the **D&B Key** window, click **Next**.
5. If you did not choose to delete default data, make sure **Install D&B Managed Solution** is selected.

   — or —

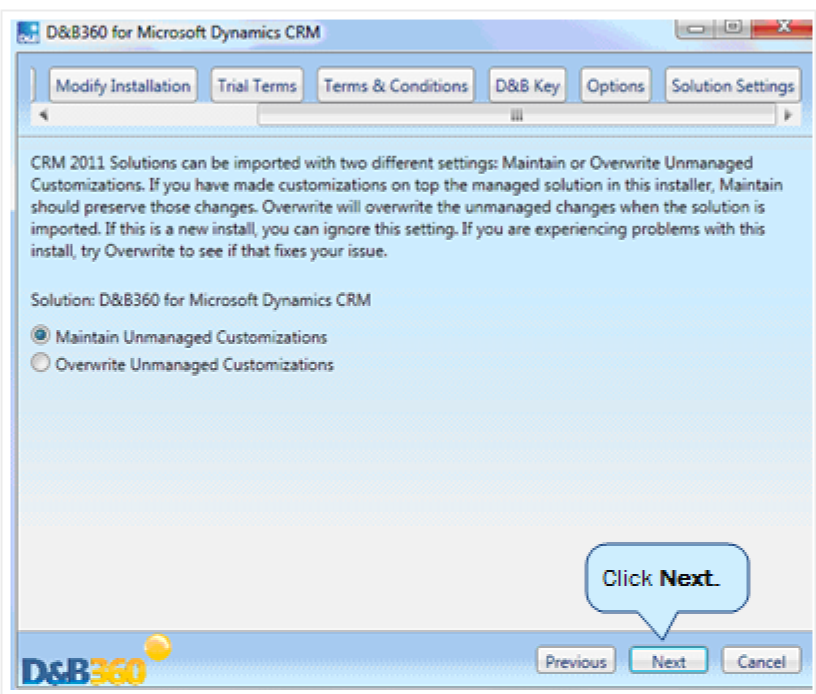
   If you did choose to delete default data, make sure **Install Default Data** is selected.

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

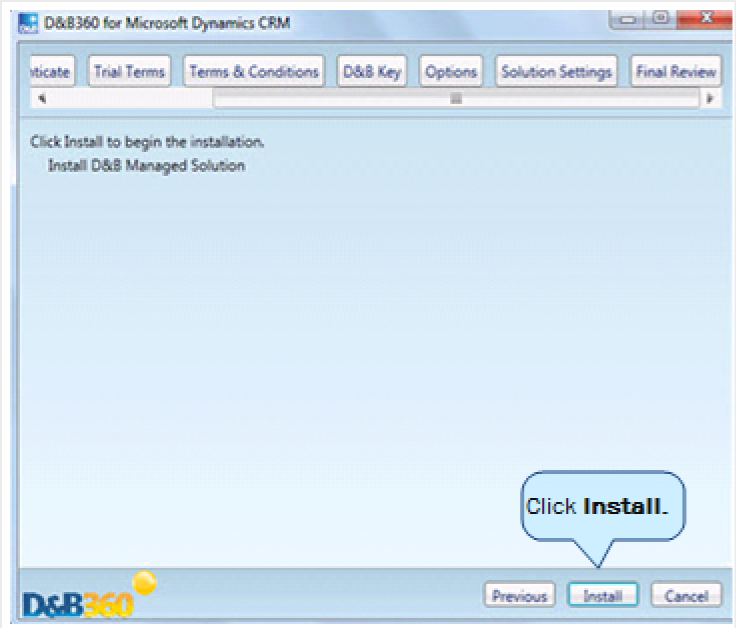
> **Note:** If you deleted your data, you must click **Install Default Data** instead of using the default setting, **Install D&B Managed Solution**.



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

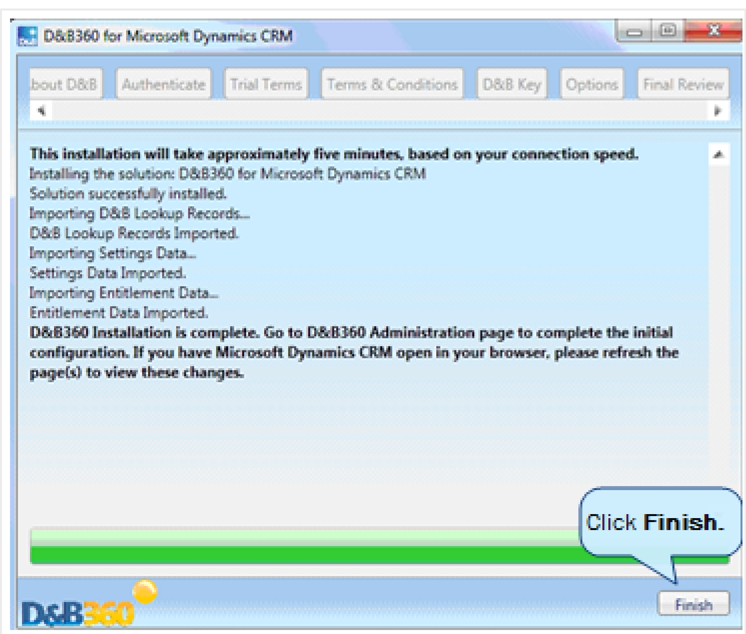


8. To complete the installation, in the **Final Review** window, click **Install**.



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

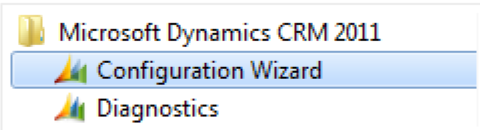
9. After the re-installation or upgrade has successfully completed, click **Finish**.
10. If your CRM is open in a browser window, refresh or reload your page to see the changes.



Configuring Outlook to Integrate with the MSD CRM

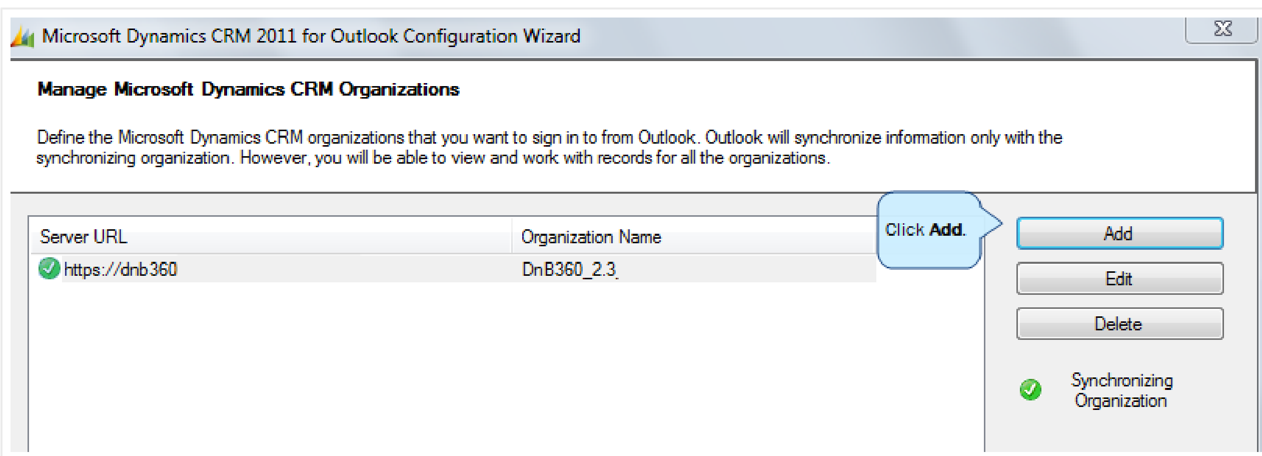
The Microsoft Dynamics CRM2011 configuration wizard should already be installed. See Start -> Programs -> Microsoft Dynamics CRM 2011. If it is not, download and install it from this web site: http://www.microsoft.com/en-us/download/details.aspx?id=27821

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**.



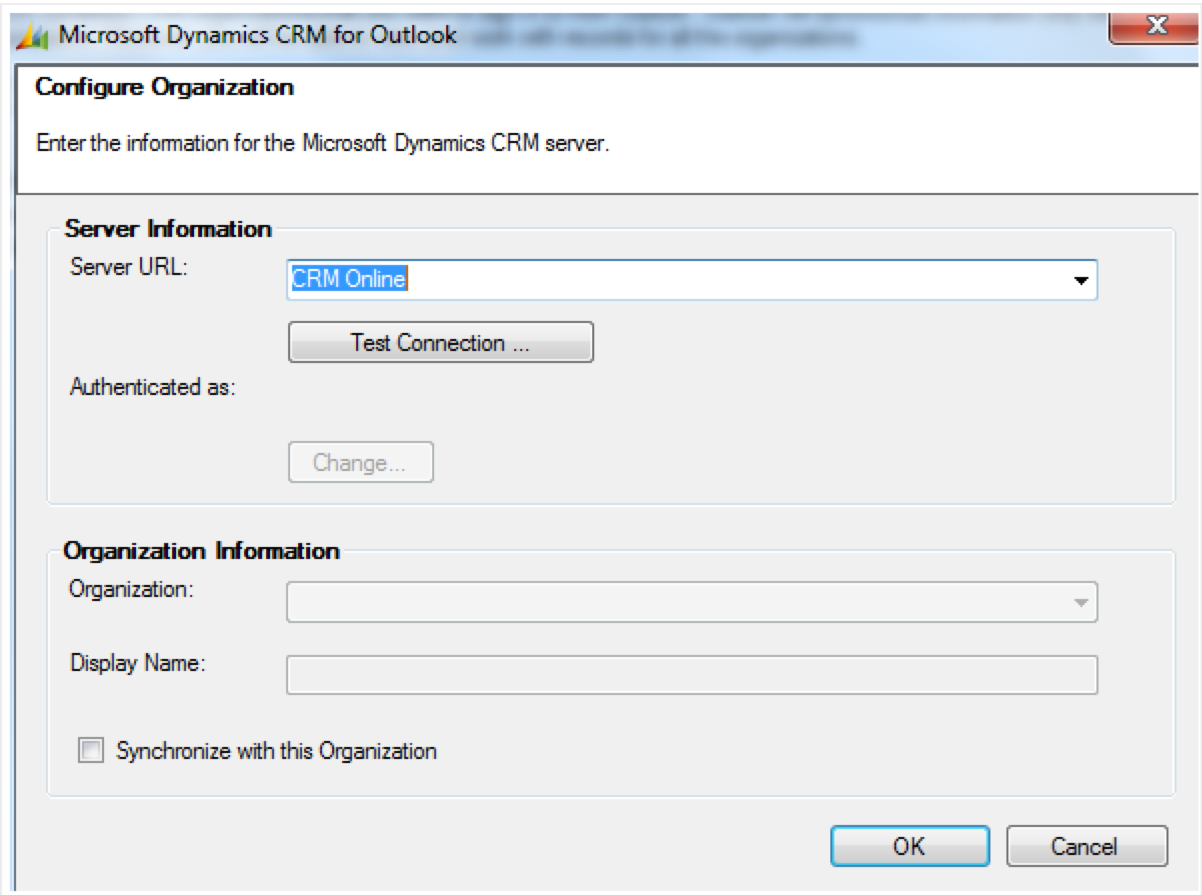
4. In the **Microsoft Dynamics CRM 2011 for Outlook Configuration Wizard** window:

   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**.



4 Configuring D&B360

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:

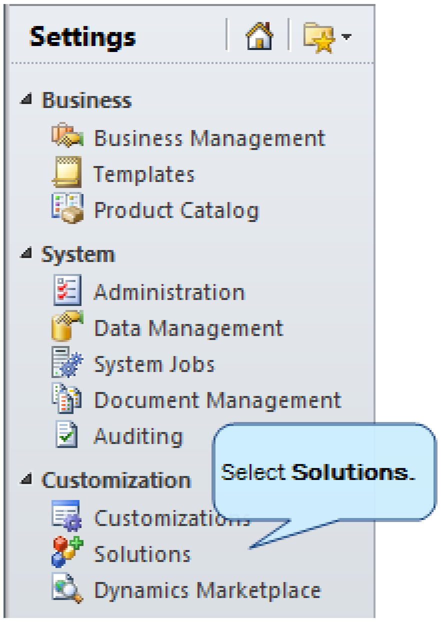
D&B360 Administrator	Features and Administration Page: This role has full access to all D&B360 features including access to the D&B360 Administration page.
D&B360 User	Features Only: This role has full access to all D&B360 features excluding access to the D&B360 Administration page.

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.

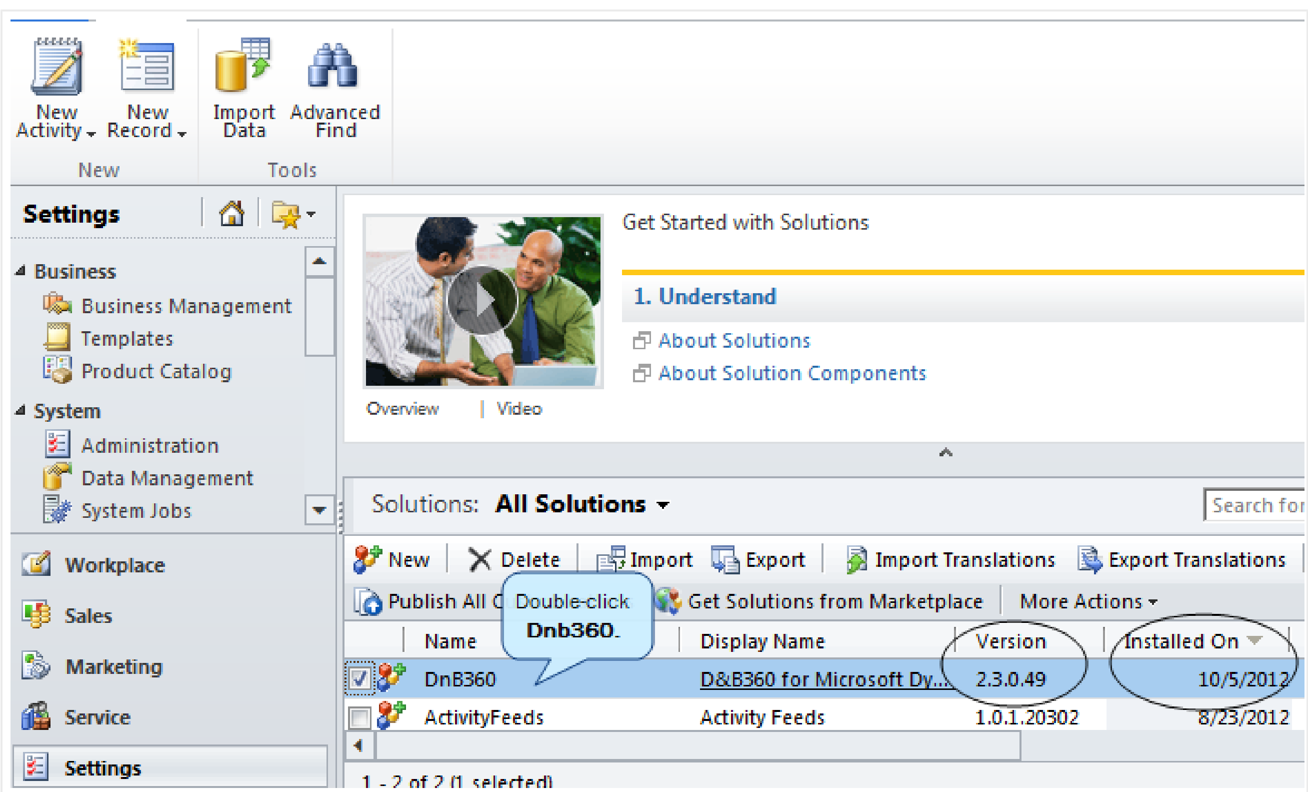
Ensuring the D&B360 Application is Available

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



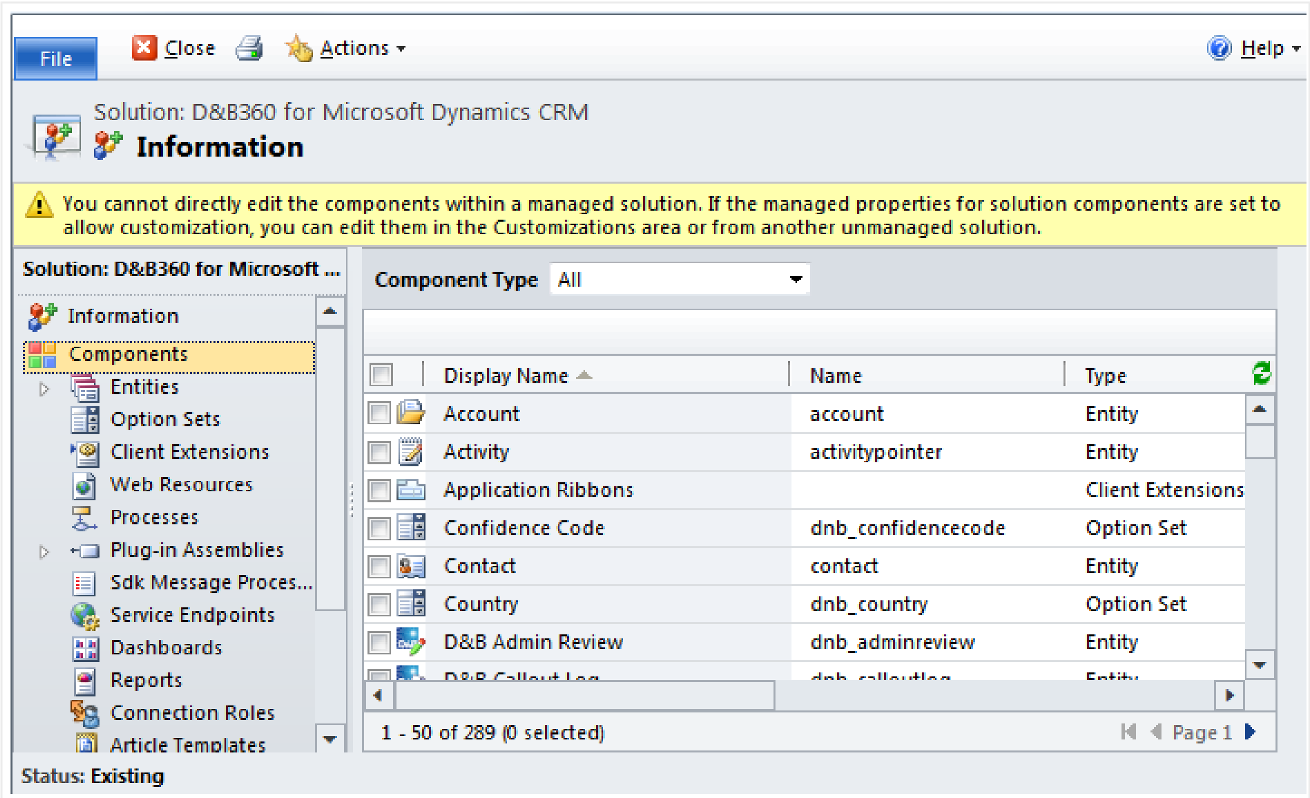
2. To verify that the application is installed, verify that it displays in the **Solutions** area.

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



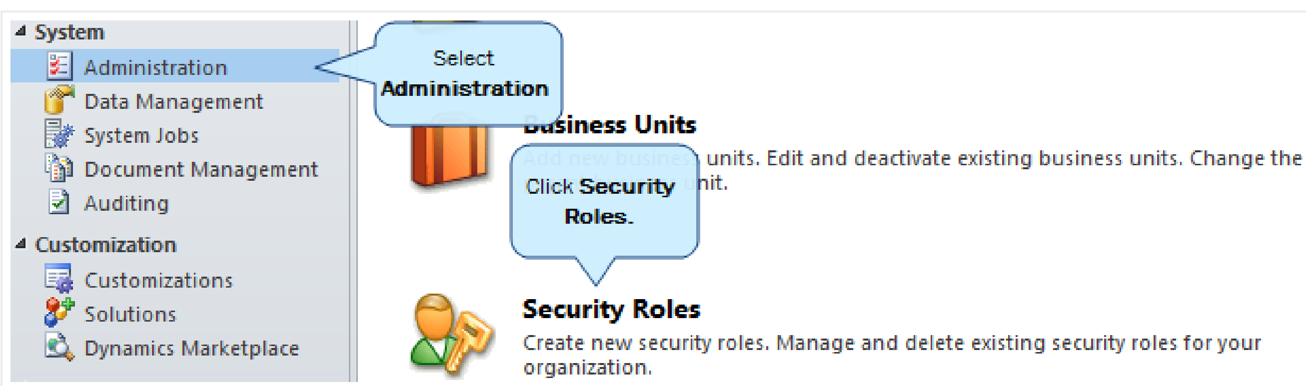
3. To view the application components, on the **Solutions** window, double-click **D&B360**.

   The **Information** window opens and displays the components.

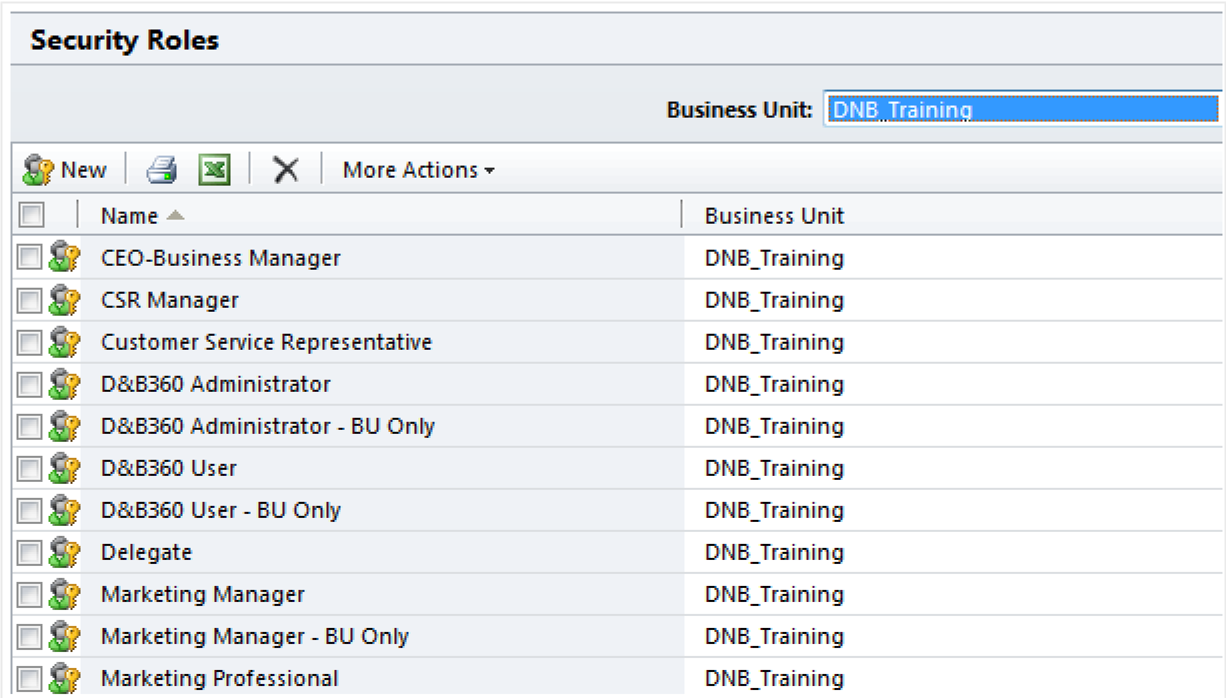


Viewing Available D&B360 Roles

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.



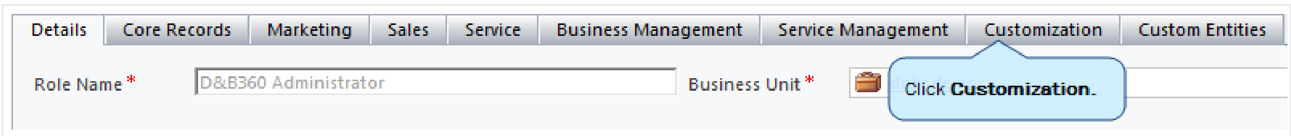
You can select from these 8 possible tasks that are permitted for a variety of components:

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.

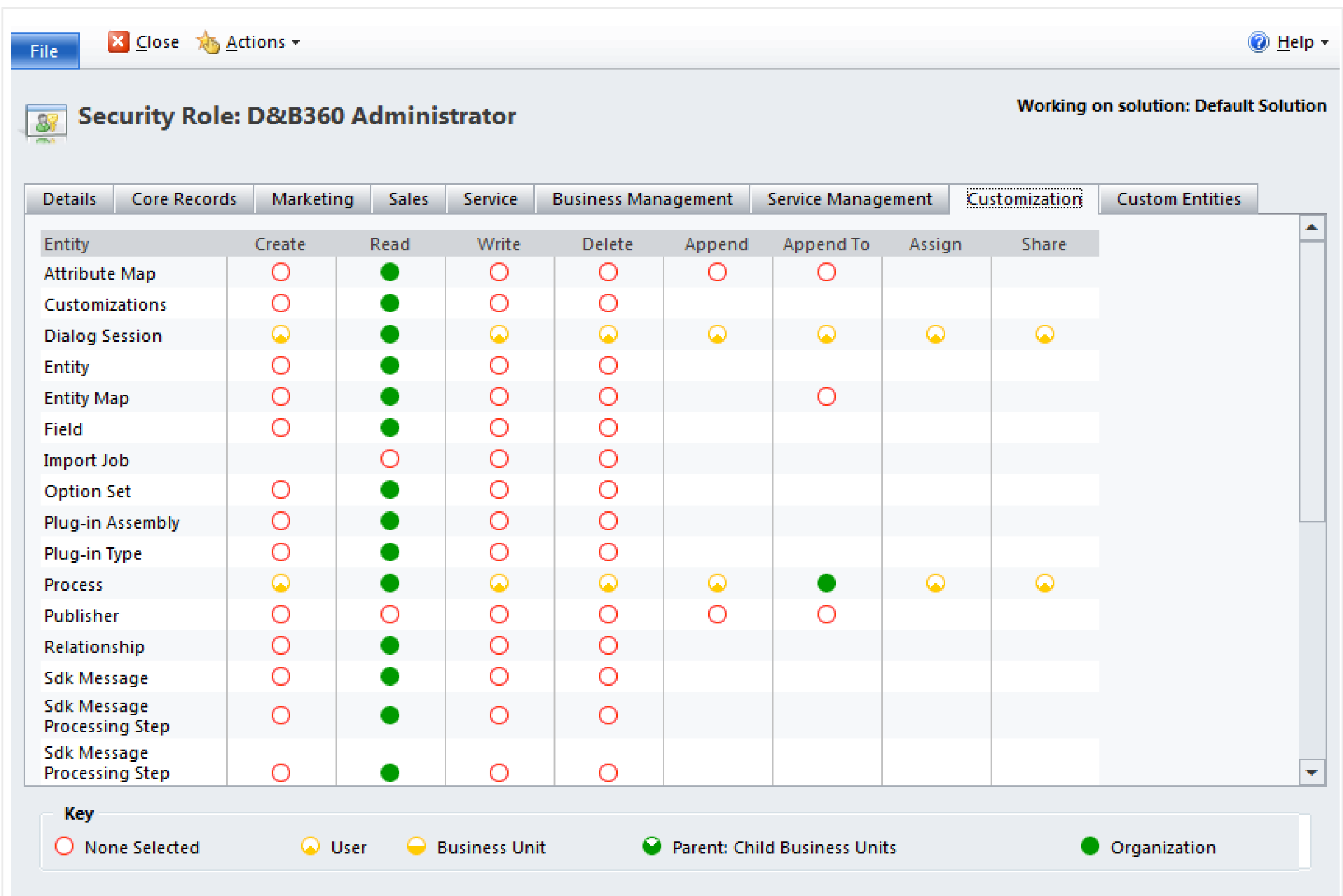
2. In the **Security Role D&B Administrator** window, click **Customization** to display permissions associated with this role.



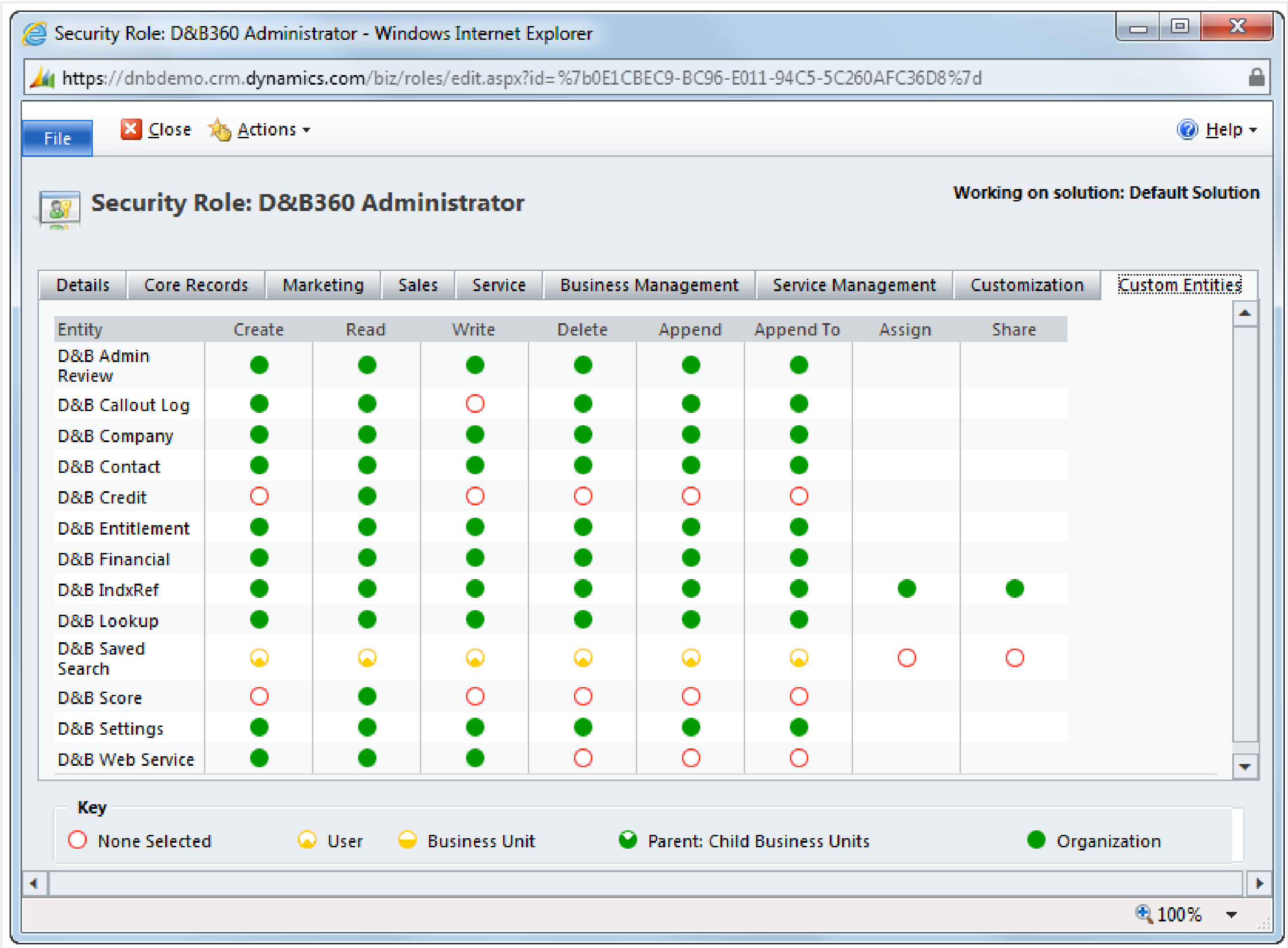
3. To view remaining permissions, click **Custom Entries**.

D&B360 Administrator Permissions

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

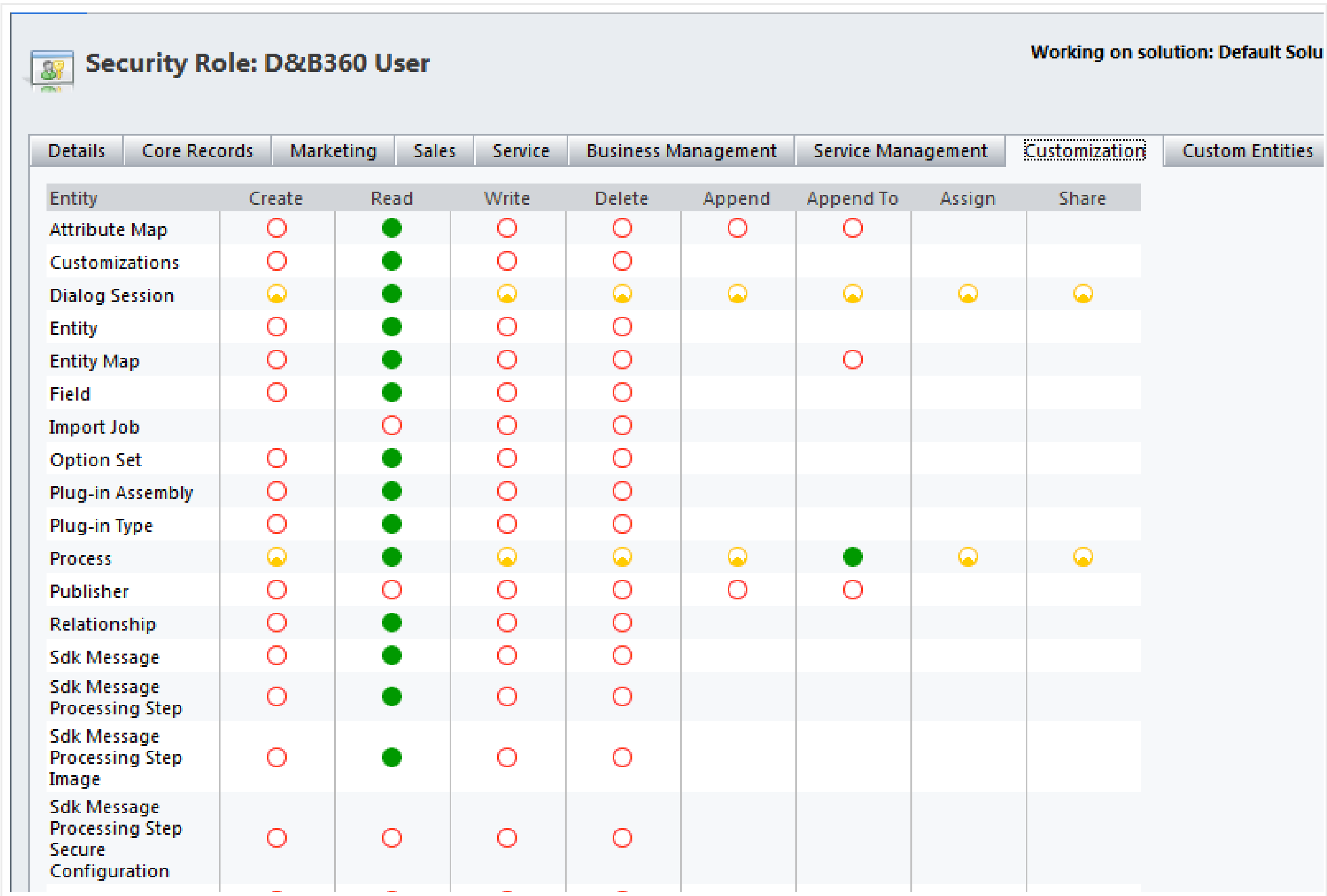


In the **Security Role: D&B Administrator** window, **Custom Entries** tab, administrator permissions are also indicated by green (user type) circles.

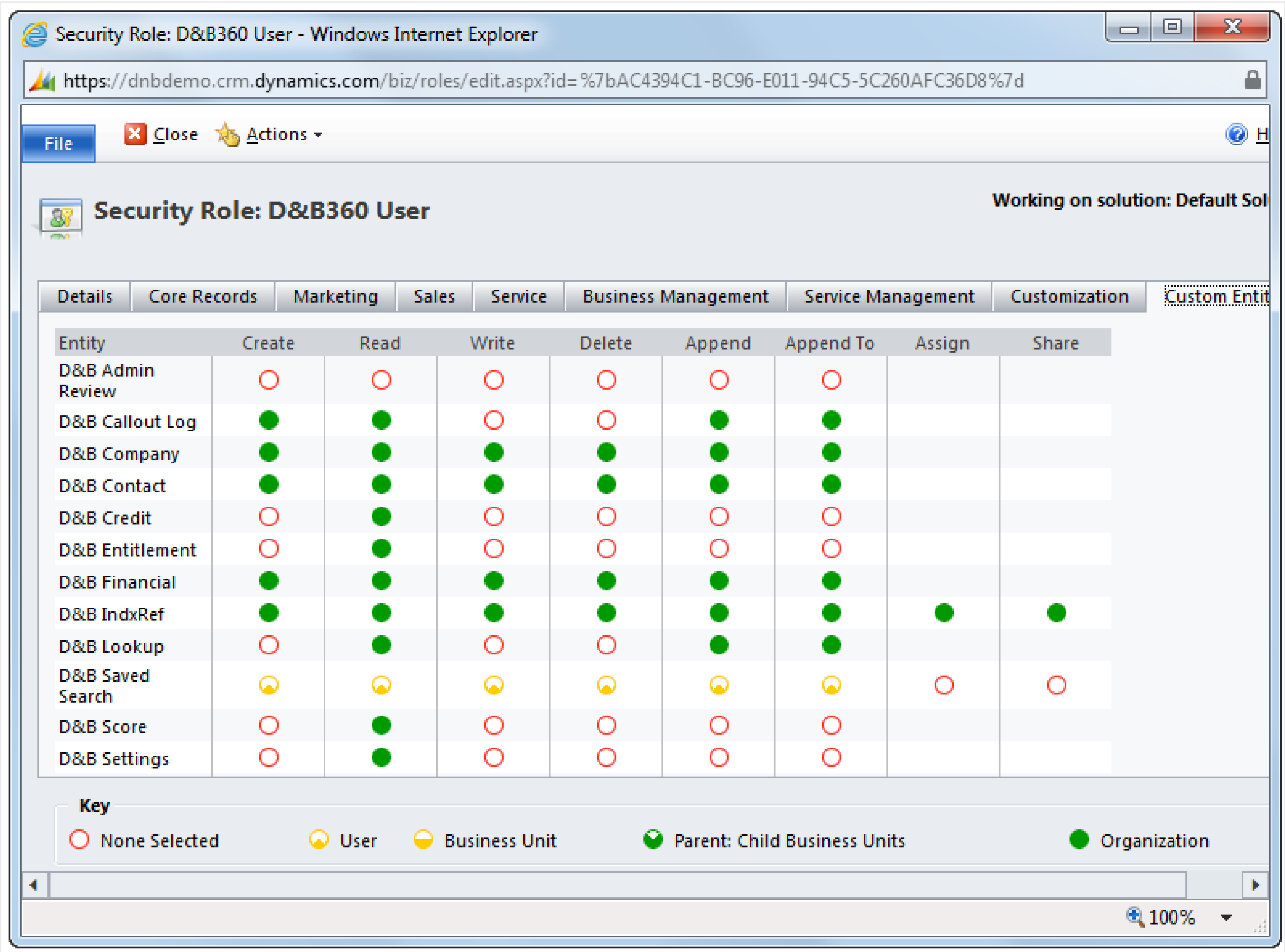


D&B360 User Permissions

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

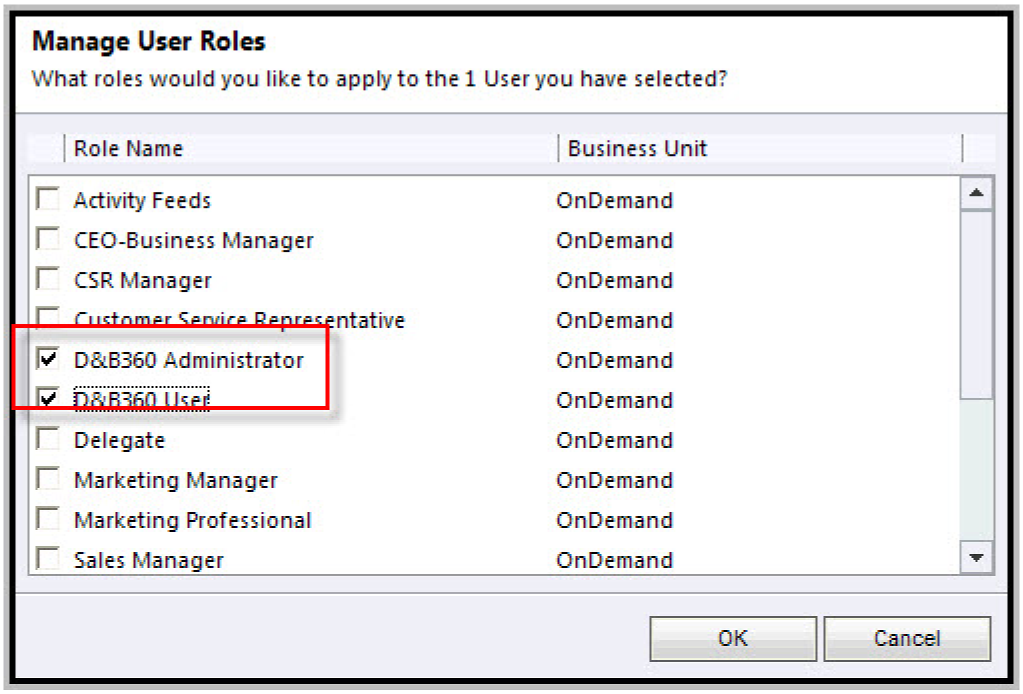


In the **Security Role: D&B User** window, **Custom Entries** tab, administrator permissions are also indicated by green (user type) circles.



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.



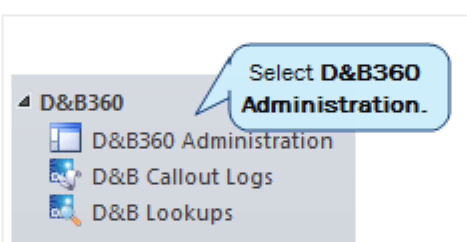
Note: Only someone who is assigned the role of administrator is authorized to configure settings. After you have been assigned the role of D&B360 Administrator, you can configure the D&B360 settings.

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.

3. Expand **System Settings**, and in the **D&B System** area, use the menus to configure these settings:

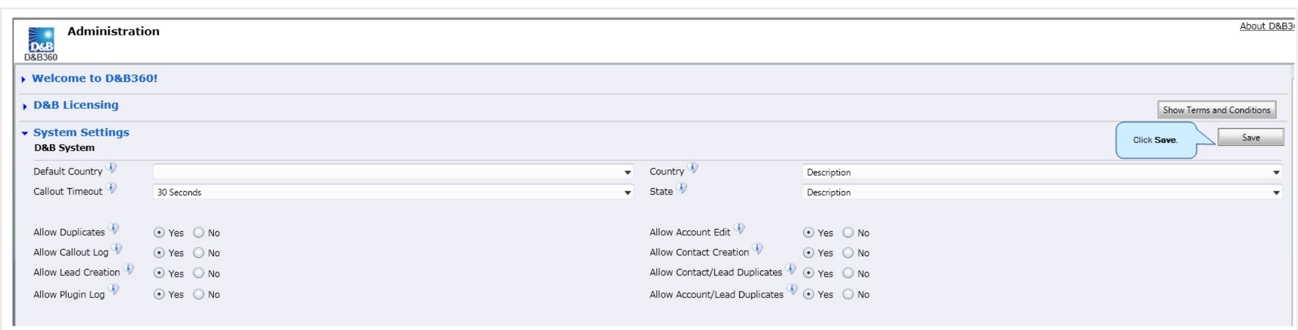
   a. Select the **Default Country** that you want to use when you search for accounts.

   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.

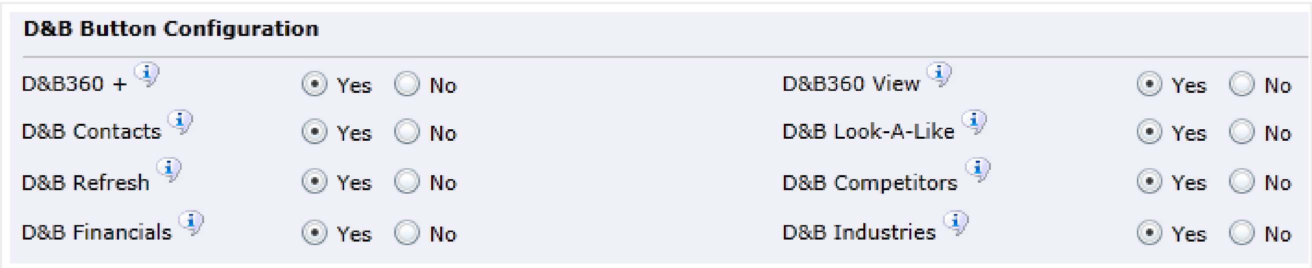
4. For the **Allow** fields, generally keep the default settings.

5. Click **Save**.



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.



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

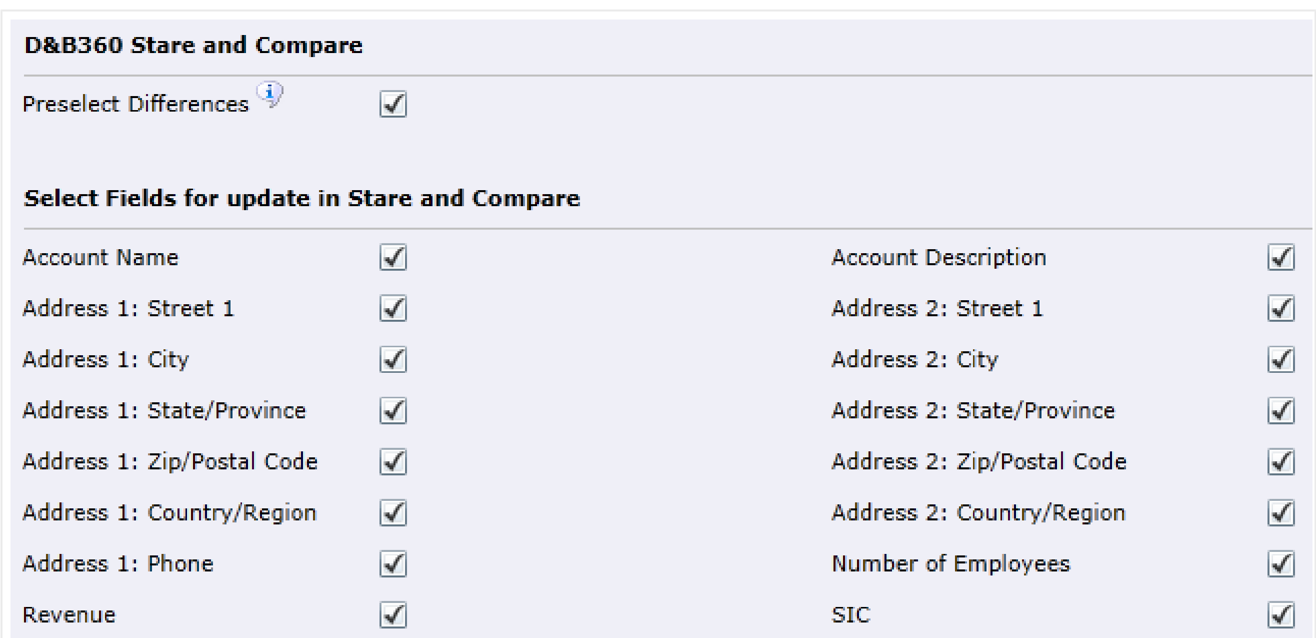
1. In the **System Settings**, **ROW Annotation Configuration** area, click to select the check boxes for each of the Rest-of-World options that you want to make available to your users.
2. Click **Save**.

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

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.
2. 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**.

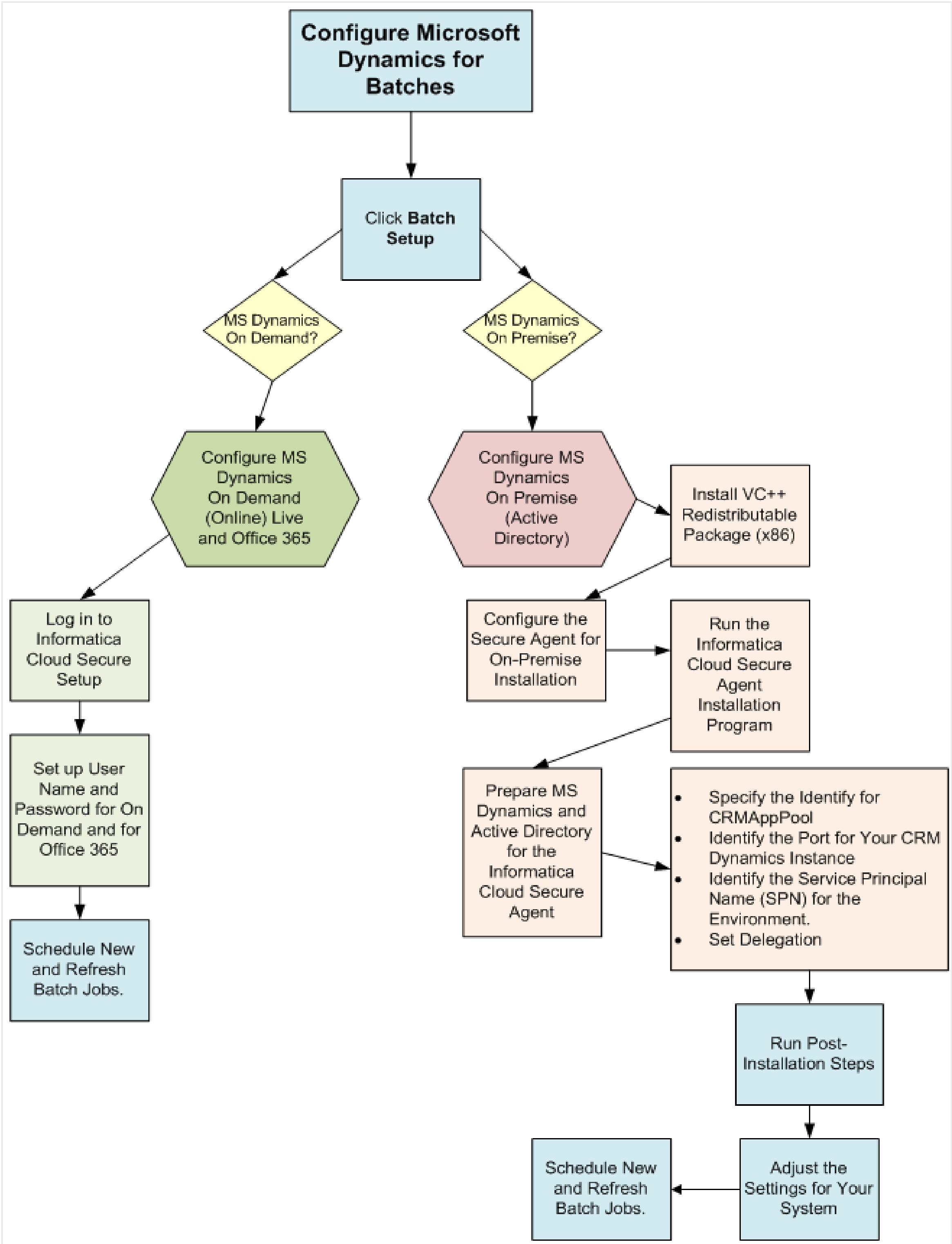


5 Managing Batches and Installing the Informatica Cloud Secure Agent

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.


Configure Microsoft Dynamics for Batches
Click **Batch Setup**
MS Dynamics On Demand?
MS Dynamics On Premise?
Configure MS Dynamics On Demand (Online) Live and Office 365
Configure MS Dynamics On Premise (Active Directory)
Install VC++ Redistributable Package (x86)
Log in to Informatica Cloud Secure Setup
Configure the Secure Agent for On-Premise Installation
Run the Informatica Cloud Secure Agent Installation Program
Set up User Name and Password for On Demand and for Office 365
Prepare MS Dynamics and Active Directory for the Informatica Cloud Secure Agent
Specify the Identify for CRMAppPool
Identify the Port for Your CRM Dynamics Instance
Identify the Service Principal Name (SPN) for the Environment.
Set Delegation
Schedule New and Refresh Batch Jobs.
Run Post-Installation Steps
Schedule New and Refresh Batch Jobs.
Adjust the Settings for Your System

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

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

Confidence Code Threshold Facts

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

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

Validating D-U-N-S Numbers

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

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

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

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

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.

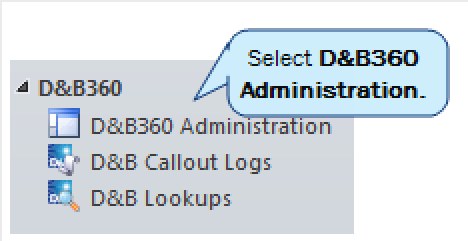
(!) Important Note: Make note of these requirements:

- 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.

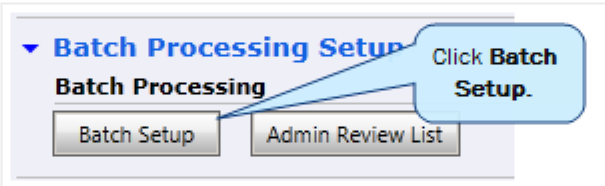
Registering the Secure Agent for an On-Demand Installation

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**.



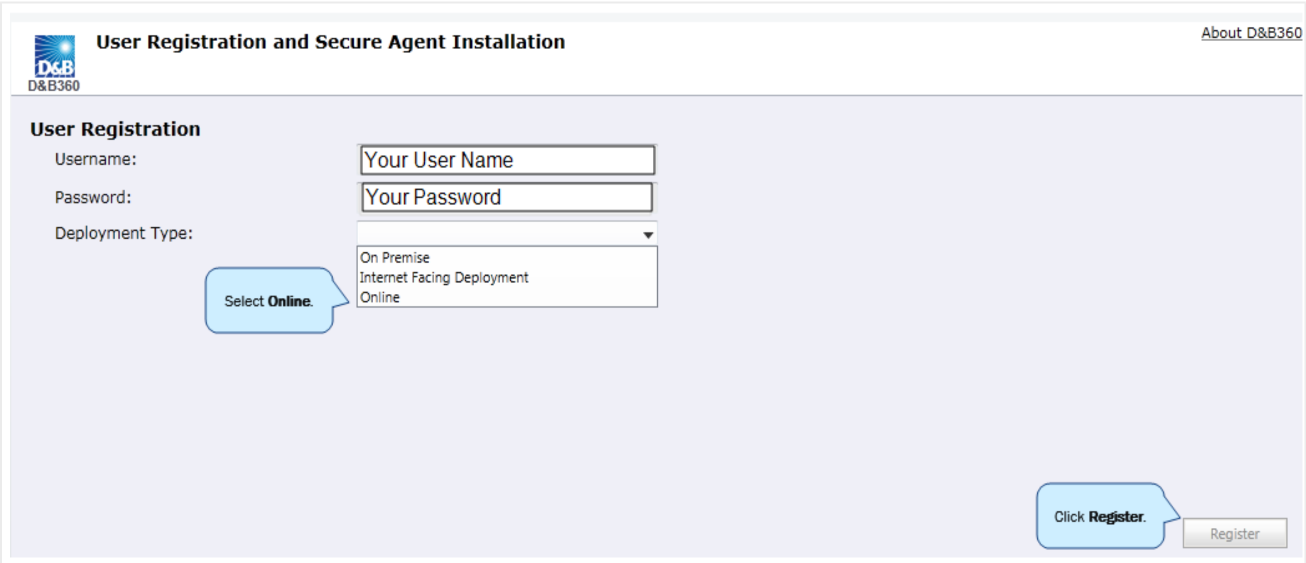
3. In the **Batch Processing Setup** area, **click Batch Setup**.



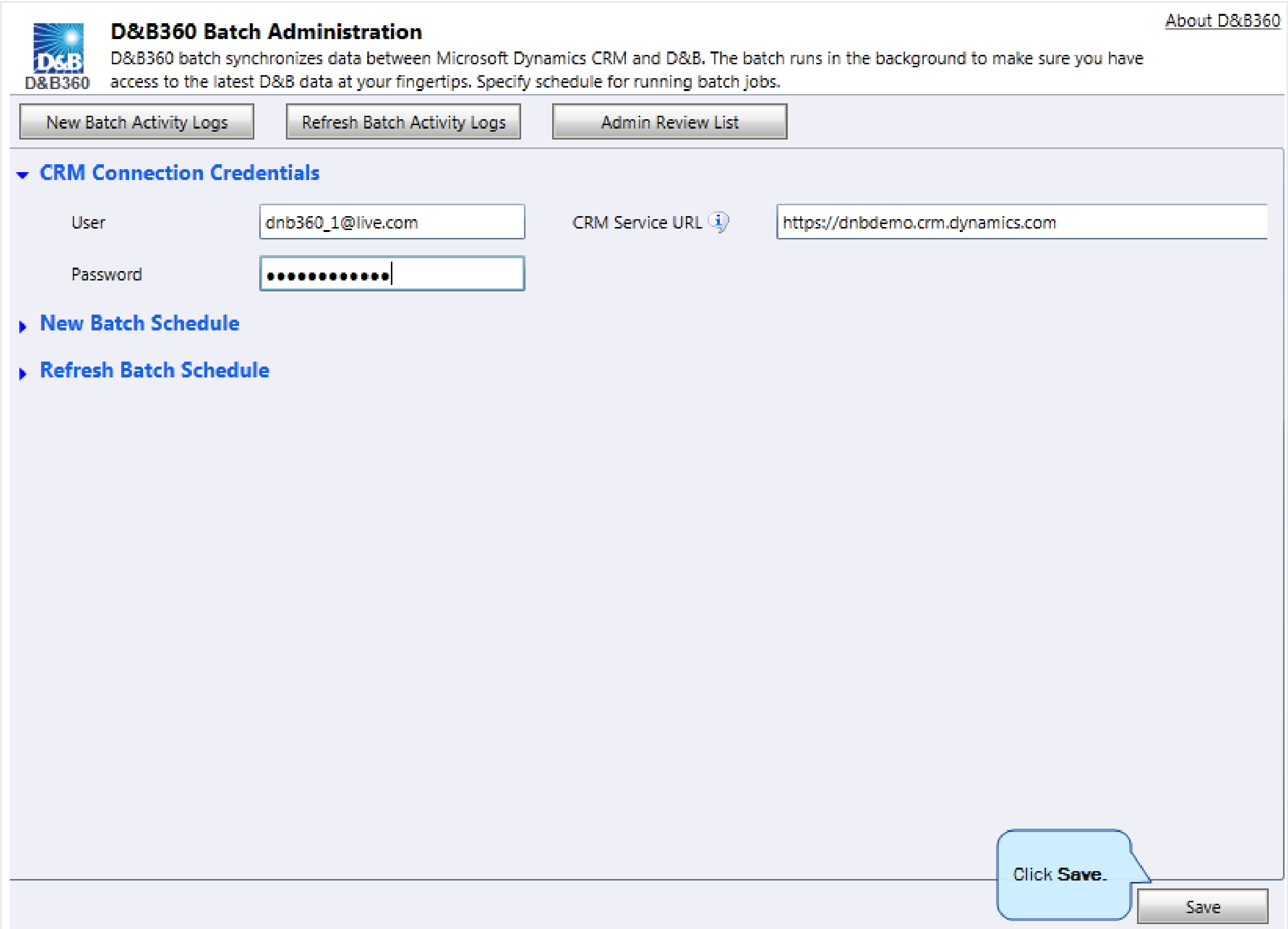
In the **D&B360 Batch Administration** window, the system generates your Username and Password.

(!) 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**.



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



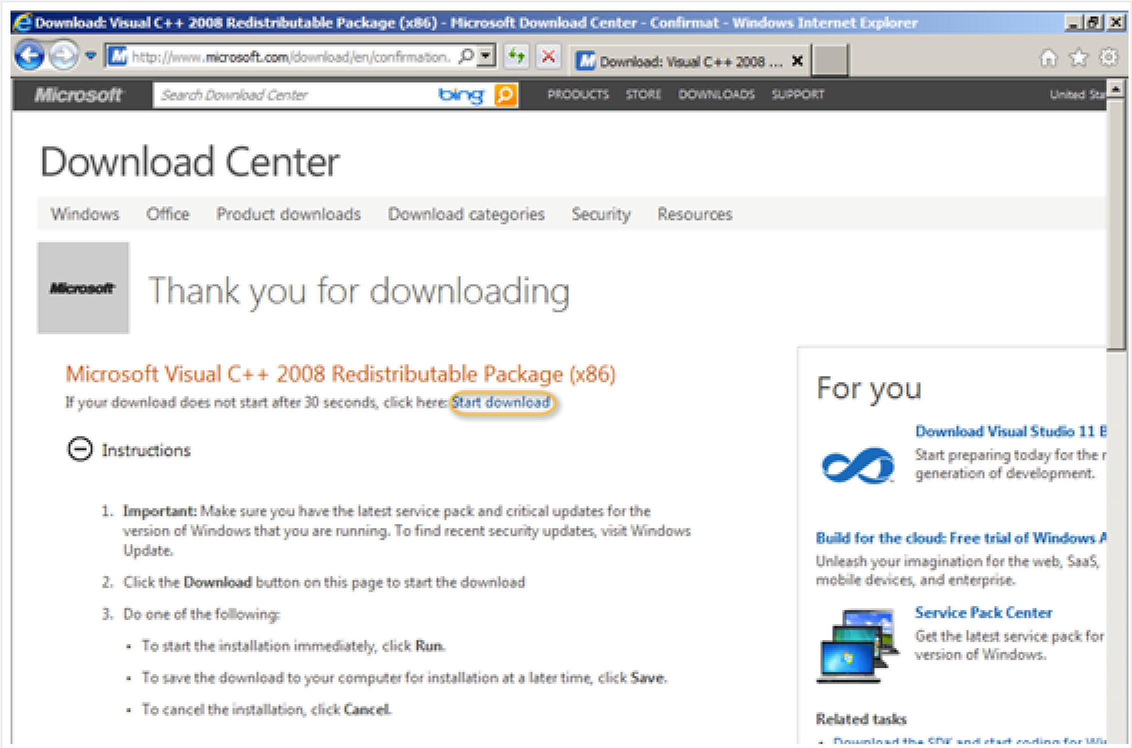
After you have completed these steps, you are ready to schedule new and refresh batch jobs (see "Scheduling Batch Jobs" on page 6-1).

Configuring the Secure Agent for an On-Premise Installation

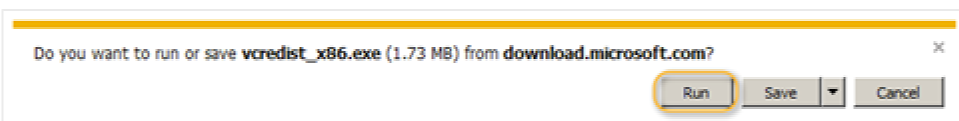
Before you configure the secure agent for an on-premise installation, you need to install the VC++ Redistributable Package (x86).

Installing the VC++ Redistributable Package (x86)

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

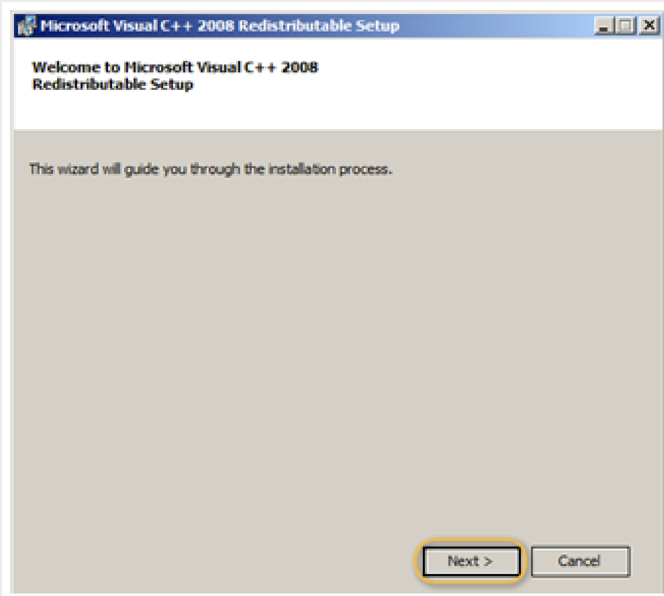


3. When you are prompted to run or save the .exe file, click **Run**.

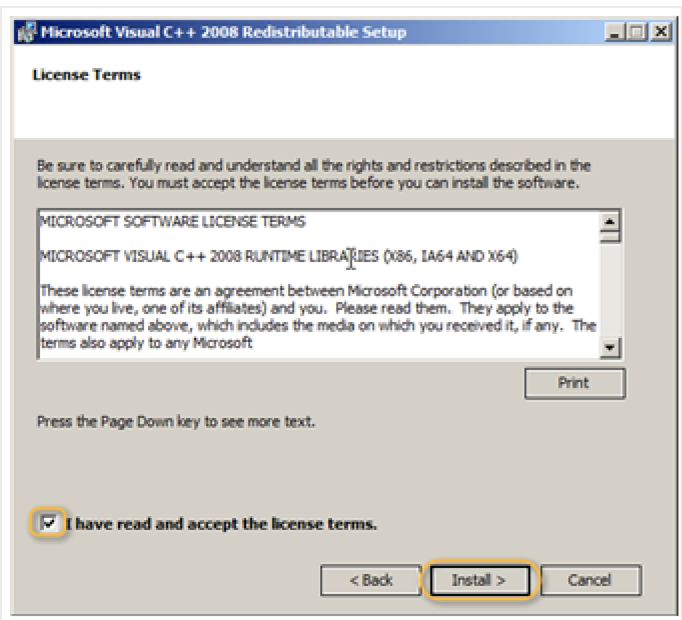


The **Welcome to Microsoft Visual C++ 2008 Redistributable Setup** wizard opens.

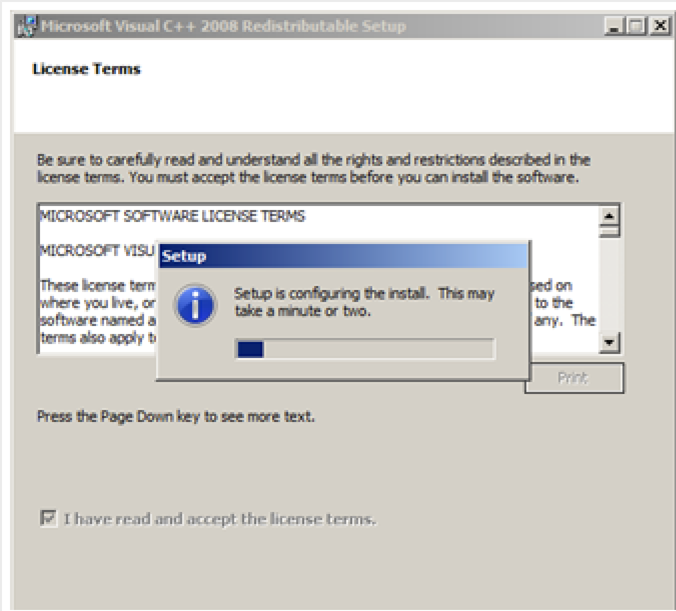
4. In the first wizard window, click **Next**.



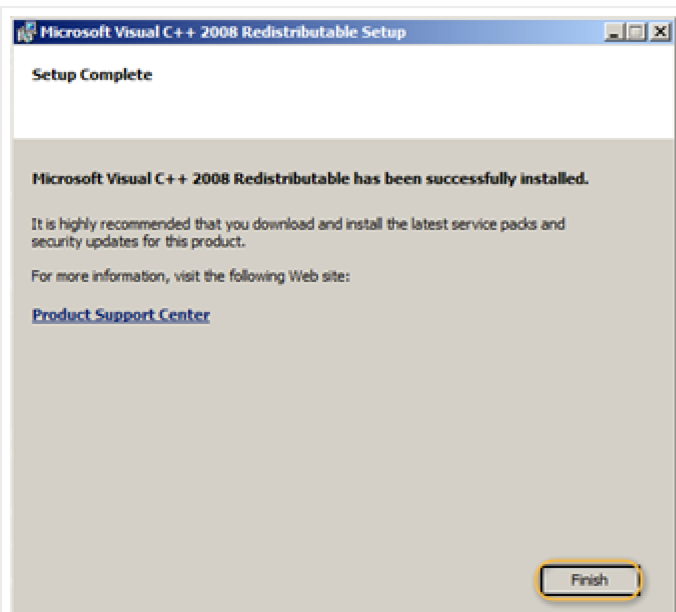
5. In the **License Terms** window, I **have read and accept the license terms** field, select the check box.
6. Click **Install**.



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



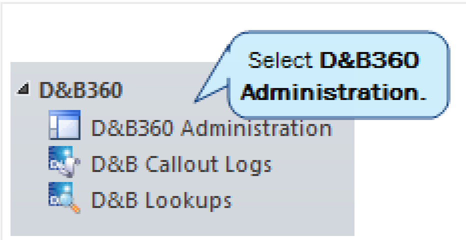
7. In the **Setup Complete** window, click **Finish** after the installation is complete



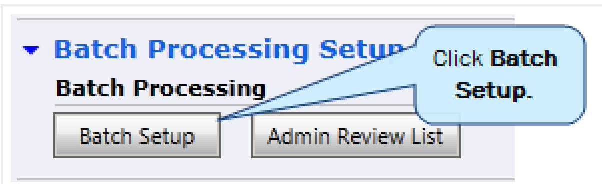
Steps for Configuring the Secure Agent for an On-Premise Installation

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**.



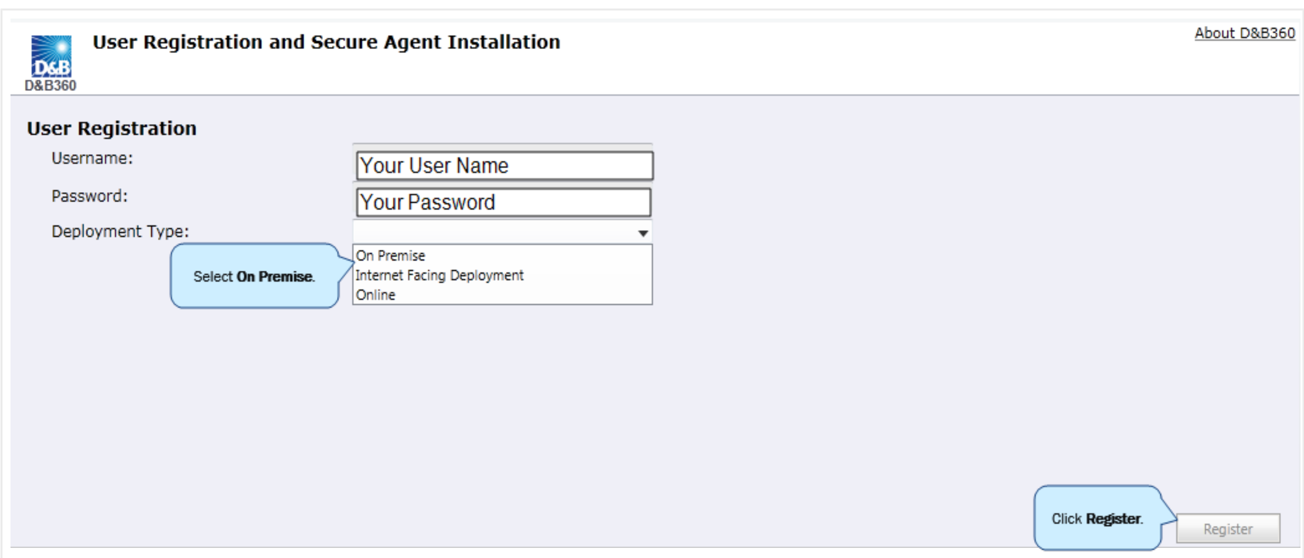
3. In the **Batch Processing Setup** area, **click Batch Setup**.



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

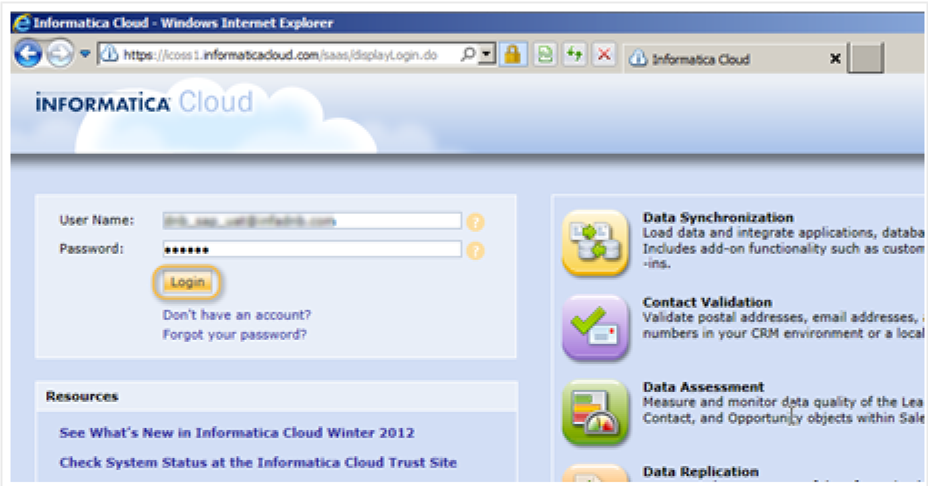
(!) Important Note: Make a note of this because you will use these later to register the Secure Agent.

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

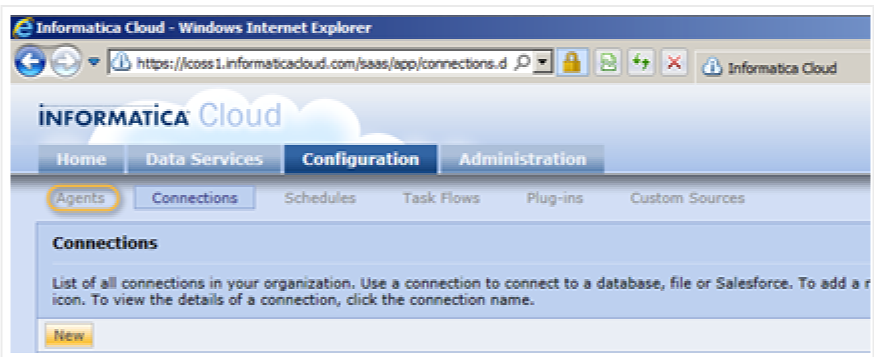


Logging in to the Informatica Cloud Secure Agent

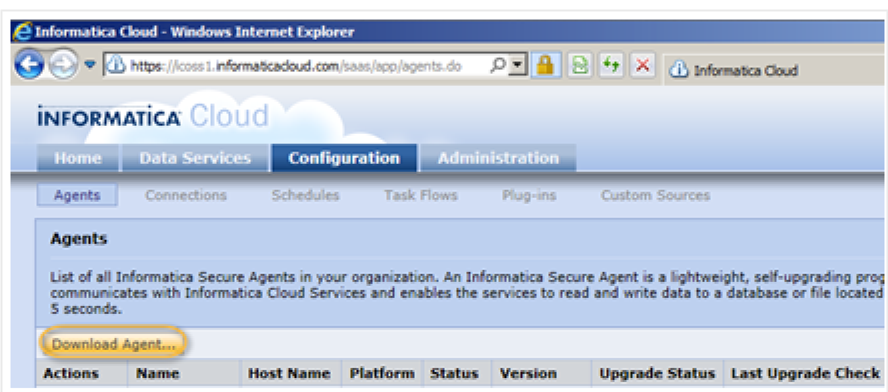
1. Access the Informatica Cloud window at this URL: https://icosp2.informaticacloud.com/saas.
2. In the **Informatica Cloud** window, type the user name and password for the CRM that you made note of previously, and then click **Login**.



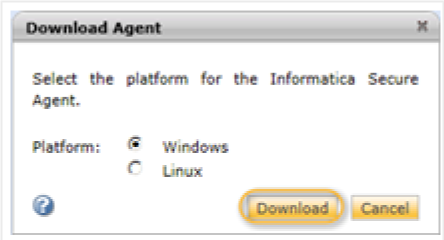
3. In the **Informatica Cloud** window, click the **Configuration** tab, then click the **Agents** tab.



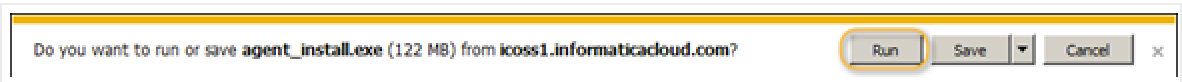
4. Click **Download Agent**.



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

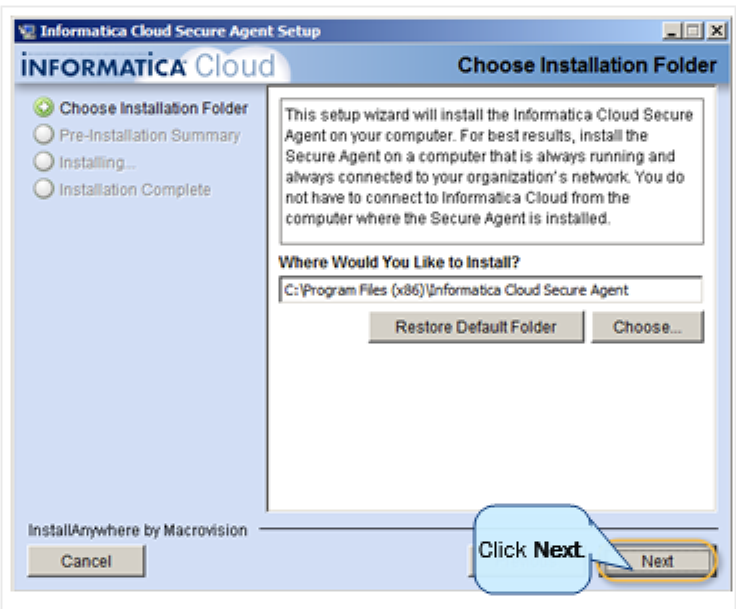


6. At the prompt to run or save the .exe file, click **Run**.

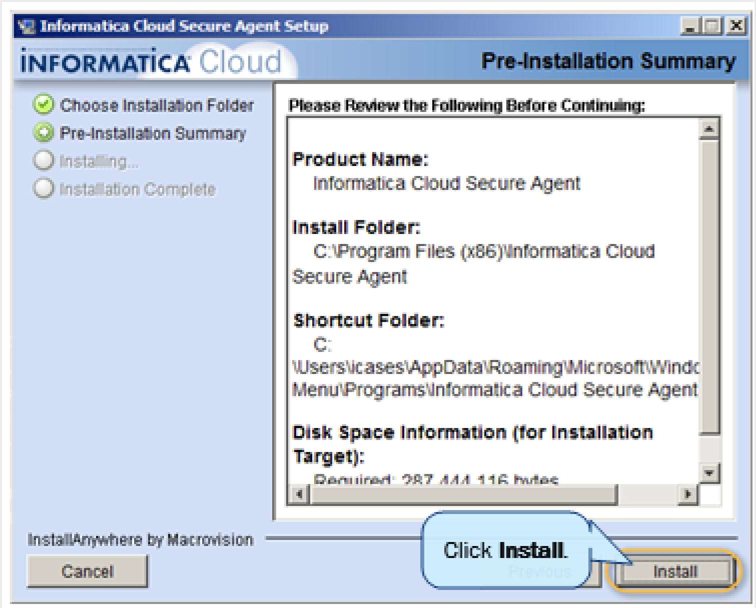


Running the Informatica Cloud Secure Agent Installation Program

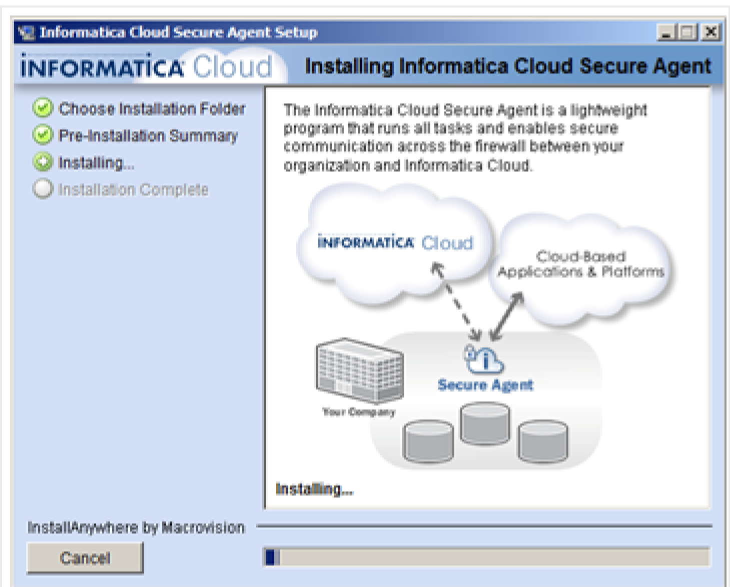
1. In the **Informatica Cloud Secure Agent Setup** window, **Choose Installation Folder** area, leave the default program directory or click **Choose** to specify a different location.
2. To install the secure agent, click **Next**.



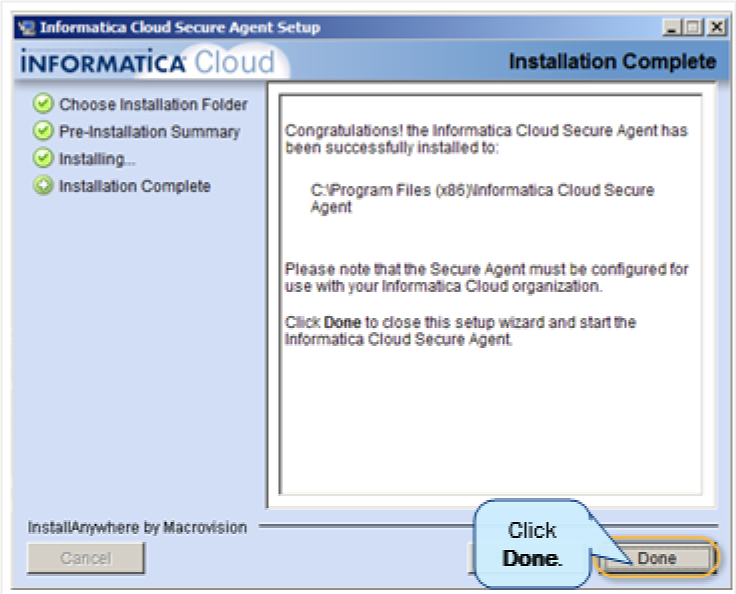
3. In the **Pre-Installation Summary** window, review the settings and if everything is correct, click **Install**.



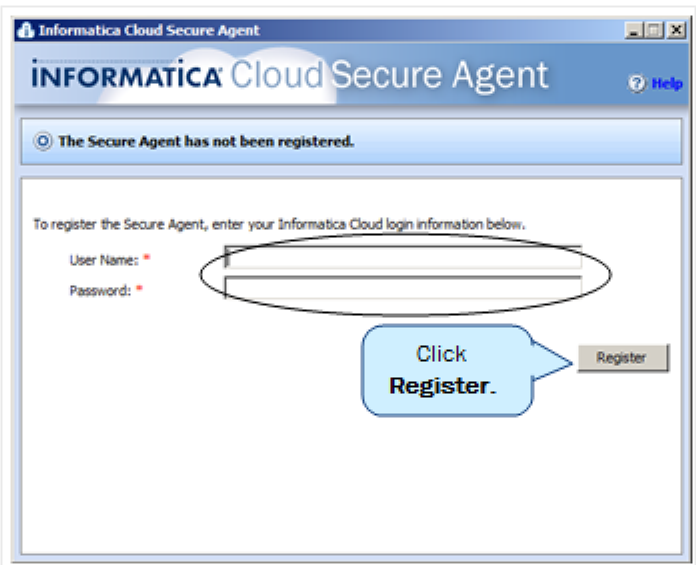
The **Installing** window displays the progress of the installation process.



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

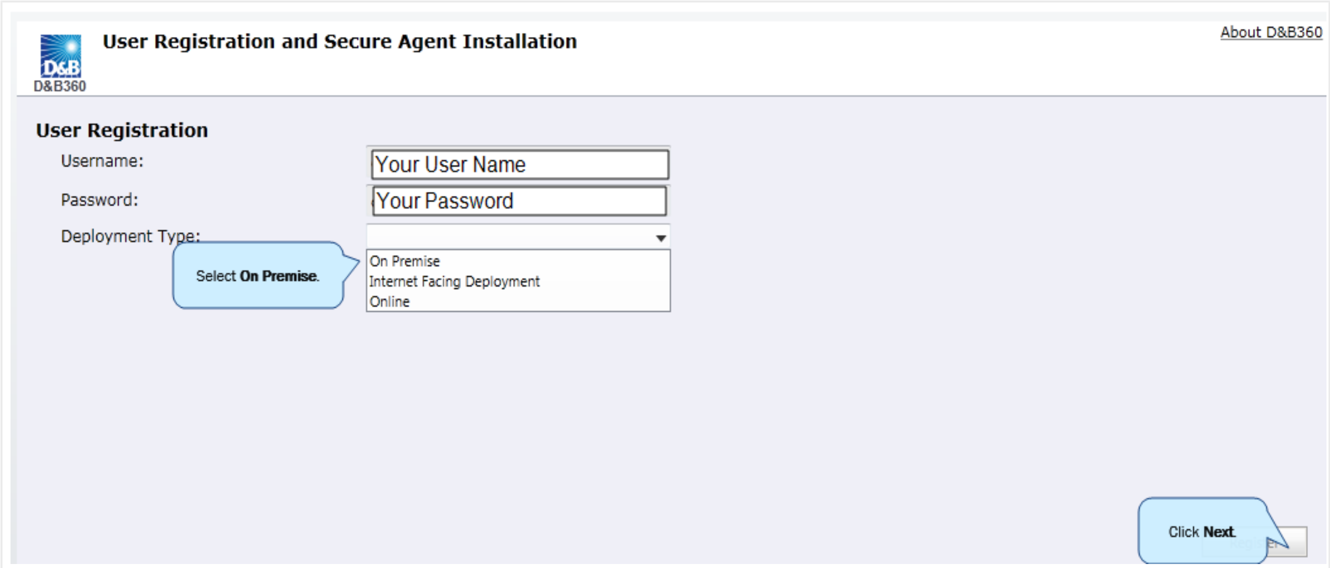


The **Informatica Cloud Secure Agent** window displays a message that it is starting up and upgrading. After the upgrade process is complete, a message displays that the secure agent is up and running.

6. In the **Informatica Cloud** window, type the user name and password that you made note of earlier.

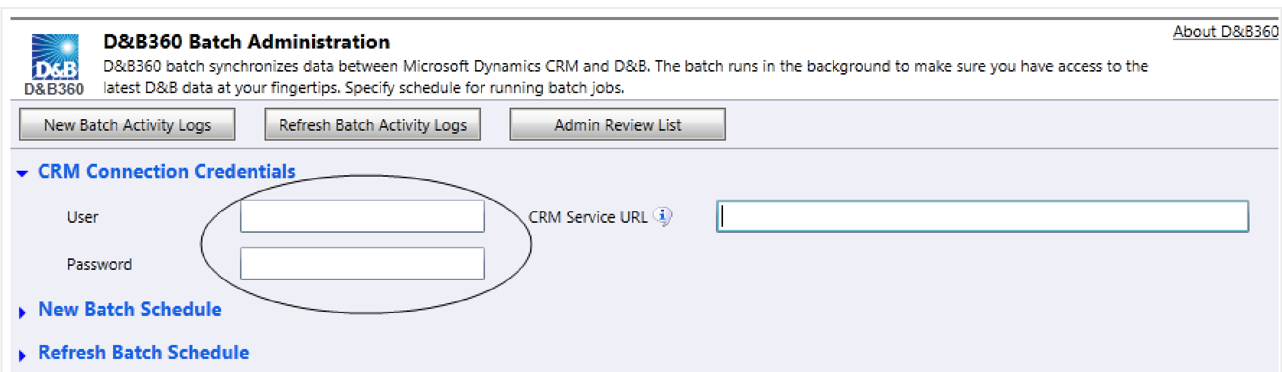
   The **Configuration** window displays the log in credentials you entered previously.

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.

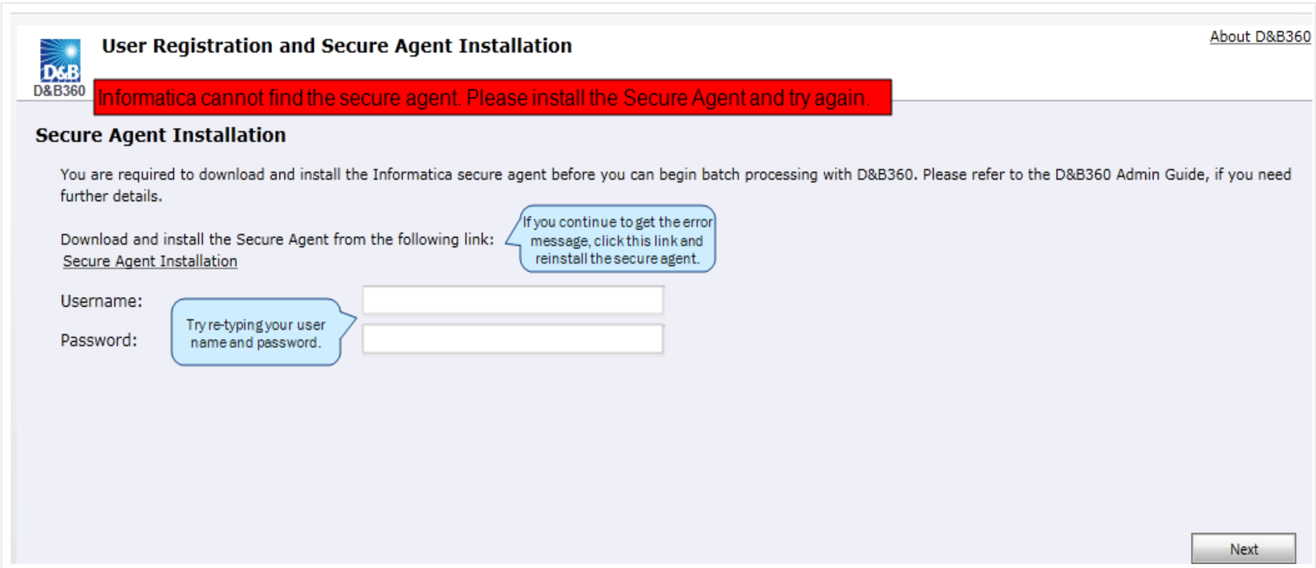


If you have correctly registered the CRM, the **CRM Connection Credentials** window displays.

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



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.



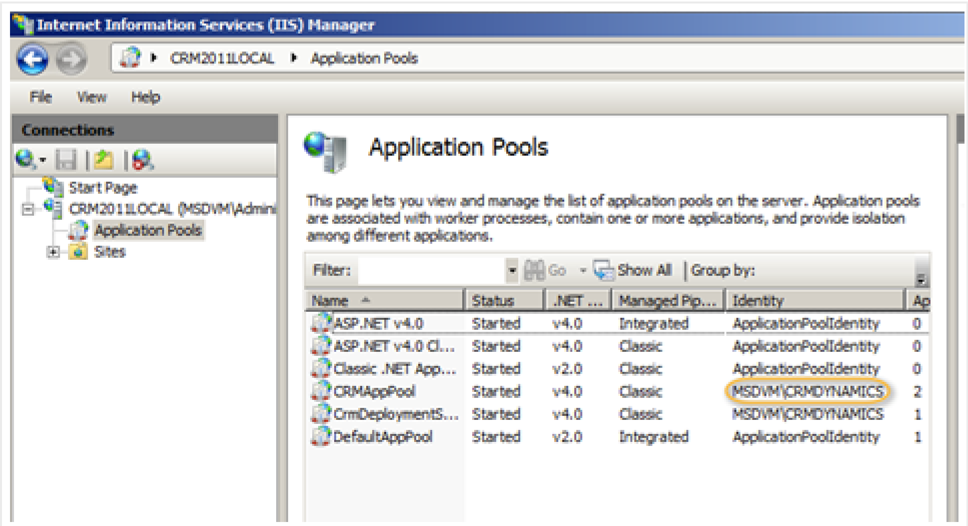
If you have correctly registered the CRM, the **CRM Connection Credentials** window displays.

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.

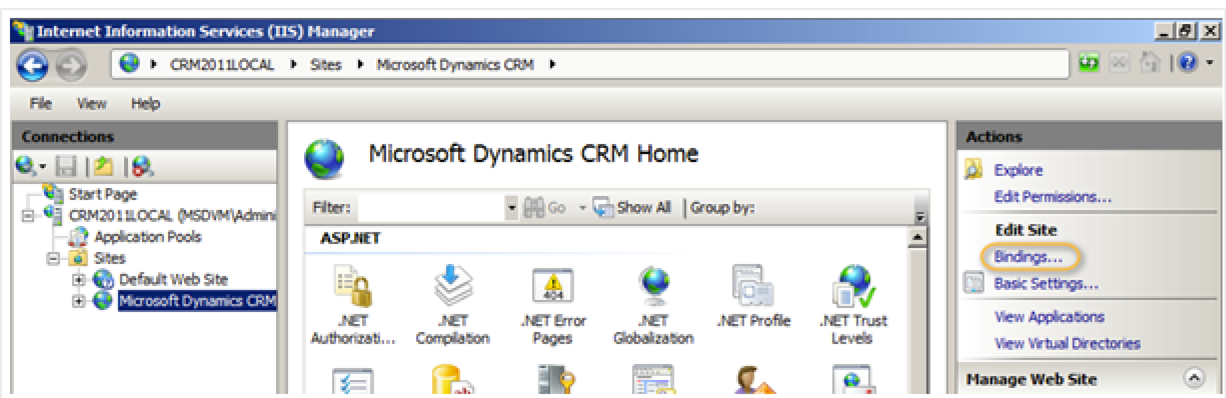
Specify the Identify for CRMAppPool

- Log in to your MSD Application server.

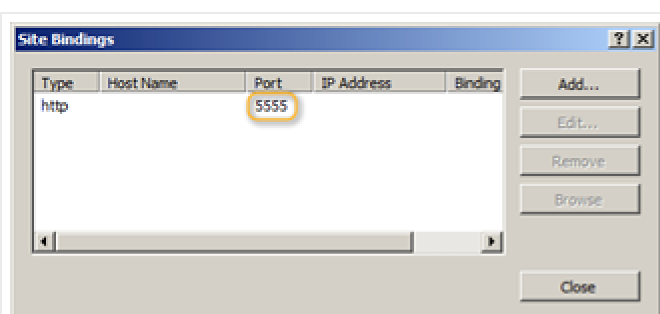


Identify the Port for Your CRM Dynamics Instance

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



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



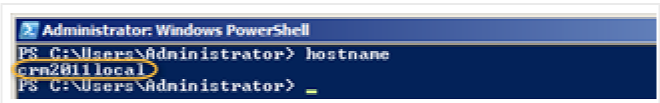
Identify the Service Principal Name (SPN) for the Environment.

(!) 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.

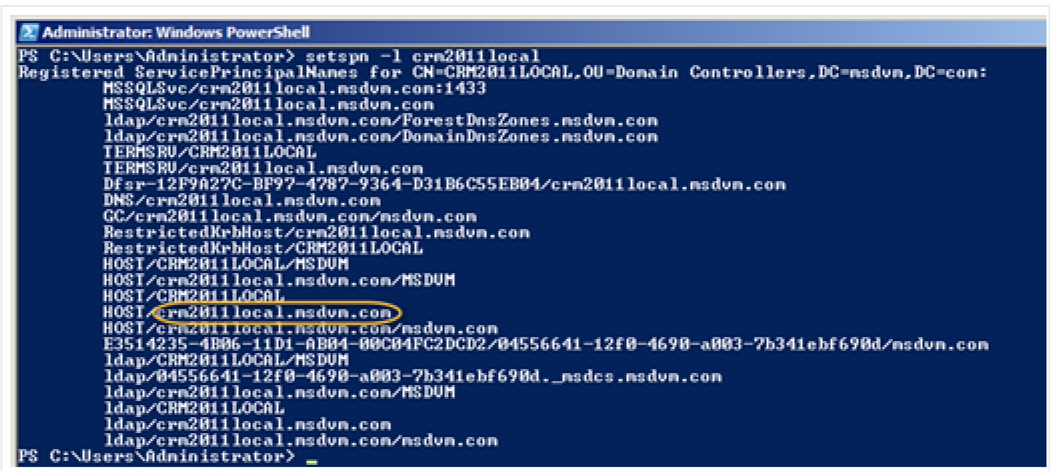
   The **Administrator: Windows Powershell** window opens.

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



```
Administrator: Windows PowerShell
PS C:\Users\Administrator> hostname
crm2011local
PS C:\Users\Administrator> _
```

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



```
Administrator: Windows PowerShell
PS C:\Users\Administrator> setspn -l crm2011local
Registered ServicePrincipalNames for CN=CRM2011LOCAL,OU=Domain Controllers,DC=msdvm,DC=com:
        MSSQLSvc/crm2011local.msdvm.com:1433
        MSSQLSvc/crm2011local.msdvm.com
        ldap/crm2011local.msdvm.com/ForestDnsZones.msdvm.com
        ldap/crm2011local.msdvm.com/DomainDnsZones.msdvm.com
        TERMSRV/CRM2011LOCAL
        TERMSRV/crm2011local.msdvm.com
        Dfsr-12F9A27C-BF97-4787-9364-D31B6C55EB04/crm2011local.msdvm.com
        DNS/crm2011local.msdvm.com
        GC/crm2011local.msdvm.com/msdvm.com
        RestrictedKrbHost/crm2011local.msdvm.com
        RestrictedKrbHost/CRM2011LOCAL
        HOST/CRM2011LOCAL/MSDVM
        HOST/crm2011local.msdvm.com/MSDVM
        HOST/CRM2011LOCAL
        HOST/crm2011local.msdvm.com
        HOST/crm2011local.msdvm.com/msdvm.com
        E3514235-4B06-11D1-AB04-00C04FC2DCD2/04556641-12f0-4690-a003-7b341ebf690d/msdvm.com
        ldap/CRM2011LOCAL/MSDVM
        ldap/04556641-12f0-4690-a003-7b341ebf690d._msdcs.msdvm.com
        ldap/crm2011local.msdvm.com/MSDVM
        ldap/CRM2011LOCAL
        ldap/crm2011local.msdvm.com
        ldap/crm2011local.msdvm.com/msdvm.com
PS C:\Users\Administrator> _
```

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

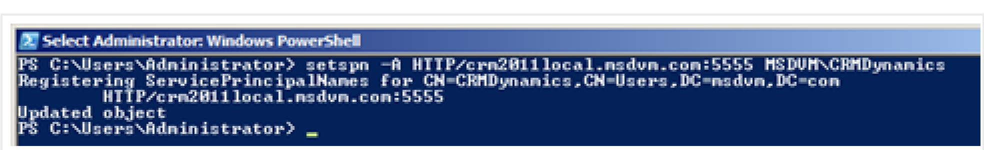
4. Enter the following command with the values obtained in the previous steps as follows:

   `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`



```
Select Administrator: Windows PowerShell
PS C:\Users\Administrator> setspn -A HTTP/crm2011local.msdvm.com:5555 MSDVM\CRMDynamics
Registering ServicePrincipalNames for CN=CRMDynamics,CN=Users,DC=msdvm,DC=com
        HTTP/crm2011local.msdvm.com:5555
Updated object
PS C:\Users\Administrator> _
```

5. Enter the command:

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

In our example, this is

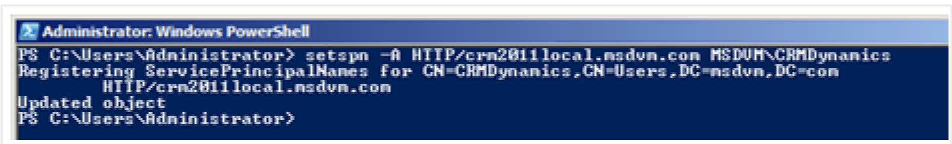
```
setspn -A HTTP/crm2011local.msdvm.com:5555 MSDVM\CRMDynamics setspn -A
HTTP/<spn> <user>
```

6. Enter the command:

```
setspn -A HTTP/<spn> <user>
```

In our example, this is

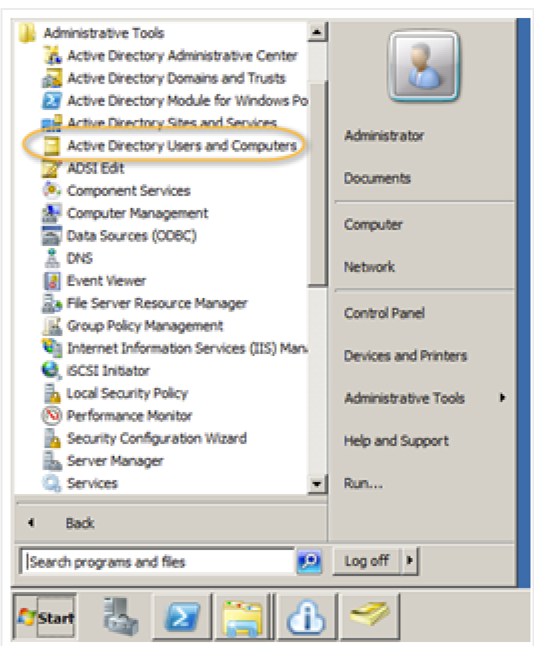
```
setspn -A HTTP/crm2011local.sdvm.com MSDVM\CRMDynamics
```



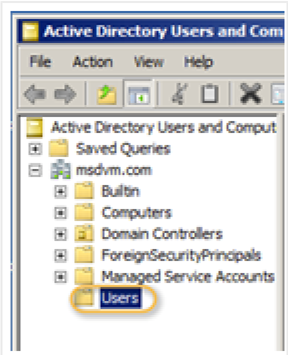
Setting Delegation

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

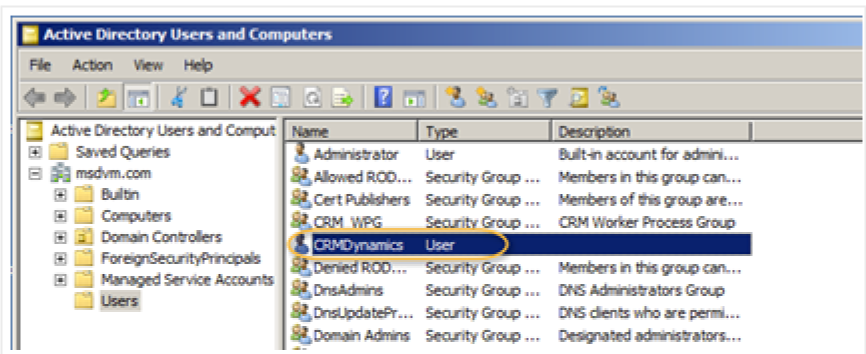
1. Log in to your Domain Controller and select **Active Directory Users and Computers**.



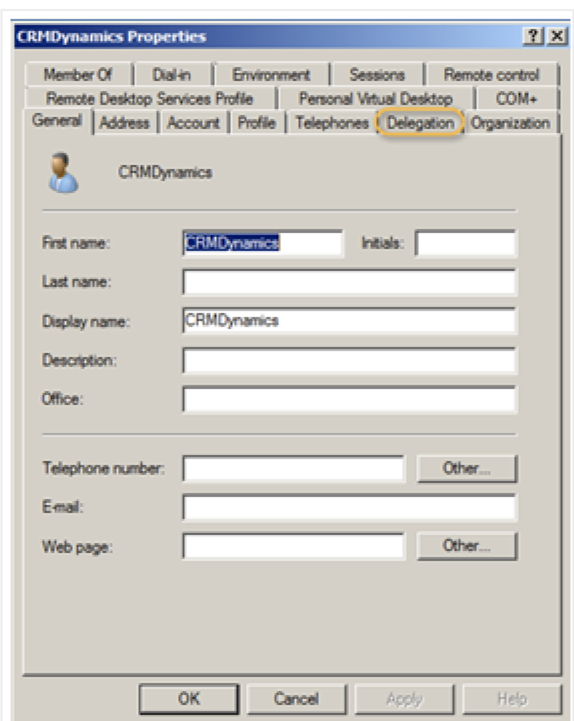
2. In the **Active Directory Users and Computers** window, select **msdvm.com/Users**.



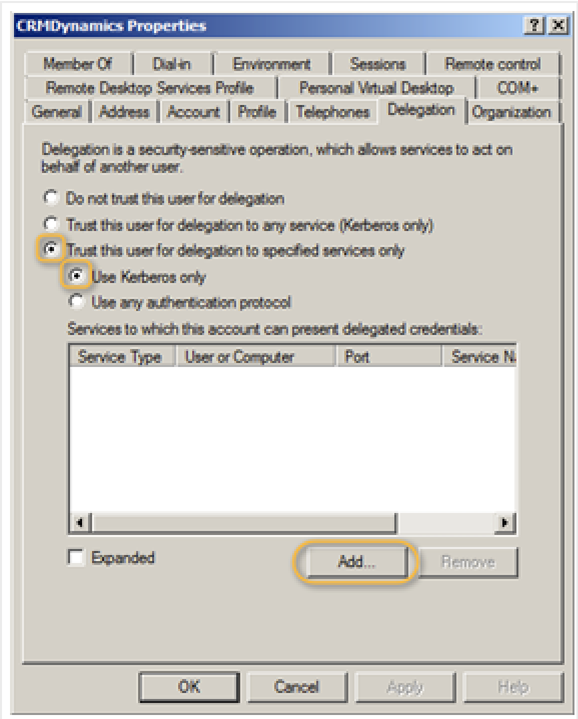
3. In the **Users** directory, locate the User identified in the Step 1 and double-click it (see this step on page 5-21).



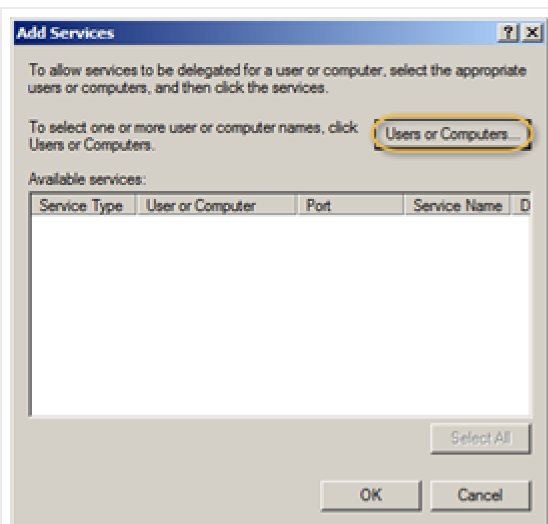
4. In the **CRMDynamics Properties** window, select the **Delegation** tab.



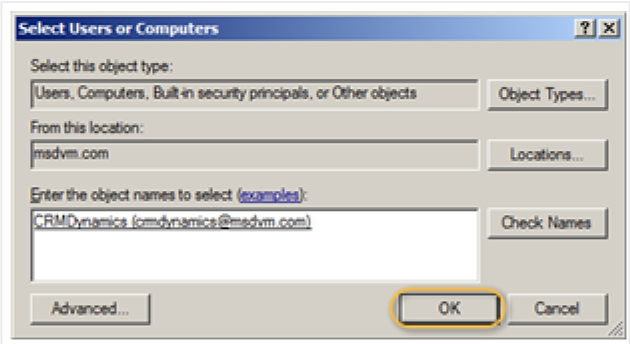
5. Select the **Trust this user for delegation to specified services only** and **Use Kerberos only options**, and then click **Add**.



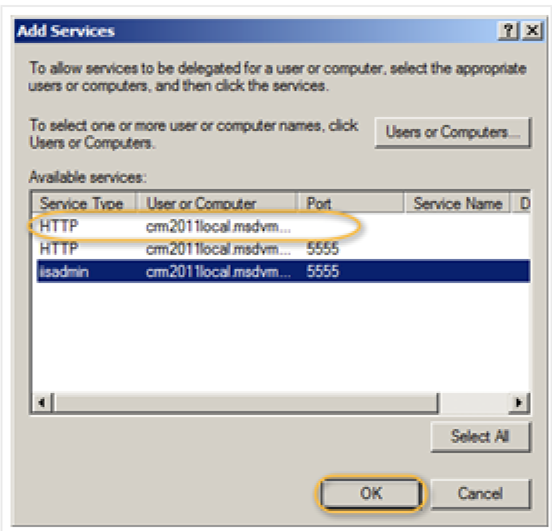
6. Click **Users or Computers**.



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**.



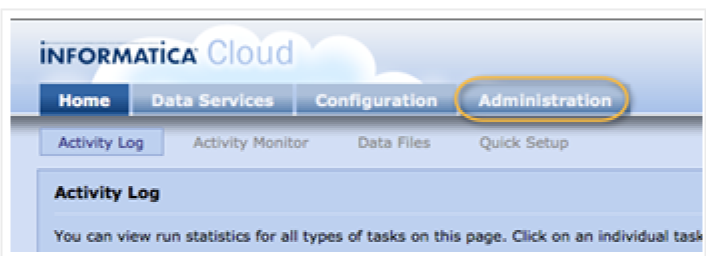
Post-Installation Steps

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

   The Secure Agent shuts down.

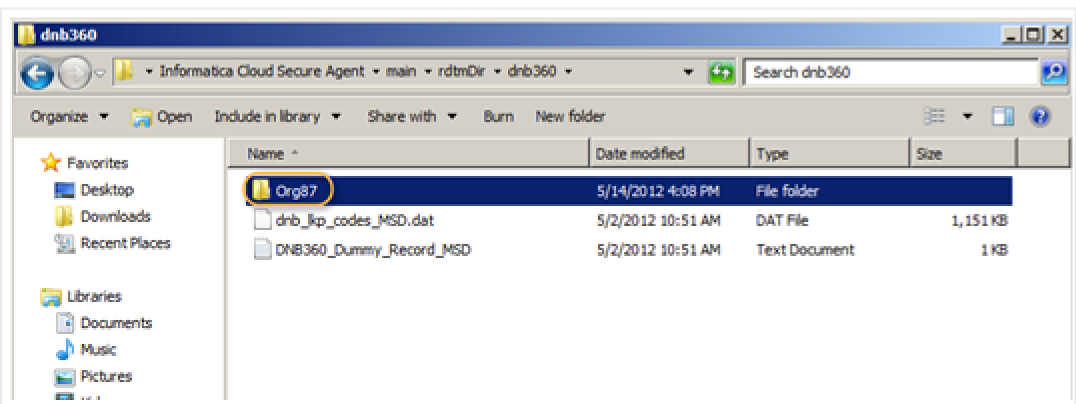
   A message displays to inform you that the Secure Agent has been stopped.

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



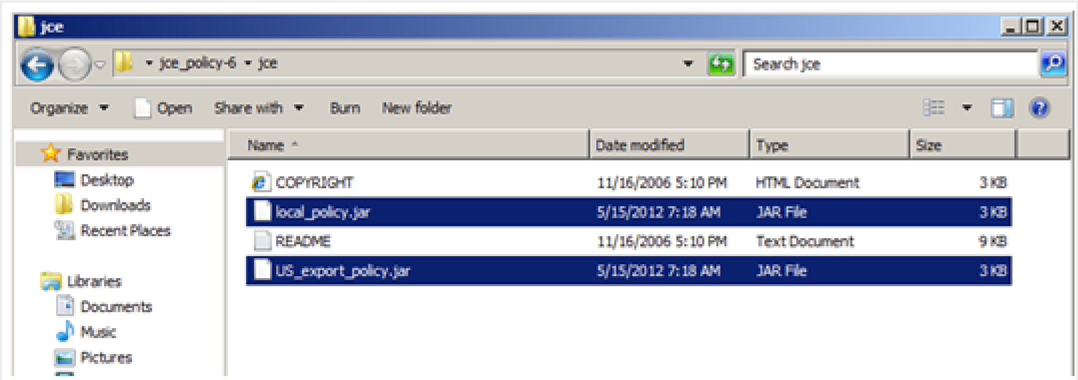
3. Log back in to Informatica Cloud using the user name and password you previously entered.
4. In the **My Organization** window, identify the **Organization ID** for your installation, for example, Org87.

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



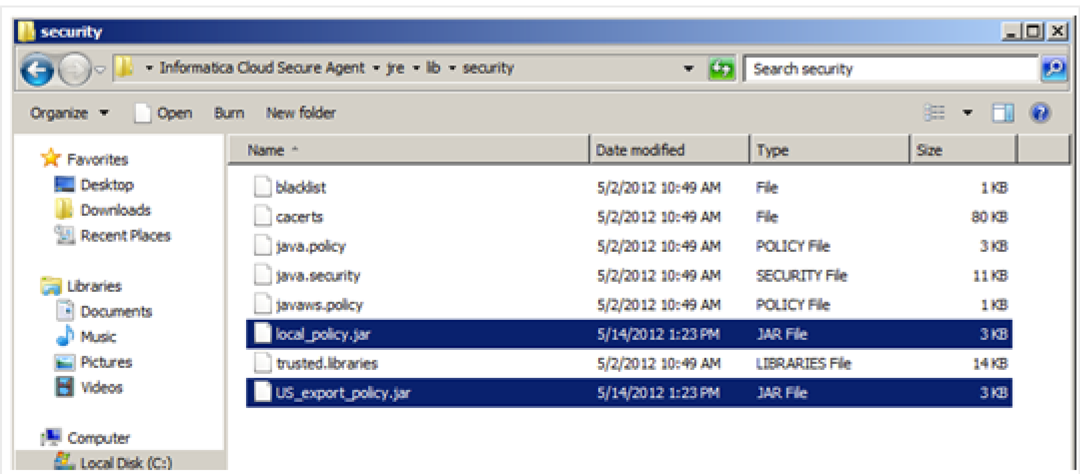
6. Download the Java Security Policy Files from this URL: http://www.oracle.com/technetwork/java/javase/downloads/jce-6-download-429243.html.
7. Unzip the zip package and copy:

   `local_policy.jar and US_export_policy.jar`



8. Paste the unzipped files in the

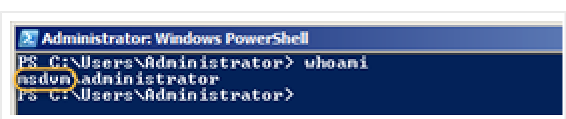
   `Program Files (x86)\Informatica Cloud Secure Agent\jre\lib\security`
   directory and overwrite the existing files.



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
```

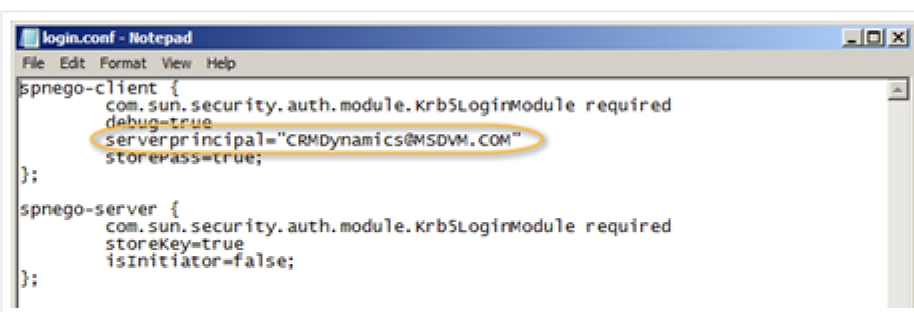
3. Save the file.

(!) 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.



```
spnego-client {
        com.sun.security.auth.module.Krb5LoginModule required
        debug=true
        serverprincipal="CRMDynamics@MSDVM.COM"
        storePass=true;
};

spnego-server {
        com.sun.security.auth.module.Krb5LoginModule required
        storeKey=true
        isInitiator=false;
};
```

   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

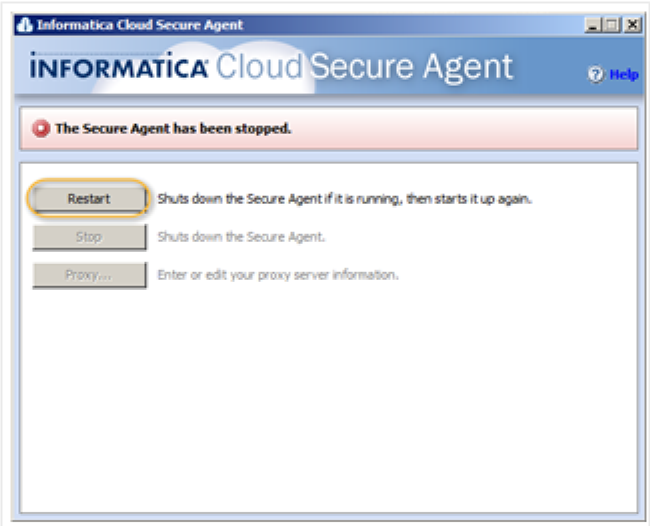
      Default JRD password: changeit

Optional Step When the DNS Is Unable to Perform Host Resolution

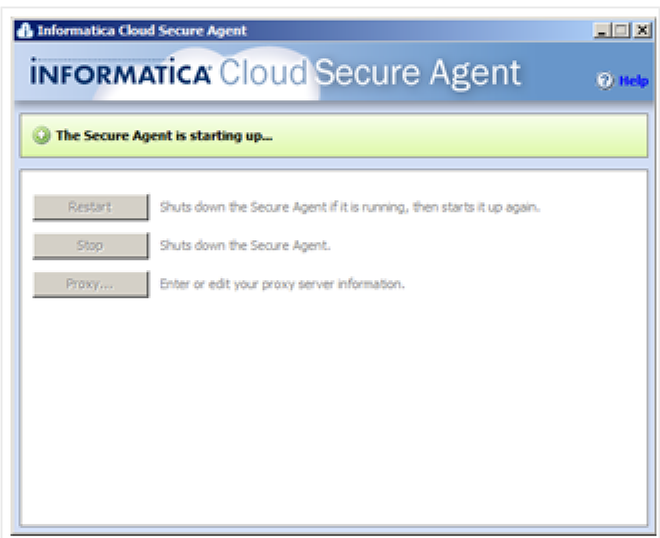
If the DNS is improperly set, you might need to add the IP address and hostname to your hosts file to resolve the hosts used for MSD deployment. For example, in Windows 7, the IP address can be found in this directory -- `C:\Windows\System32\drivers\etc`.

Restarting the Secure Agent

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



The Informatica Cloud Secure Agent starts up.



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

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

Each batch job has its own distinct schedule:

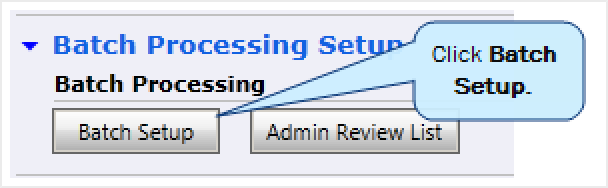
New Batch	When you are ready to execute a batch job for the first time, you must run the New Batch Job.
Refresh Batch	You can run Refresh Batch only after you have run New Batch at least once.

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

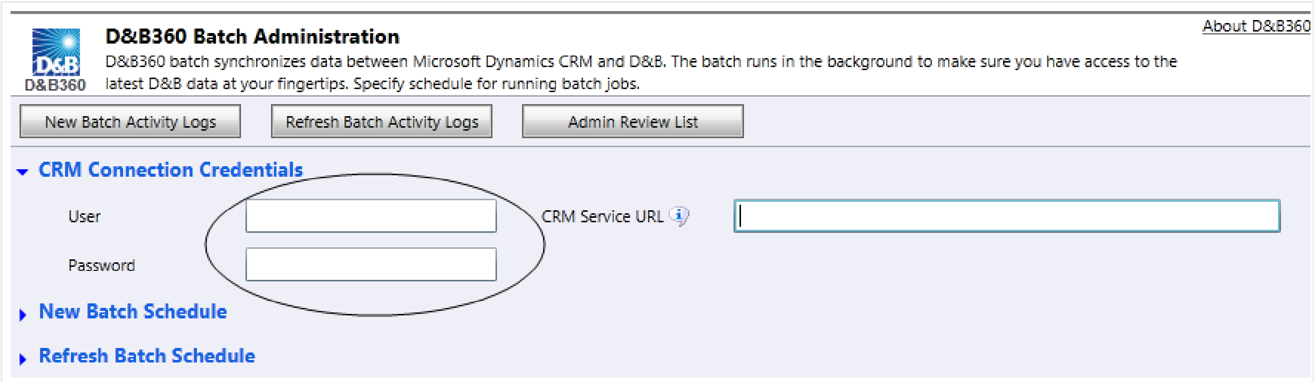
Note: For both New Batch Jobs and Refresh Batch Jobs, the start date and time is a mandatory field.To cancel a job that you've scheduled to run at a future date and time, enter a past date and time. If your job has already started, you cannot cancel it.

Scheduling a New Batch Job

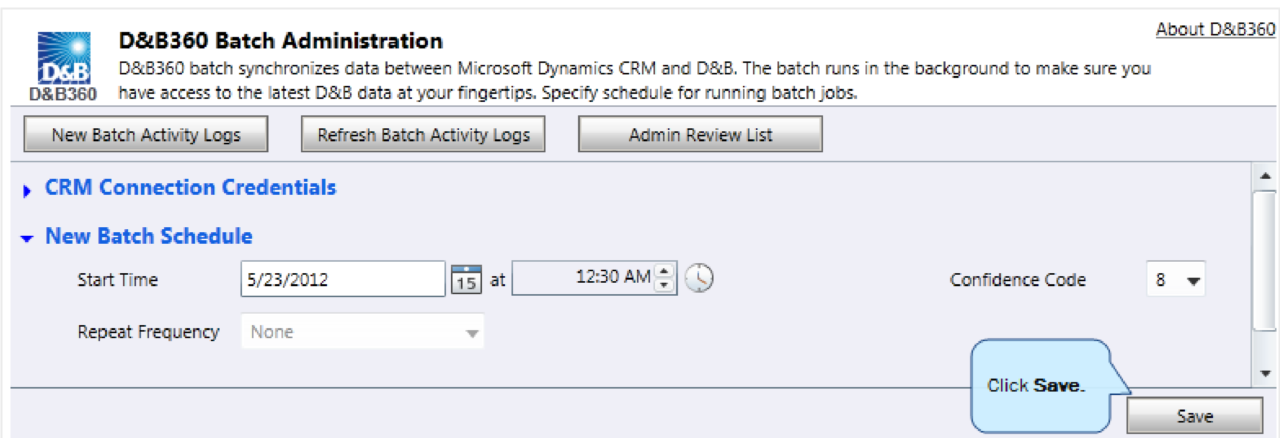
1. In the **D&B360 Administration** window, click **Batch Setup**.



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



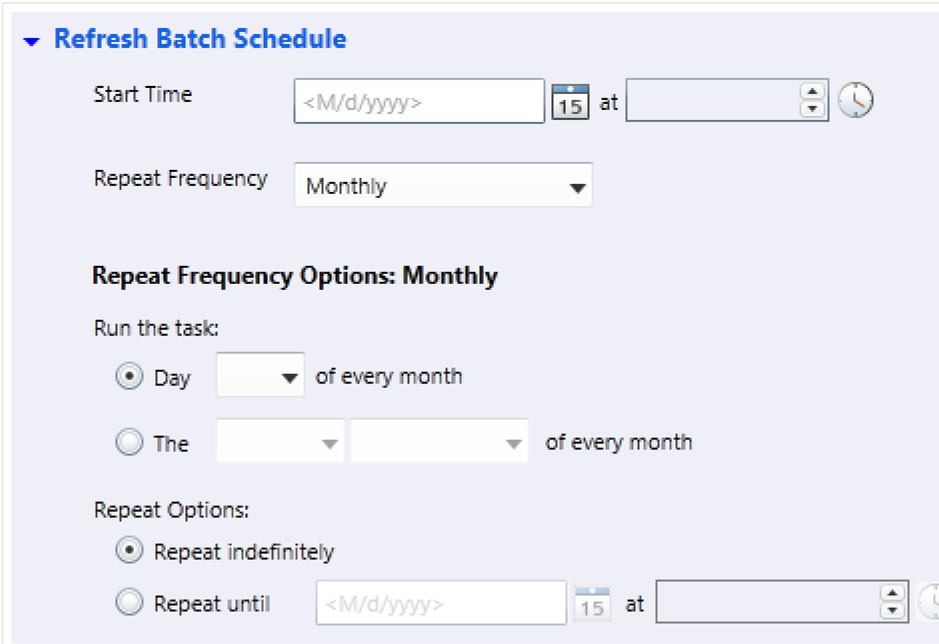
3. In the **New Batch Schedule** area, enter the **Start Time** for a new batch:
   a. To set the date, type it or use the calendar.
   b. To set the time, type it or use the clock.
4. In the **Confidence Code** field, select from 1 to 10. The default is **8**. We recommend using a relatively high confidence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



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.



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 indefinitely or • Repeat until and choose the date and time.	

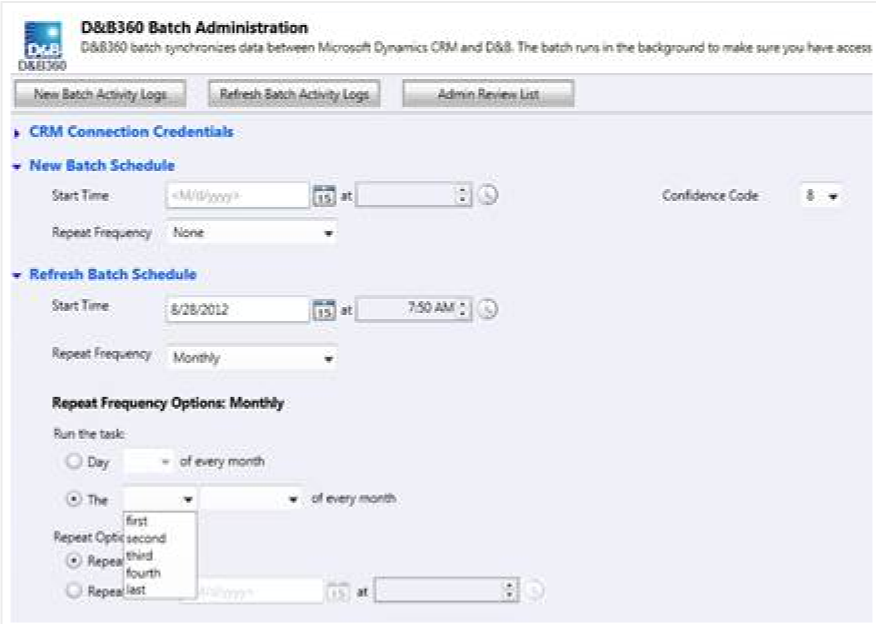
Scheduling a Refresh Batch Job

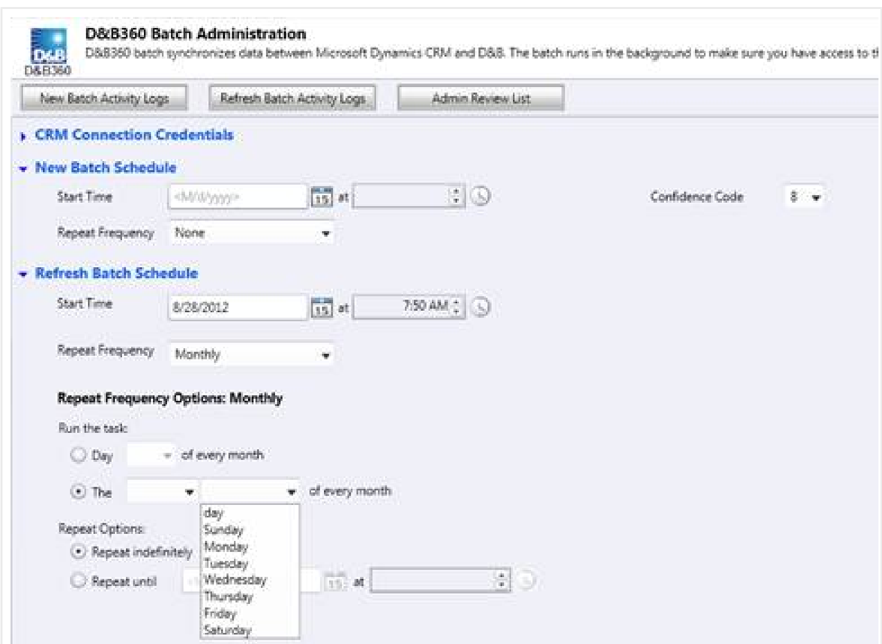
Before you can schedule a Refresh Batch Job, which repeats a previous batch job, you must have run a New Batch job at least once (see "Scheduling a New Batch Job" on page 6-1).

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:





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

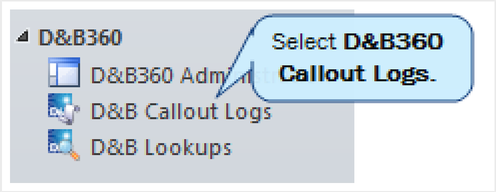
7 Reviewing Logs, Admin Review Lists, and D&B360 Reports

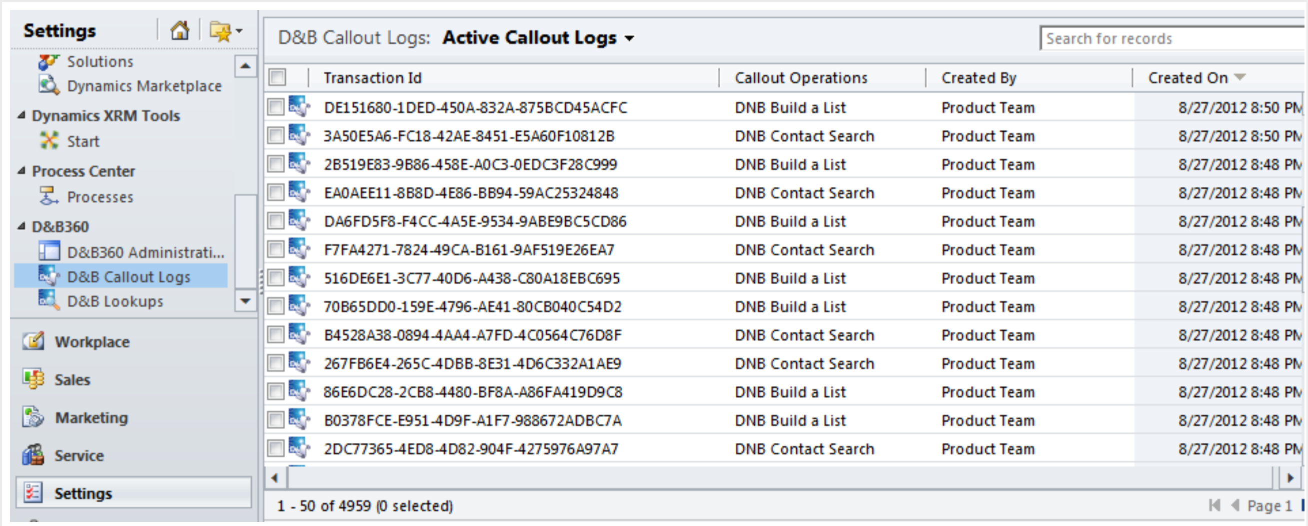
After you have scheduled batches, you need to monitor the batch processes and be alert for incomplete results. You also need to review the results from batch jobs.

Accessing the Callout Logs

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

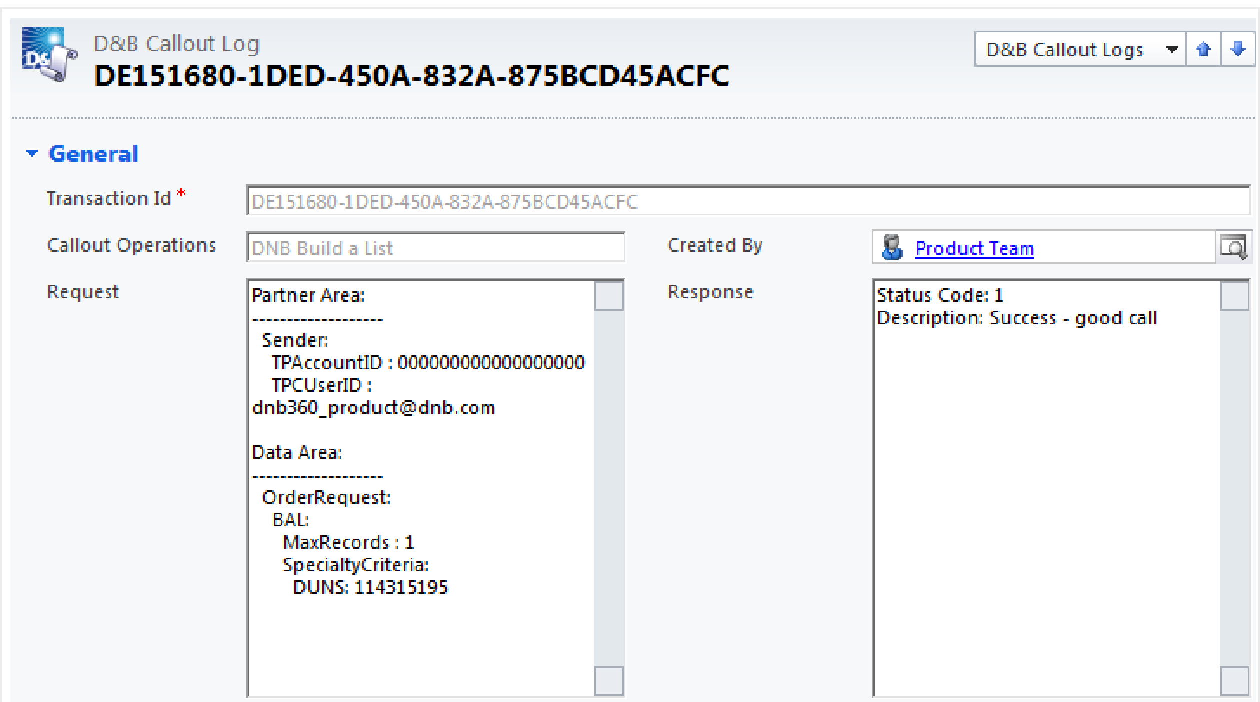
1. In the left menu, select **D&B360 -> D&B Callout Logs**.





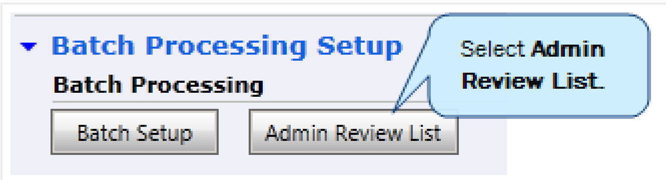
2. To get additional information about a transaction, click the **Transition Id**.

Information about this transaction displays in a new window.



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.



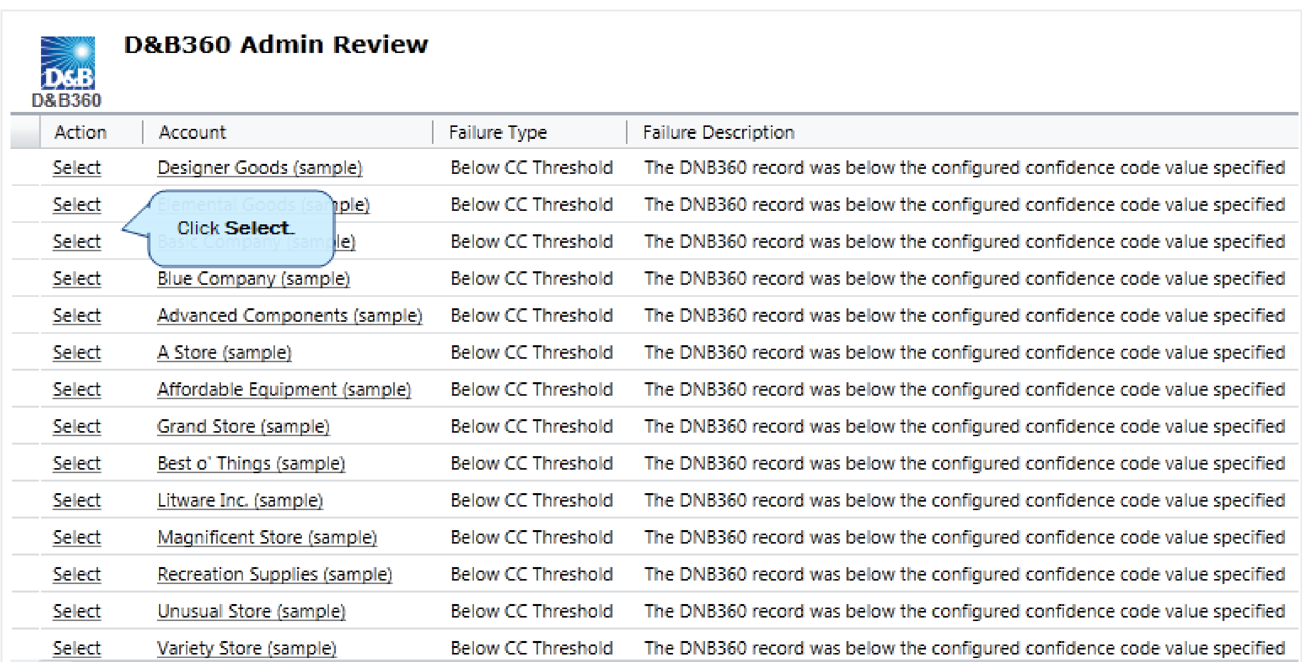
Using the Admin Review List

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

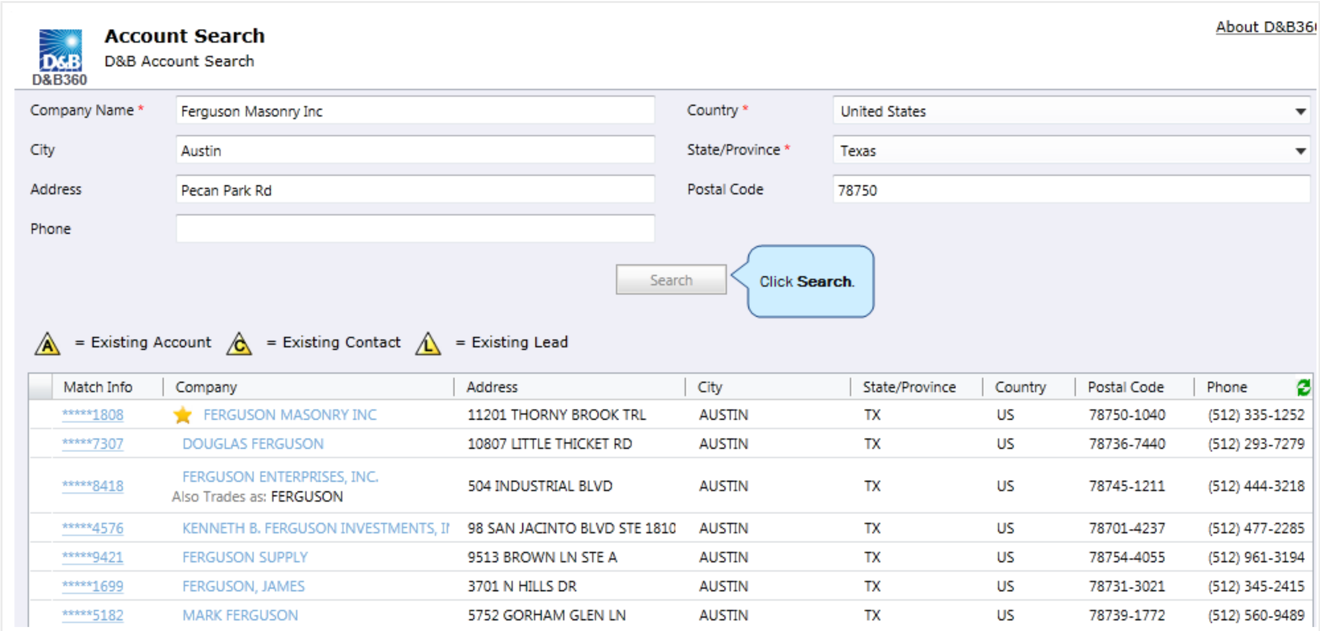
Note: Records that fall below the defined Confidence Code Threshold are moved to the Admin Review List. They are not automatically re-processed in the next batch run. You must manually process these records.

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



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 (sample)	Below CC Threshold	The DNB360 record was below the configured confidence code value specified
Select	Basic Company (sample)	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.



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.

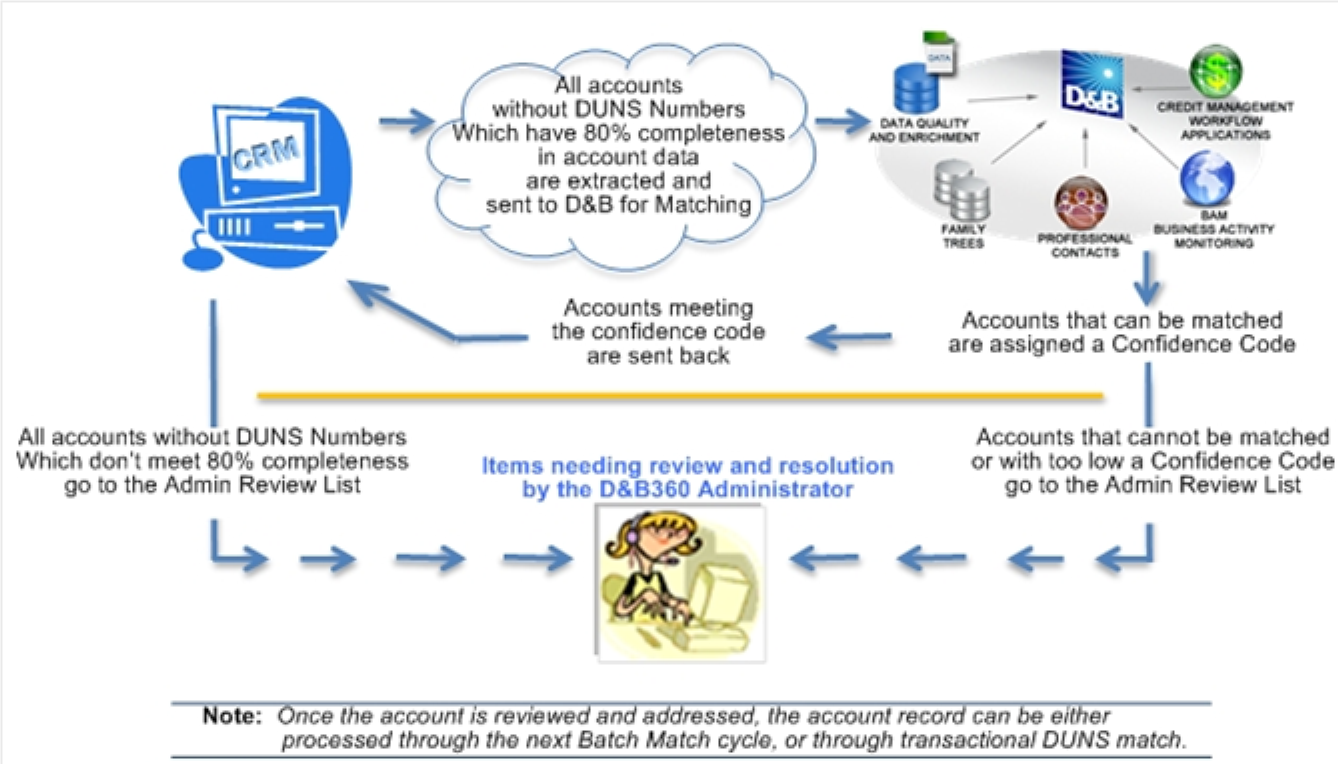
Viewing and Processing Failed Batched Records Listed in the Administrator Review List

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.

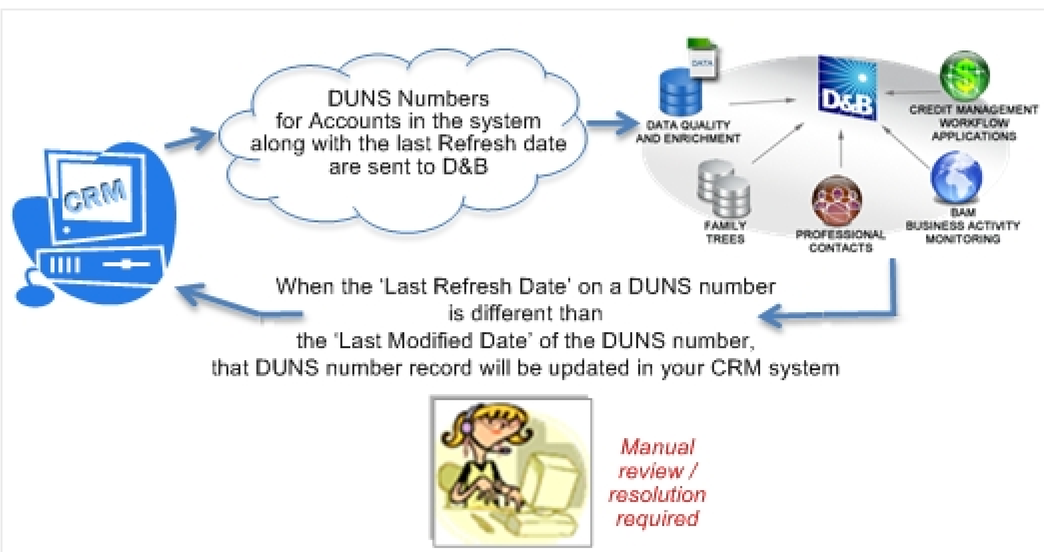
When the information is returned from D&B, most of the accounts will have been matched with D-U-N-S Numbers. Some accounts will be sent to the Admin Review List for one of the following reasons:

- 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.

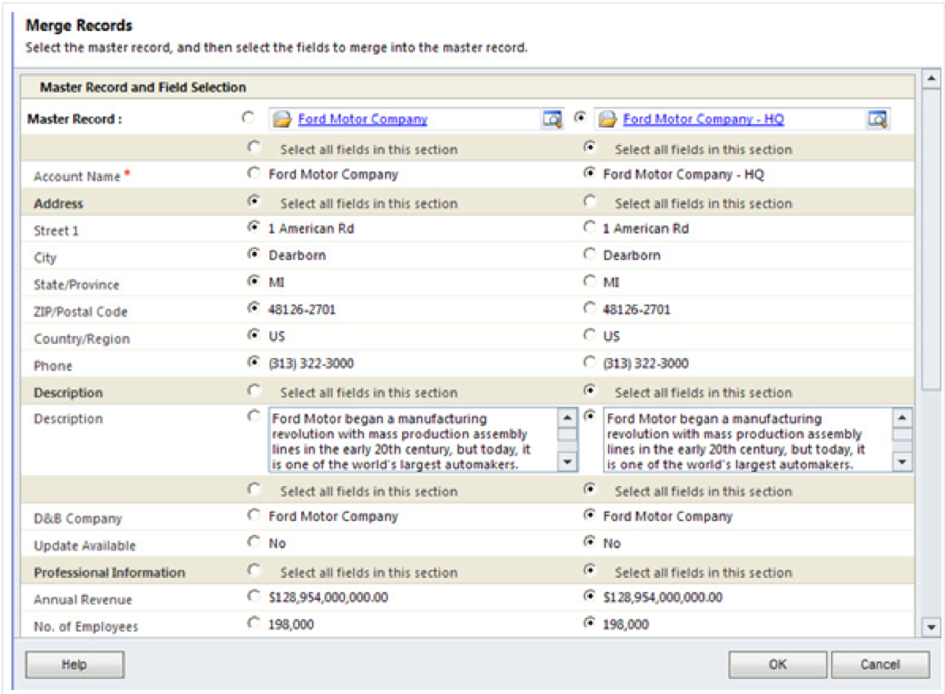
Using the Duplicate DUNS Report to Merge Duplicate Accounts

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.

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.



(!) 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.

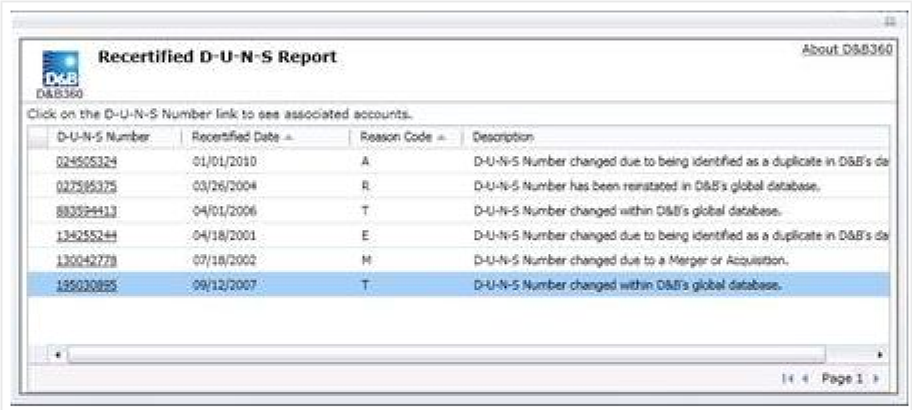
5. To complete the merge process, click **OK**.

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.

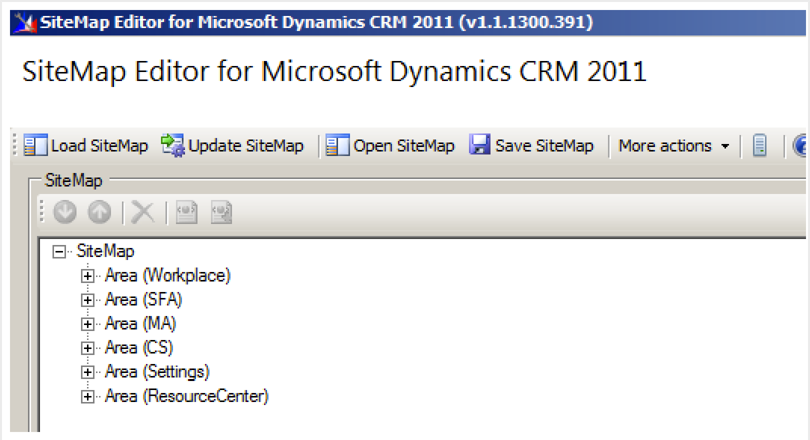

Recertified D-U-N-S Report
About D&B360
D&B360
Click on the D-U-N-S Number link to see associated accounts.
D-U-N-S Number
Recertified Date
Reason Code
Description
01/01/2010
A
D-U-N-S Number changed due to being identified as a duplicate in D&B's
03/26/2004
R
D-U-N-S Number has been reinstated in D&B's global database.
04/01/2006
T
D-U-N-S Number changed within D&B's global database.
04/18/2001
E
D-U-N-S Number changed due to being identified as a duplicate in D&B's
07/18/2002
M
D-U-N-S Number changed due to a Merger or Acquisition.
09/12/2007
T
D-U-N-S Number changed within D&B's global database.
Page 1

8 Troubleshooting

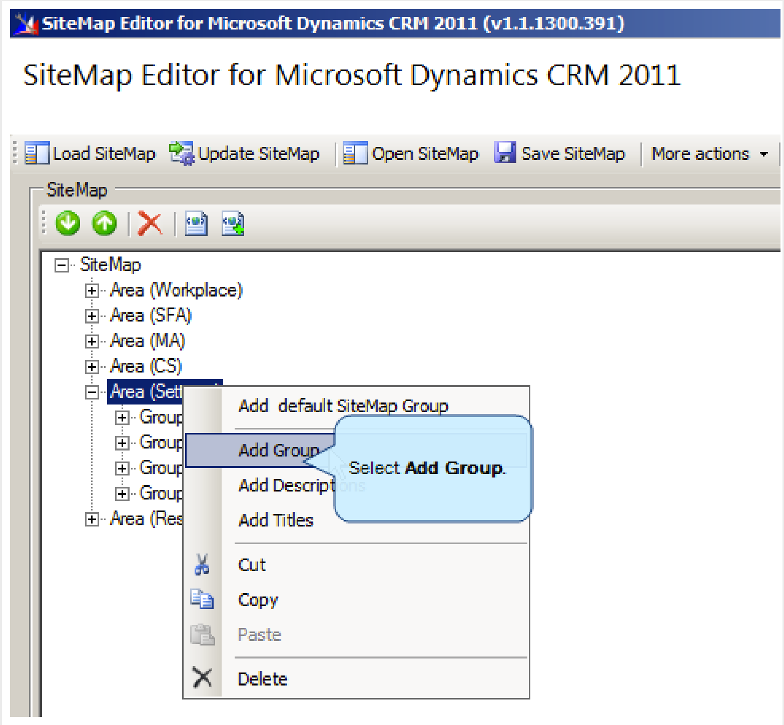
Enabling D&B360 Administration on a Customized SiteMap

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.



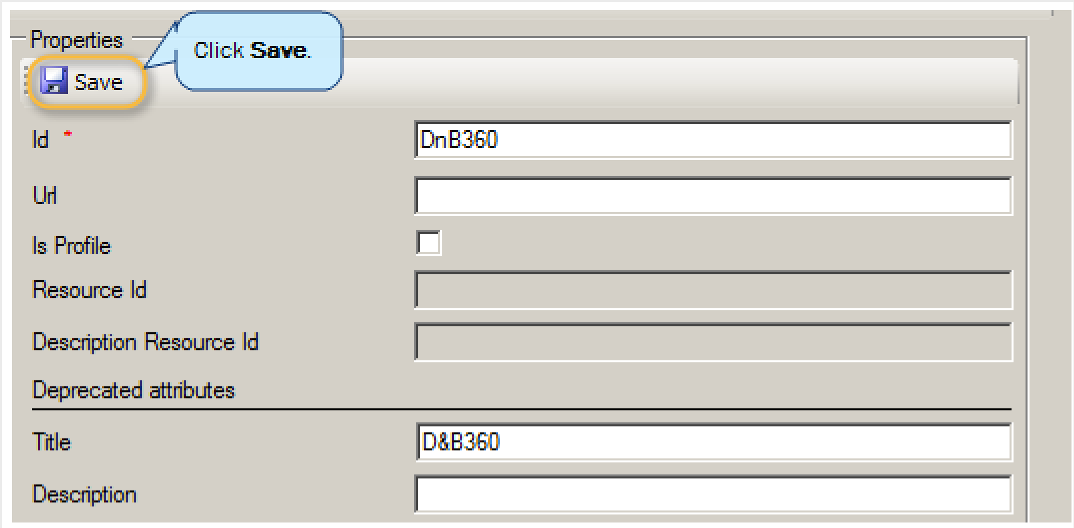
2. In the **SiteMap** window, right-click **Area (Settings)** and select **Add Group**.



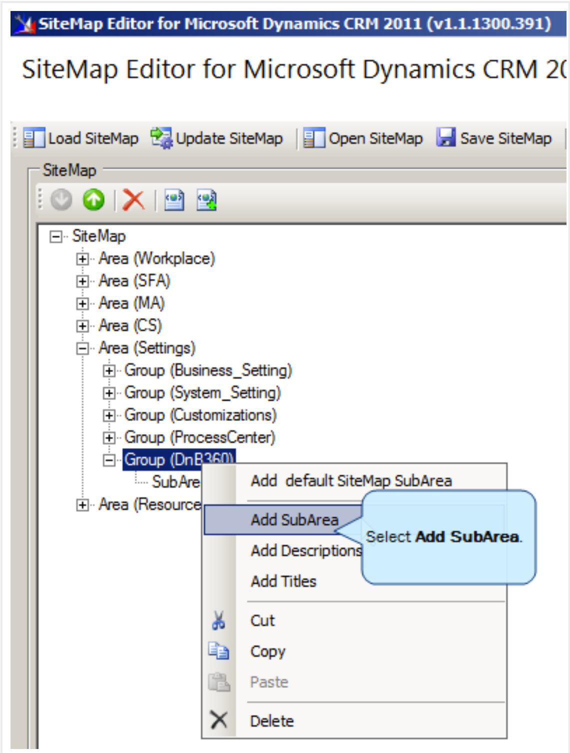
3. In the **Properties** window:

   a. In the **Id** field, type **DnB360**.

   b. In the **Title** field, type **D&B360**.



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



5. In the **Properties** window:

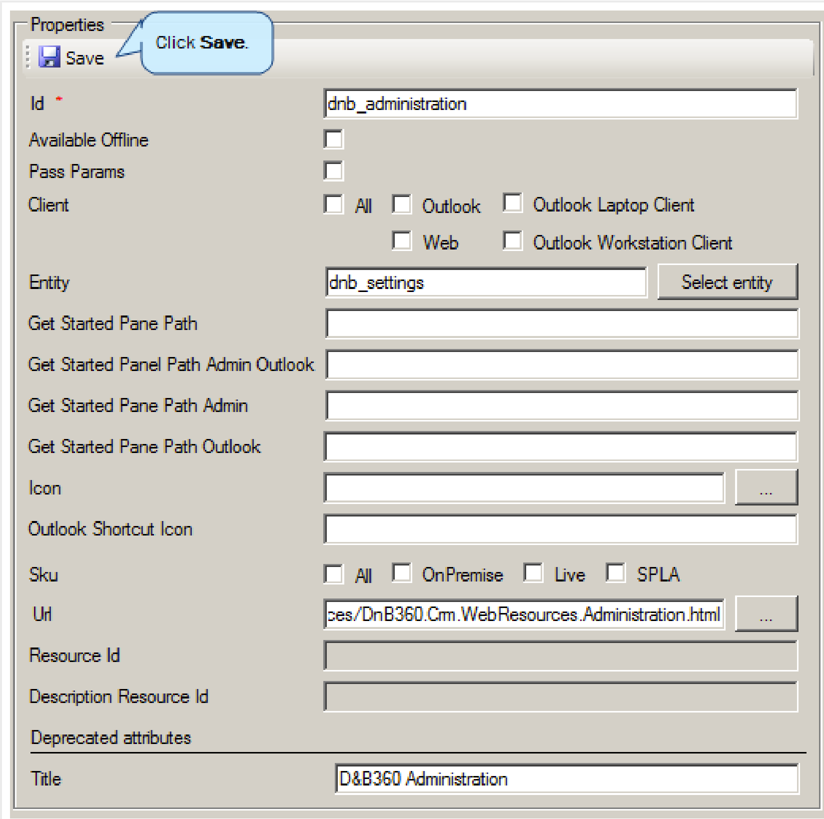
   a. In the **Id** field, type **dnb_administration**.

   b. In the **Entity** field, type **dnb_settings**.

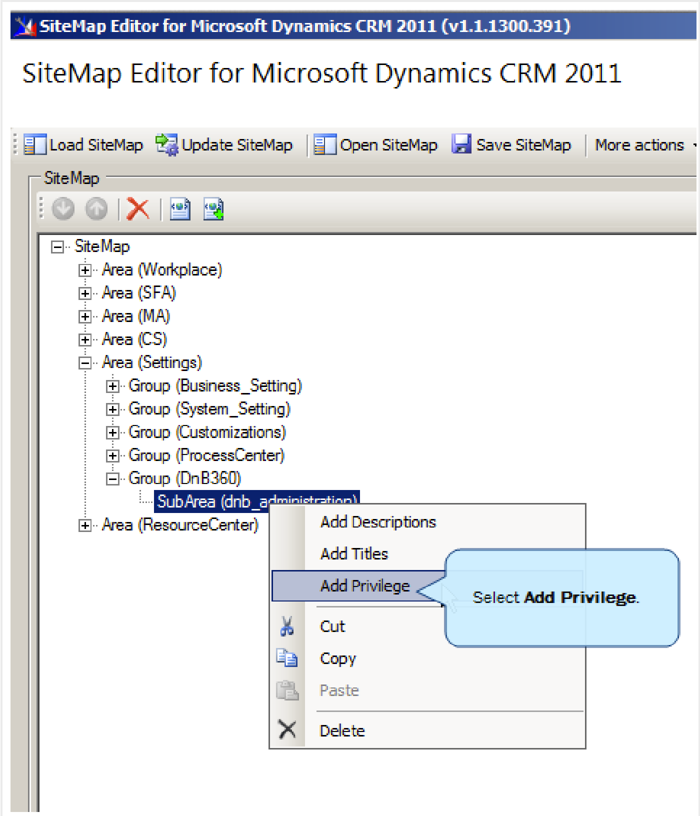
   c. In the **Url** field, enter:
   $webresource:dnb_/WebResources/DnB360.Crm.WebResources.Administration.html

   d. In the **Title** field, type **D&B360 Administration**.

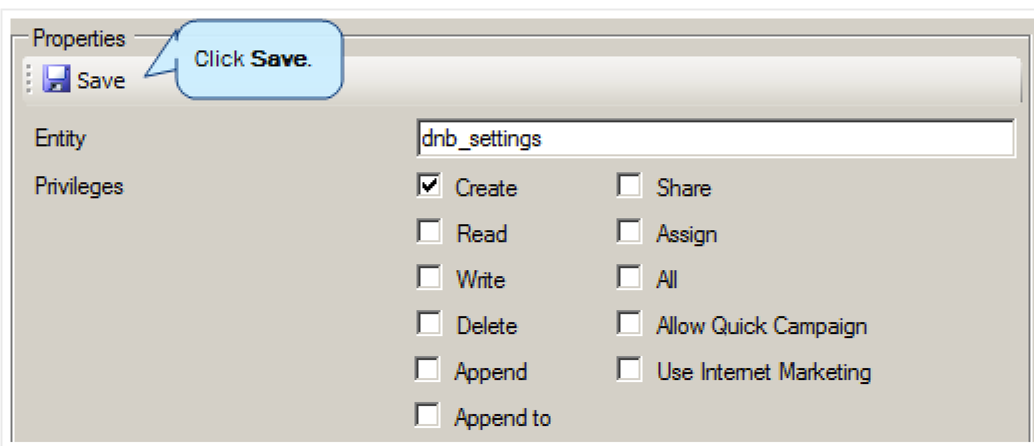
   e. Click **Save**.


Properties
Save
Click Save.
Id *
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
Icon
Outlook Shortcut Icon
Sku
All
OnPremise
Live
SPLA
Url
ces/DnB360.Crm.WebResources.Administration.html
Resource Id
Description Resource Id
Deprecated attributes
Title
D&B360 Administration

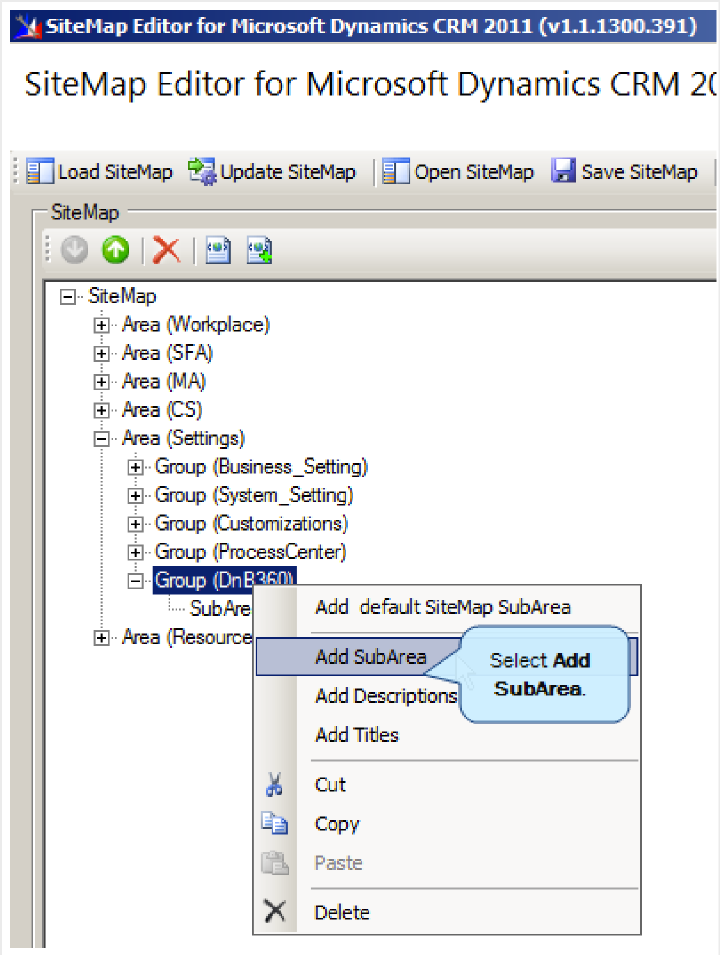
6. In the **Site Map Editor** window, right-click **SubArea (dnb_administration)** and select **Add Privilege**.



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



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



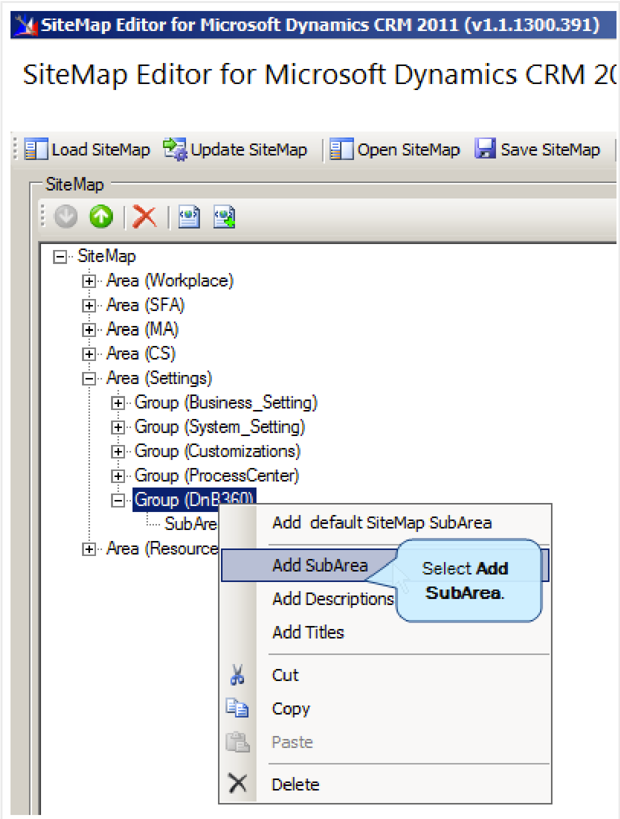
9. In the **Properties** window:

   a. In the **Id** field, type **dnb_calloutlog**.

   b. In the **Entity** field, type **dnb_calloutlog**.

   c. Click **Save**.

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

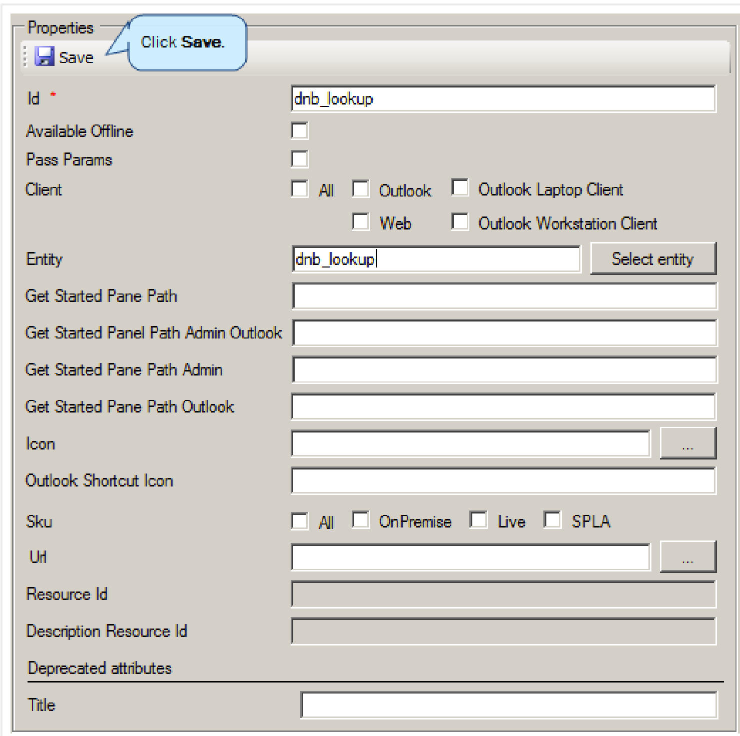


11. In the **Properties** window:

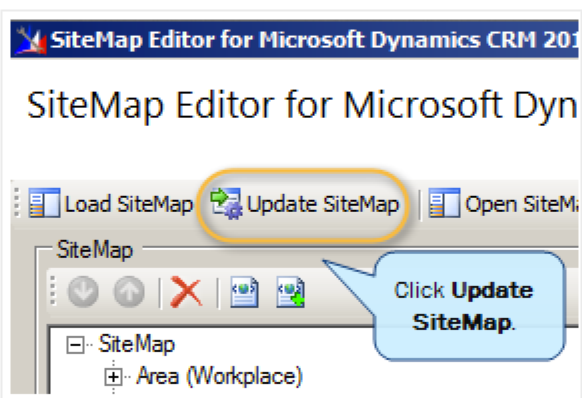
    a. In the **Id** field, type **dnb_lookup**.

    b. In the **Entity** field, type **dnb_lookup**.

    c. Click **Save**.



12. Click **Update SiteMap**.

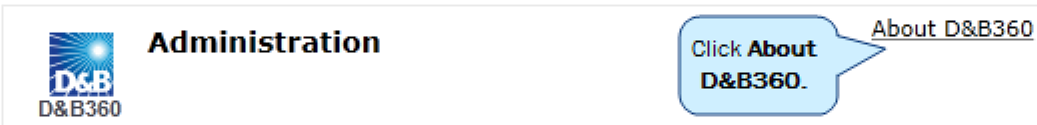


For on-demand (Live) environments, it might take a few minutes for the settings to take effect. You might want to publish all customizations.

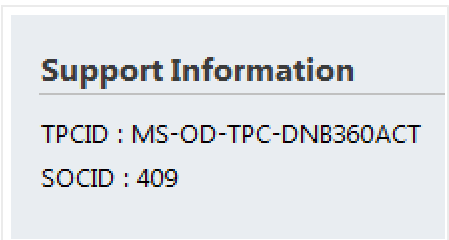
Finding Your SOCID and TPCID

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**.



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



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.

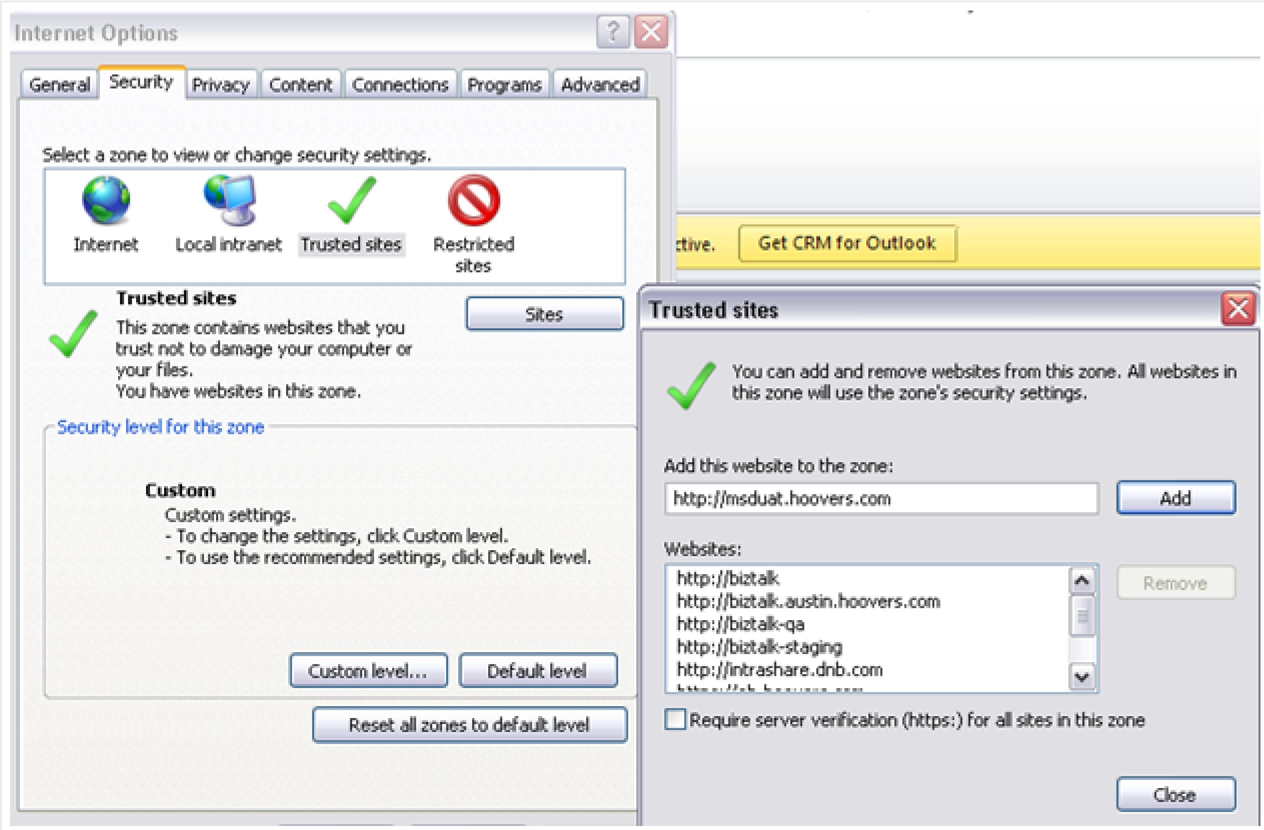
1. After you have completed the installation process, you might receive an error such as the one below:

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.



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 Communication	SLA Determined with the customer. Based on mutual agreement of the severity of the issue.

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

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

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

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