D&B360 Administration and Installation Guide

for SAP CRM

Version 2.3

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About this Guide

Audience and Purpose

This guide is for SAP 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 SAP 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 SAP 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.

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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* SAP 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.

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D&B360 Packages

The D&B360 features are available in the packages described in this section.

Note: D&B People are considered to be premium if direct contact information for them is available to download.

Paid Subscriptions

Type of Tracking	Description
Person Credit	• Imports of premium people are limited and charged against your contact credits. That is, D&B only charges you the first time you import a specific premium person. D&B does not charge any subsequent imports of that person. • For each premium import, one credit is consumed. • Imports of non-premium people are unlimited, and importing them is not charged against your credits. For example: • When you import multiple people that includes 20 premium people, and 5 of these were previously imported, D&B charges you credits only for the 15 contact credits that were not already imported. • When you import a single person that is a previously imported premium person, you are not charged a contact credit.
Company Credit	Company imports are unlimited for paid customers, and D&B does not charge credits for them.

Trial Subscriptions

Type of Tracking	Description
Person Credit	The contact credit limit represents the combined number of premium and non-premium D&B people that customers can import. For example, a user with a trial credit limit of 25 could import: • 20 premium and 5 non-premium people; or • 10 premium and 15 non-premium people, and so on.
Company Credit	Company imports are limited and tracked for trial customers.

Note: Batch Match Records, Batch Refresh Records, and 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 do not perform optimally without DUNS numbers appended to all records by using Batch Match or the DUNS Import Tool.

Credit Consumption Rules

D&B People are considered to be premium if direct contact information for them is available to download.

Type of Tracking	Description
Person Credit	• Imports of premium people are limited and charged against your contact credits. That is, D&B only charges you the first time you import a specific premium person. D&B does not charge any subsequent imports of that person. • For each premium import, one credit is consumed. • Imports of non-premium people are unlimited, and importing them is not charged against your credits. For example: • When you import multiple people that includes 20 premium people, and 5 of these were previously imported, D&B charges you credits only for the 15 contact credits that were not already imported. • When you import a single person that is a previously imported premium person, you are not charged a contact credit.
Company Credit	Company imports are unlimited for paid customers, and D&B does not charge credits for them.

Type of Tracking	Description
Person Credit	The contact credit limit represents the combined number of premium and non-premium D&B people that customers can import. For example, a user with a trial credit limit of 25 could import: • 20 premium and 5 non-premium people; or • 10 premium and 15 non-premium people, and so on.
Company Credit	Company imports are limited and tracked for trial customers.

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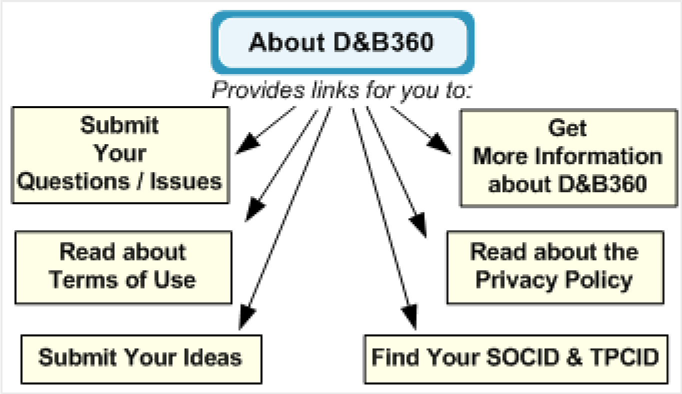
2 Getting Started

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

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

Specifying the Requirements for Your CRM Environment

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

1. The D&B360 Add-On is designed to work with SAP CRM 7.0 SP08. If you don’t have this level of Support Package, we strongly recommend that you upgrade your system before installing our Add-On.
2. You should be using SAP CRM 7.0. If you are using SAP CRM 6.0, you won’t be able to install this Add-On. For more information about the status of this Add-On and compatibility with your version of SAP, contact your D&B sales representative.
3. The package was created using Support Package Manager for EBP/CRM (SPAM) level 33. Therefore, you need level 33 or higher to successfully install the package.
4. Before you install D&B360 in the SAP environment, make note of the following certified platform version requirements:
   - Client Operating System MS Windows
   - Browser IE 7 or 8
   - Server Operating Systems Windows Server 2008, 64-bit
   - Databases MS SQL 2008 / X86_64

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

3 Installing D&B360

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

These instructions are for SAP CRM admin users only. If you encounter any issues during installation, open a case with your D&B360 Support team.

You should have received an email message from D&B that includes a link to the D&B360 Registration Site. On that site, you can click a link to download a .SAR file and a certificate file. The .SAR file contains the D&B360 components that are required to enhance your SAP CRM solution with the power of D&B data. The certificate allows your system to connect securely to D&B data.

Note: The execution or transaction commands that you enter in the Command field are not case-sensitive. In our examples, we use lowercase letters, but you can also use all uppercase letters.

Installing the D&B360 Add-On to your SAP CRM Environment

After you download the .SAR file, you will have all the required components and customizations. Next, you need to import the D&B360 Add-On. This process is similar to that of importing any SAP Support package.

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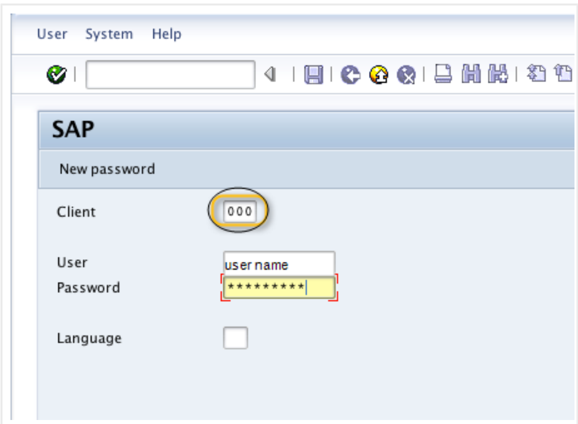
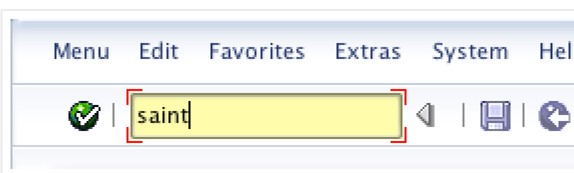
Downloading and Decompressing the .SAR File

Note: You must be a user with basic administrator privileges to perform these steps.

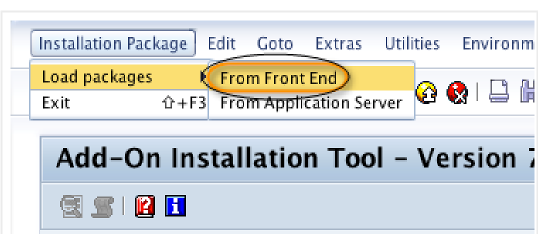
1. In the **SAP** log in window, log in to your development machine.
   a. In the **Client** field, type **000**.
   b. In the **User** field, type your user name.
   c. In the **Password** field, type your password.



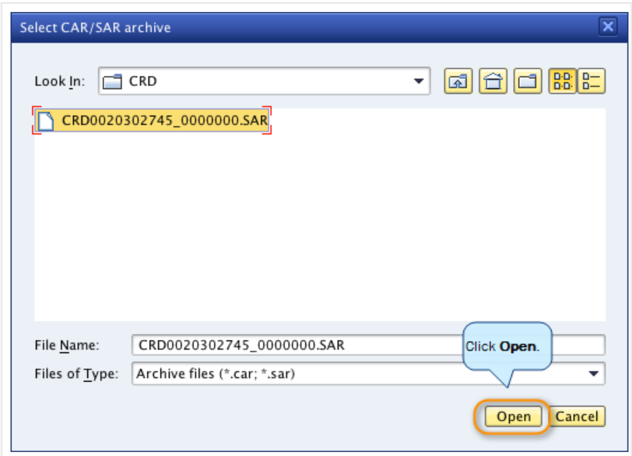
2. In the **Command** field, execute transaction **saint**.



3. In the **Add-On Installation Tool** window, select **Installation Package**, **Load packages**, **From Front End**.

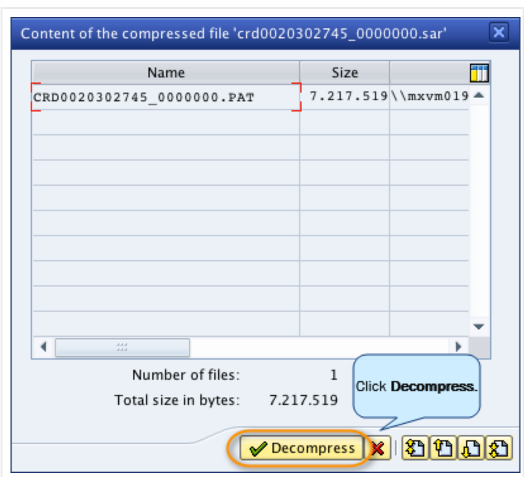


4. In the **Select CAR/SAR archive** window, navigate to the folder where you saved the downloaded .SAR file, and then click **Open**.



As the system processes the file, a window displays stating that the system is reading the archive contents.

5. After the system finished reading the .SAR file, in the Content of the compressed file window, click **Decompress**.

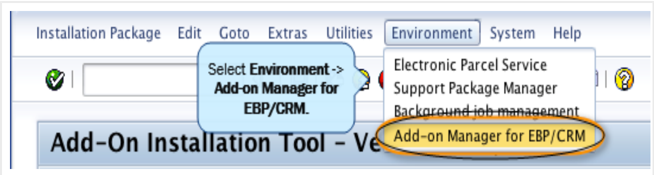


This process extracts the .PAT file, which contains all the components of the D&B360 solution from the .SAR file and places it in the required folder of your SAP CRM server.

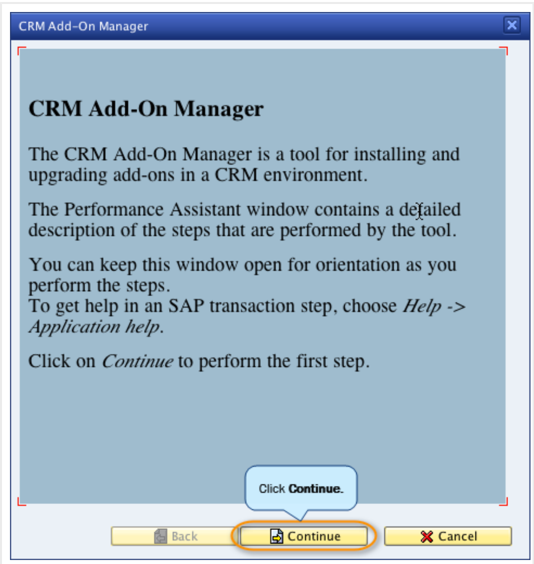
Importing the Package

After the .PAT file displays in the EPS Inbox, you can import the package.

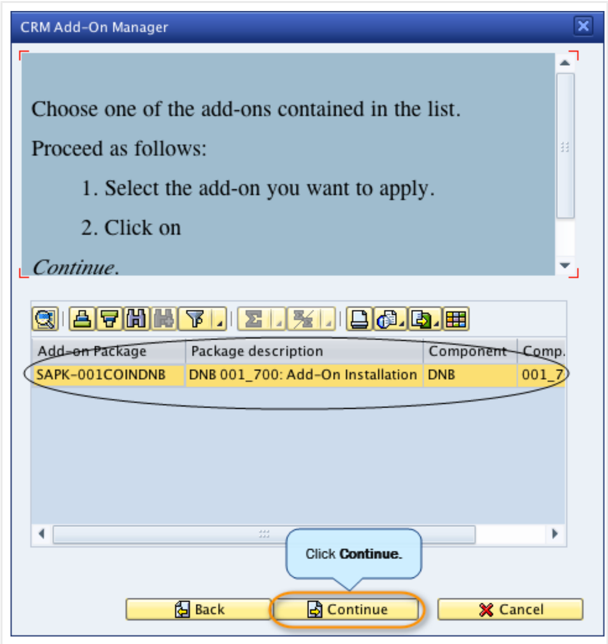
1. In the SAINT transaction window, select **Environment**, **Add-on manager for EBP/CRM**.



2. In the **CRM Add-On Manager** window, click **Continue**.

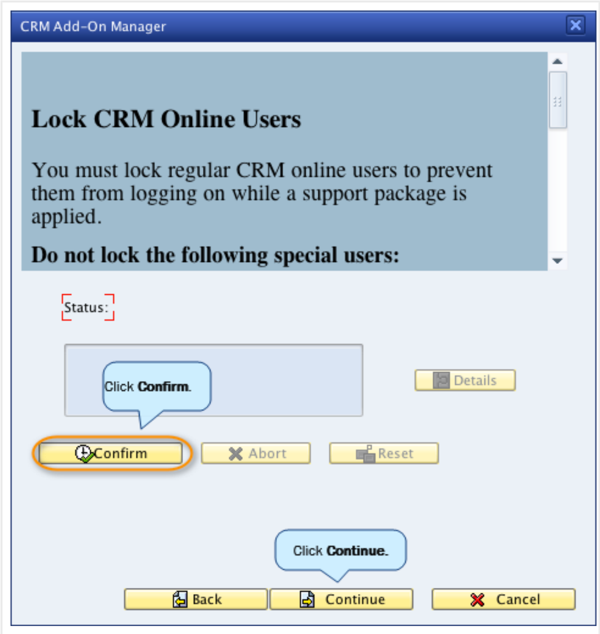


3. In the next **CRM Add-On Manager** window, select the D&B360 Add-On installation package, and then click **Continue**.



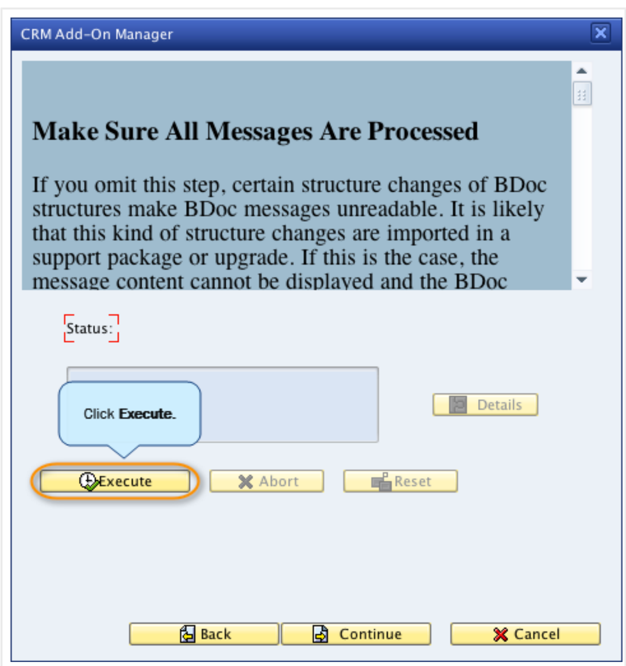
Note: The system displays a series of tasks that you need to complete before you import the Add-On package, and requests confirmation when those tasks are completed.

4. In the next **Lock CRM Online Users** area, to prevent users from logging in while the installation package is being installed, click **Confirm**.
5. Click **Continue**.

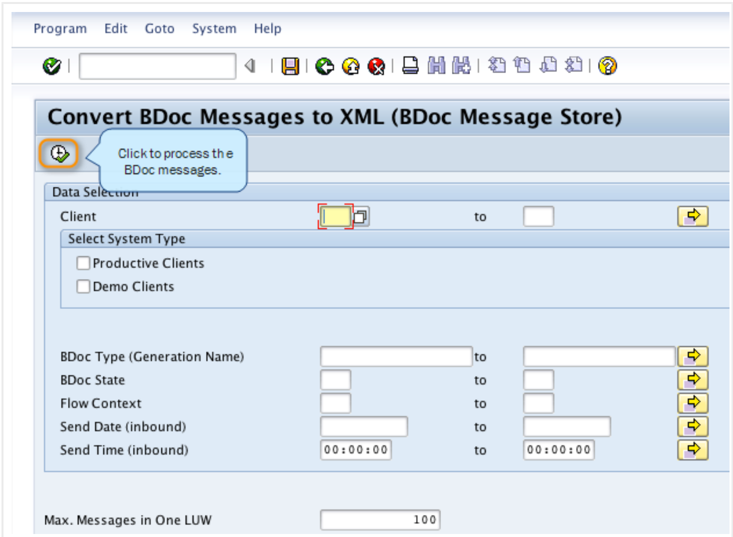


6. In the **Log Off Users Currently Logged On** area, click **Confirm**, and then click **Continue**.

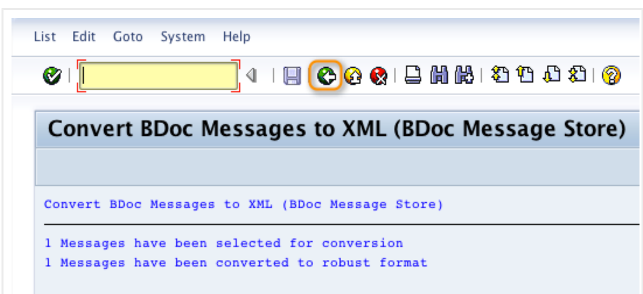
7. In the **Make Sure All Messages Are Processed** area, click **Execute**.

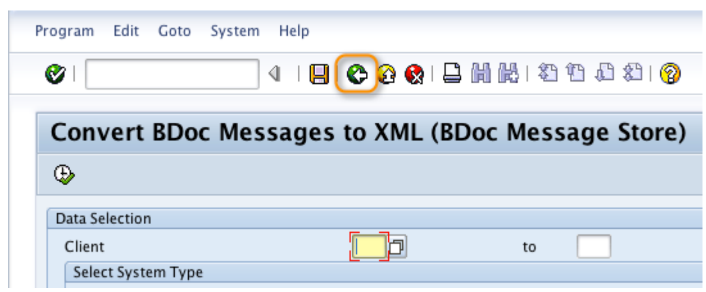


8. In the **Convert BDoc Messages to XML** window, to process the BDoc messages and convert them to XML, click the execute icon.



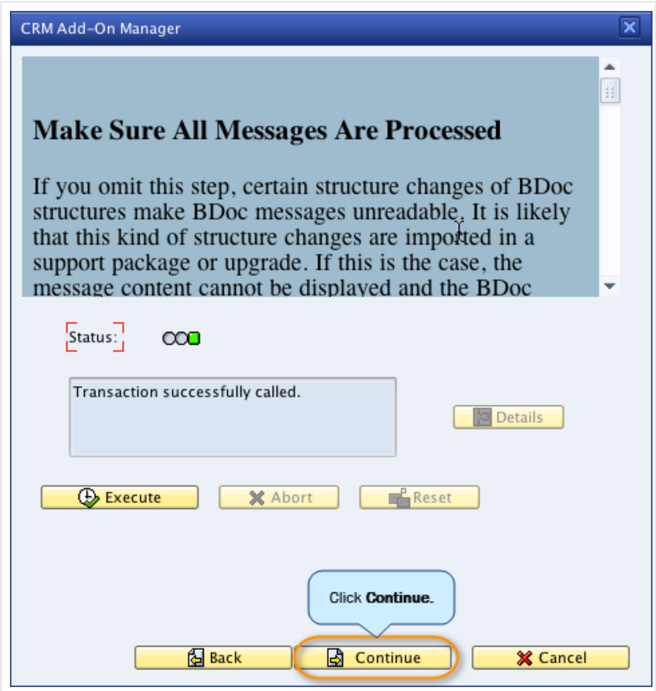
The **Convert BDoc Messages to XML** window displays a message that the messages have been converted:



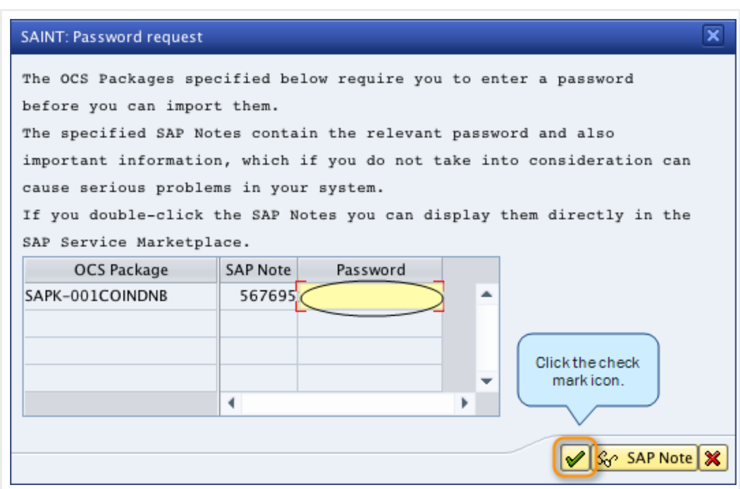


Returning to the Installation Process

1. In the next **CRM Add-On Manager** window, **Make Sure All Messages Are Processed** area, click **Continue**.



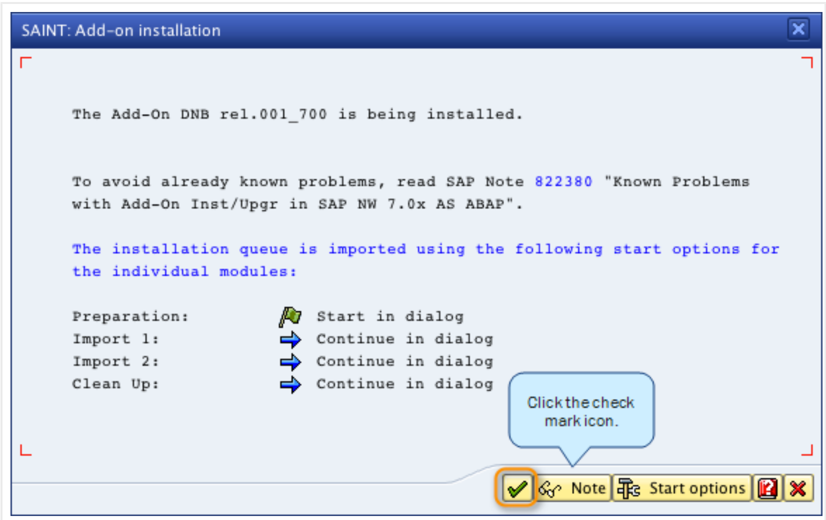
2. In the **SAINT Password request** window, type the password that your D&B360 sales representative provided for you, and then click the check mark icon.



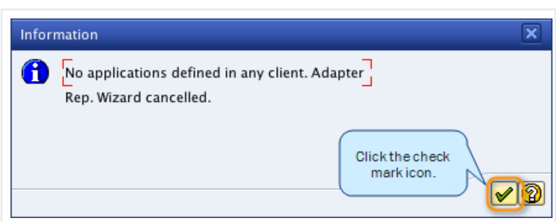
Completing the Import Process

You can complete this process either online or offline. These steps describe the online process.

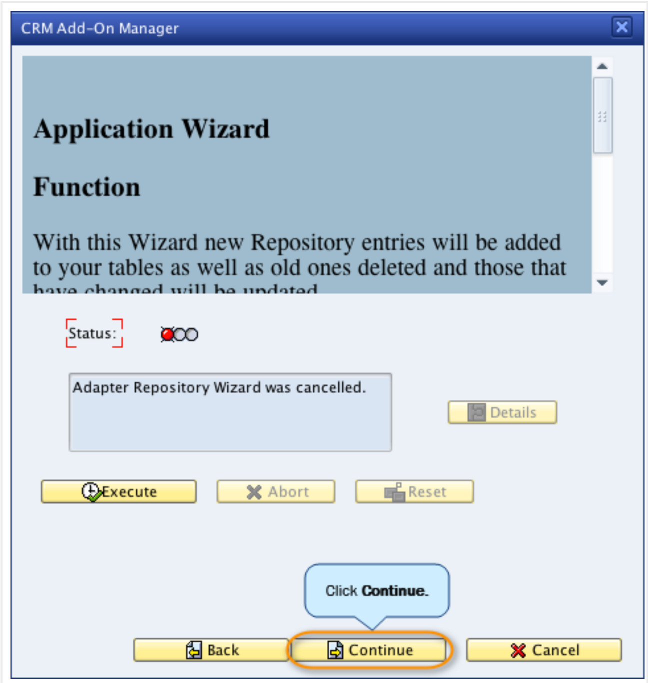
1. In the **SAINT Add-on installation** window, click the check mark icon to begin the process.



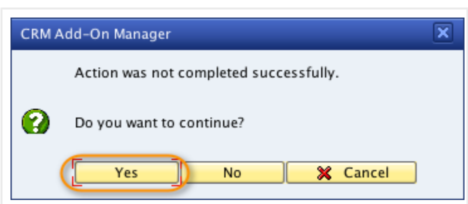
The status bar displays the tasks that the system is performing. After a few minutes, an Information window might display. If so, click the check mark icon.



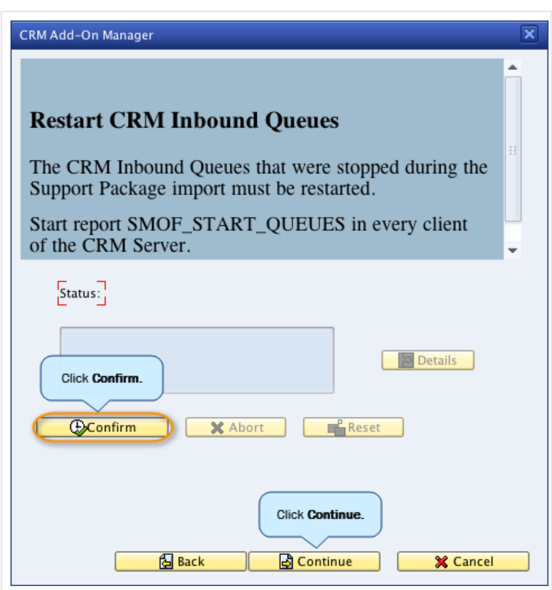
2. In the **CRM Add-On Manager** window, **Application Wizard** area, click **Continue**.



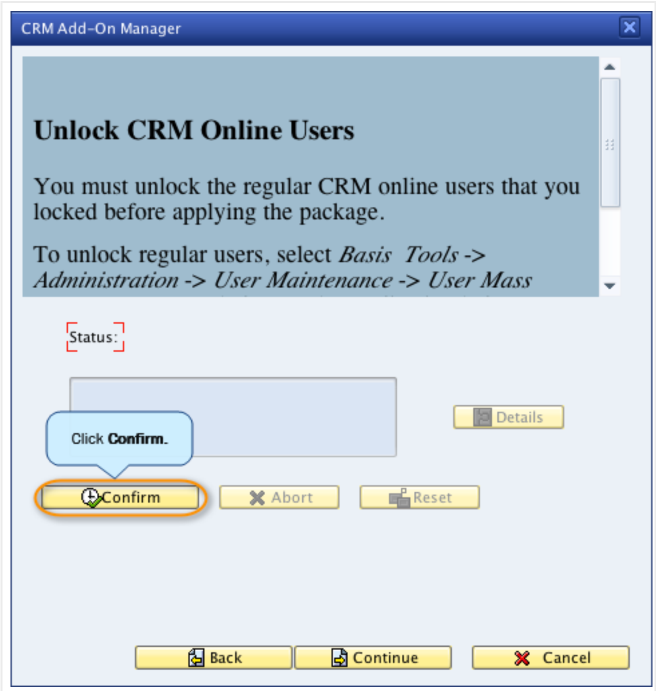
3. At the prompt to continue, click **Yes**.



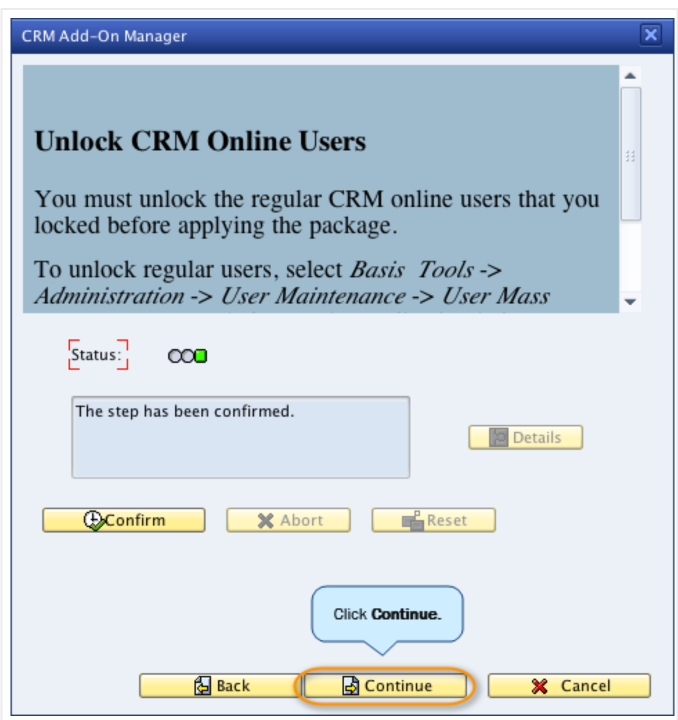
4. In the **Restart CRM Inbound Queues** area, click **Confirm**, and then click **Continue**.



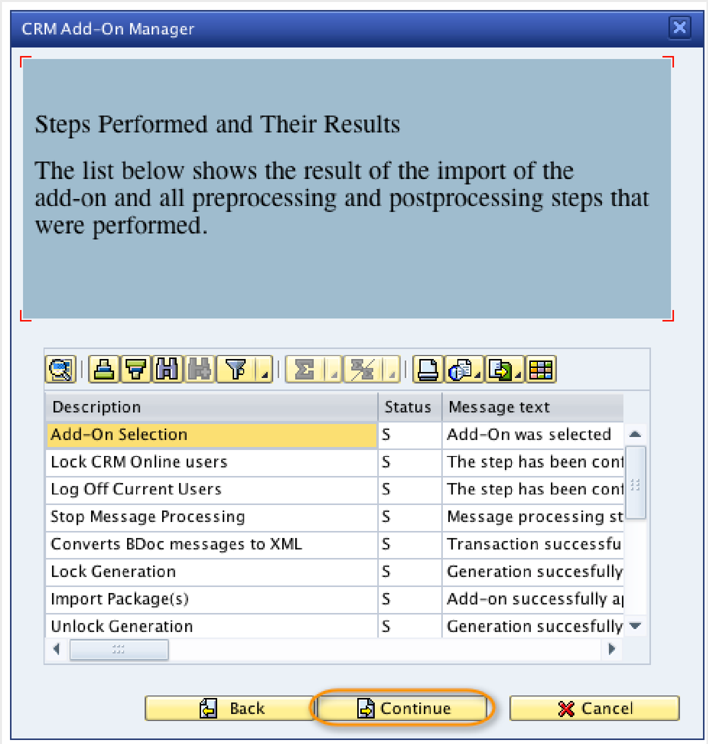
5. In the **Unlock CRM Online Users** area, click **Confirm**.



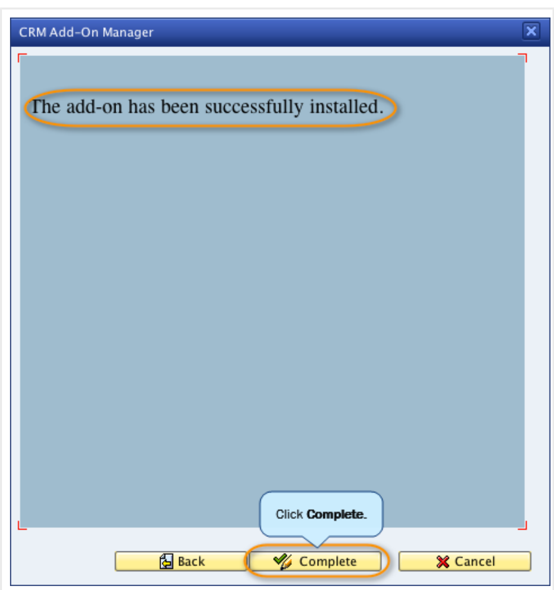
6. In the next **CRM Add-on Manager** window, click **Continue**.



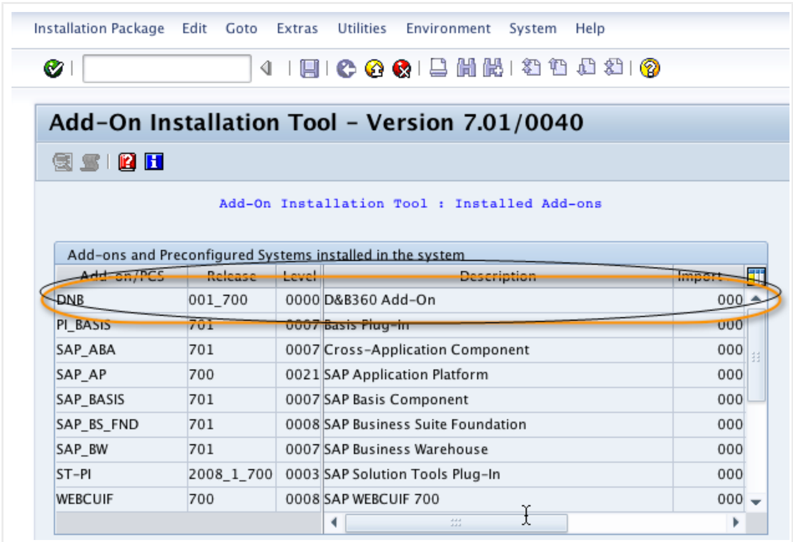
7. In the next **CRM Add-On Manager** window, review the results, and then click **Continue**.



8. In the **CRM Add-On Manager** window that informs you the add-on has been successfully installed, click **Complete**.



In the **Add-On Installation Tool** window, the **Add-ons and Preconfigured Systems Installed in the system** column displays the **D&B360 Add-On**.



Note: We continually work to provide a better experience for you. We usually package corrections and enhancements in Support Packages. Now that you have installed your D&B360 solution, you might want to upgrade it to the latest SP level. For more information, See "Importing the Support Package" on page A-7.

4 Completing the Post-Installation Steps

After you have successfully installed the D&B360 Add-On package, you need to verify that the application can communicate securely with the D&B360 Data as a Service (DaaS) layer. Then you can activate the customization features and assign users the new Business Role and access to D&B360.

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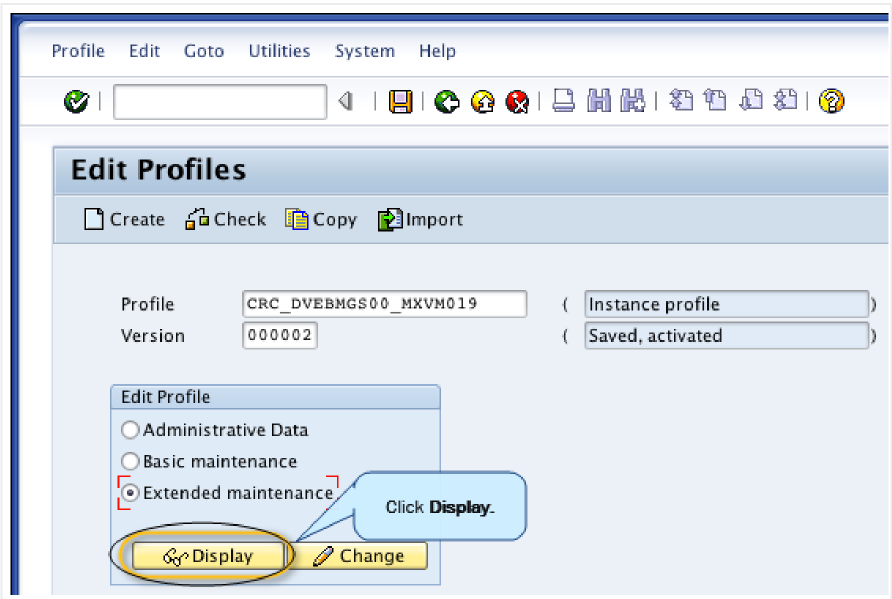
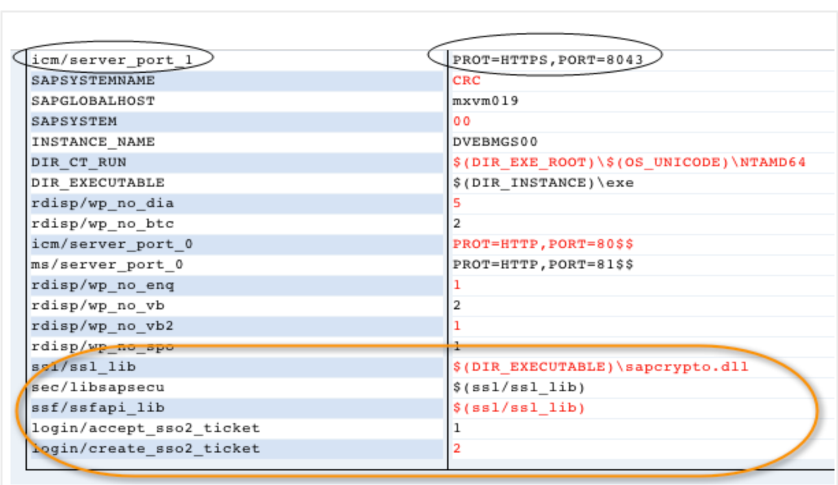
Verifying the SAPCryptoLib Setup

The D&B360 application communicates over a secure socket layer (SSL) channel with the D&B360 DaaS layer. To set up the SAP CRM so that this works successfully, you need to properly install and configure the SAPCryptoLib and verify the settings using transaction RZ10.

- In the **Edit Profiles** window, select your profile and click **Display.**



For the SSL mechanism to work successfully, you must set `icm/server_port_n` to use `PORT=HTTPS` on any port. In this example, the port used is 8043, but you can specify port 443 or any other port. If the SAPCryptoLib is properly configured, entries similar to the following illustration display:



icm/server_port_1	PROT=HTTPS,PORT=8043
SAPSYSTEMNAME	CRC
SAPGLOBALHOST	mxvm019
SAPSYSTEM	00
INSTANCE_NAME	DVEBMGS00
DIR_CT_RUN	$(DIR_EXE_ROOT)\$(OS_UNICODE)\NTAMD64
DIR_EXECUTABLE	$(DIR_INSTANCE)\exe
rdisp/wp_no_dia	5
rdisp/wp_no_btc	2
icm/server_port_0	PROT=HTTP,PORT=80$$
ms/server_port_0	PROT=HTTP,PORT=81$$
rdisp/wp_no_enq	1
rdisp/wp_no_vb	2
rdisp/wp_no_vb2	1
rdisp/wp_no_spo	1
ssl/ssl_lib	$(DIR_EXECUTABLE)\sapcrypto.dll
sec/libsapsecu	$(ssl/ssl_lib)
ssf/ssfapi_lib	$(ssl/ssl_lib)
login/accept_sso2_ticket	1
login/create_sso2_ticket	2

Note: If these entries are absent, or if you are unsure that the SAPCryptoLib is properly set up, check SAP Note 510007. It provides the information you need to setup the Cryptography components of SAP. You might need to enter your user name and password to access the SAP note.

Configuring Personal Security Environments

The D&B360 DaaS layer communicates through an SSL channel. You need to upload the D&B certificate to your SAP CRM server to allow the SAP CRM server to accept and decrypt messages it exchanges with the D&B360 DaaS layer. SAP stores security configuration and certificates on Personal Security Environments (PSEs).

1. Verify whether you have the required PSEs in your system:

   In the **Command** field, execute transaction **STRUST** to verify whether you have the following entries:

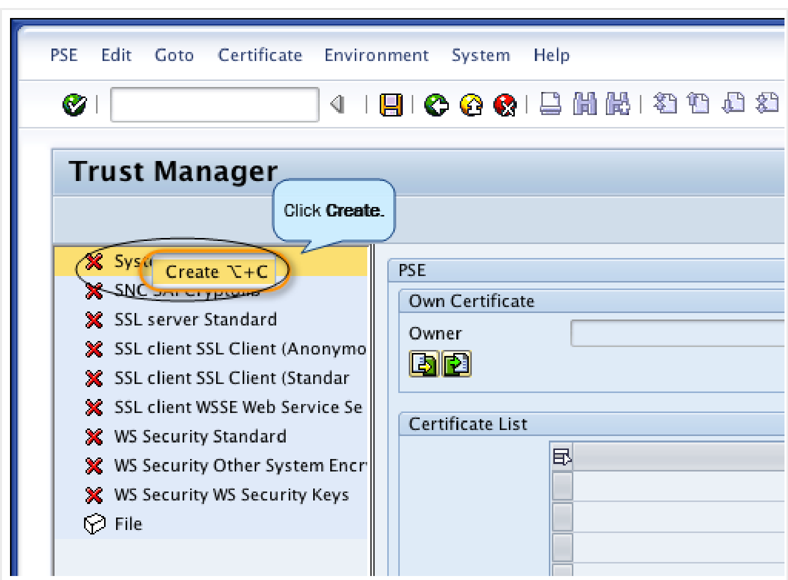
   - A System PSE
   - An SSL server Standard PSE
   - An SSL client SSL Client (Anonymous) PSE entries

2. If you have these, go to the next section, "Uploading D&B Security Certificates."

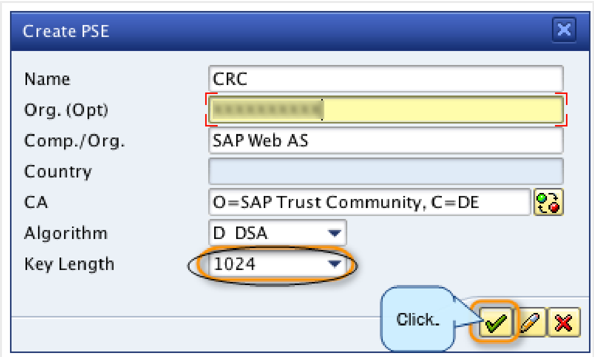
   — or —

   If you don't have these, create them as follows:

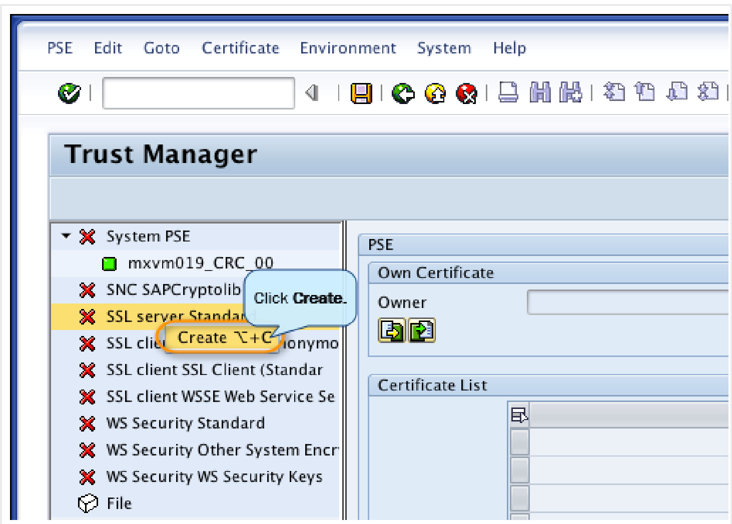
1. In the **Trust Manager** window, right-click **System PSE**, and then click **Create.**



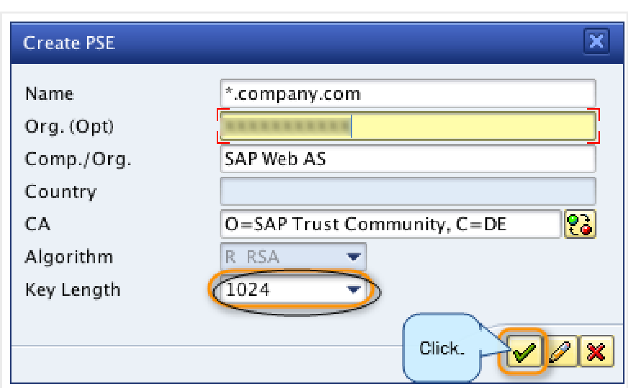
2. In the **Create PSE** window, **Key Length** field, select the length you want the key to be, then click the check mark or press the Enter key.



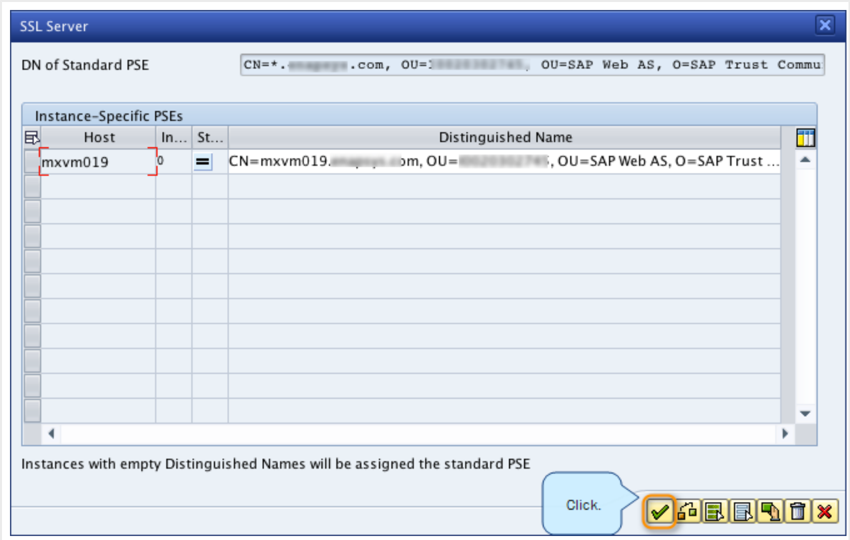
3. In the **Trust Manager** window, right-click **SSL server Standard**, and then click **Create**.



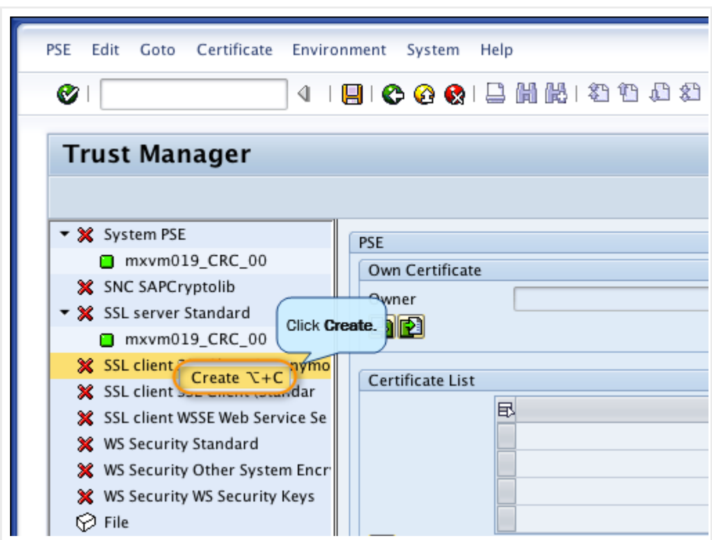
4. In the **Create PSE** window, **Key Length** field, select the length you want the key, and then click the check mark or press the Enter key.



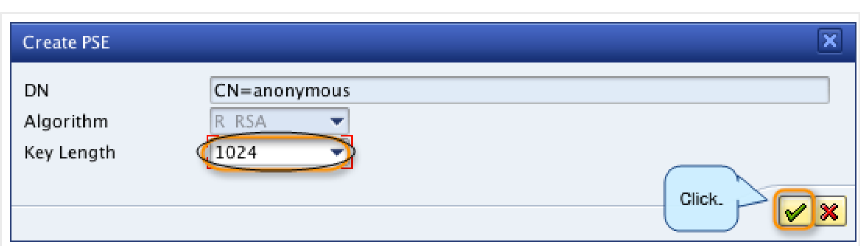
5. In the **SSL Server** window, accept the entries and click the check mark or press the Enter key.



6. In the **Trust Manager** window, right-click **SSL client (Anonymous)**, and then click **Create**.



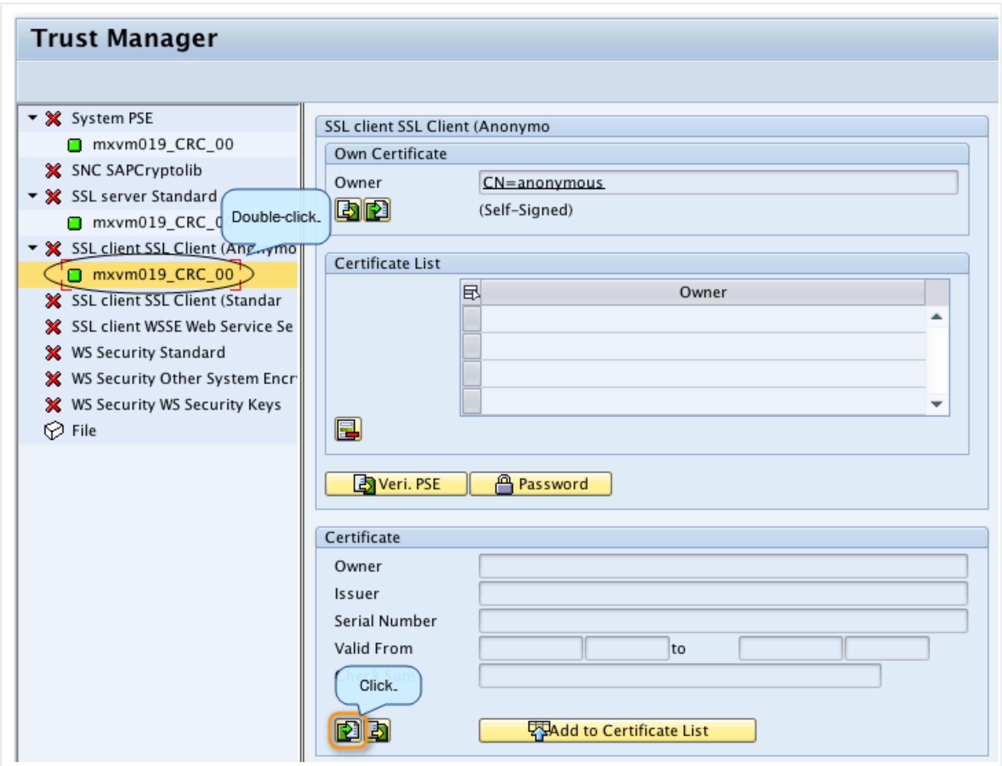
7. In the **Create PSE** window, **Key Length** field, select the key length you want the key to be, then click the check mark or press the Enter key.



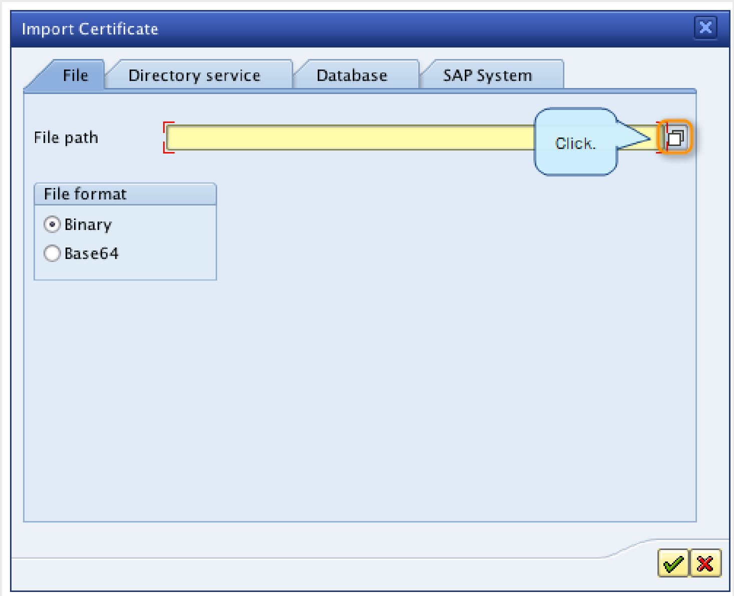
Uploading Security Certificates

Uploading the D&B Security Certificate

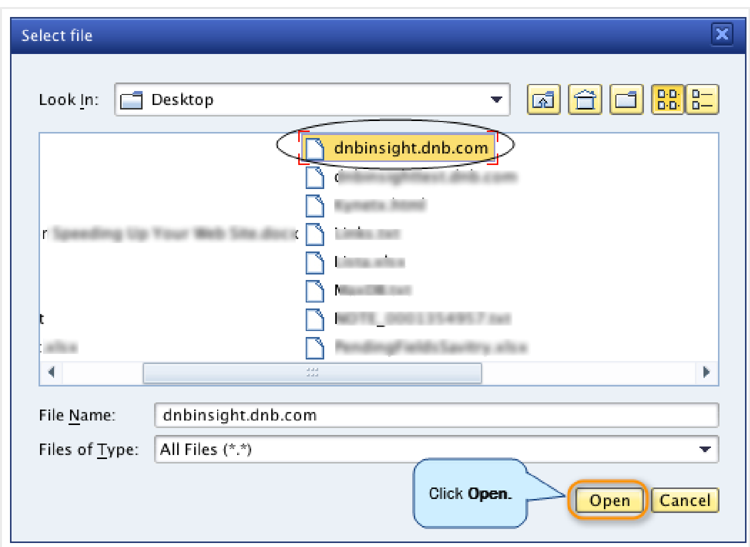
1. In the **Trust Manager** window, double-click **SSL client SSL Client (Anonymous)**, and then click the upload icon.



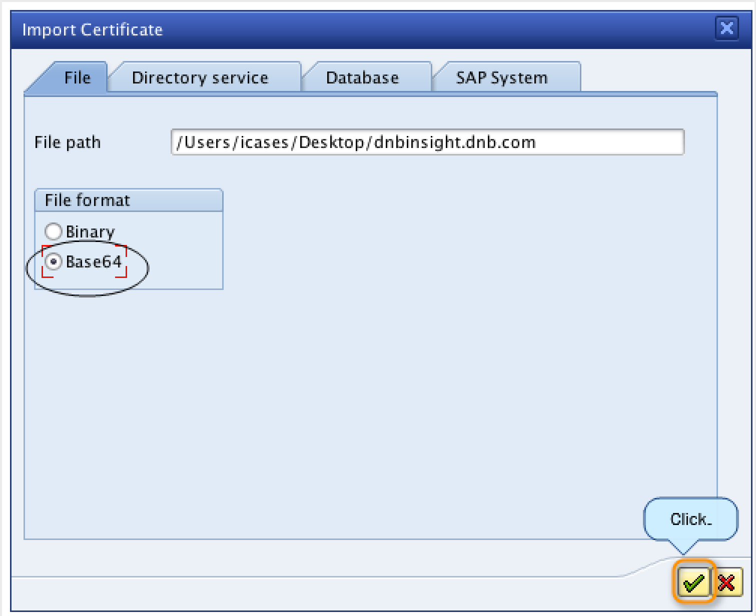
2. In the **Import Certificate** window, to select the certificate that D&B provided to you when you downloaded the installation package, click the folder icon.



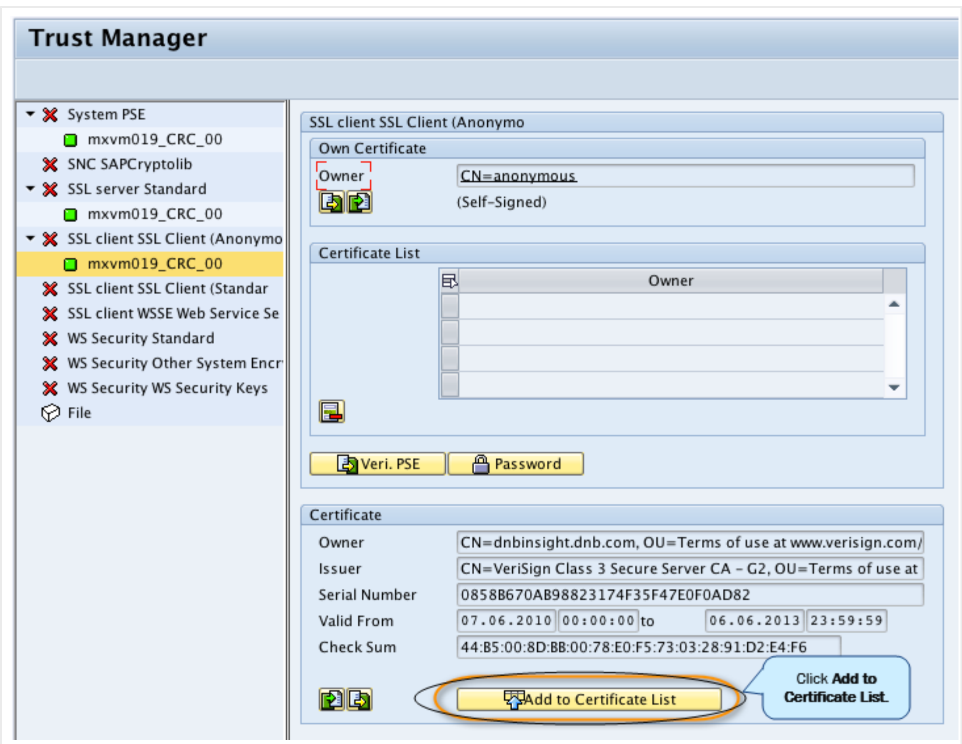
3. In the **Select File** window, browse to the folder where you saved the package.
4. Select the file, and then click **Open**.



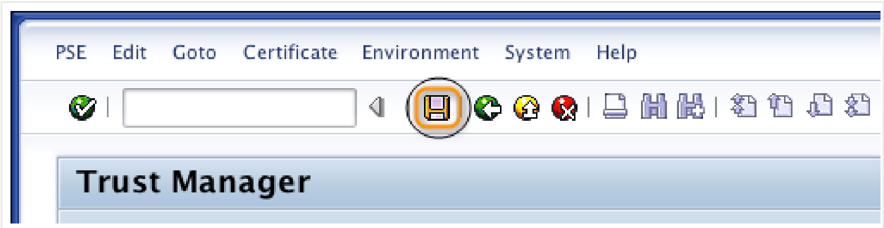
5. In the **Import Certificate** window, select **Base64**, and then click the check mark.



6. In the **Trust Manager** window, click **Add to Certificate List**.



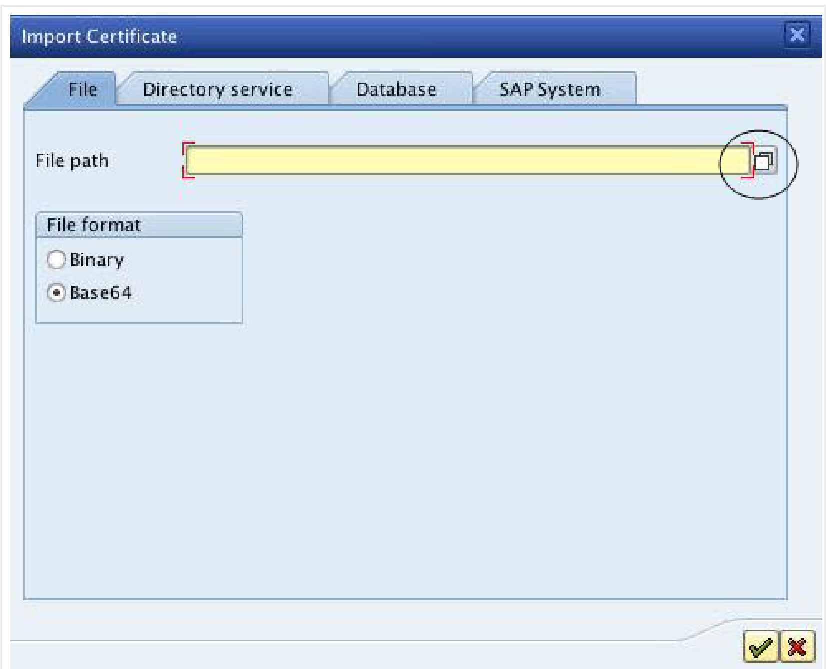
7. In the **Trust Manager** window, click the disk icon to save your changes.



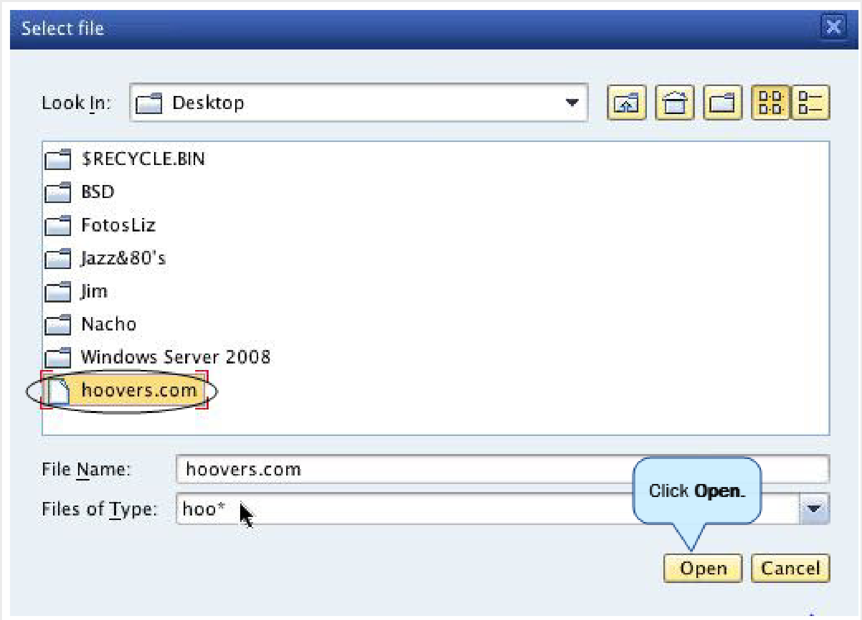
8. When the system warns you that you need to restart ICM, restart your SAP CRM instance.

Adding the Hoover's Security Certificate

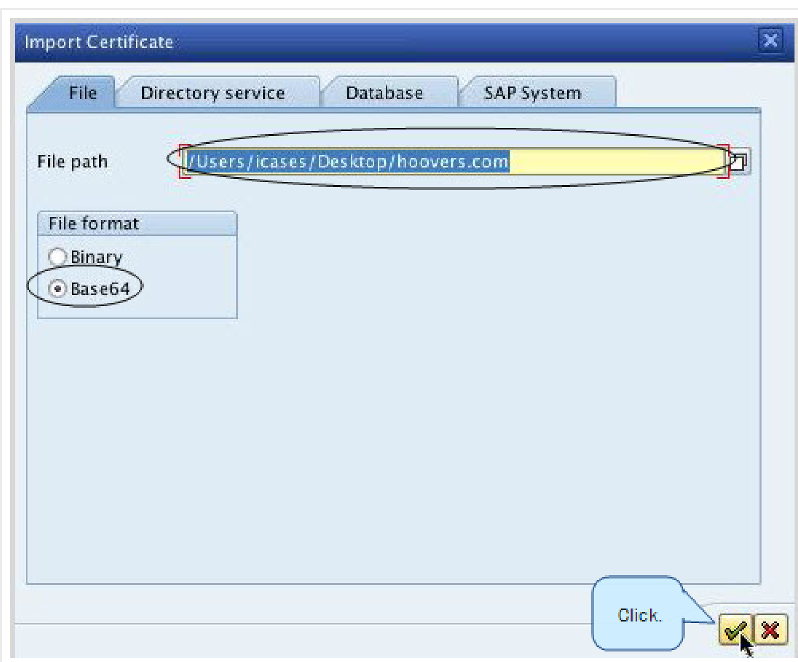
1. In the **Import Certificate** window, click the folder icon to navigate to your Hoover's certificate file.



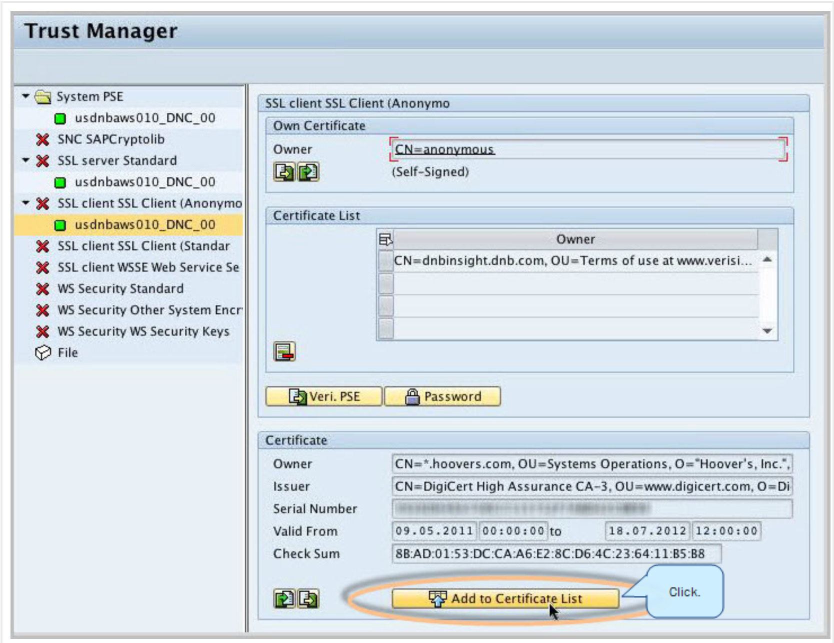
2. In the **Select file** window, select the Hoover's certificate, and then click **Open**.



3. In the **Import Certificate** window, after you have selected the correct directory path, select **Base64**, and then click the check mark.

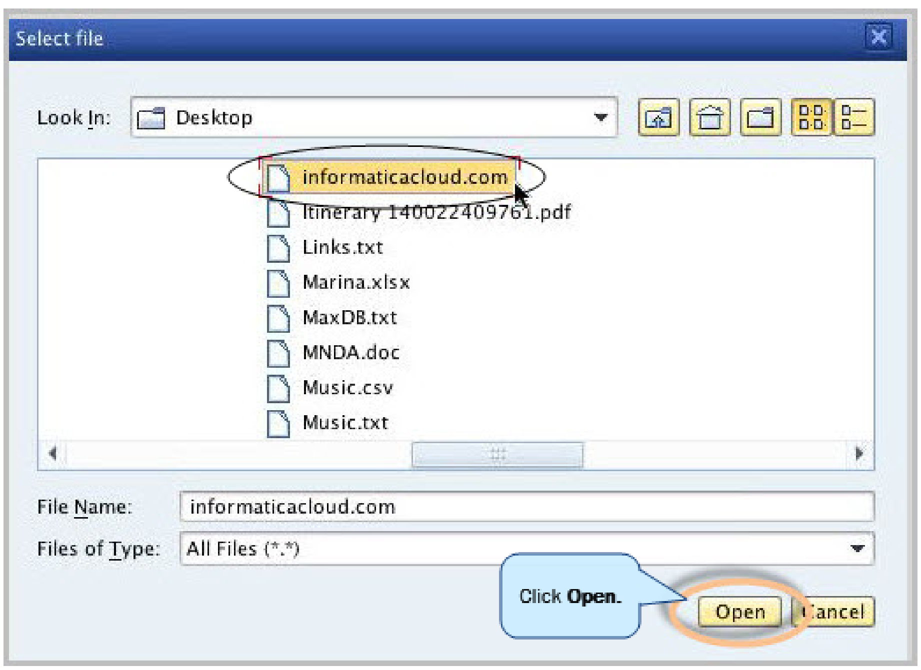


4. In the **Trust Manager** window, click **Add to Certificate** List.

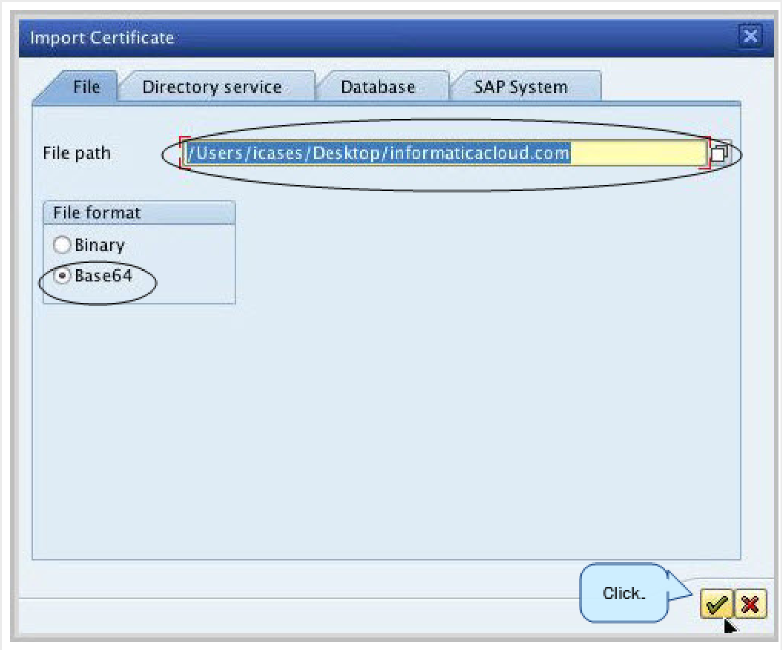


Adding the Informatica Cloud Security Certificate

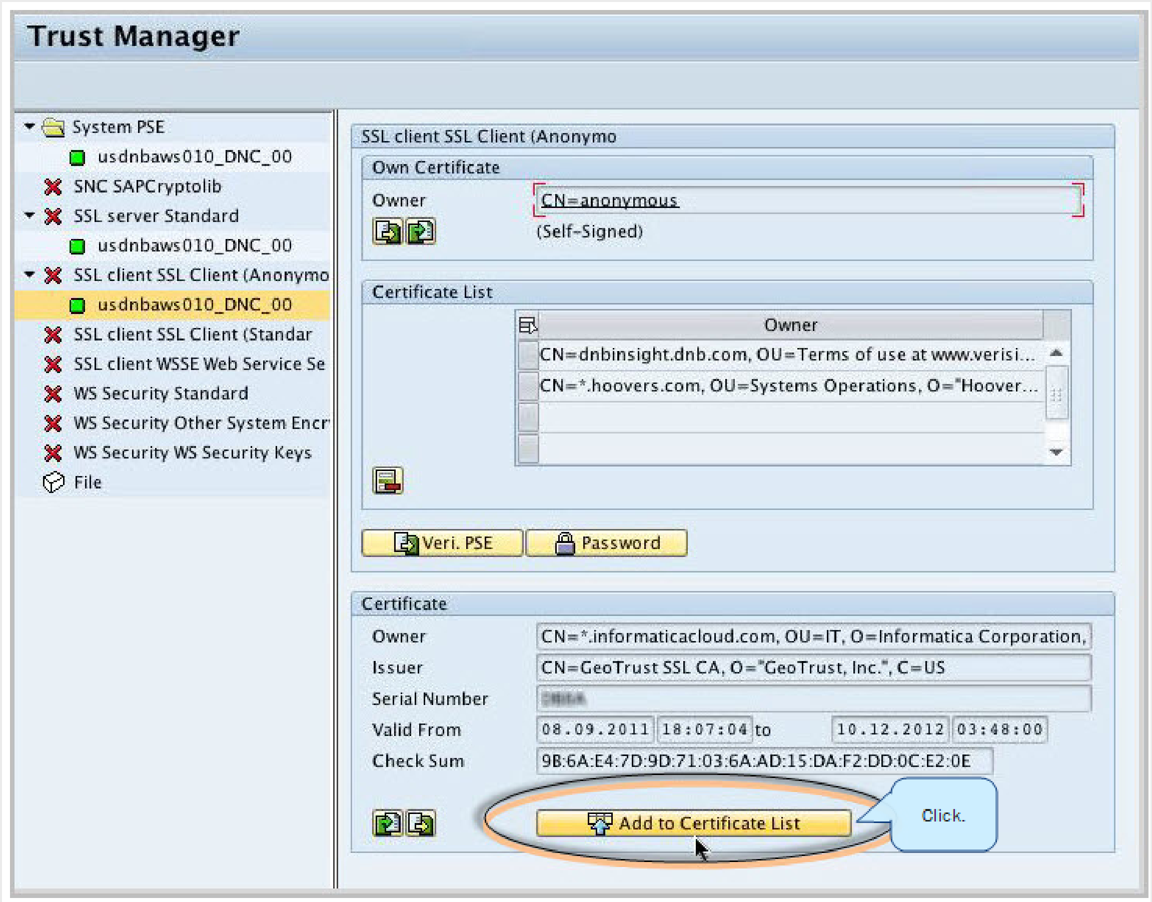
1. In the **Select file** window, click **informaticacloud.com**, and then **click** Open.



2. In the **Import Certificate** window, verify the correct file path, select **Base64**, and then click the check mark.

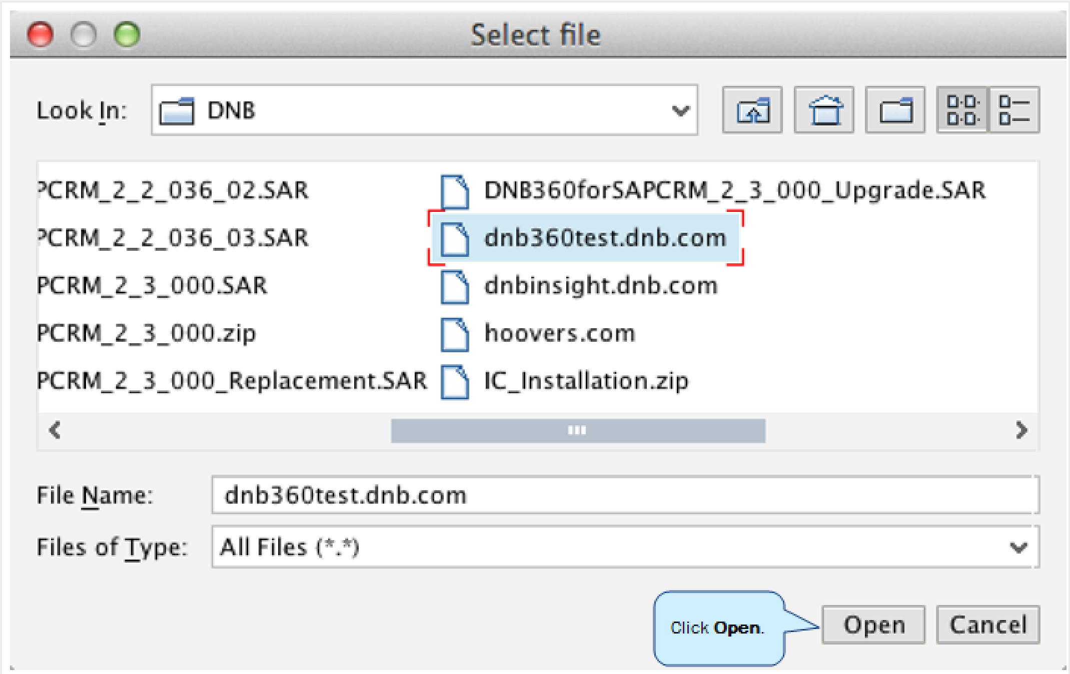


3. In the Trust Manager window, click **Add to Certificate List**.

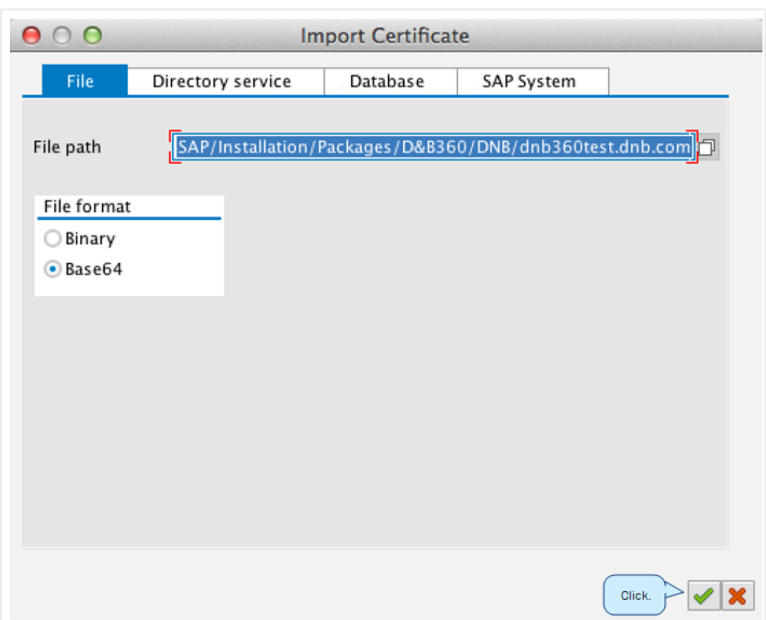


Adding the Rest of World Security Certificate

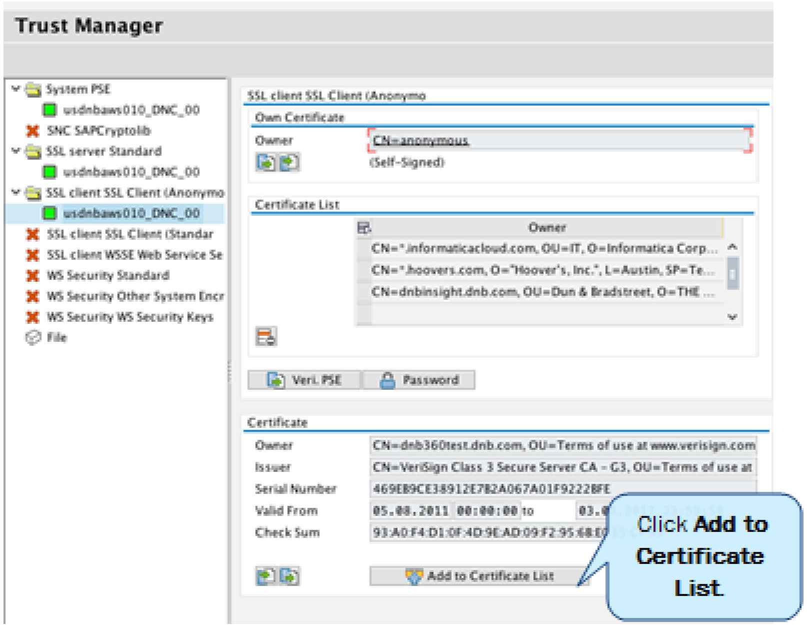
1. In the **Select file** window, click **dnb360text.com**, and then click **Open**.



2. In the **Import Certificate** window, verify the correct file path, select **Base64**, and then click the check mark.



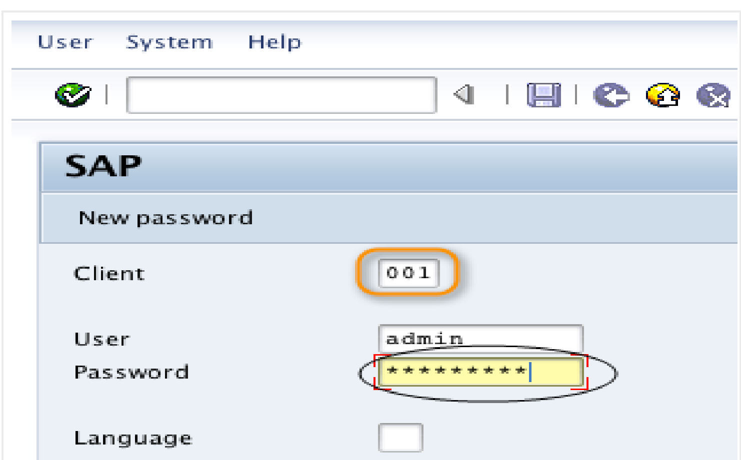
3. In the **Trust Manager** window, click **Add to Certificate List**.



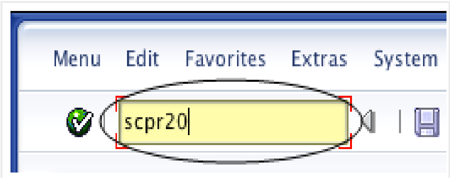
Activating D&B360 Customizations Using Business Configuration Sets

Now that you have imported all of the D&B360 components to your system, the system needs your authorization to import some specific customizations. The customizations will then be available to the client when you log in.

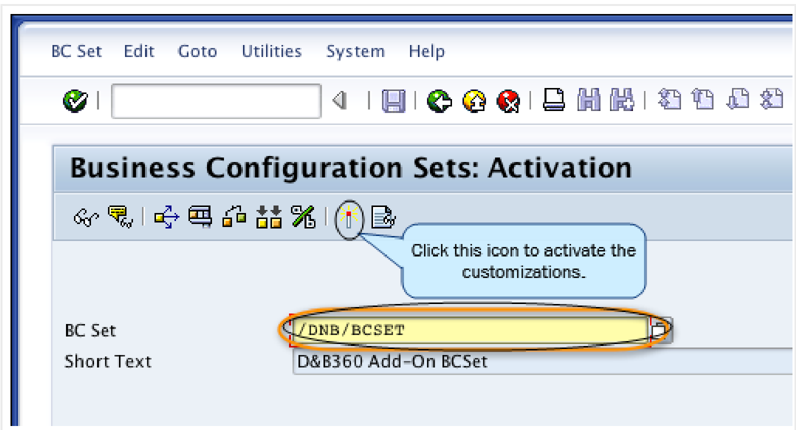
1. In the **SAP** log in window, log in to your development client.



2. In the **Command** field, execute transaction **scpr20**.

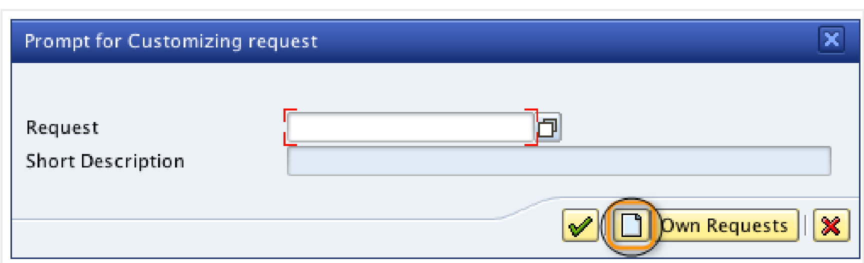


3. In the **Business Configuration Sets: Activation** window, select **/DNB/BCSET**.
4. Click the icon to activate these customizations.

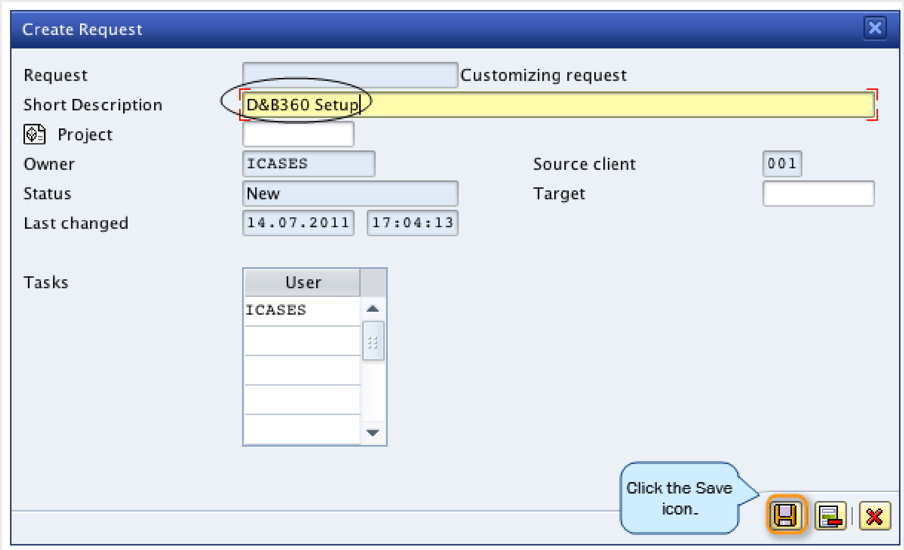


The required customizations will upload to your system. Later we will transport them to QA and Production.

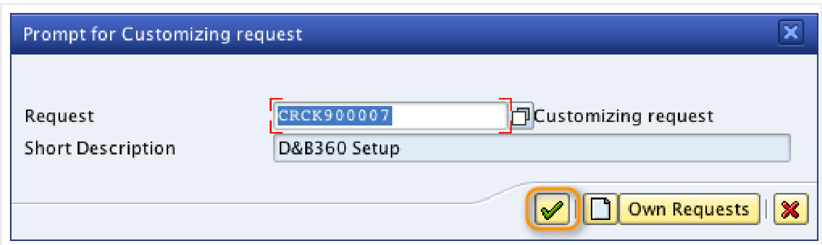
5. In the **Prompt for Customizing request** window, to create a customizing transport request, click the icon next to **Own Requests**.



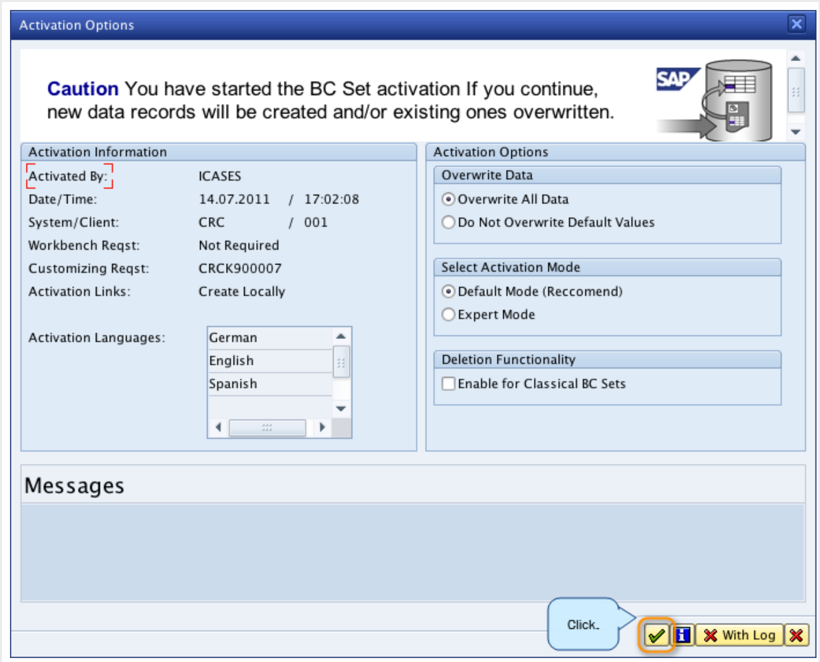
6. In the **Create Request** window, type an appropriate name for the request, and then click the **Save** icon.



7. In the **Prompt for Customizing request** window, verify the information that displays is correct, and then click the check mark or press the Enter key.



8. In the **Activation Options** window, review the information, and then click the check mark or press the Enter key.

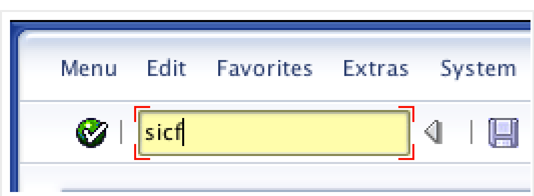


After the system finishes importing the customizations, a window displays to inform you of the status. If your system has additional clients, you need to import these customizations by using transaction scc1 and by using the transport you created previously (see this step on page 4-17.)

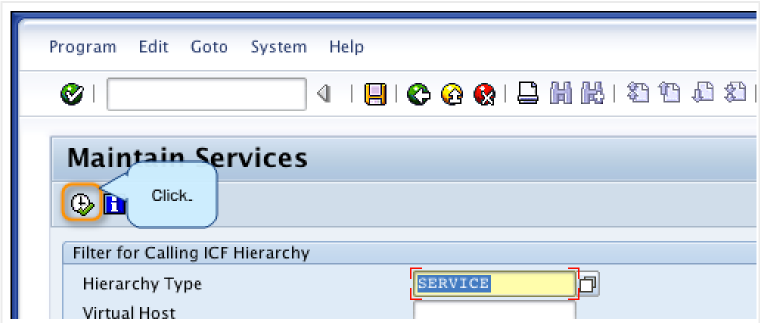
Activating D&B360 User Interface Services

The CRM user interface (UI) applications provided with the package are inactive by default, so you need to activate them.

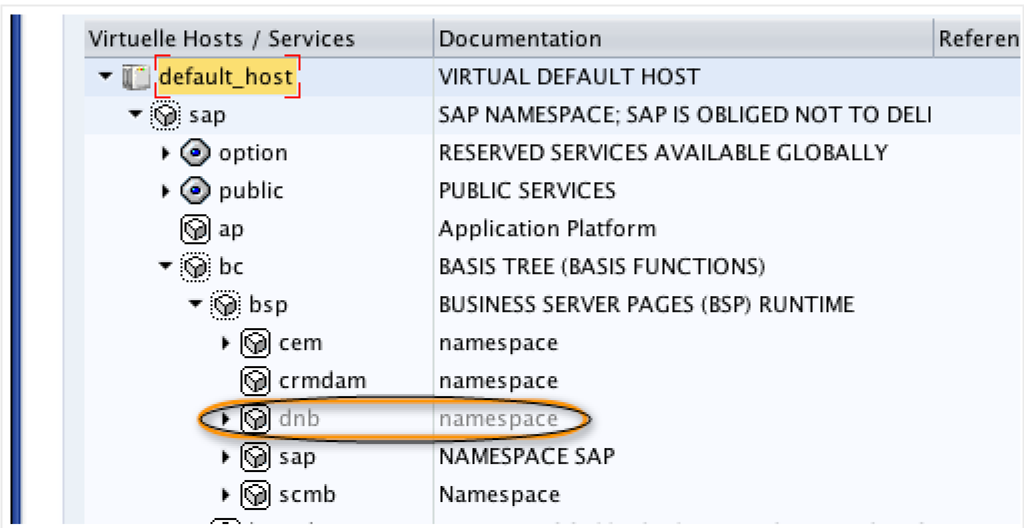
1. In the **Command** field, type the executable **sicf**.



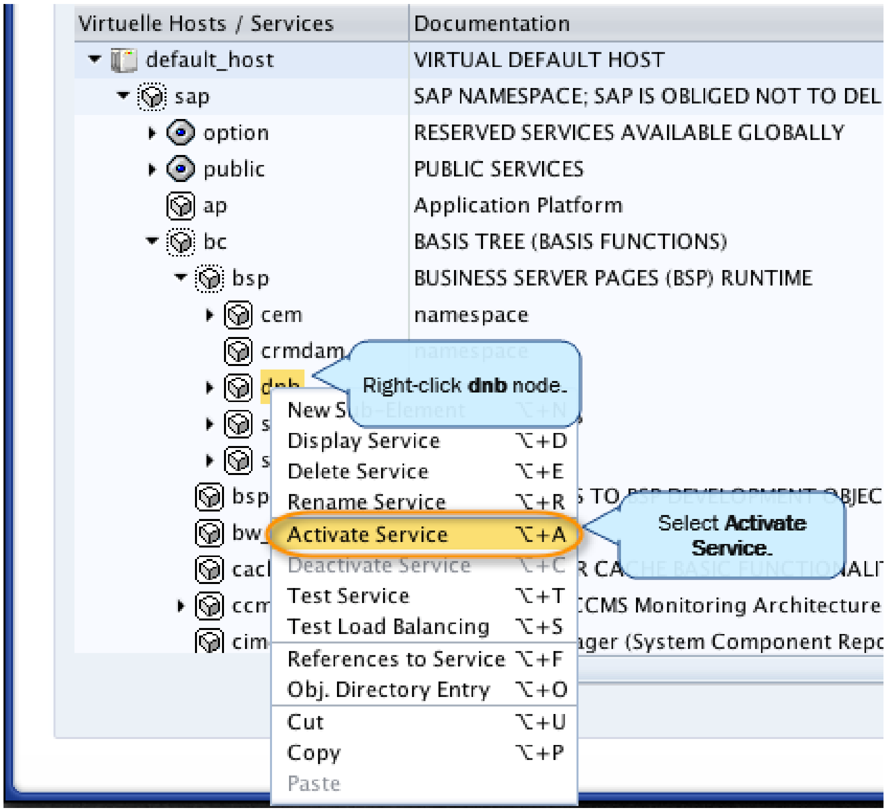
2. In the **Maintain Services** window, click the execute icon.



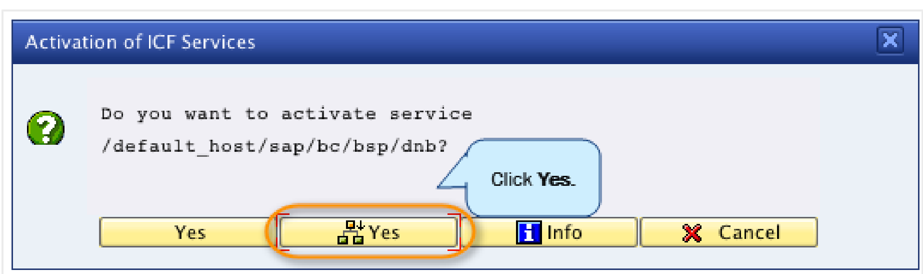
3. In the **Virtuelle Hosts/Services** area, **default_host/sap/bc/bsp** path, locate the **dnb** node.



4. Right-click the **dnb** node, then select **Activate Service**.



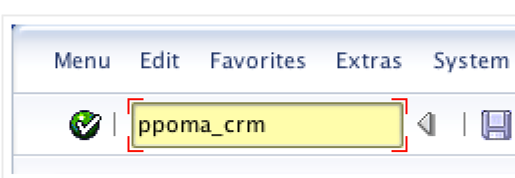
5. In the **Activation of ICF Services** window, click **Yes**.



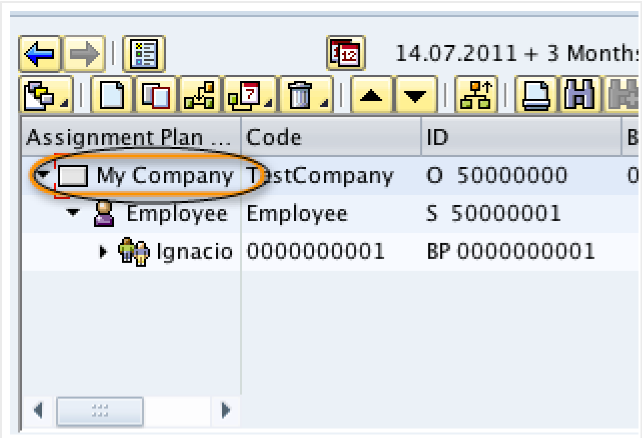
Assigning D&B360 Business Roles to Users

A Business Role defines which applications users have access to. As the administrator, you need to assign business roles to users to determine which applications they can access.

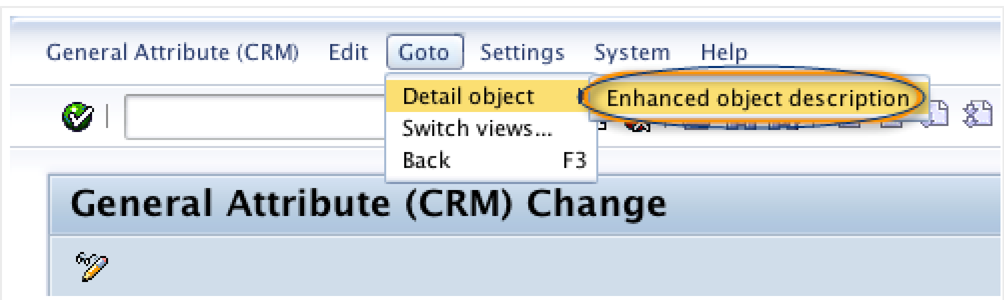
1. In the **Command** field, execute transaction, **ppoma_crm**.



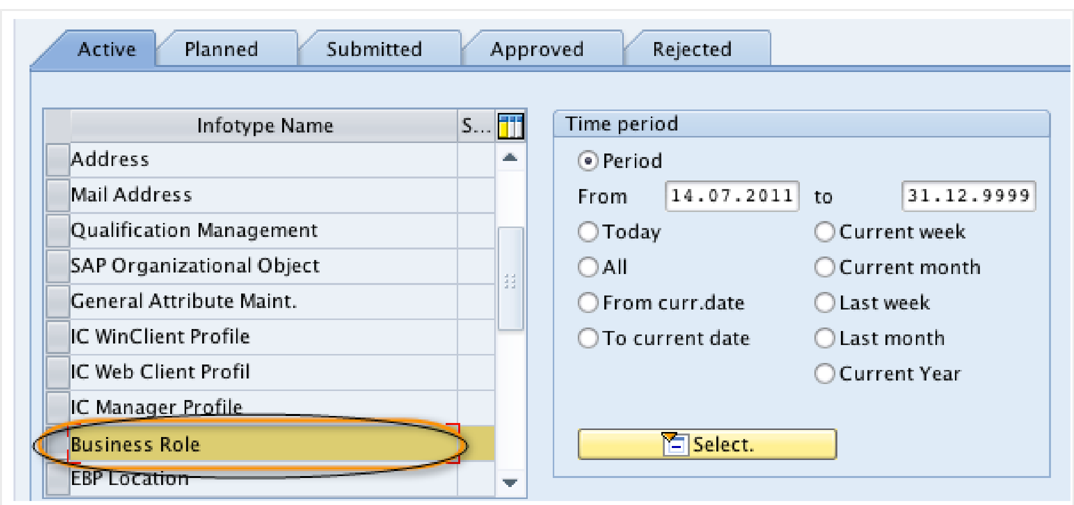
2. In the **Assignment Plan** area, select the organizational structure unit for which you want to add D&B functionality.



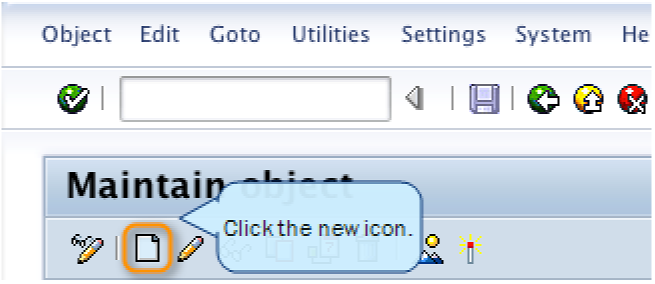
3. In the **General Attribute (CRM) Change** window, **Goto** menu, select **Detail Object** -> **Enhanced** object description.



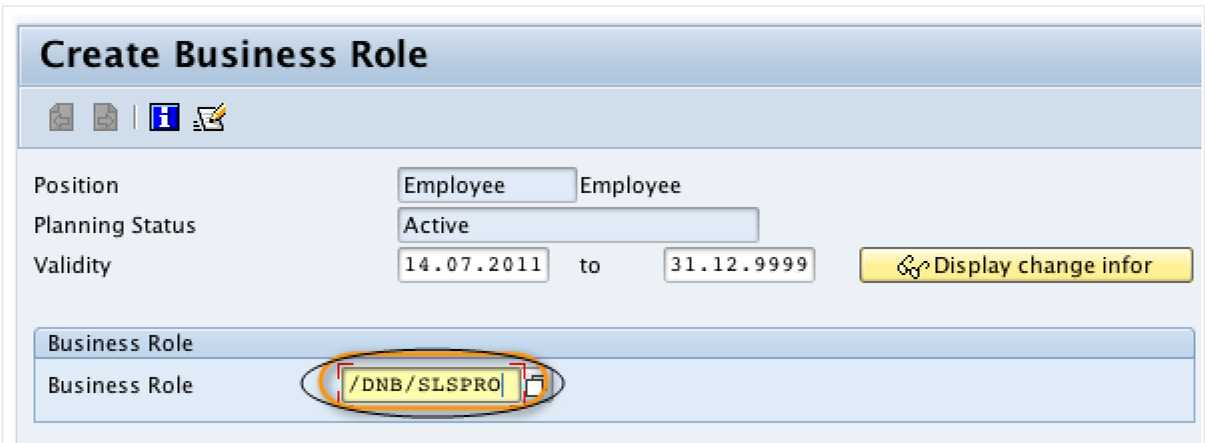
4. In the **Active** tab, **Infotype Name** column, select **Business Role**.



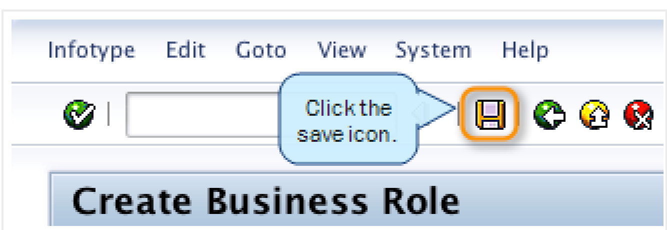
5. In the **Maintain** object window, click the new icon.



6. In the **Create Business Role** window, **Business Role** field, type **/DNB/SLSPRO**.



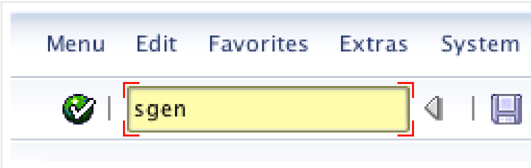
7. Click the save icon.



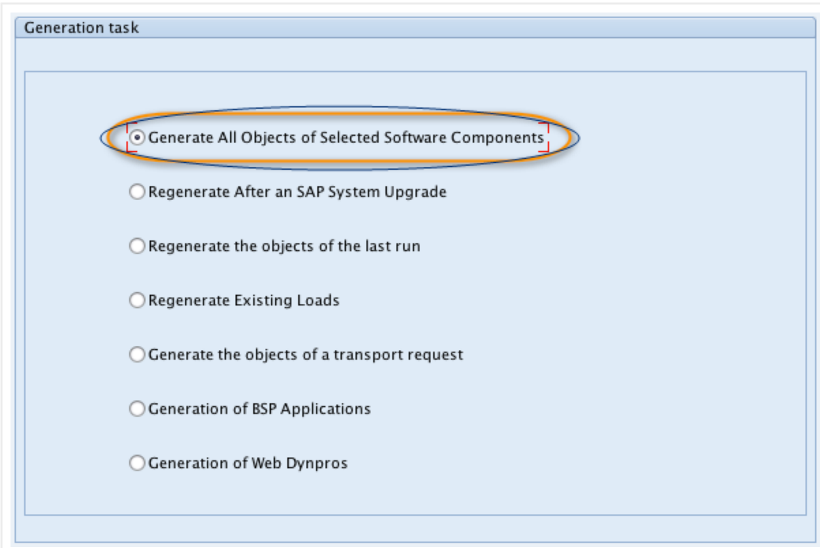
(Optional) Generating Package Components

The D&B360 Add-On package installs the D&B360 software components to your system, but the components need to be generated within the SAP CRM. When you access a component for the first time, the system generates it. To use the package most efficiently, we recommend that you have the system generate all of the components now.

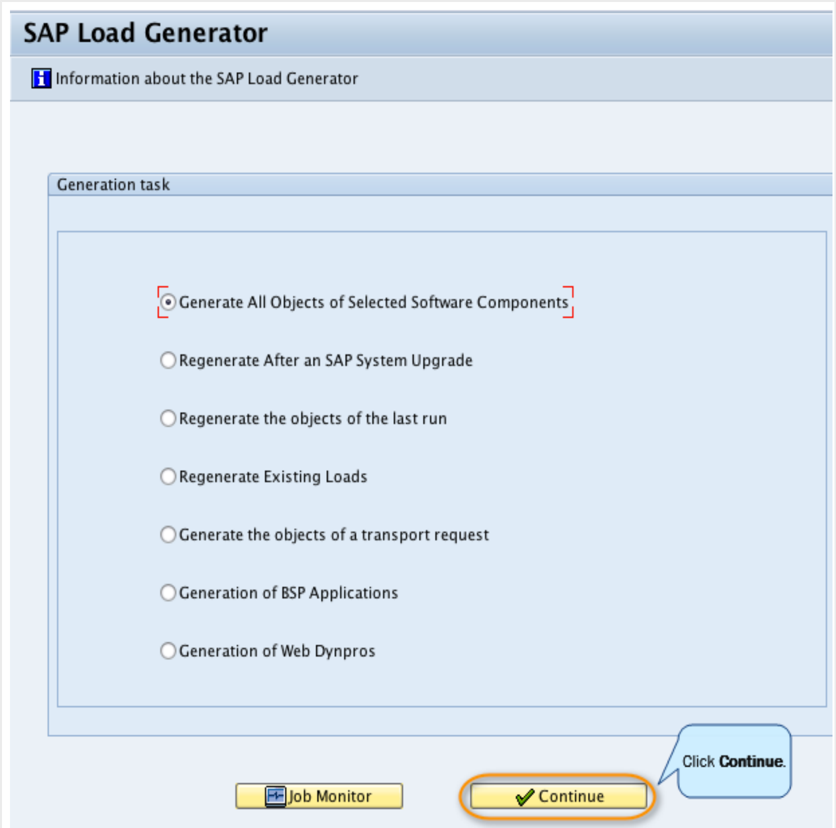
1. In the **Command** field, execute transaction **sgen**.



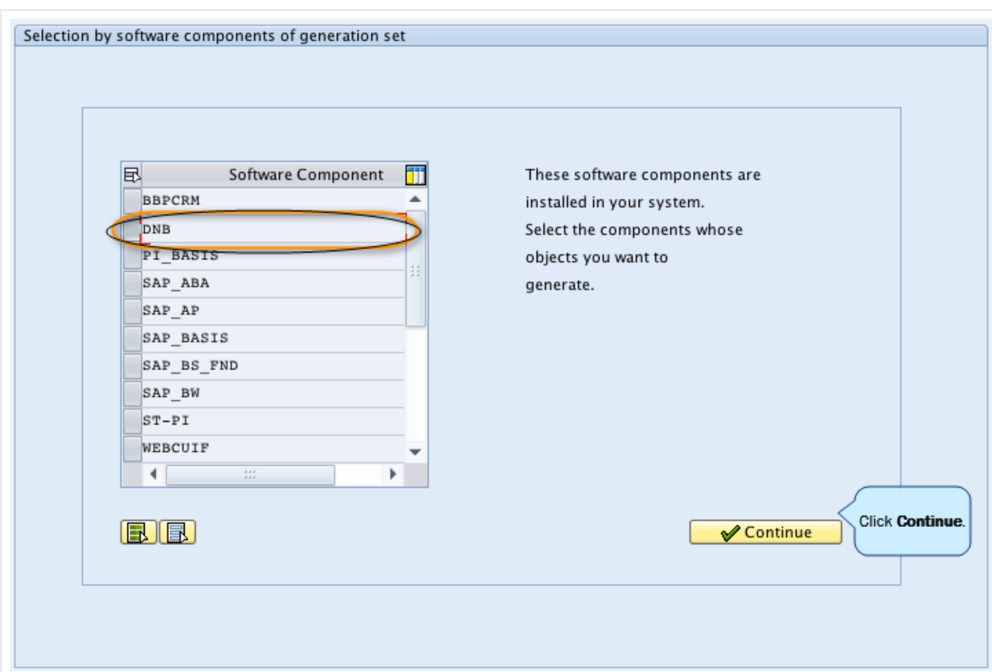
2. In the **Generation task** window, select **Generate All Objects of Selected Software Components**.



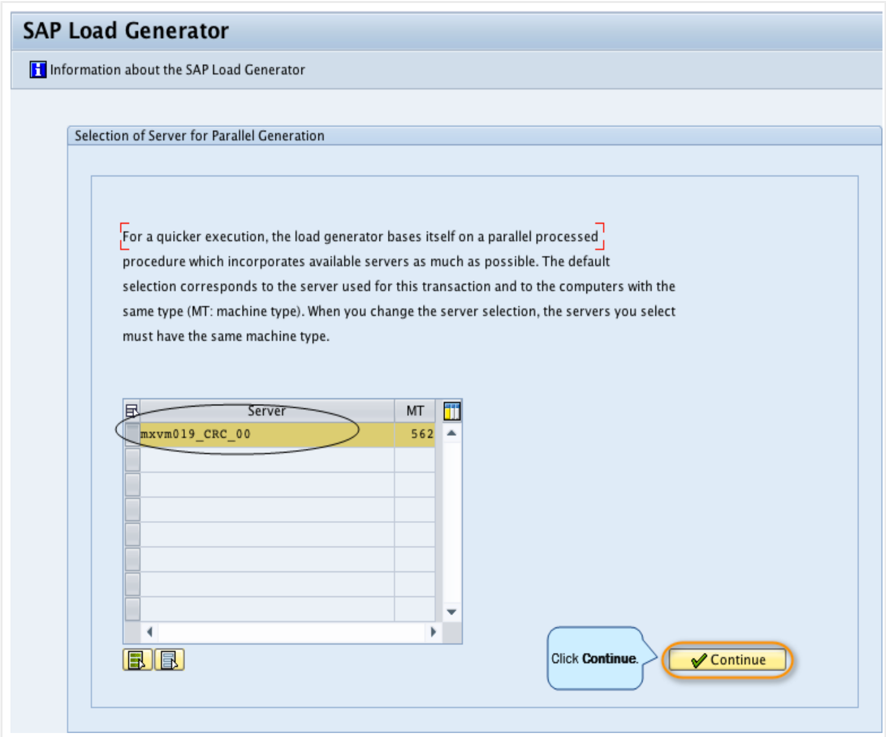
3. In the **SAP Load Generator** window, click **Continue**.



4. In the **Selection by software components of generation set** window, **Software Component** list, select **DNB**, and then click **Continue**.



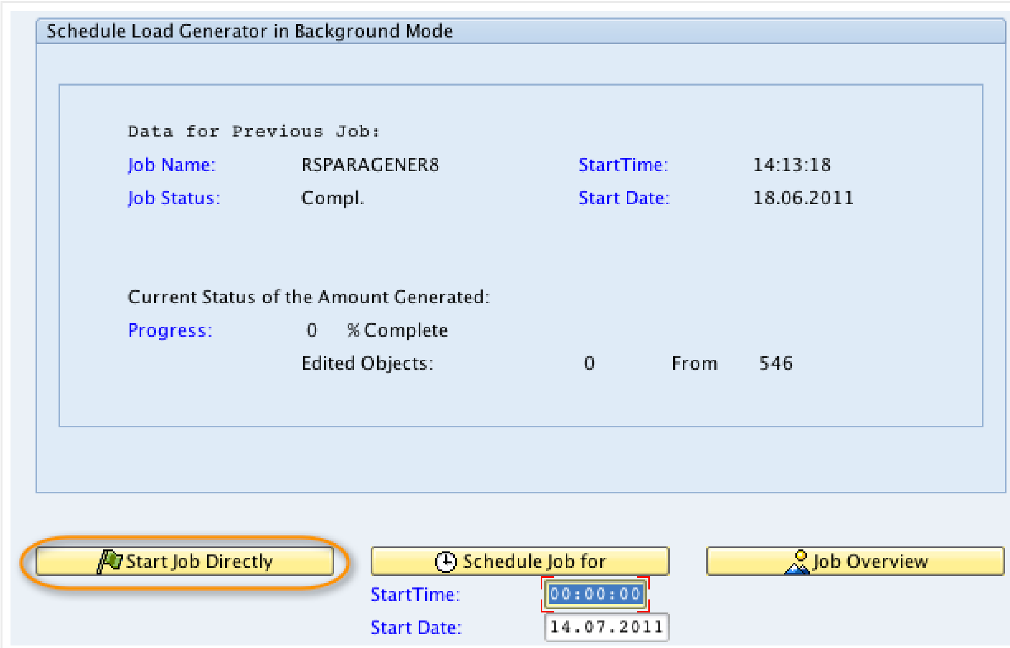
5. In the **SAP Load Generator** window, **Select of Server for Parallel Generation Server** list, select the default server for parallel execution, and then click **Continue**.



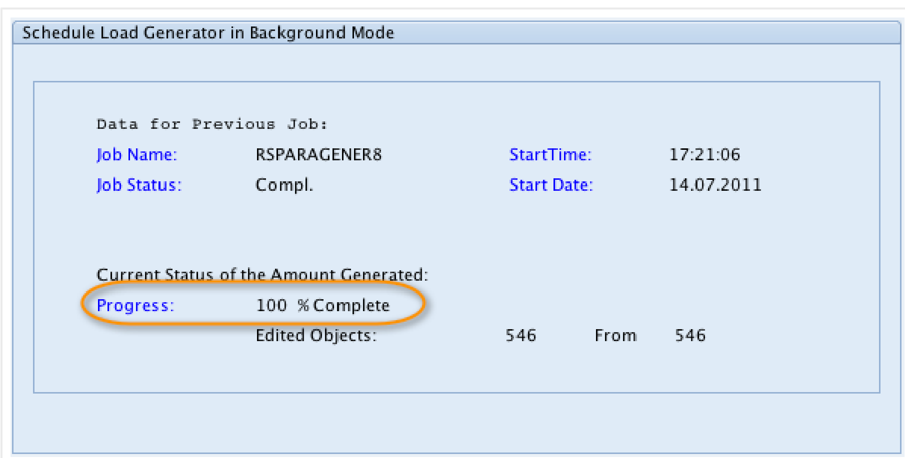
6. In the **Schedule Load Generator in Background Mode** window, select **Start Job Directly** to start it immediately.

— or —

Select **Schedule Job for** and enter the **StartTime** and **Start Date**.



After the job runs, the **Progress** field displays that the job is 100% complete.



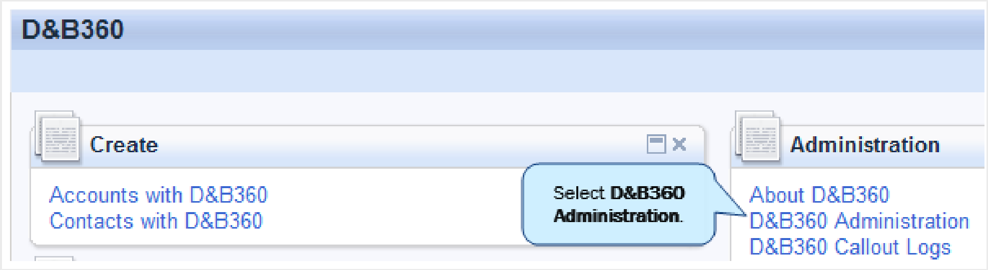
5 Running D&B360 for the First Time

Registering D&B360

1. In the **Command** field, execute transaction **crm_ui**.

The **D&B360** menu displays in the SAP CRM left menu.

2. Click **D&360**, and then select **D&B360 Administration**.



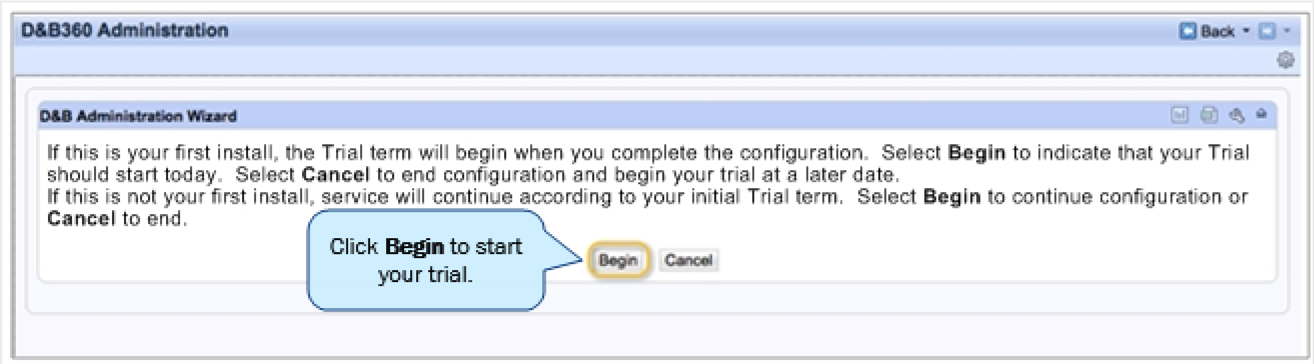
If this is your first time to install D&B360, the **D&B Administration Wizard** window opens with a message that explains when the trial period begins.

3. In the **D&B Administration Wizard** window:

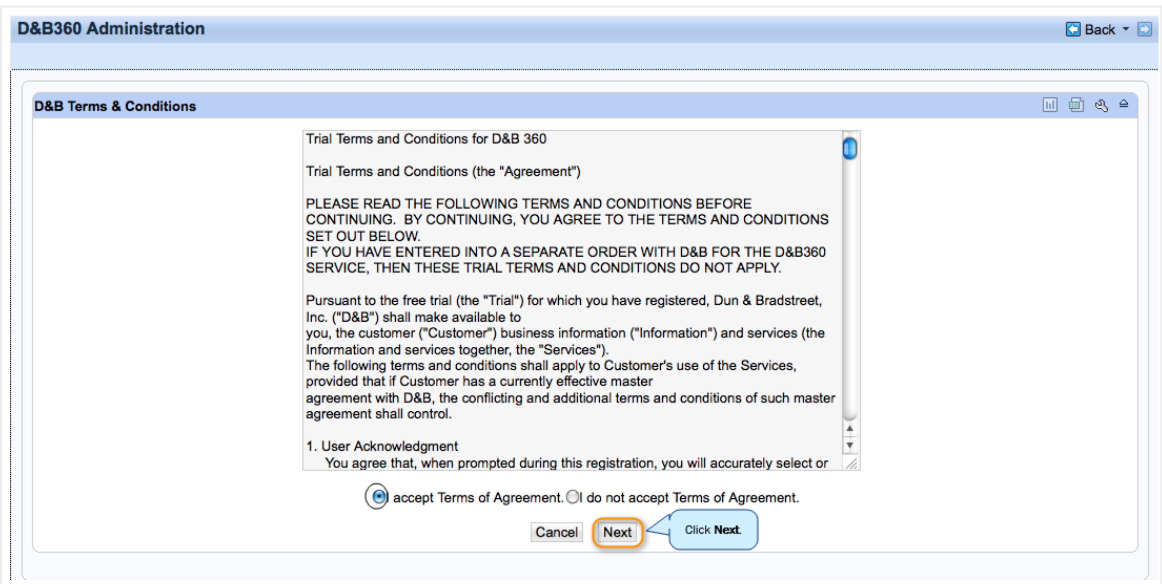
a. To being your trial click **Begin**.

— or —

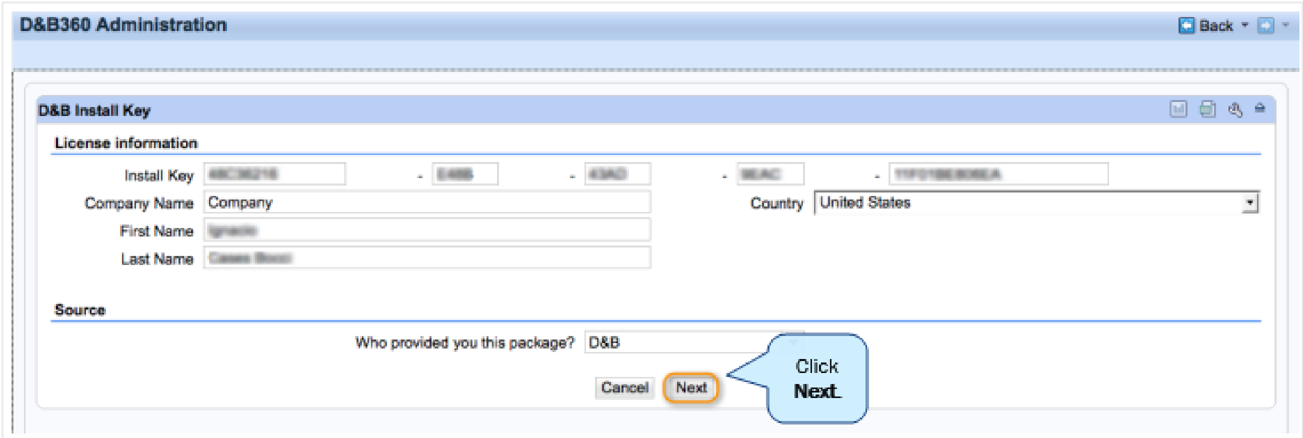
b. To cancel and start your trial later, click **Cancel**.



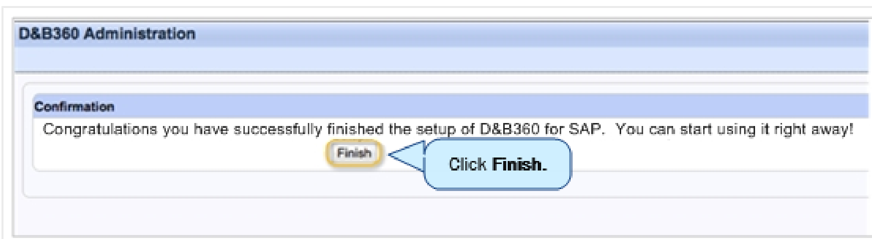
4. In the **D&B Terms and Conditions** window, read the terms and conditions, then click to accept them.
5. Click **Next** to continue.



6. In the **D&B Install Key** window, type the installation key that D&B360 provided you.
7. Type your **Company Name**, **Location**, **First Name**, and **Last Name**, or if these fields are pre-populated, make sure they are correct.
8. Click **Next**.



9. In the **Confirmation** window, click **Finish**.

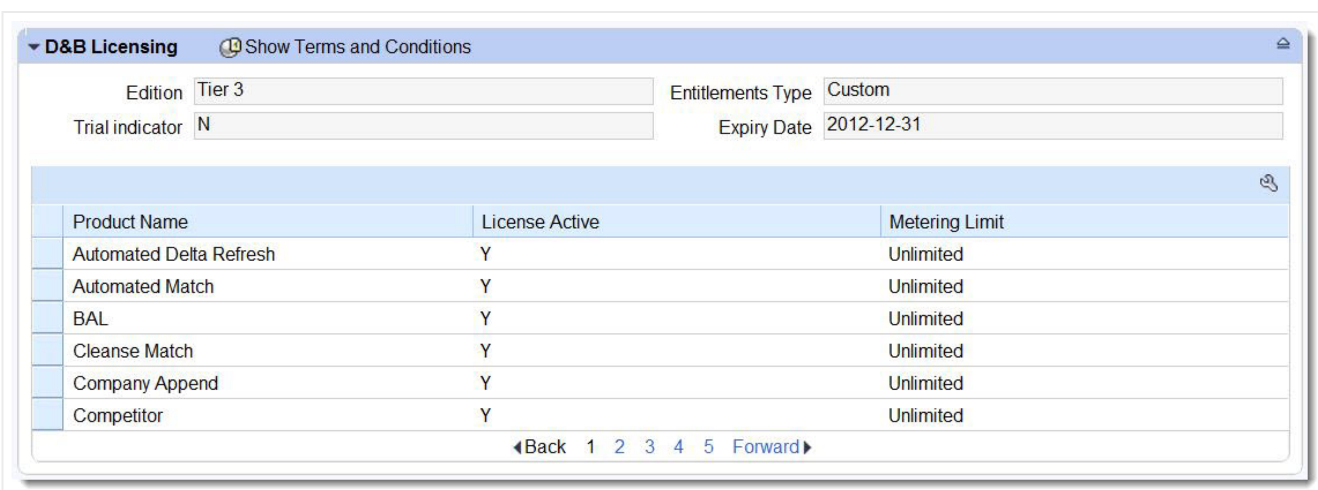


The **D&B SAP CRM Administration** window opens, and you have completed registration.

Updating Entitlements

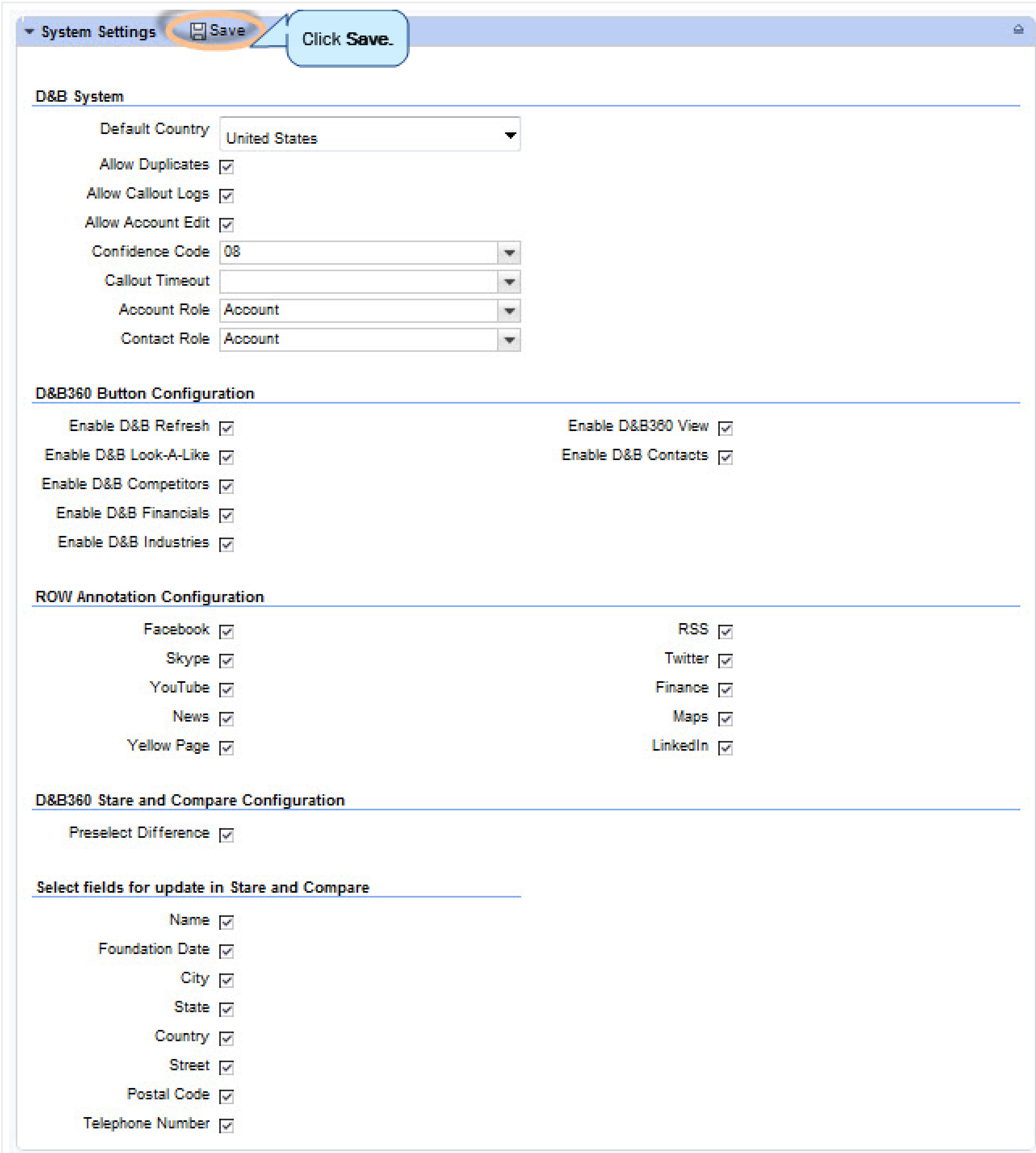
To set your application behavior, you need to consider the requirements and entitlements for your company. The system is connected to the DaaS layer and retrieves the entitlements your company signed up for.

1. In the **D&B Licensing** window, review the entitlements.



2. In the **System Settings** window, configure the system settings as you want to display them for your users, then click **Save**.

Note: For more information about the settings, refer to the *D&B360 User Guide*.



After you save your configuration settings, the users in your system will see the D&B360 menu on the SAP CRM left menu. They can click D&B360 to view its functions.

6 Preparing the SAP CRM for Batch Processing

Installing the Informatica Cloud Secure Agent for the SAP CRM

Installing the VC++ 2008 Redistributable Package

(!) Important Note: Before you can schedule a batch or a job, you must complete all of the following steps. D&B360 for SAP CRM must authenticate the proper credentials with Informatica Cloud Services.

Before you install the Informatica Cloud Secure Agent, you need to install the VC++ 2008 redistributable package.

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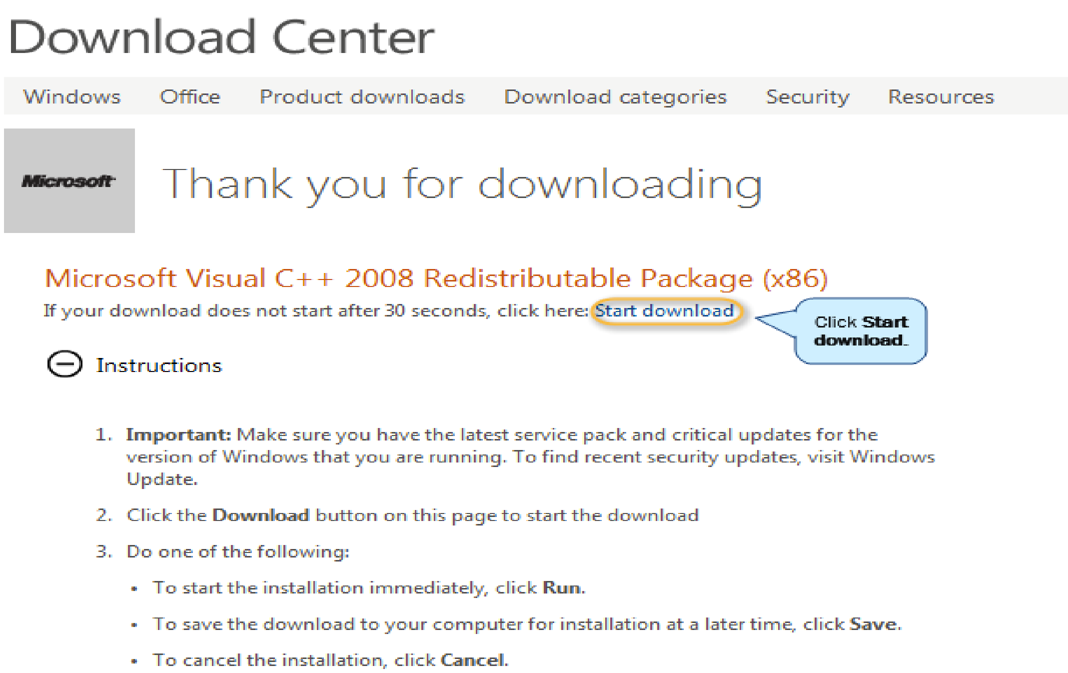
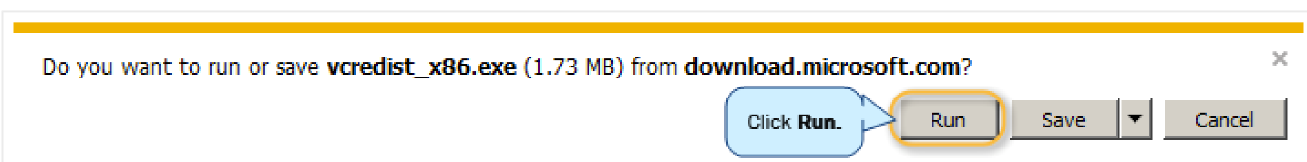
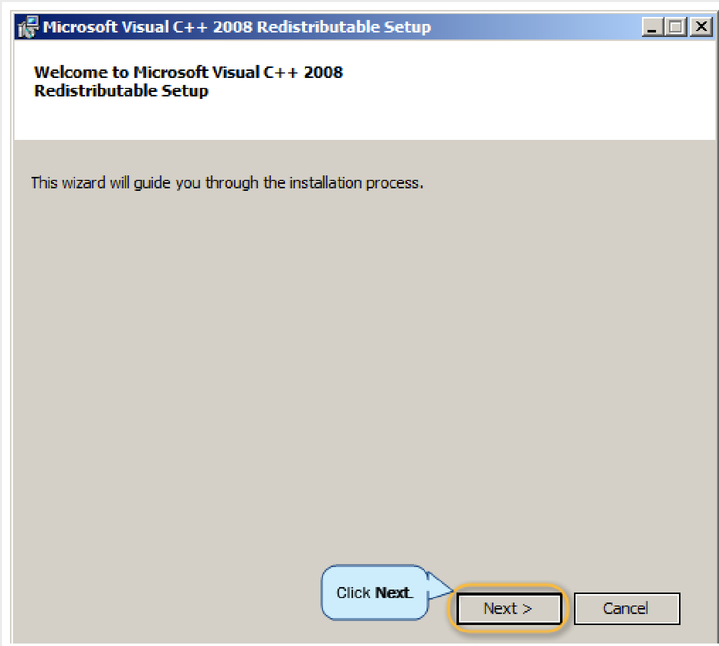
1. Open a web browser to: http://www.microsoft.com/download/en/confirmation.aspx?id=29
2. In the **Download Center** window, **Microsoft Visual C++ Redistributable Package (x86)** area, click **Start download**.



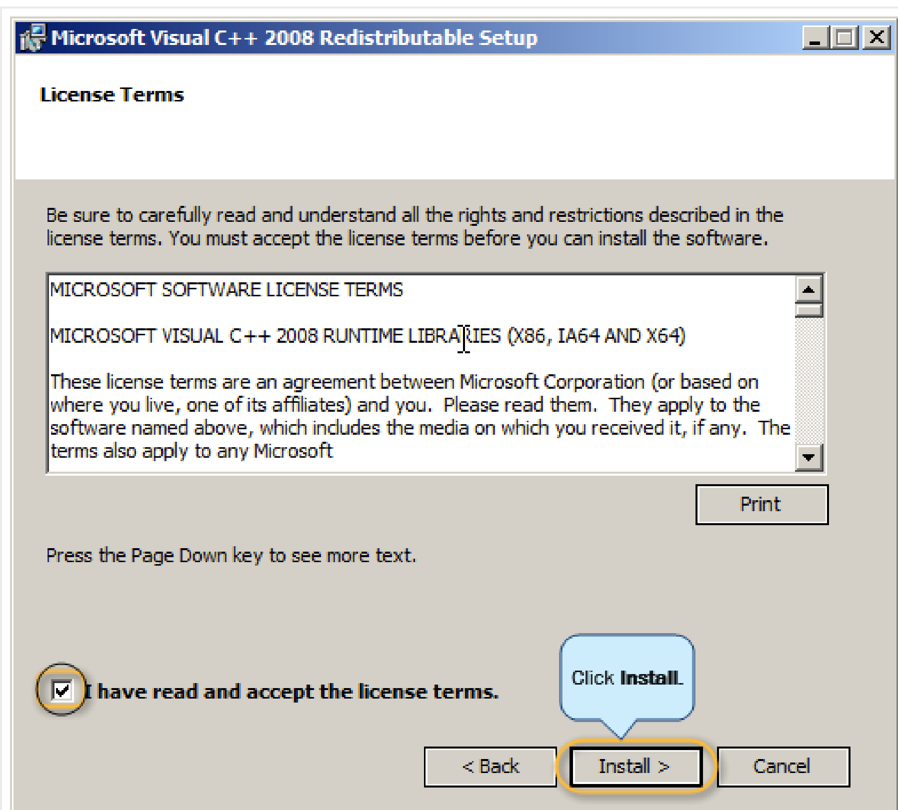
3. When the system prompts you to run or save the package, click **Run**.



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

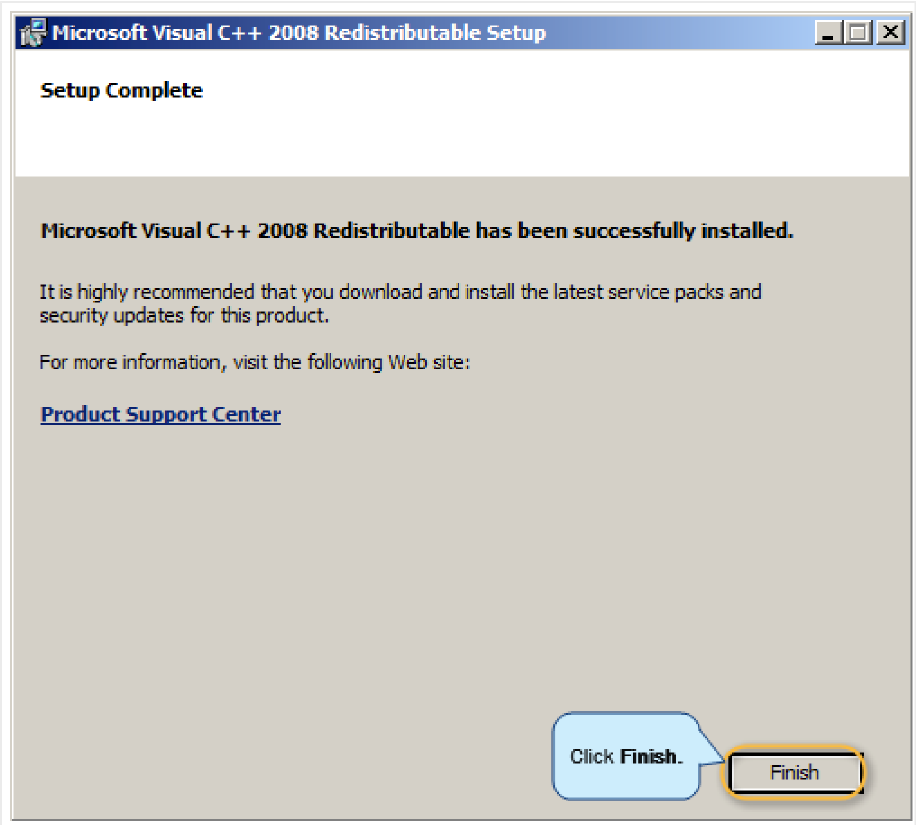


5. In the **License Terms** window, click to select the check box and accept the terms, then click **Install**.



A **Setup** window displays the status of the installation.

6. Wait for a few minutes while the installer installs the package.
7. In the **Setup Complete** window, click **Finish**.

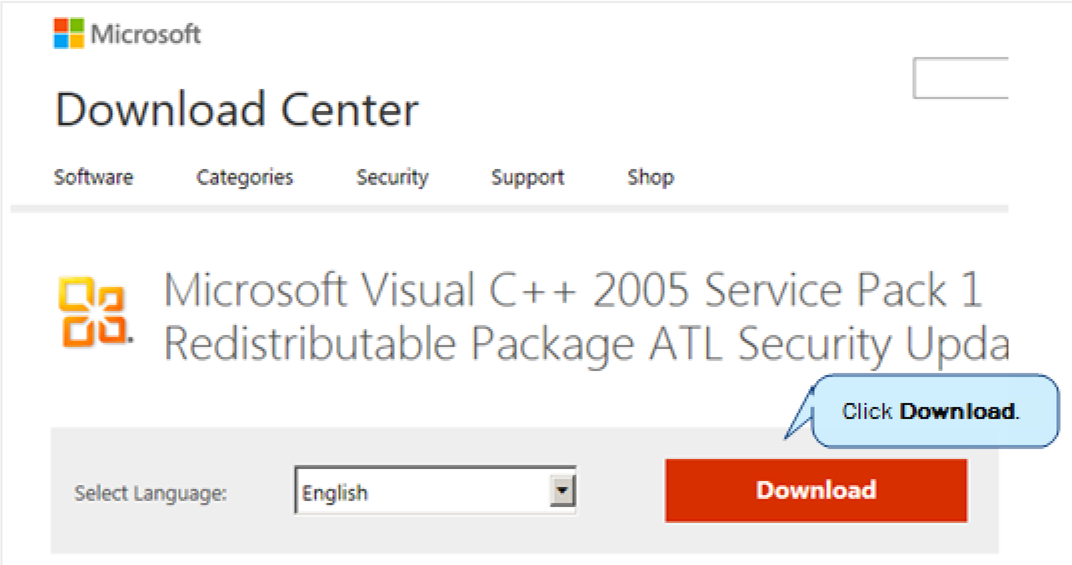


Installing the VC++ 2005 Service Pack 1 Redistributable Package ATL Security Update

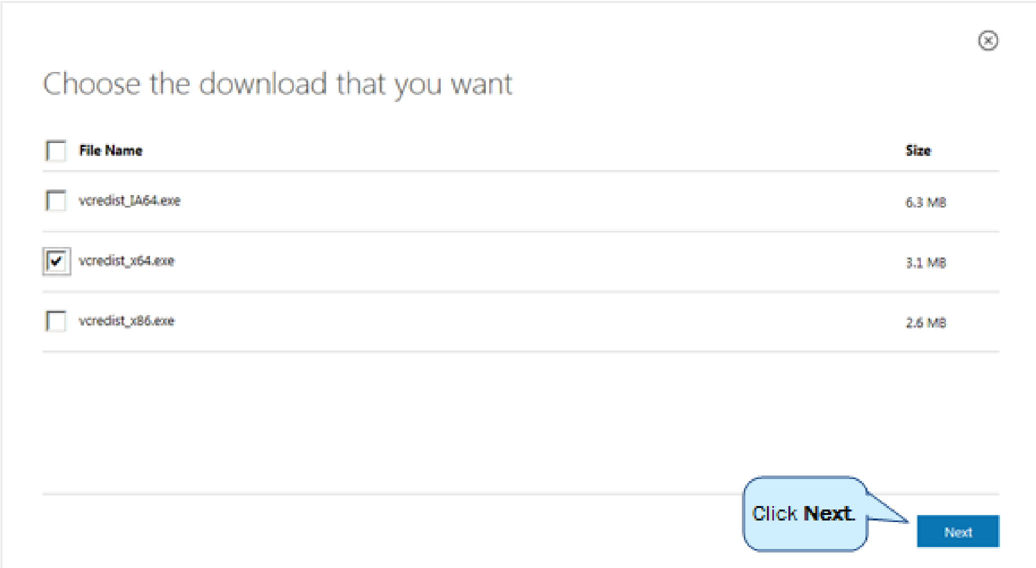
Before you install the Informatica Cloud Secure Agent, you need to install the VC++ 2005 redistributable package.

1. Open a web browser to: http://www.microsoft.com/en-in/download/details.aspx?id=14431.

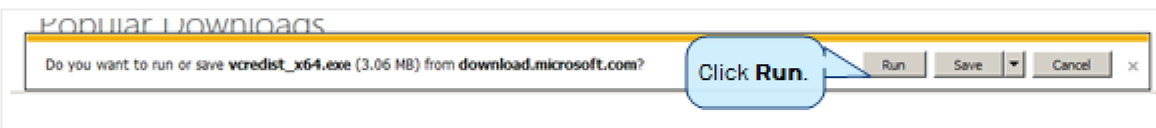
2. In the **Download Center** window, **Microsoft Visual C++ 2005 Service Pack 1 Redistributable Package ATL Security Update** area, click **Download**.



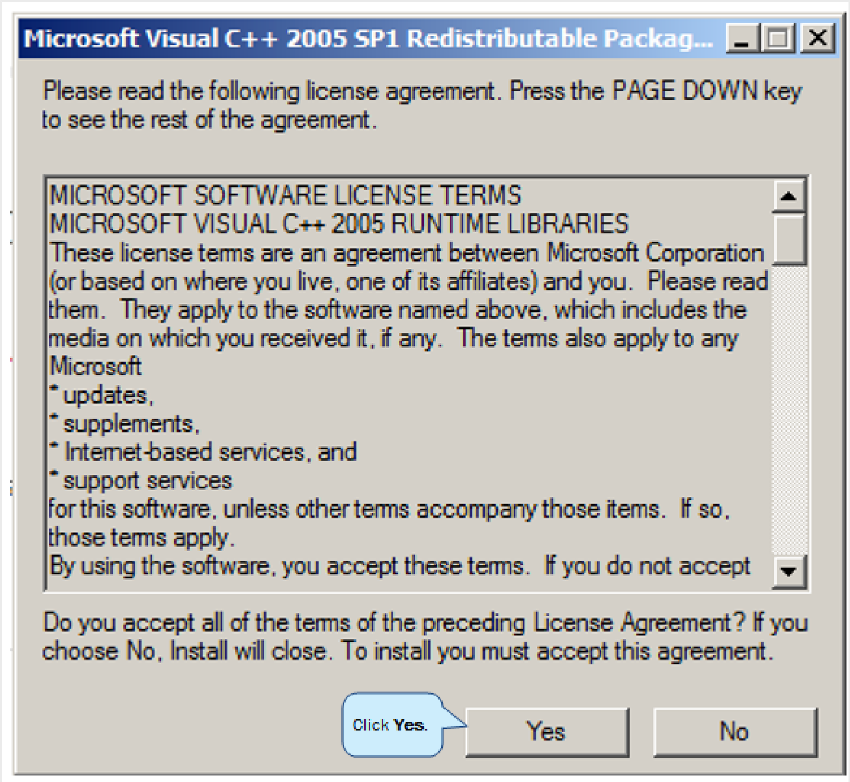
3. In the **Choose the download that you want** area, select the platform that matches your installation, and then click **Next**.



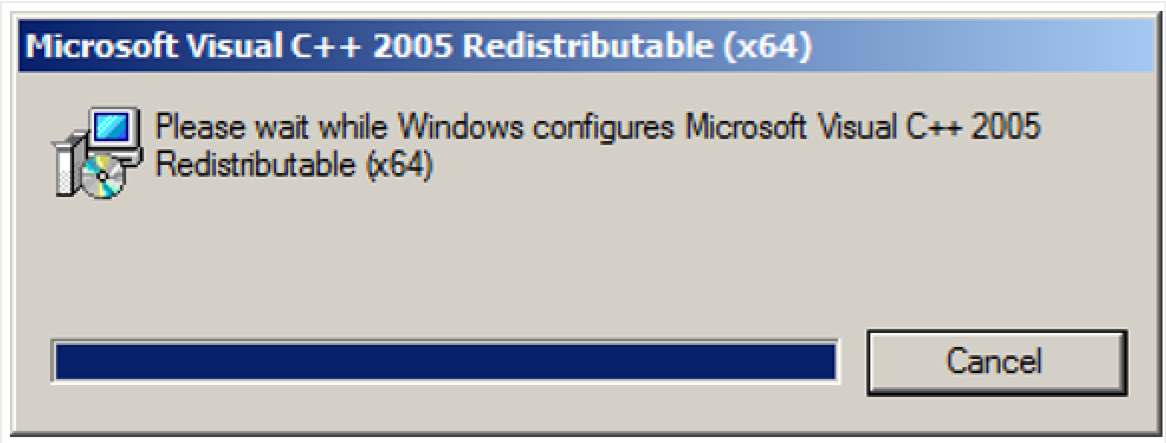
4. At the system prompt to run or save the package, click **Run**.



5. In the **Microsoft Visual C++ 2005 SP1 Redistributable Package** window, to agree to the Microsoft Software License Terms, click **Yes**.



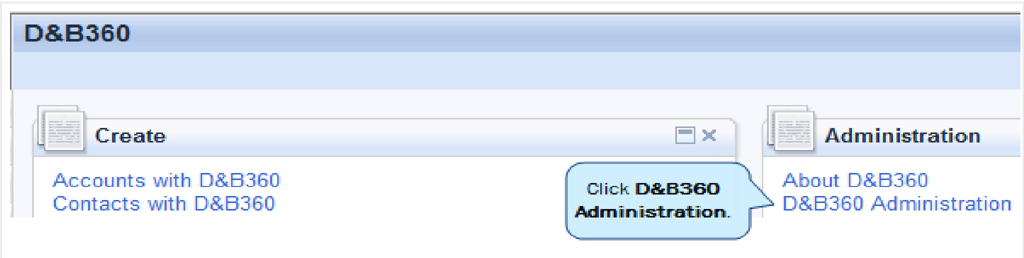
The installation and configuration process begins. A progress window displays a progress bar, then closes after the installation has completed.



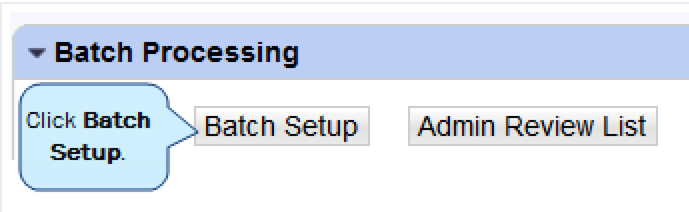
Downloading the Secure Agent Installer

Navigating to the Installation Window

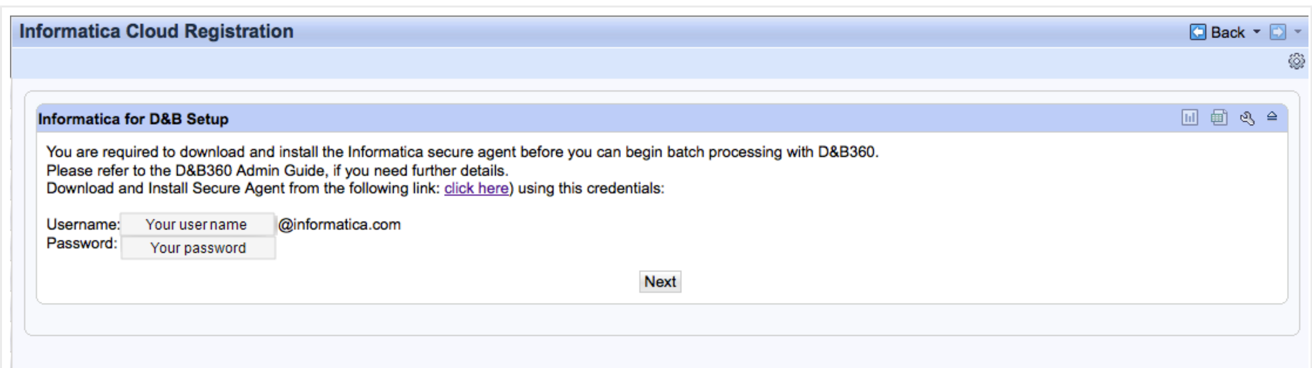
1. In the **D&B360** window, click **D&B360 Administration.**



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



The first time you access the D&B360 Administration window Batch Setup area, the D&B360 application automatically registers your installation to the Informatica Cloud Secure Agent. The agent creates a user name and password for you.

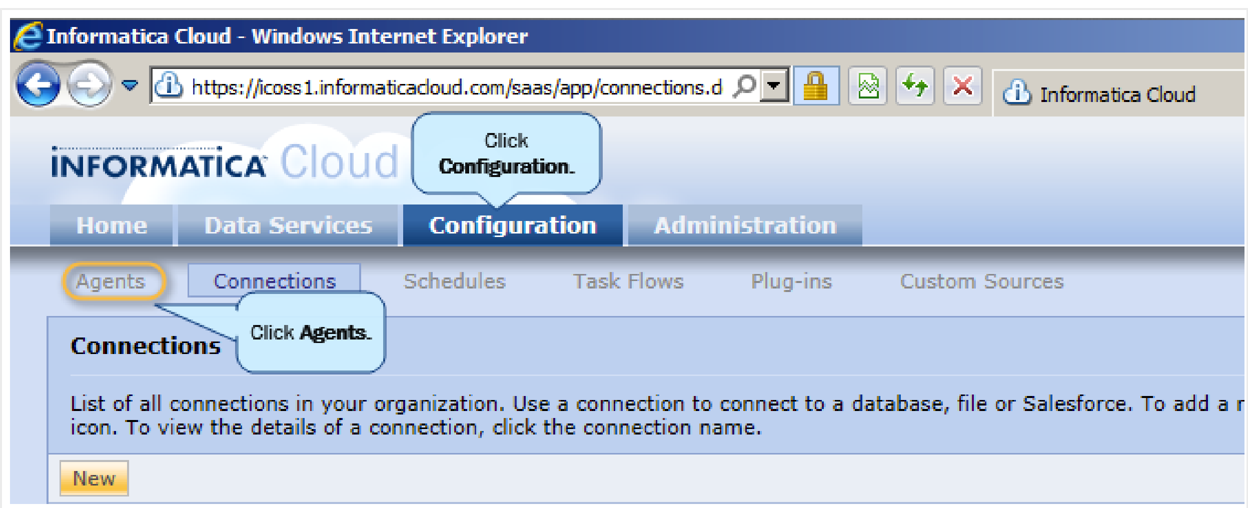


Downloading the Installer

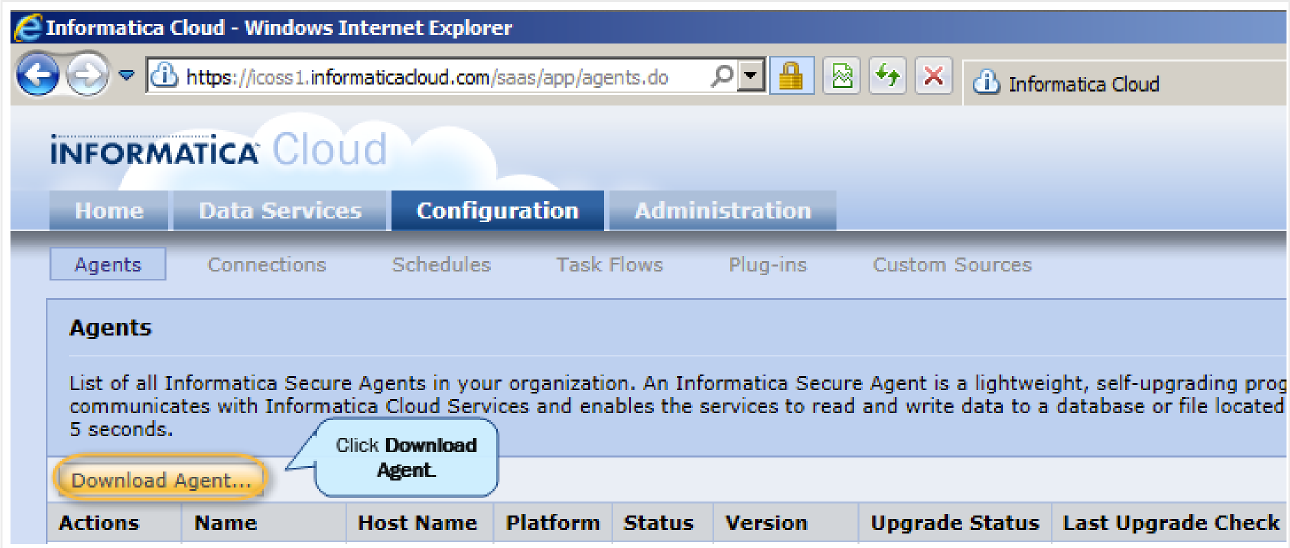
To download the secure agent installer:

1. In the **Informatica Cloud** window, **User Name** and **Password** fields, type the user name and password created for you in the **Informatica Cloud Registration** window, and then click **Login**.

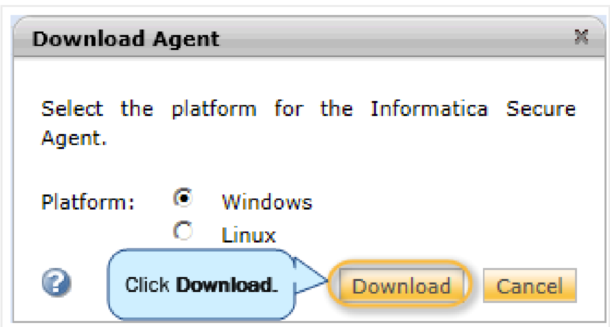
2. In the **Informatica Cloud** window, click **Configuration**, and then **Agents**.



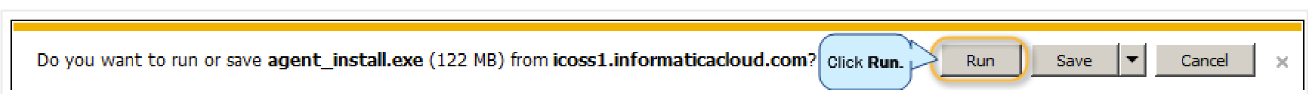
3. In the **Agents** area, click **Download Agent**.



4. In the **Download Agent** window, click **Download**.



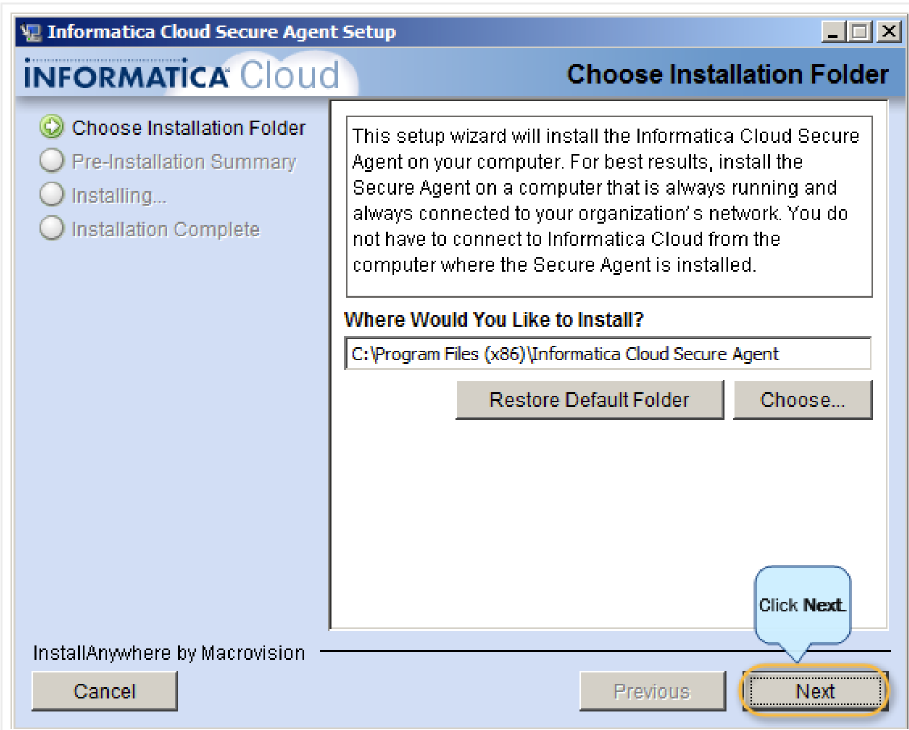
5. At the prompt, click **Run**.



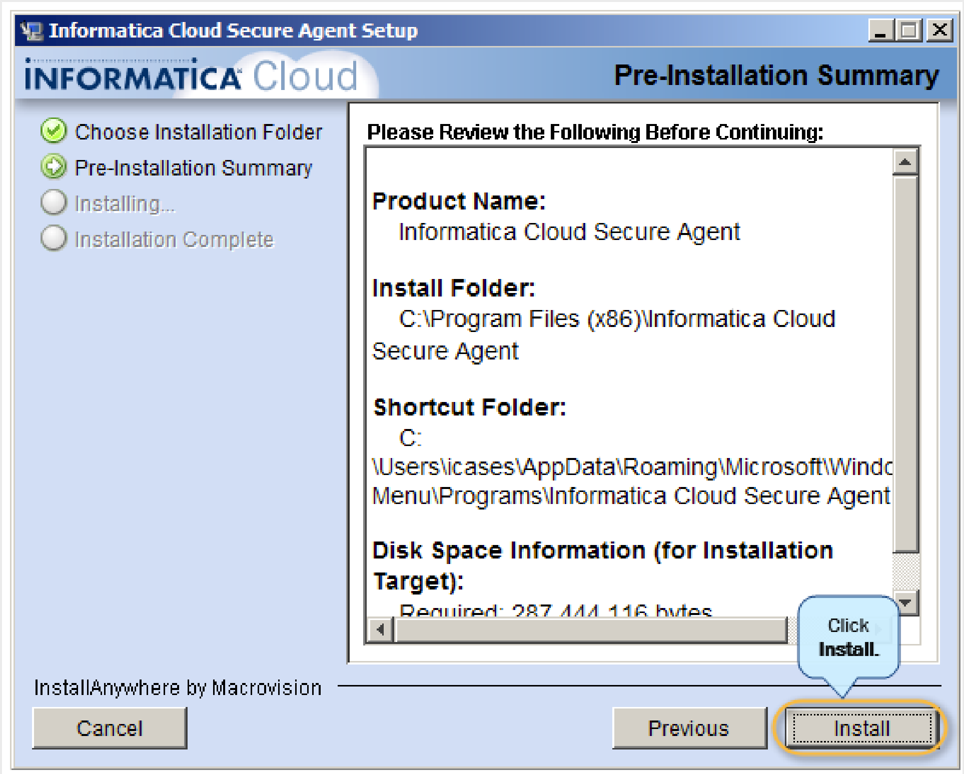
Installing the Secure Agent

The Informatica Cloud Secure Agent Setup program starts.

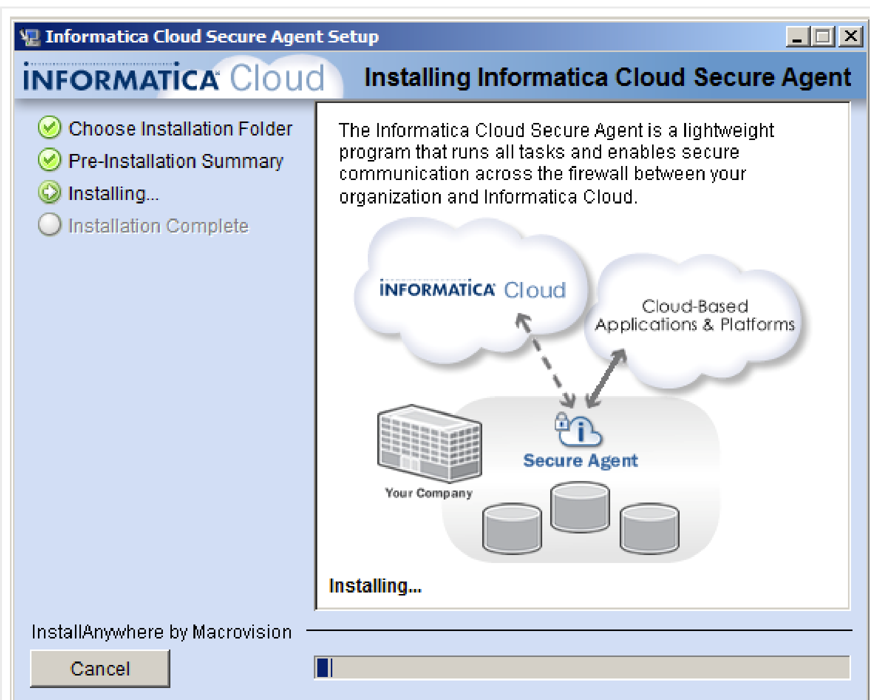
1. In the **Choose Installation Folder** window, click **Next**.



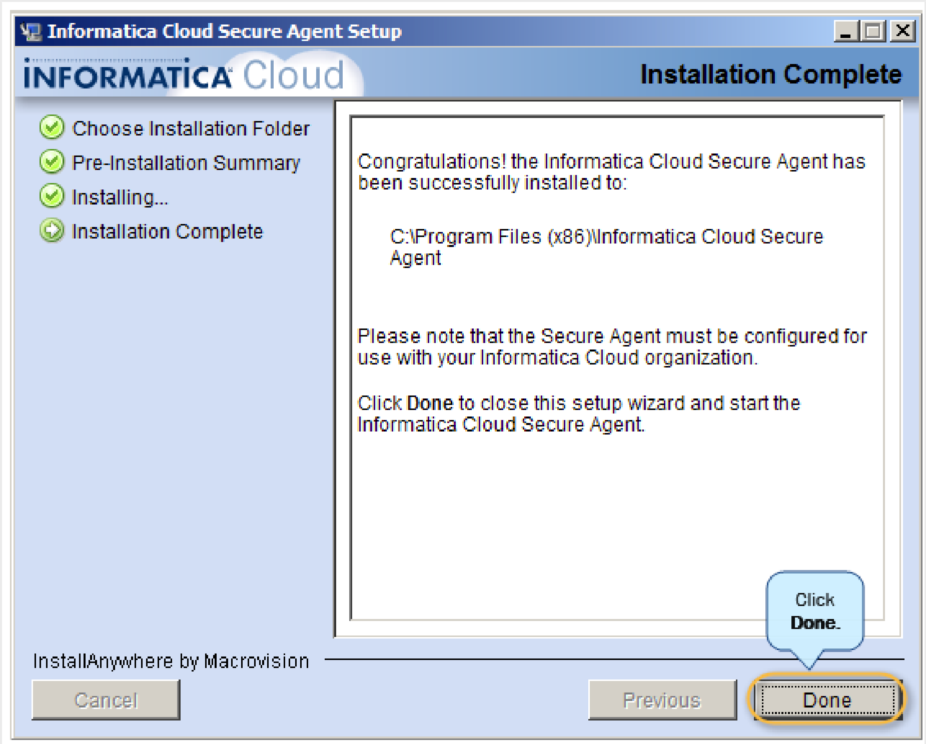
2. In the **Pre-Installation Summary** window, review the information that displays.
3. After you confirm that everything is correct, click **Install**.



The **Installing Informatica Cloud Secure Agent** window displays the status of the installation process.

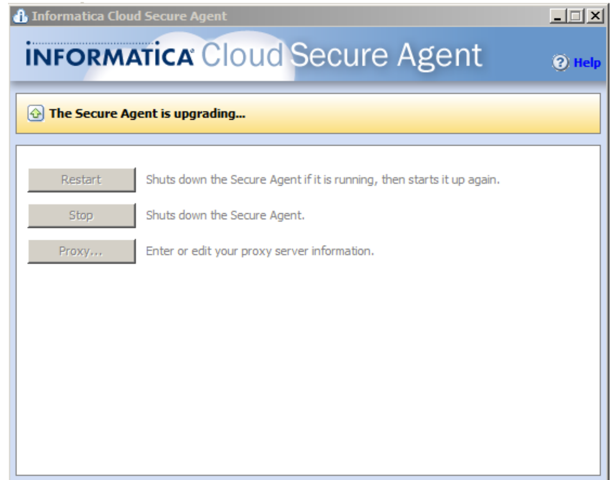


4. After the **Informatica Cloud Installation Complete** window opens and displays a summary, click **Done**.



5. In the **Informatica Cloud Secure Agent** registration window, type your registration credentials, then click **Register**.

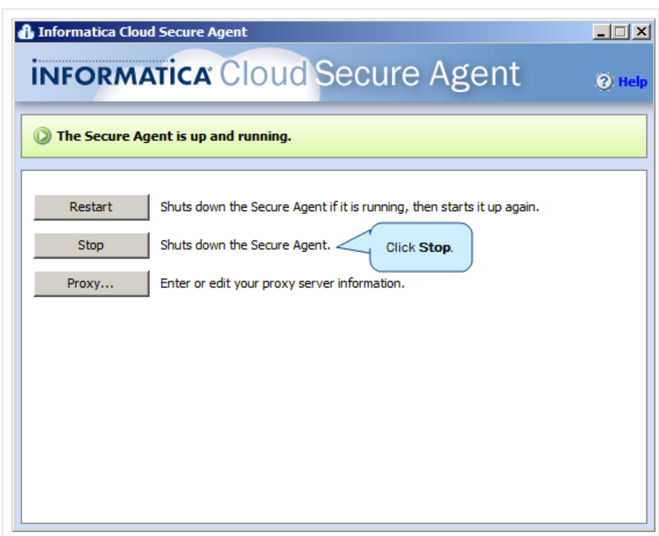
The Secure Agent registers and starts up, and then begins the upgrade process.



Restarting the Secure Agent

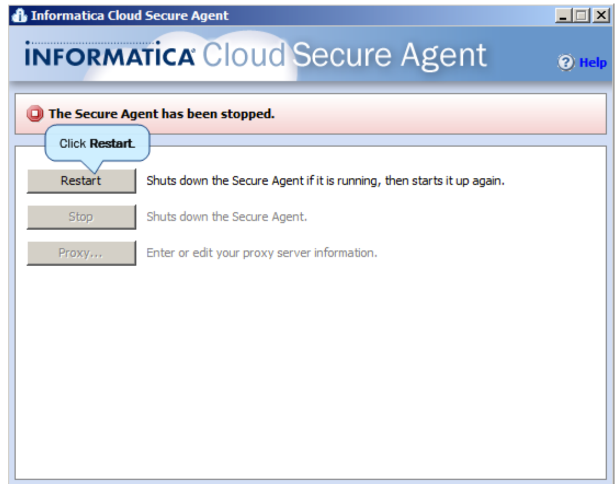
After the upgrade process is complete, a window opens and informs you that the secure agent is up and running.

1. Click **Stop**.



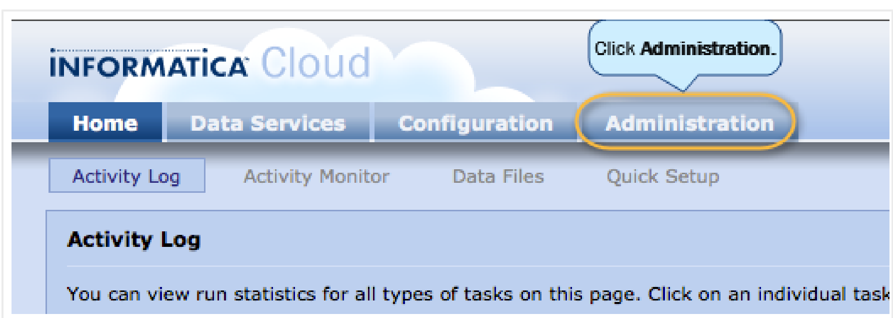
The **Informatica Cloud Secure Agent** window displays the status of the Secure Agent.

2. Click **Restart** to restart the agent.



Setting Up the Informatica Cloud Portal

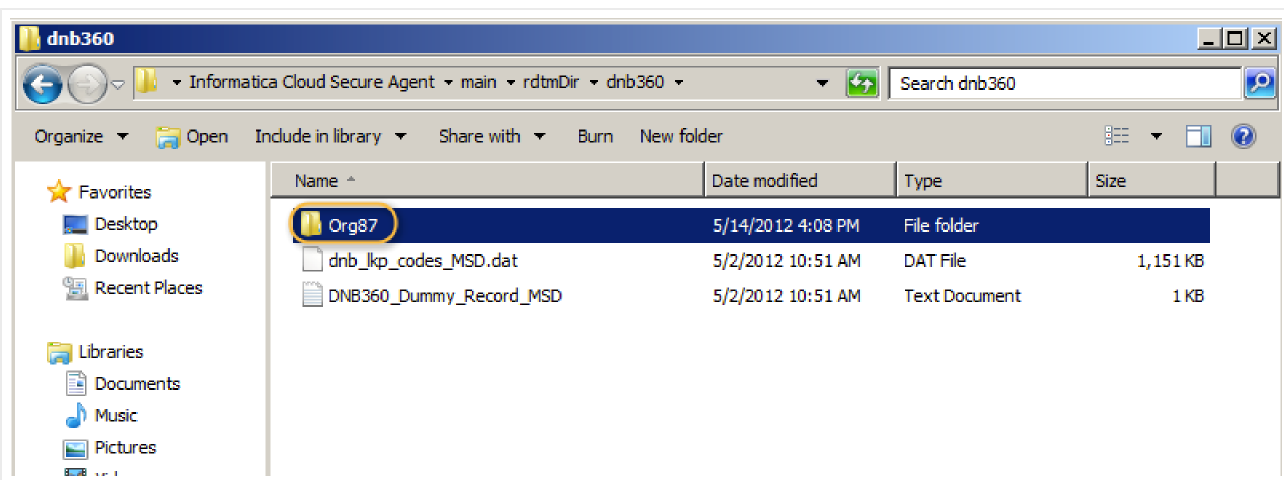
1. In the **Informatica Cloud** window, click **Administration**.



2. In the **Administration** area, identify the **Organization ID** for your installation.

   In this example, it is Org87.

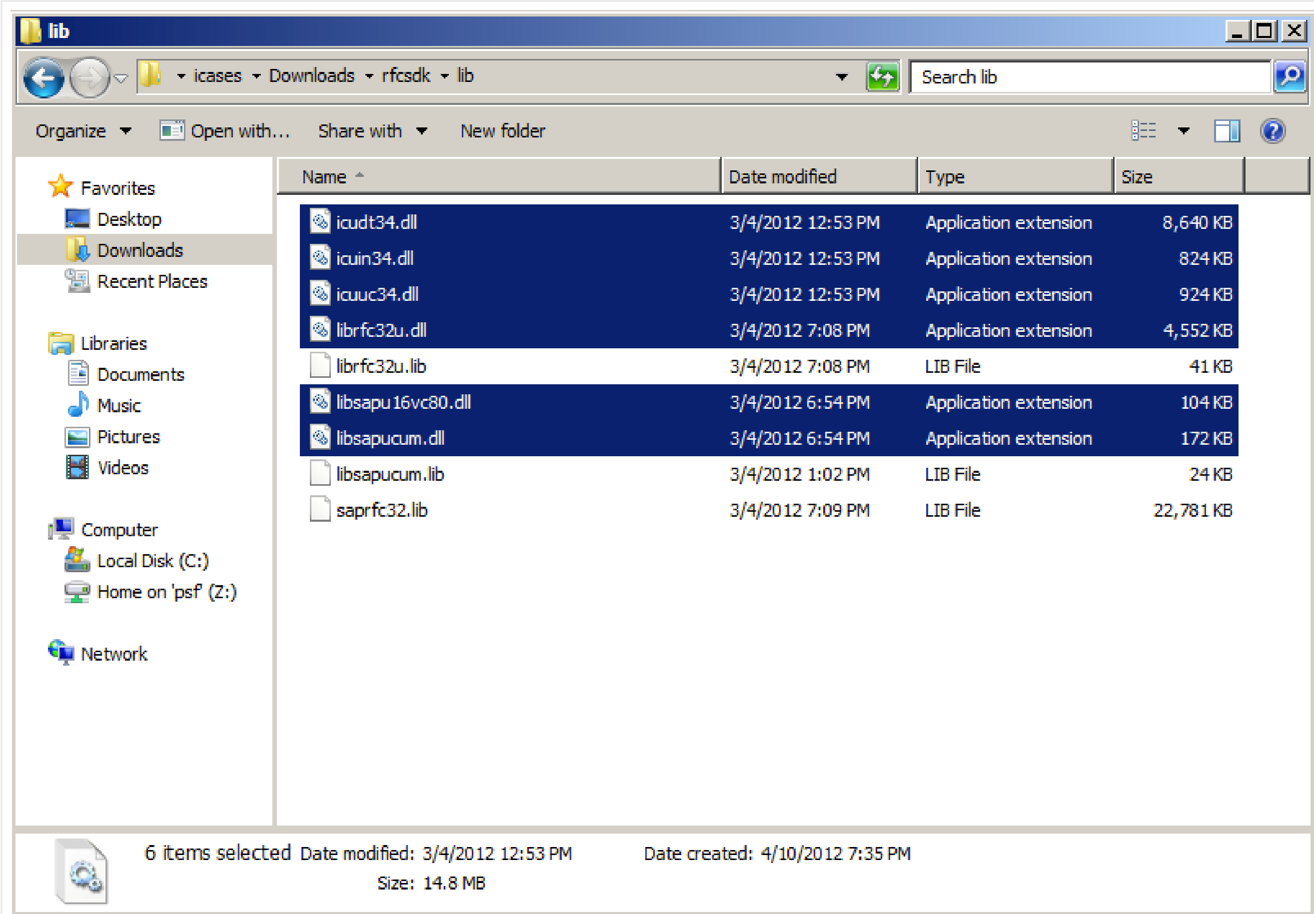
3. In your local directory, create a folder with the Secure Agent Organization ID: …`\Informatica Cloud Secure Agent\main\rdtmDir\dnb360\directory`.



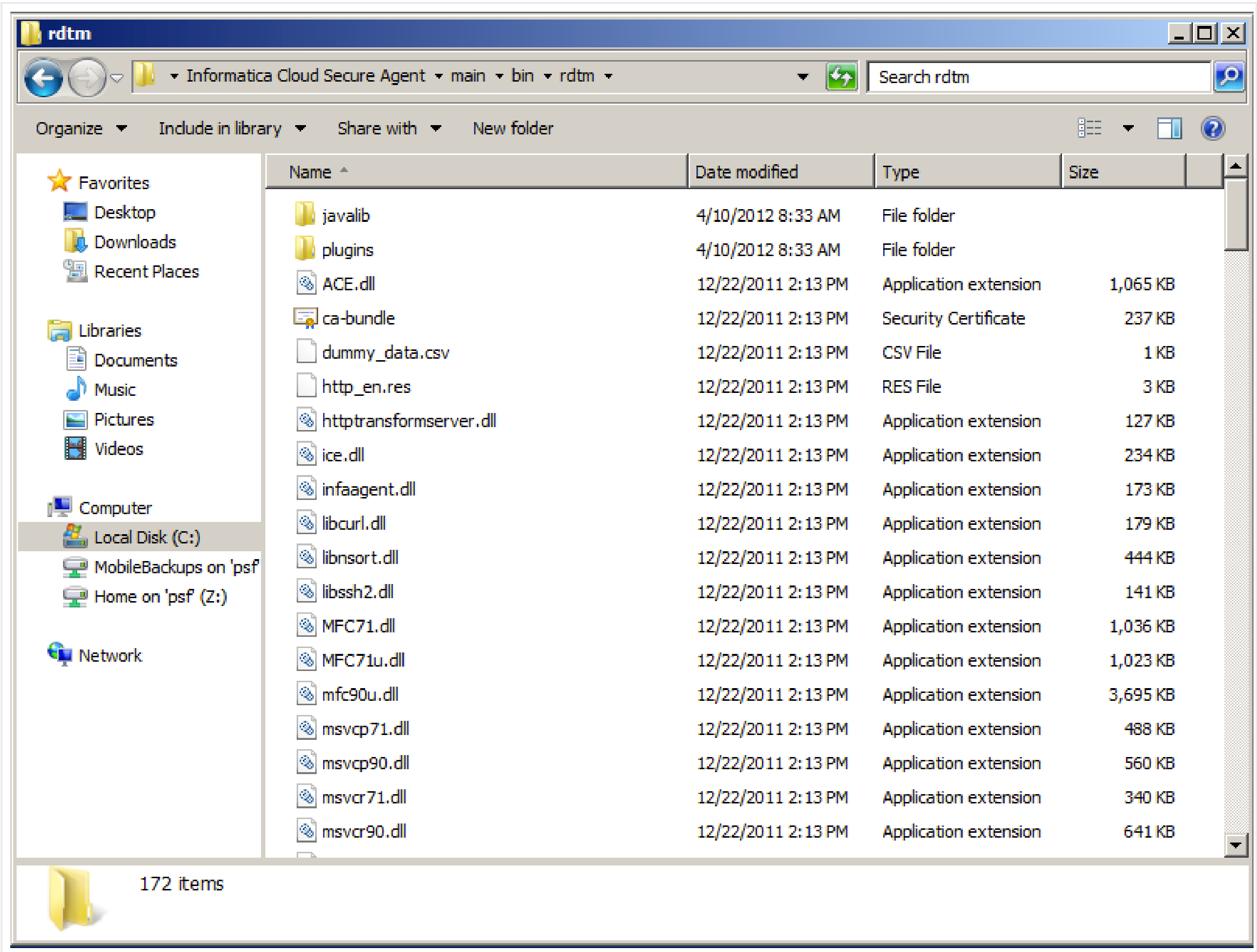
4. From this website https://service.sap.com/swdc, download the `SAP RFC SDK 7.10 IA32` package.
5. To unpack the package, use the command, `SAPCAR: SAPCAR -XVF RFC-XXXXX.SAR`.

```
PS C:\Users\icases\downloads> .\SAPCAR_5-20002092.exe -xvf .\RFC_4-10009744.SAR
SAPCAR: processing archive .\RFC_4-10009744.SAR (version 2.01)
x rfcsdk
x rfcsdk/bin
x rfcsdk/bin/librfc32u.dll
x rfcsdk/include
x rfcsdk/include/sapitab.h
x rfcsdk/include/saprfc.h
x rfcsdk/include/sapuc.h
x rfcsdk/include/sapucx.h
x rfcsdk/lib
x rfcsdk/lib/icudt34.dll
x rfcsdk/lib/icuin34.dll
x rfcsdk/lib/icuuc34.dll
x rfcsdk/lib/librfc32u.dll
x rfcsdk/lib/librfc32u.lib
x rfcsdk/lib/libsapu16vc80.dll
x rfcsdk/lib/libsapucum.dll
x rfcsdk/lib/libsapucum.lib
x rfcsdk/lib/saprfc32.lib
x rfcsdk/text
x rfcsdk/text/icu_license.txt
x rfcsdk/text/rfc_library_guide.pdf
x rfcsdk/text/SAPRFC.HLP
x rfcsdk/text/saprfc.ini
x rfcsdk/text/sapu16doc.htm
x rfcsdk/text/sapucdoc.htm
SAPCAR: 25 file(s) extracted
PS C:\Users\icases\downloads> _
```

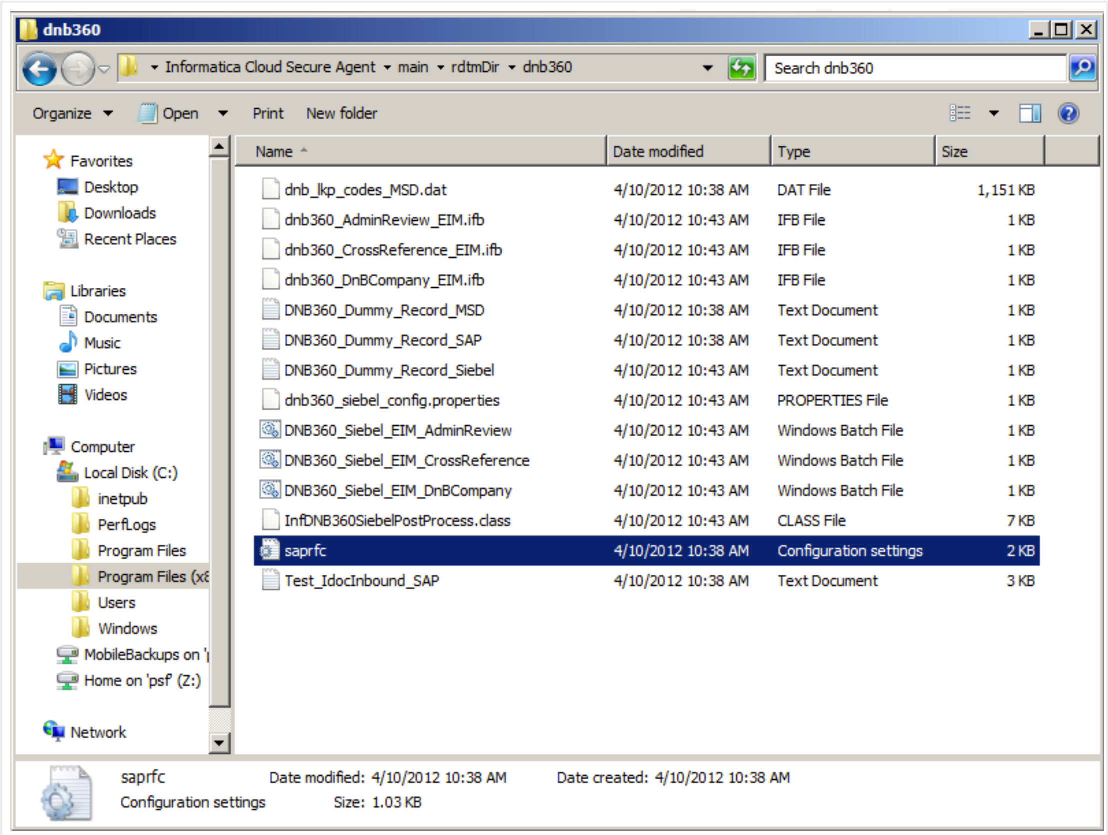
6. From the resulting `lib` directory, select and copy all of the `.dll` files.



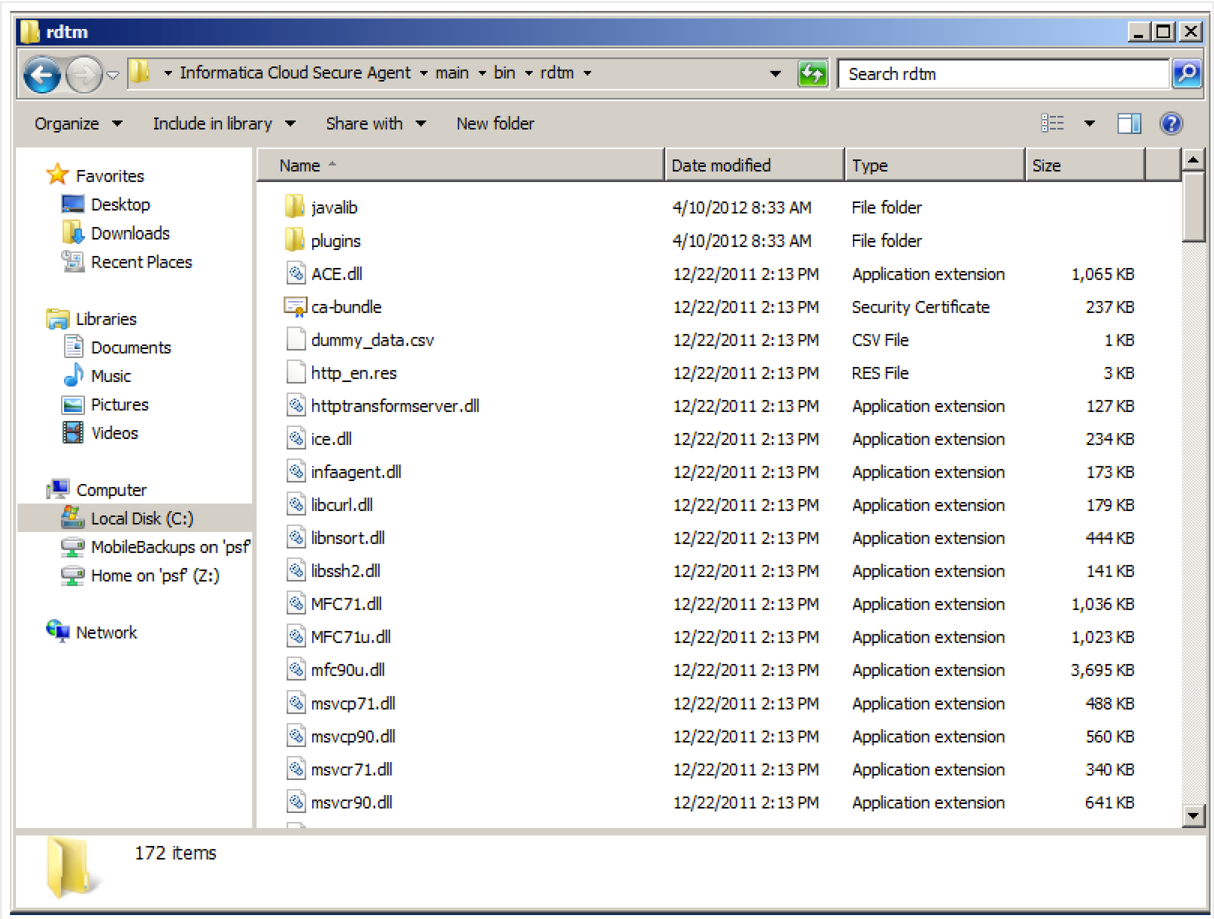
7. Paste the `.dll` files to this directory: `Program Files (x86)\Informatica Cloud Secure Agent\main\bin\rdtm`.



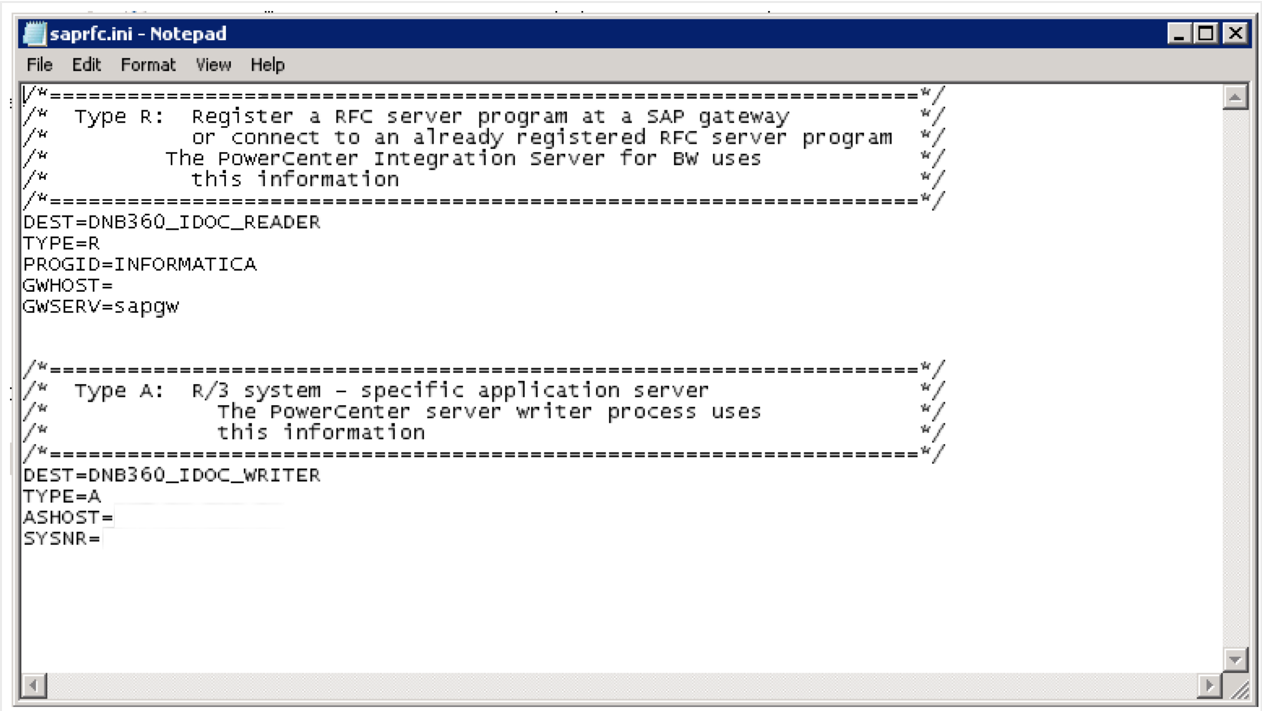
8. In the directory, `Program Files (x86)\Informatica Cloud Secure Agent\main\rdtmDir\dnb360`, copy the `sparfc.ini` file.



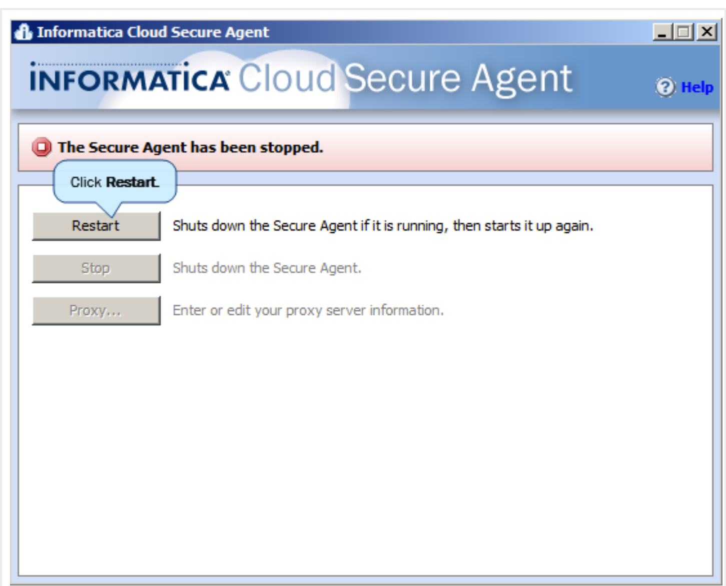
9. In the directory, `Program Files (x86)\Informatica Cloud Secure Agent\main\bin\rdtm`, paste the file from the previous step.



10. Use Notepad to edit the `saprfc.ini` file and enter the values for your system:



11. Save your file.
12. In the **Informatica Cloud Secure Agent** window, click **Restart**.



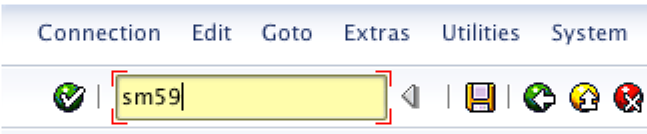
The Secure Agent starts up. A message displays to confirm the Secure Agent is up and running.

This completes installation of the Informatica Cloud Secure Agent.

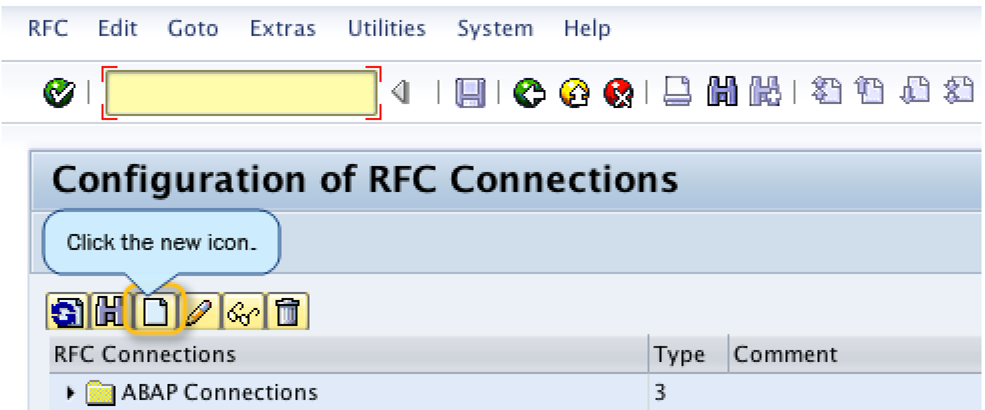
Establishing a Connection

If your entitlements include batch processing, you need to set up an RFC destination, which is a connection between your SAP CRM server and the server where the Informatica Cloud Secure Agent is installed.

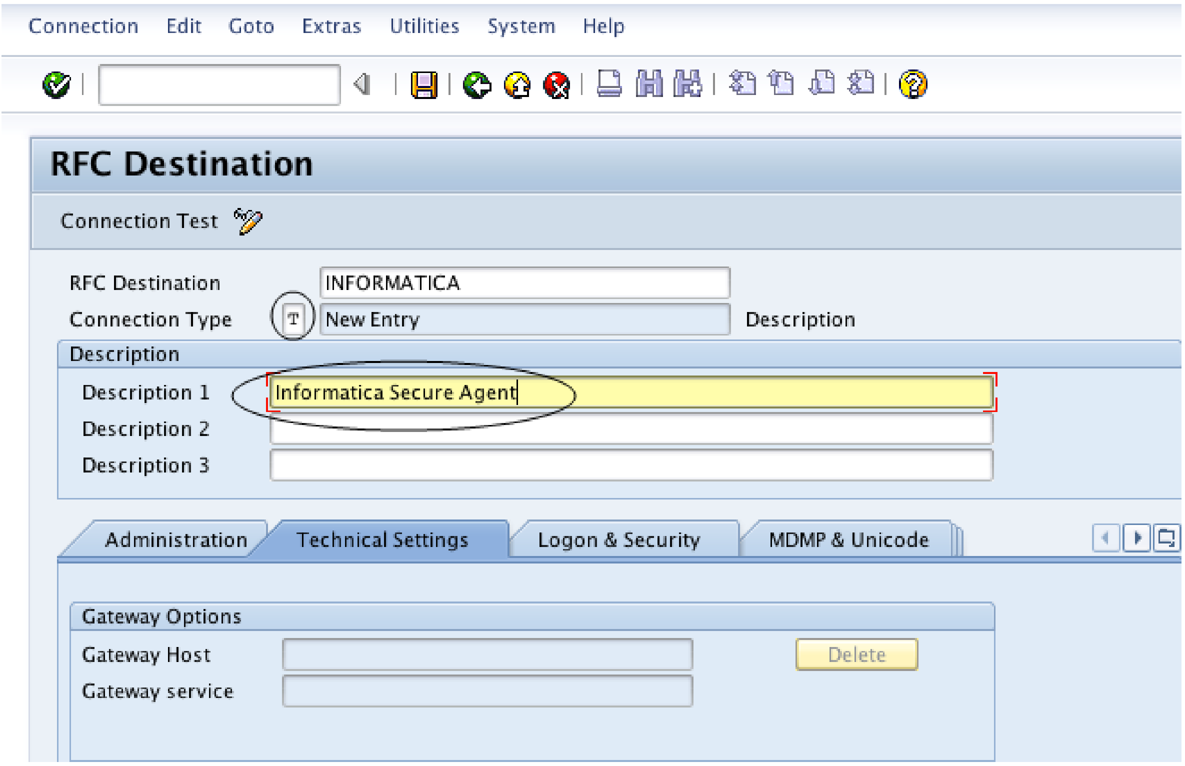
1. In the **Command** field, execute transaction **sm59**.



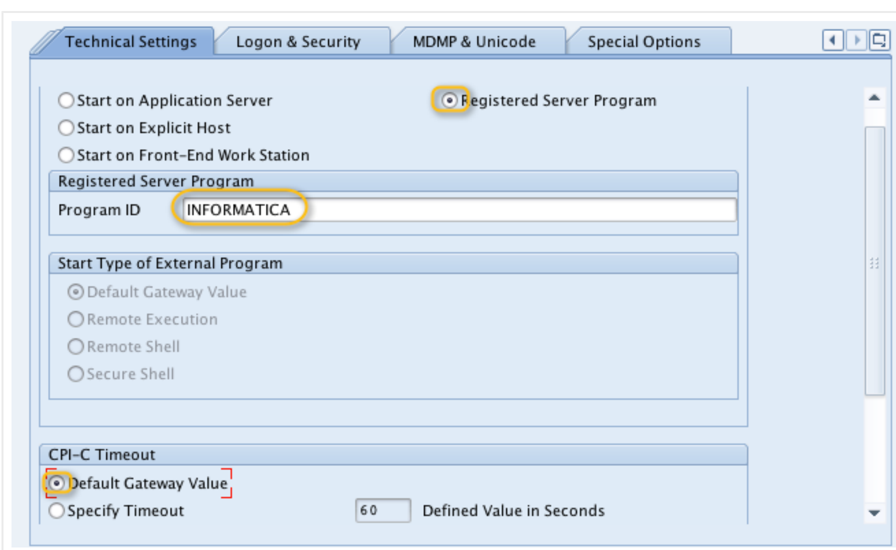
2. In the **Configuration of RFC Connections** window, click the new icon.



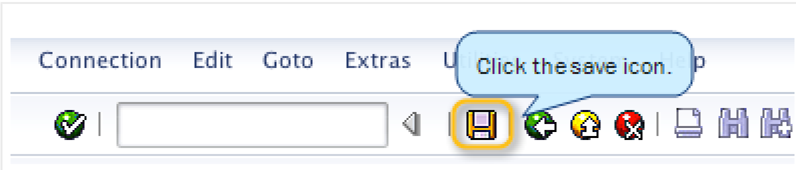
3. In the **RFC Destination** window, **Connection Type** field, enter **T**.
4. In the **Description** area, type a description for this connection, then press the check mark icon.



5. Select **Technical Settings** -> **Registered Server Program**.
6. In the **Program ID** field, type **Informatica**.
7. In the **CPI-C Timeout** area, select **Default Gateway Value.**



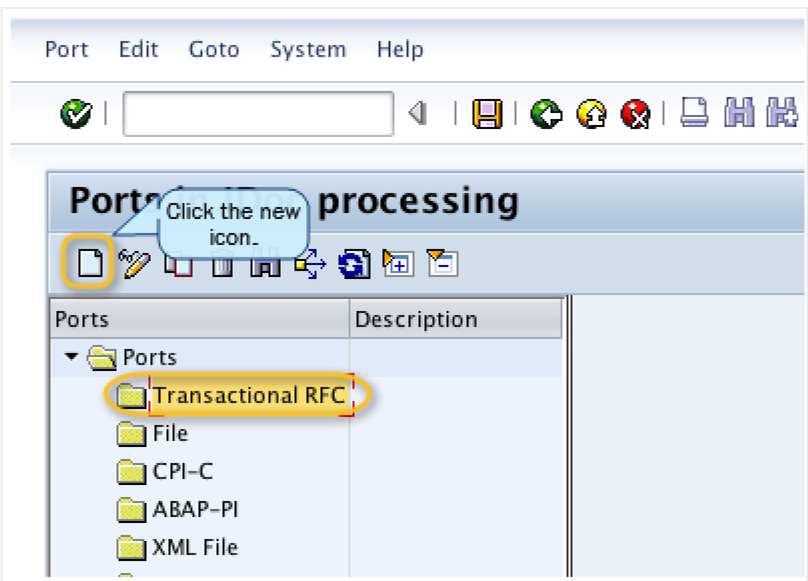
8. Click the **MDMP** tab, and in the **Communication Type with Target System** area, click **Unicode**.
9. Click the save icon.



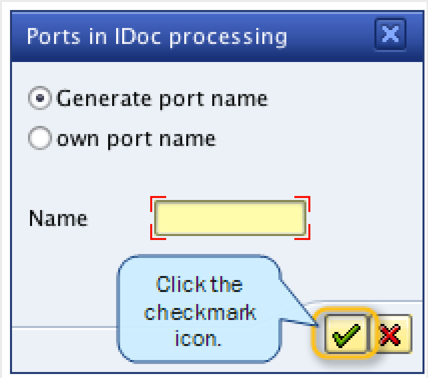
Creating a Port

1. To create a port for the RFC destination, in the **Command** field, execute transaction **we21**.

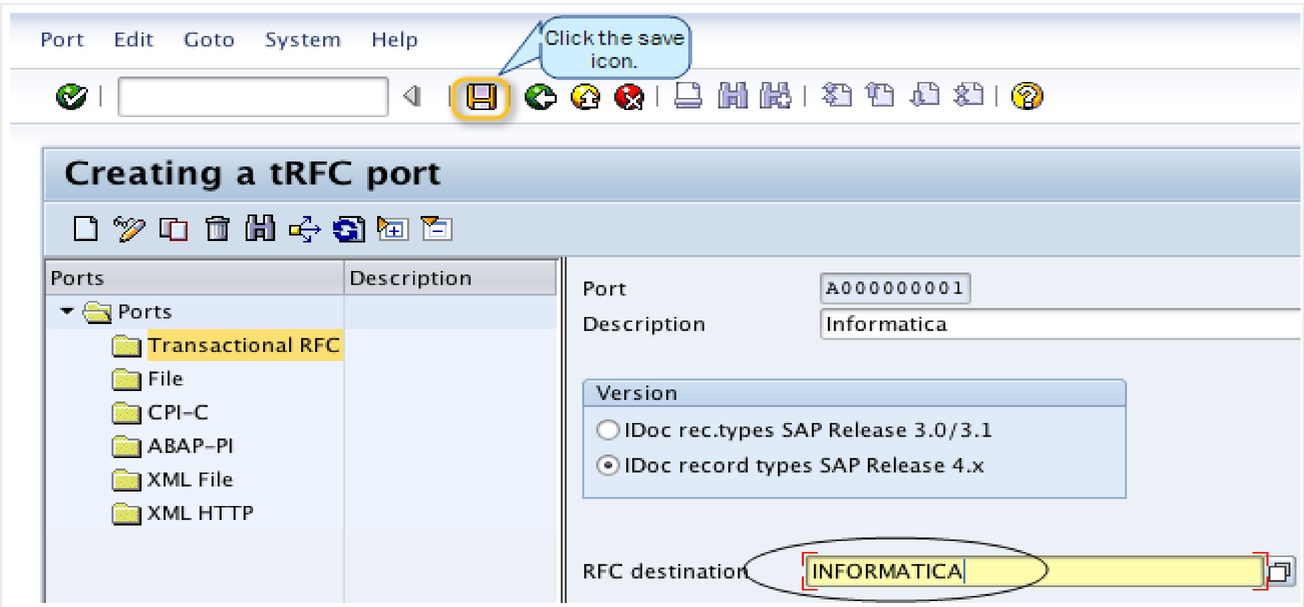
2. In the **Ports in IDoc processing** window, select **Transactional RFC**, and then click the new icon.



3. In the **Ports in IDoc processing** window, select **Generate Port Name**, then click the check mark icon.

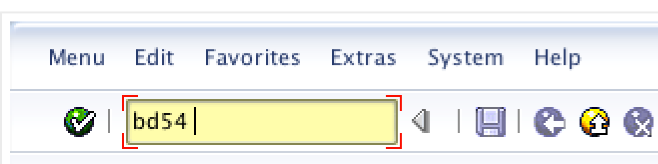


4. In the **Creating a tRFC port** window, **Description** field, type **Informatica**, and then click the save icon.

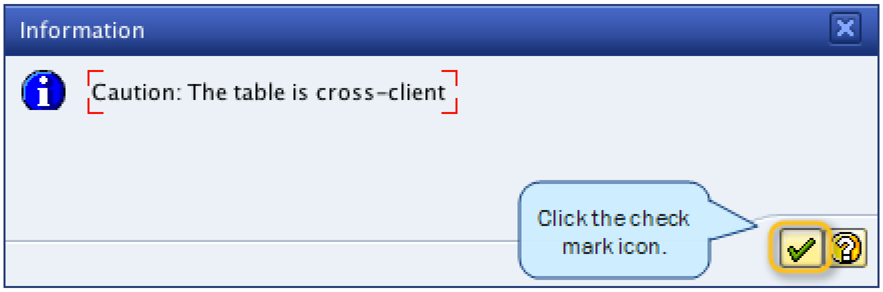


Creating a Logical System to be Associated to the Informatica Secure Agent

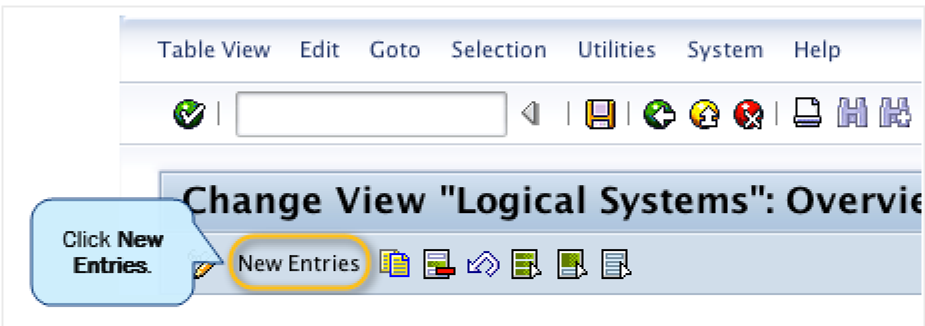
1. In the **Command** field, execute transaction **bd54**.



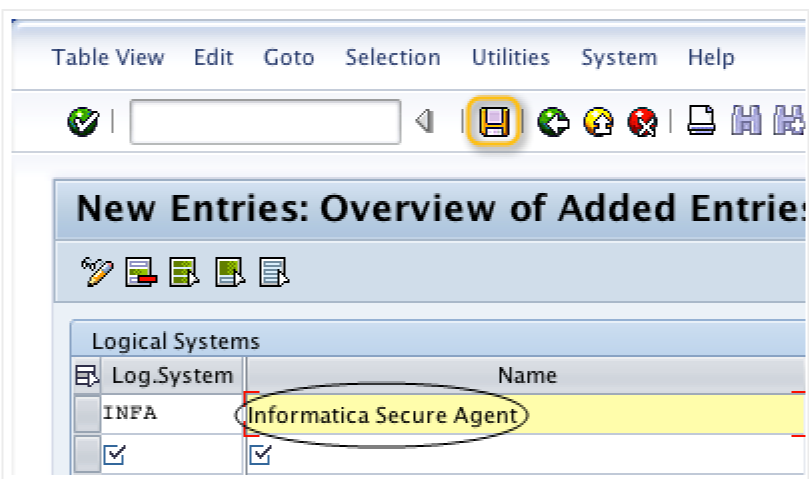
2. In the **Information** caution window, click the check mark icon.



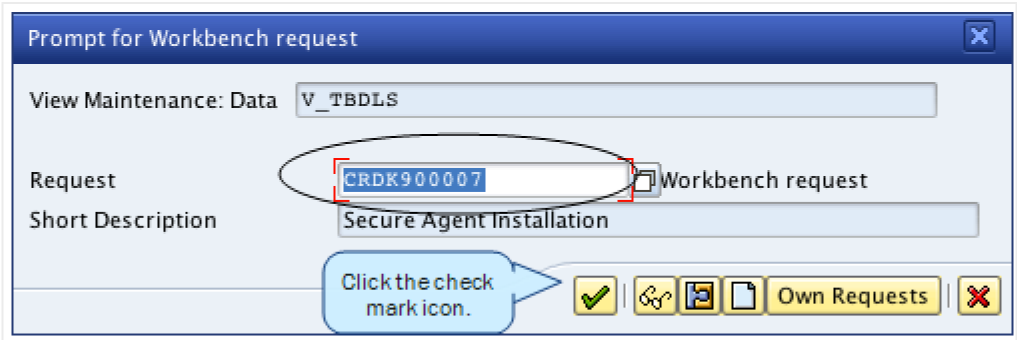
3. In the **Change View Logical Systems Overview** window, click **New Entries**.



4. In the **New Entries** window, **Logical Systems** area **INFA** field, type **Informatica Secure Agent**.

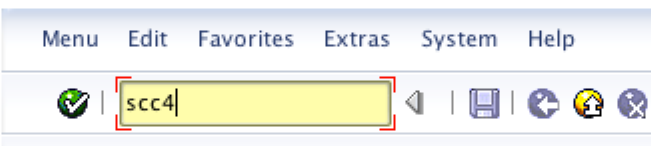


5. In the **Prompt for Workbench** request window, **Request** field, select a request that you have ready to use, or create a new one, and then click the check mark icon.

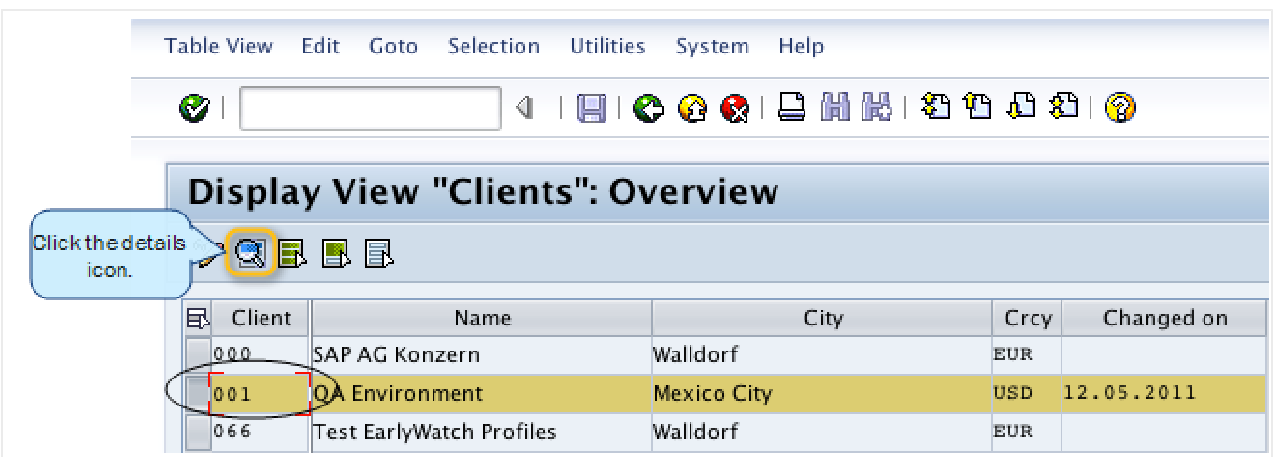


Identifying the Client's Logical System Name

1. In the **Command** field, execute transaction **scc4**.



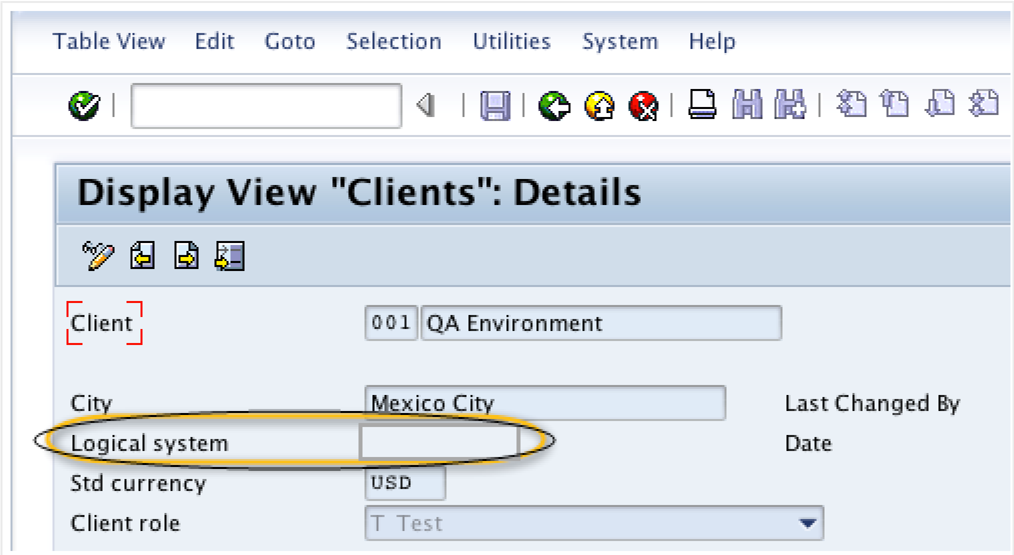
2. In the **Display View Clients Overview** window, select the client you are working on, and then click the details icon.



In the **Display View Clients Details** window, the logical system for the client should already be configured, as shown in the following illustration.

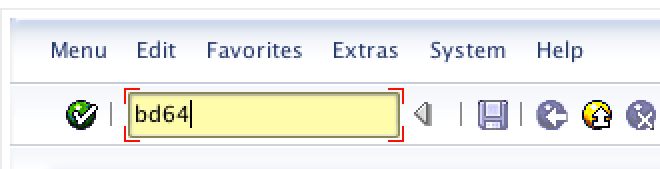
Note: Make a note of the logical system name, which you will need to know in the See "Defining the Distribution Model" on page 6-29.

If the client's logical system name is not configured, refer to your SAP CRM installation guide.

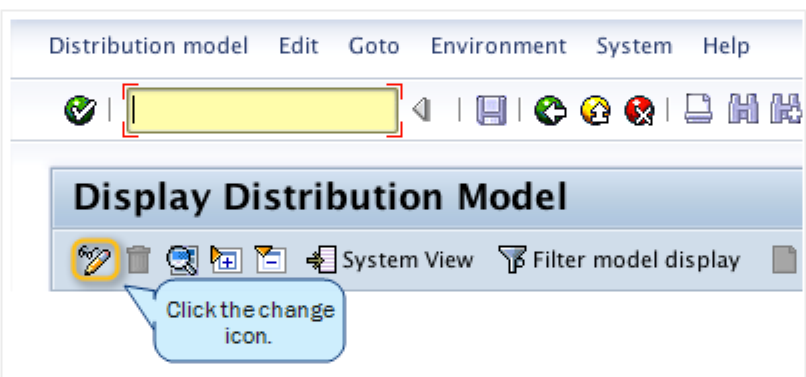


Defining the Distribution Model

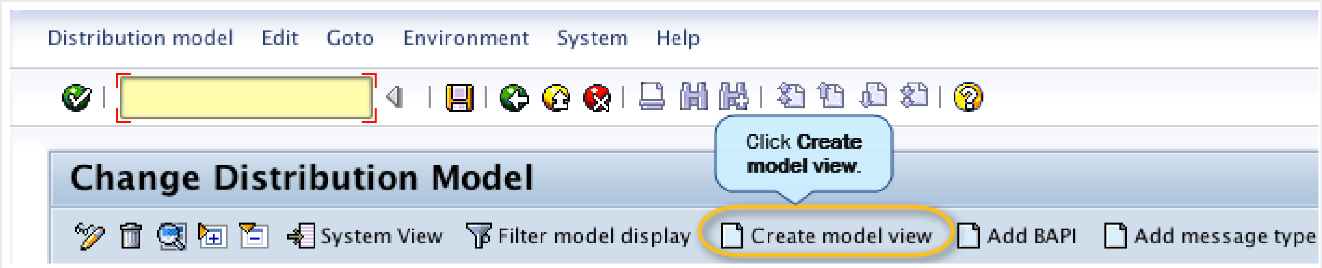
1. In the **Command** field, execute transaction **bd64**.



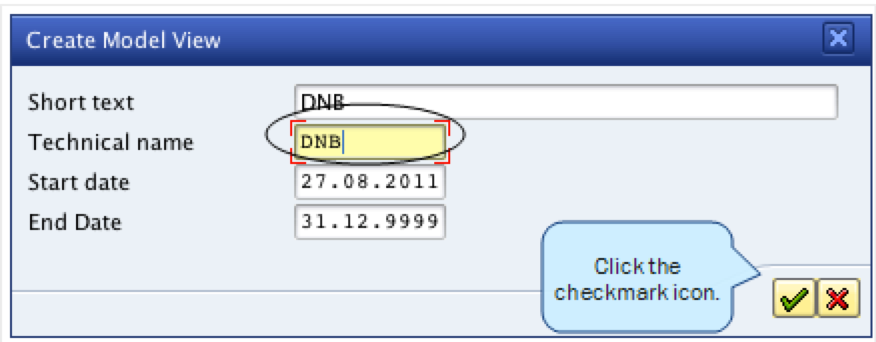
2. In the **Display Distribution Model** window, click the change icon.



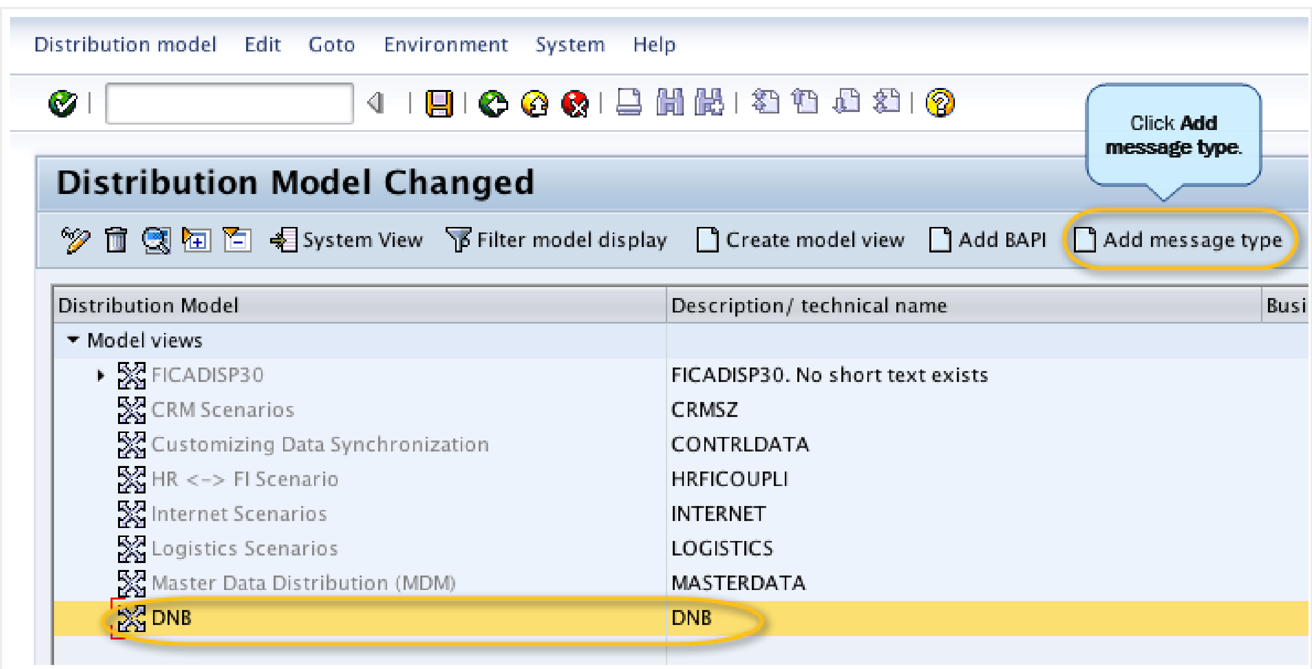
3. In the **Change Distribution Model** window, click **Create model view**.



4. In the **Create Model View** window, type a model name, for example, DNB, and then click the check mark icon.

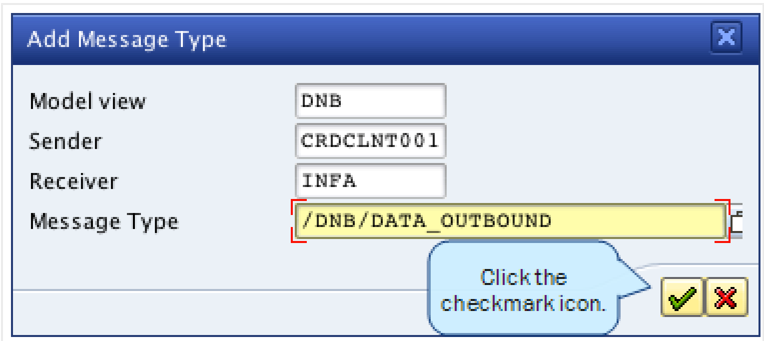


5. In the **Distribution Model Changed** window, click **Add message type**.

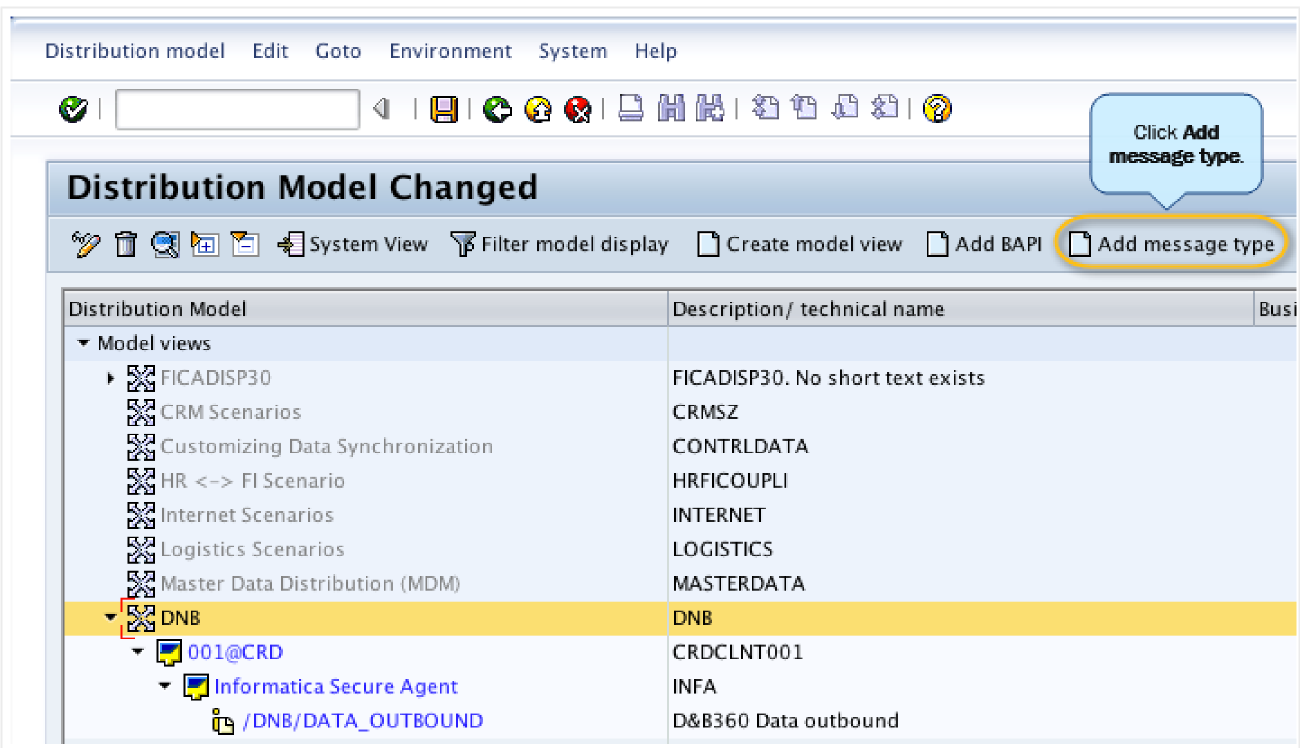


6. In the **Add Message Type** window:

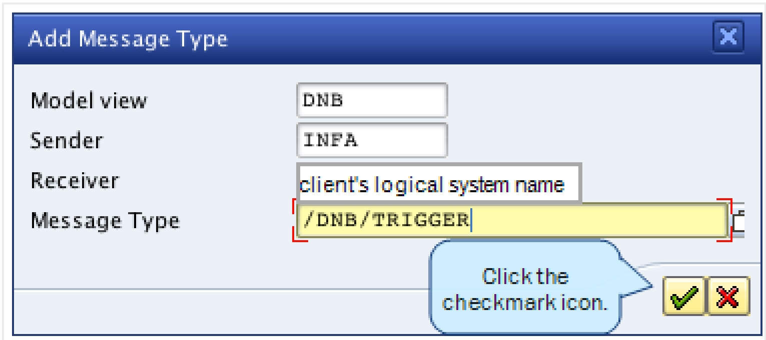
   a. In the **Sender** field, type the client's logical system name, for example, CRDCLNT001.
   b. In the **Receiver** field, type **INFA**.
   c. In the **Message Type** field, type **DNB/DATA_OUTBOUND**.
   d. Click the check mark icon.



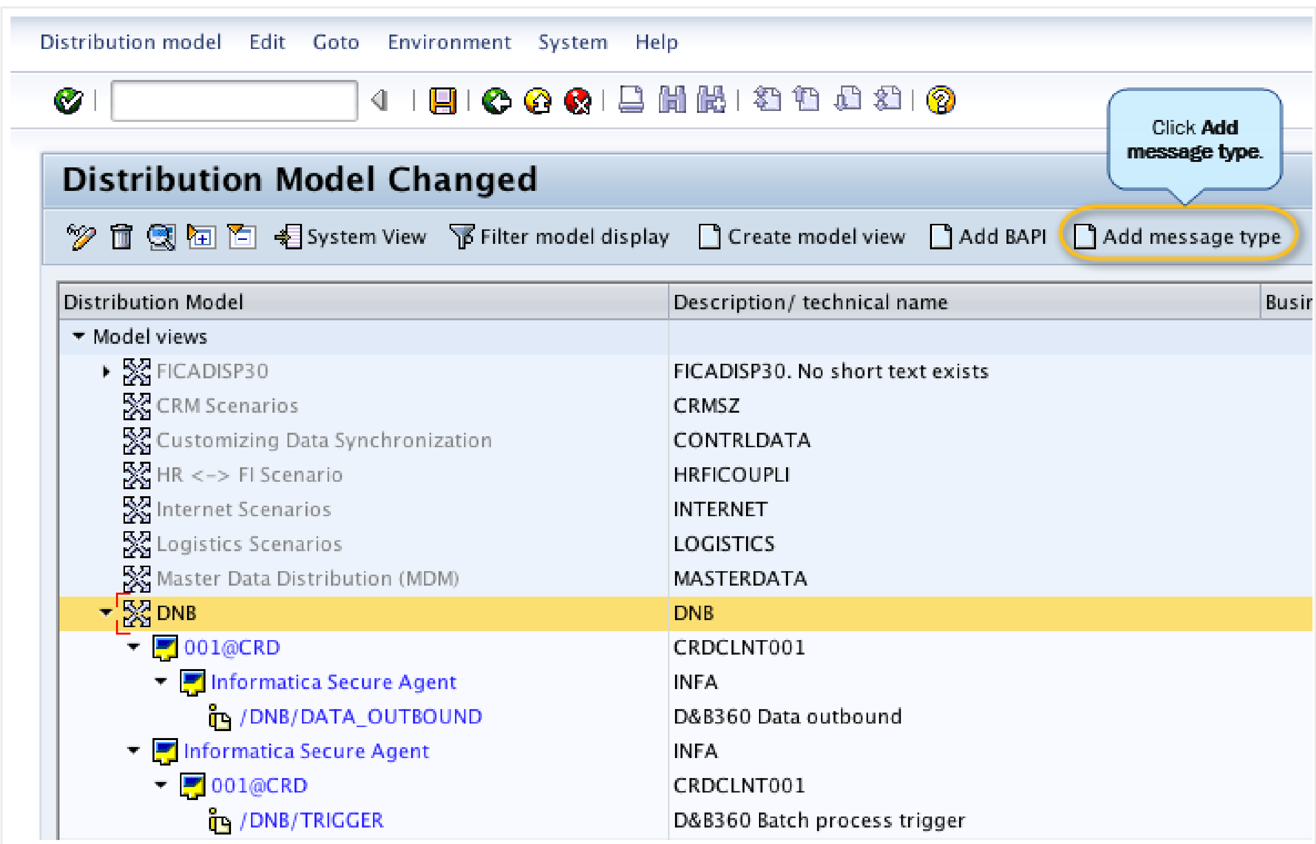
7. In the **Distribution Model Changed** window, click **Add message type**.



8. In the **Add Message Type** window:
    a. In the **Model view** field, type **DNB**.
    b. In the **Sender** field, type **INFA**.
    c. In the **Receiver** field, type your Client's logical system name.
    d. Click the check mark icon.

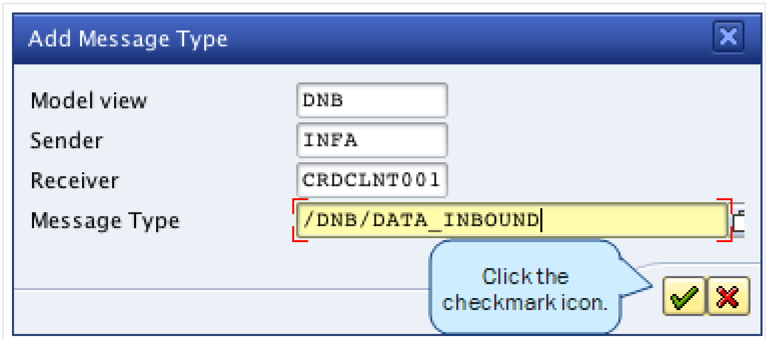


9. In the **Distribution Model Changed** window, click **Add message type**.



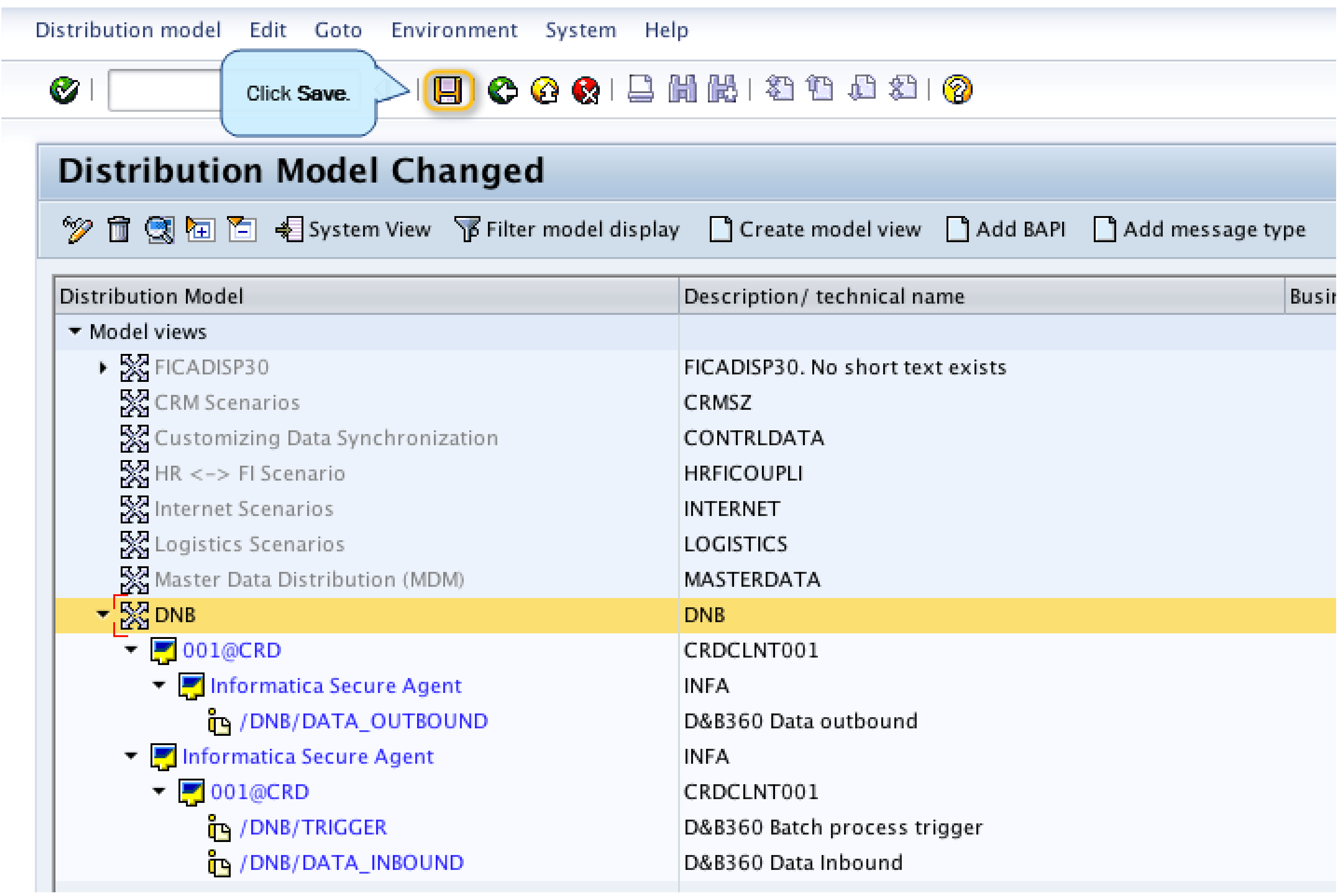
10. In the **Add Message Type** window:
    a. In the **Model view** field, type **DNB**.
    b. In the **Sender** field, type **INFA**.
    c. In the **Receiver** field, type your Client's logical system name.

d. In the **Message Type** field, type **/DNB/DATA_INBOUND**.
e. Click the check mark icon.



Your distribution model should look like the one in the following illustration.

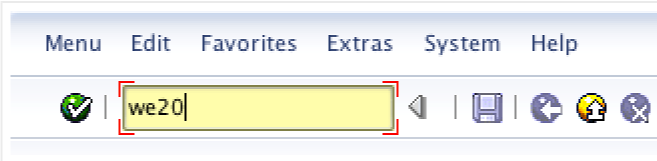
11. Click **Save**.



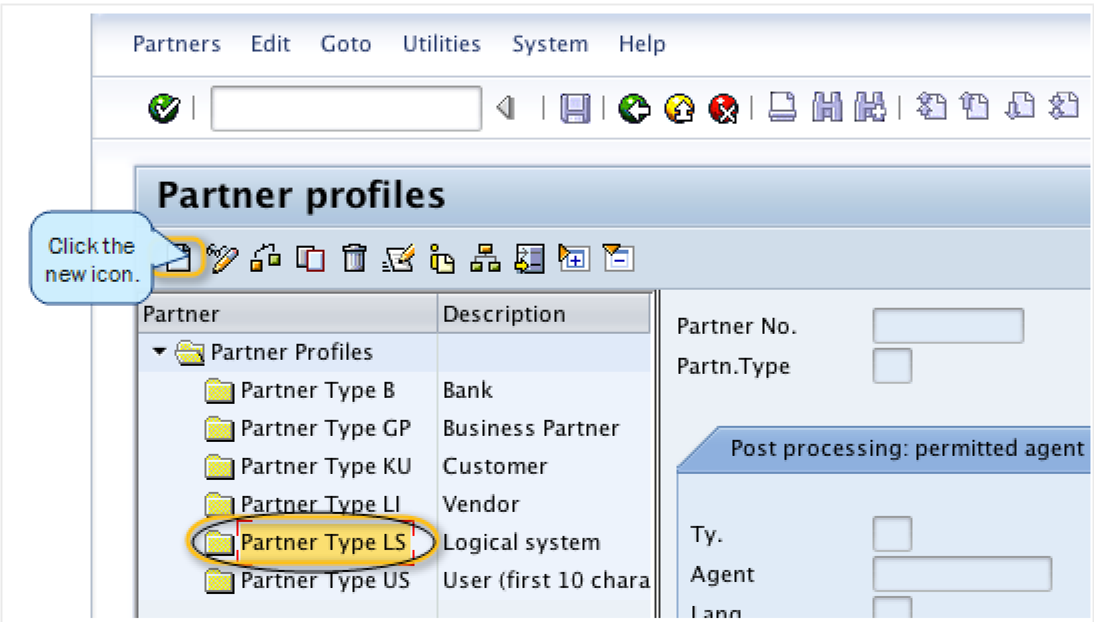
Creating Partner Profiles

After you have defined your distribution model, you need to specify how the SAP CRM will interact with INFA.

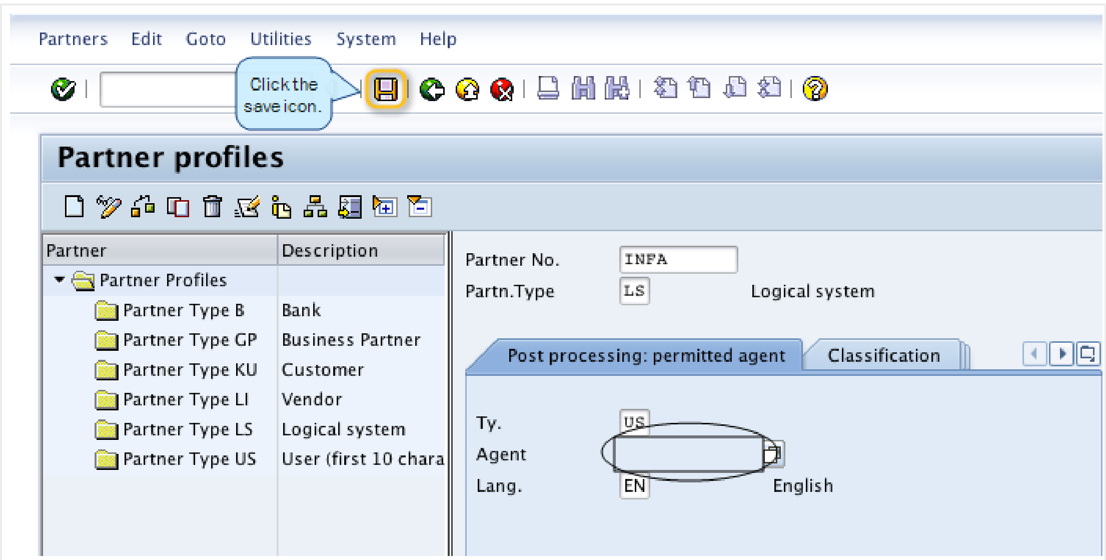
1. In the **Command** field, execute transaction **we20**.



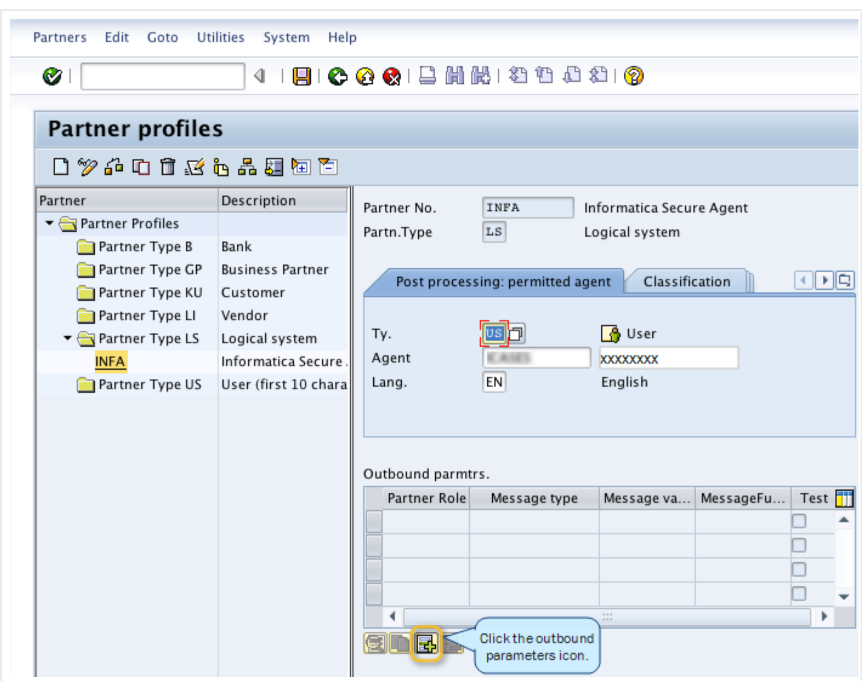
2. In the **Partner profiles** window, select **Partner Type LS**, then click the *new* icon.



3. In the **Partner profiles** window:
   a. In the **Partner No** field, type **INFA**.
   b. In the **Post processing permitted agent** tab, type a user ID to be the agent.
   c. Click the save icon.



4. In the **Partner profiles** window, **Outbound parameters** area, click the outbound parameters icon.



5. In the **Outbound Parameters** area:

   a. In the **Message Type** field, type **/DNB/DATA_OUTBOUND**.

   b. In the **Outbound Options** tab, **Receiver port** field, type the name of the port that was created in the previous section (See "Creating a Port" on page 6-25). In this example, it is A000000001.

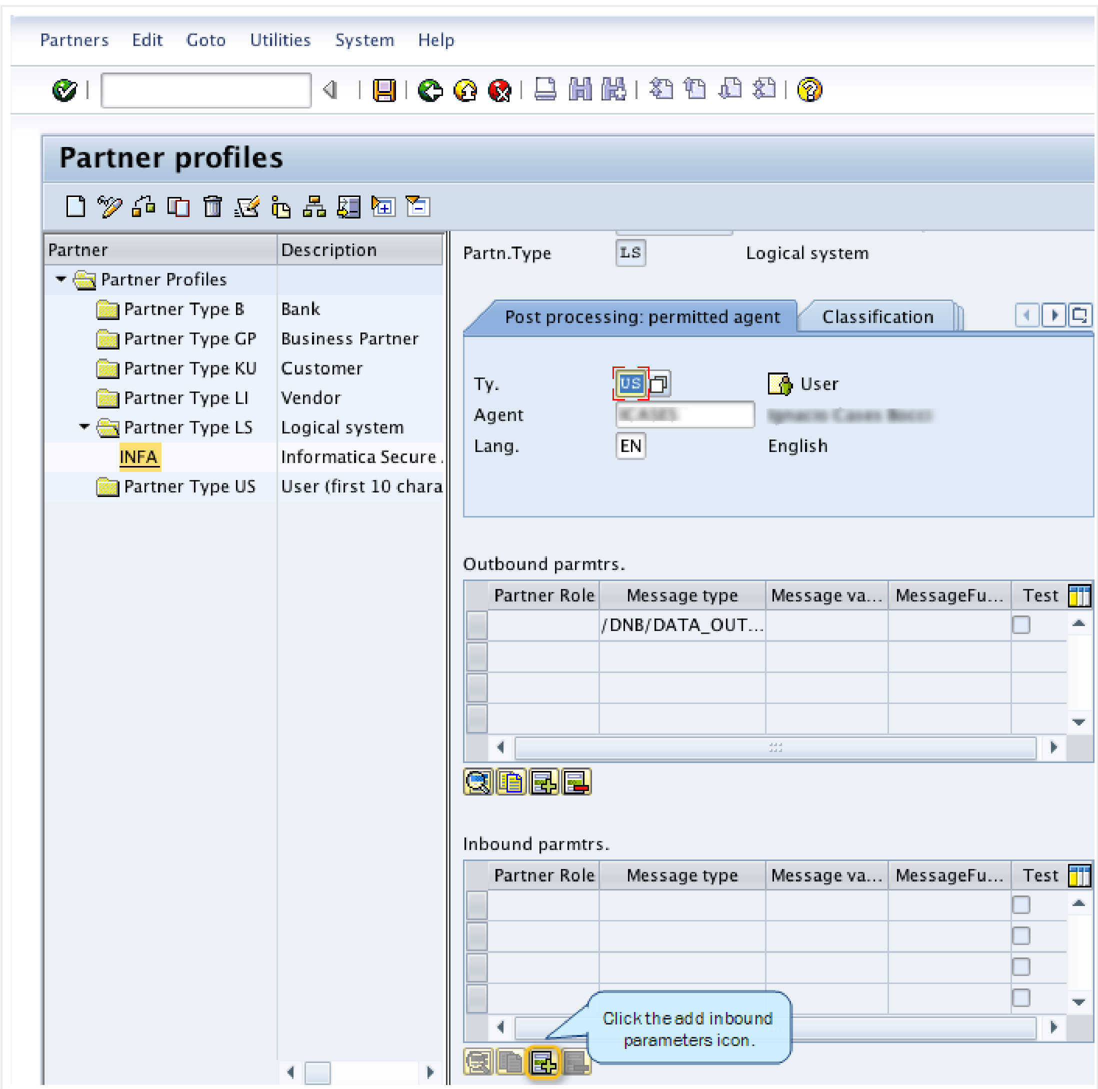
   c. In the **Output Mode** field, select **Transfer IDoc Immed**.

   d. In the **Basic type** field, type **/DNB/DATA_OUTBOUND01**.

   e. Click **Save**.

   Next you will set 2 inbound parameters.

6. In the **Partner profiles** window, **Inbound parameters** area, click the add inbound parameters icon.



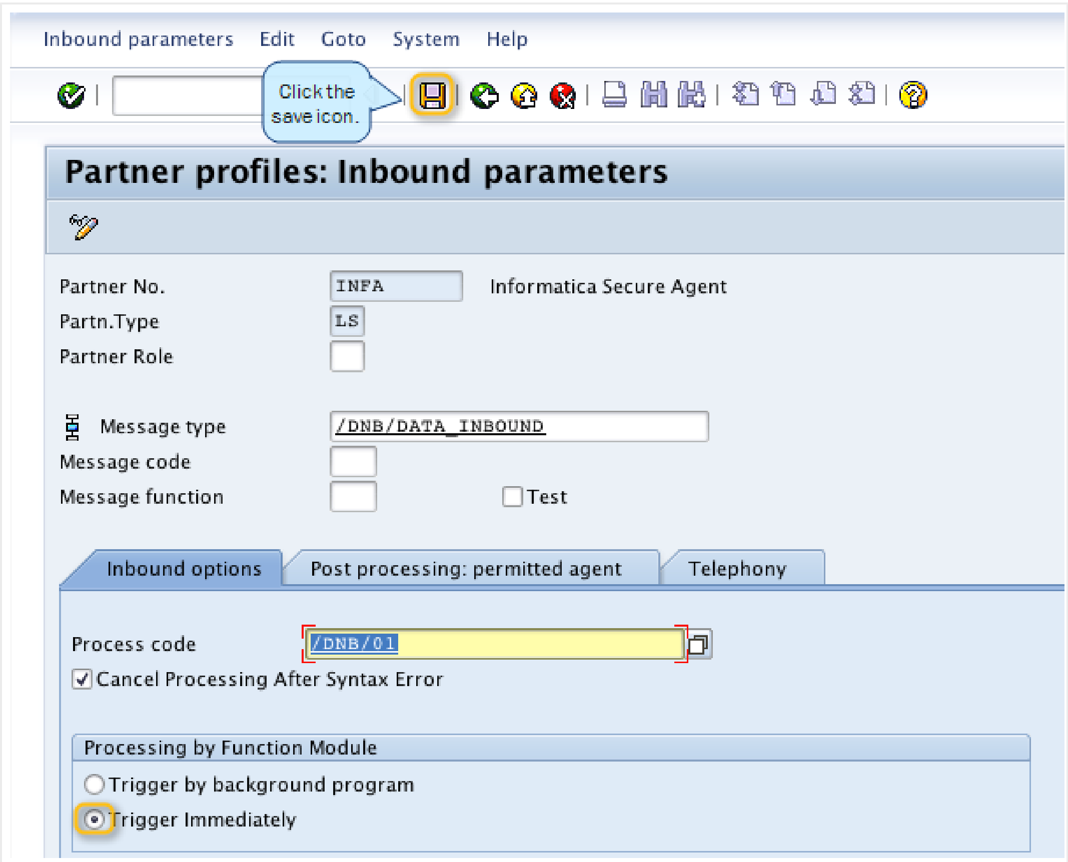
7. In the **Partner profiles: Inbound parameters** window:

a. In the **Message type** field, type **/DNB/DATA_INBOUND**.

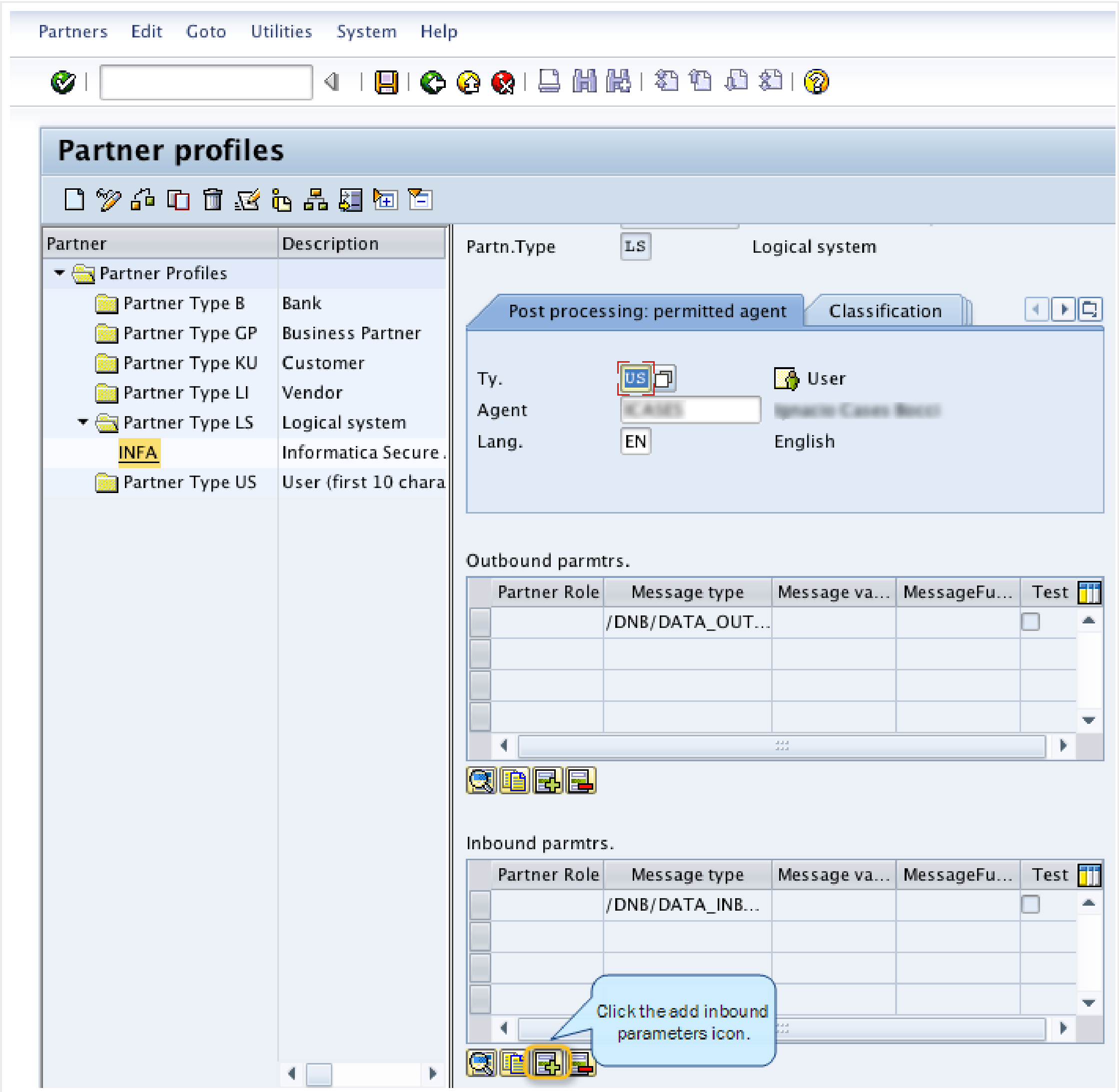
b. In the **Inbound Options** tab, **Process code** field, type **/DNB/01**.

c. In the **Processing by Function Module** field, select **Trigger Immediately**.

d. Click the save icon.



8. In the **Partner profiles** window, click the add inbound parameters icon.



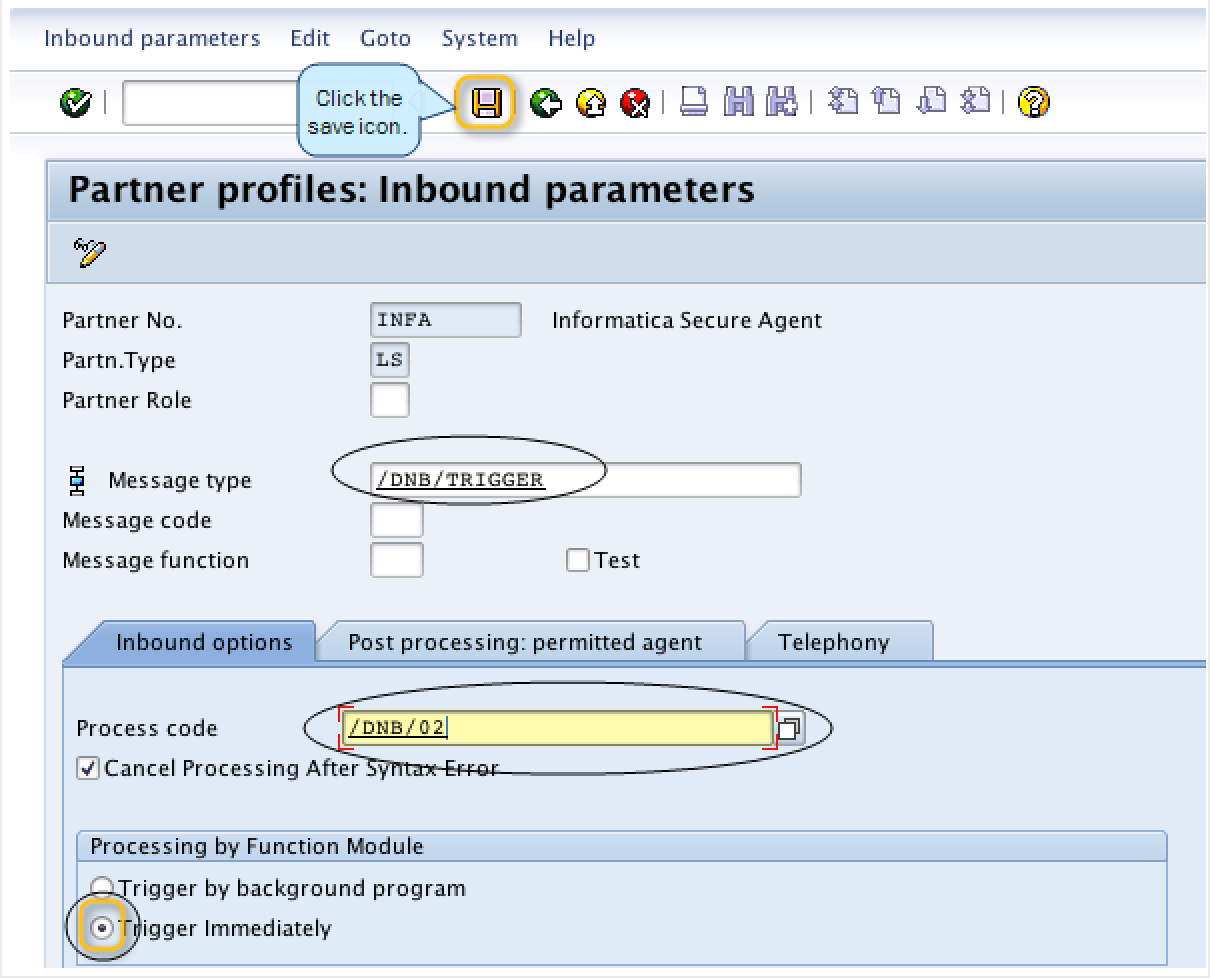
9. In the **Partner profiles: Inbound parameters** window:

   a. In the **Message type** field, type **/DNB/TRIGGER**.

   b. In the **Process Code** field, type **/DNB/02**.

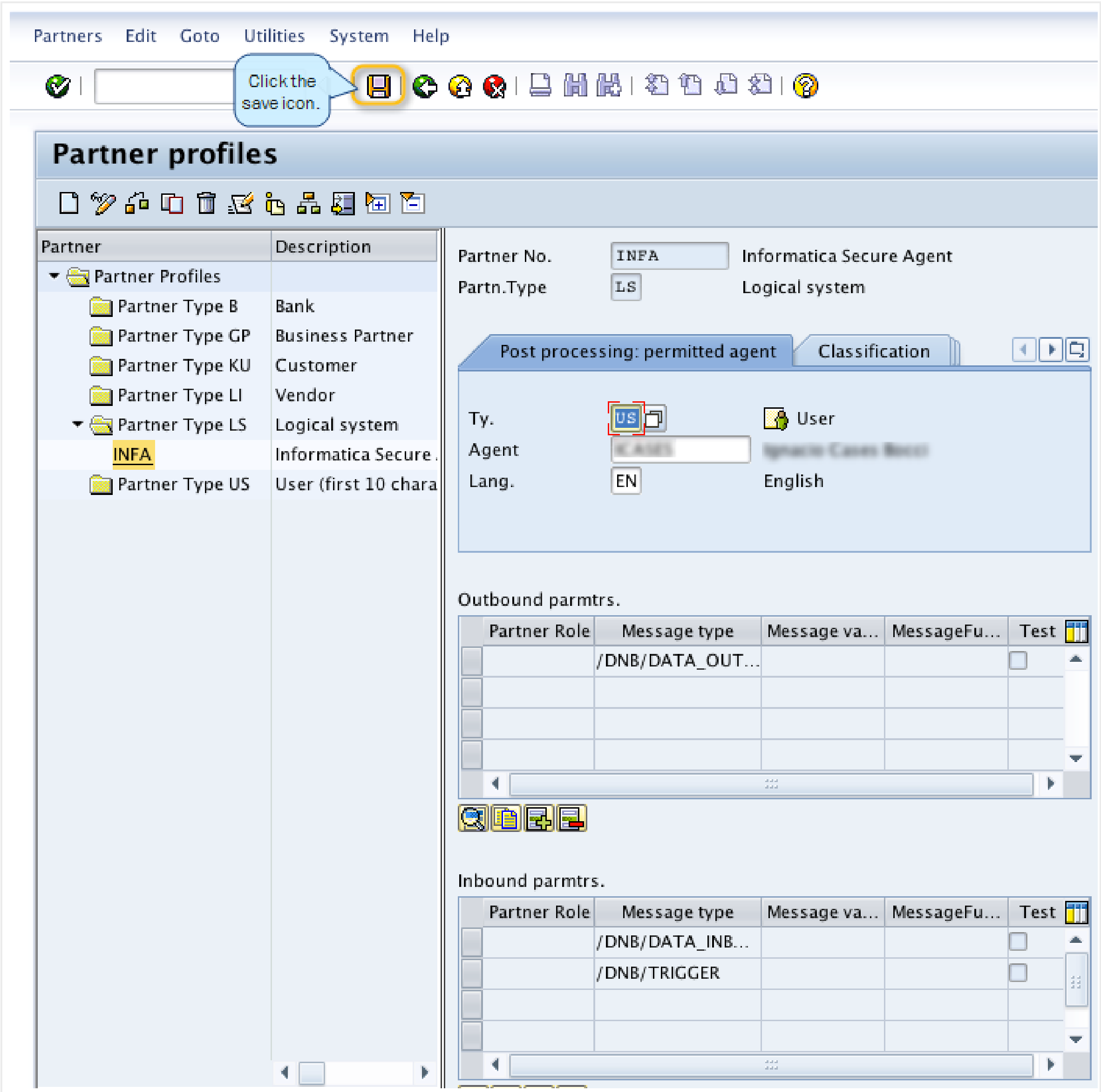
c. In the **Processing by Function** area, select **Trigger Immediately**.

d. Click the save icon.



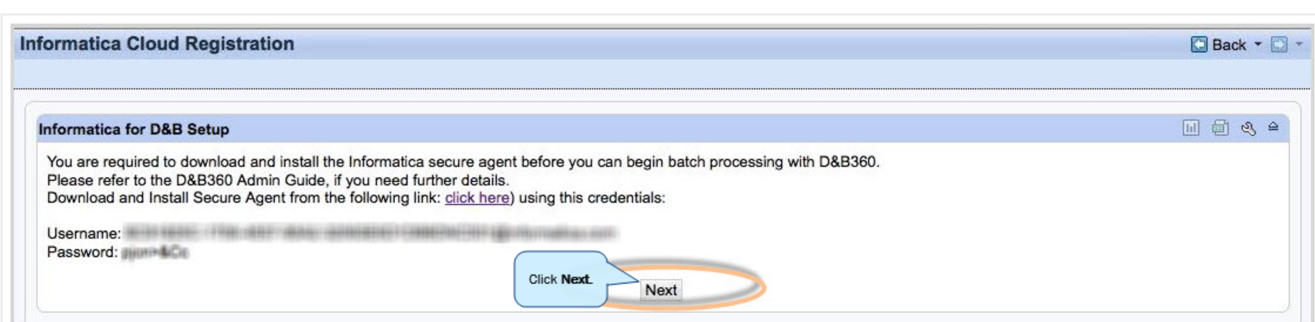
10. Click the save icon.

The **Partner profiles** window displays a summary of the settings you have configured. See the following illustration.



Next you need to complete your registration for the Informatica Cloud Services.

1. In the **Informatica Cloud Registration** window, to register for Informatica Cloud services, click **Next**.



2. In the **Informatica Cloud Registration** window, **Informatica for D&B Setup** area, click **Next**.

3. In the **Informatica Cloud Connection Credentials** window, to complete and enable Informatica Cloud services, click **Create Connections**.

Additional Notes on Filtering Records

If you need to filter some of the records being sent in the new batch schedules, you can implement the Business Add-In (BAdI) `/DNB/NEW_BATCH_FILTER_BADI` located in the Enhancement Spot `/DNB/ENHANCEMENTS`. Here you will find an example you can use to filter the records to be sent in a new batch.

7 Scheduling Batches

Overview of Batch Jobs

Two batch jobs are available through D&B360:

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

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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.

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Validating D-U-N-S Numbers

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

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

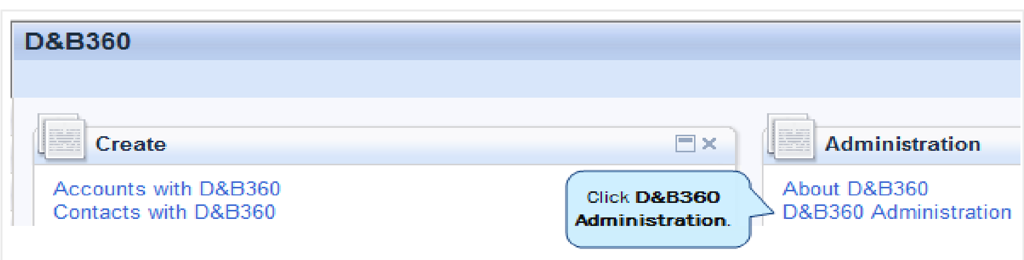
In the case of a Merger or Acquisition, re-certified D-U-N-S records will be updated within the D&B360 table with the following:

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

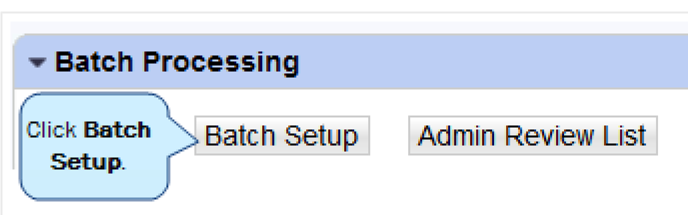
Scheduling New and Refresh Batch Jobs

Setting Up Batches

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

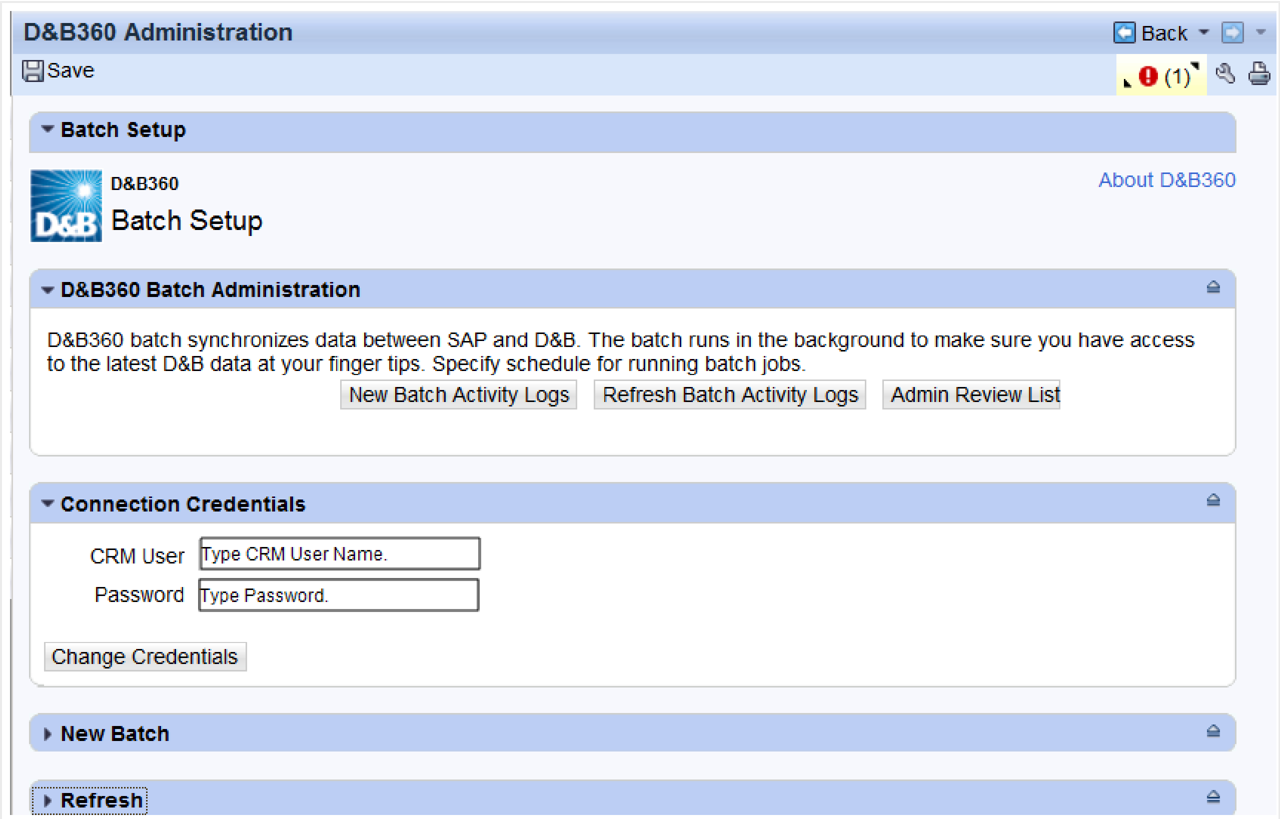


2. In the **Batch Processing** area, click **Batch Setup**.



The **Batch Setup** window opens where your Informatica information has been pre-populated.

In the **Connection Credentials** area, before you can schedule a batch job, type your **CRM User Name** and **Password**.

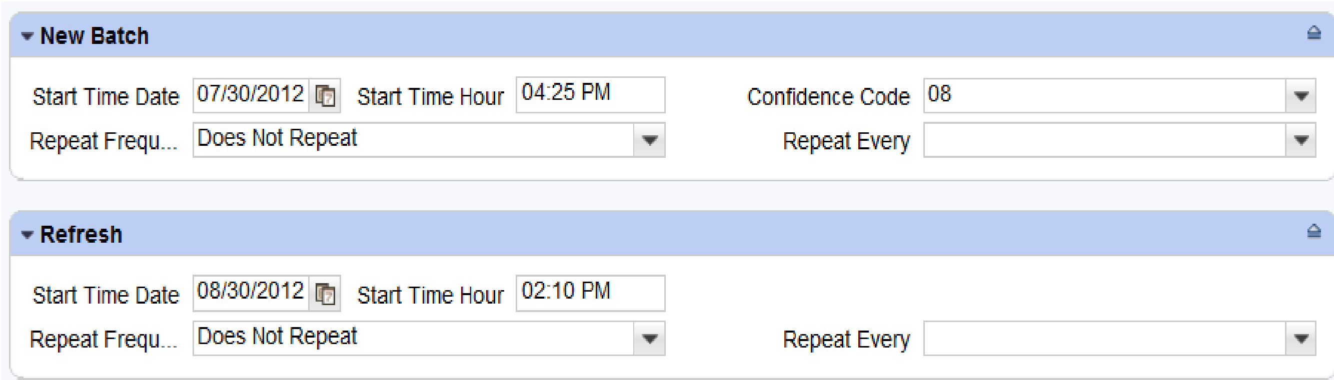


Setting Up a New Batch

You have to run a New Batch job before you can run a Refresh Batch job (See "Scheduling Batches" on page 7-1).

- In the **New Batch** area:

a. Enter the **Start Time Date** and **Start Time Hour**.
b. In the **Repeat Frequency** field, select how often you want the job to run. See "Repeat Frequency" on page 7-5.
c. In the **Repeat Every** field, select the repetition cycle for your batch job. See "Repeat Frequency" on page 7-5.
d. In the **Confidence Code** field, select 1 to 10. The default is **8**. We recommend using a relatively high confidence code.



Note: Confidence codes are used by D&B to attach a match code to the resulting company records. Records with 8 or higher confidence code portrays high quality matches. Batch processing uses this code to determine whether to update the matched records directly to the D&B360 Account table, or to reject them to the Admin Review List.

Repeat Frequency				
	None	Daily	Weekly	Monthly
Run the Task	Select Start Time and Date	Select Every day or Every weekday	Select the day of the week	• 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.		

Setting Up a Refresh Batch

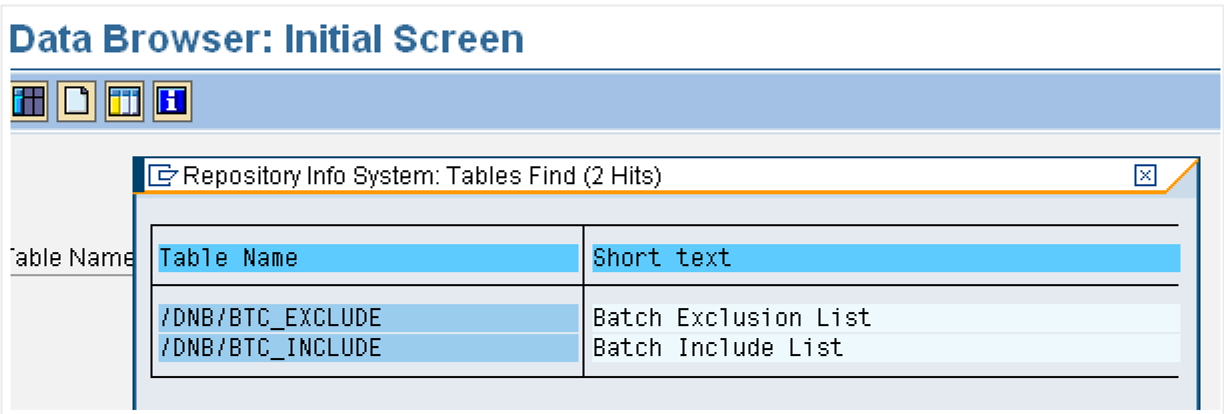
After you have run a New Batch, you can set up a Refresh Batch. Follow the instructions in See "Setting Up a New Batch" on page 7-4

Including and Excluding Accounts in Batch Selection

Two tables are available for batch selection – one for accounts to include and one for accounts to exclude. Using the following logic, the system verifies whether these tables have accounts and whether they are used for either selection or exclusion:

- Selection area:
    - If entries exist on /DNB/BTC_INCLUDE, they will be selected to be sent to batch.
    - If no entry exists on /DNB/BTC_INCLUDE, the system will select accounts from BUT000.
- Filtering section:

  If entries exist on /DNB/BTC_EXCLUDE, the result from the previous step will be filtered based on /DNB/BTC_EXCLUDE: any entry present in both the result set and /DNB/BTC_EXCLUDE will not be sent to batch.



/DNB/BTC_EXCLUDE

CLIENT MANDT CLNT 3 0 Client

PARTNER BU_PARTNER CHAR 10 0 Business Partner ID

/DNB/BTC_INCLUDE

CLIENT MANDT CLNT 3 0 Client

PARTNER BU_PARTNER CHAR 10 0 Business Partner ID

The four new reports or programs include:

Program Name	Report Title	Transaction
/DNB/BTC_EXCLUDE_CLEANUP	Clean up /DNB/BTC_EXCLUDE table	/DNB/BTC_EXC_CLEANUP
/DNB/BTC_EXCLUDE_LOAD	Uploads a file to /DNB/BTC_EXCLUDE	/DNB/BTC_EXC_LOAD
/DNB/BTC_INCLUDE_CLEANUP	Clean up /DNB/BTC_INCLUDE table	/DNB/BTC_INC_CLEANUP
/DNB/BTC_INCLUDE_LOAD	Uploads a file to /DNB/BTC_INCLUDE	/DNB/BTC_INC_LOAD

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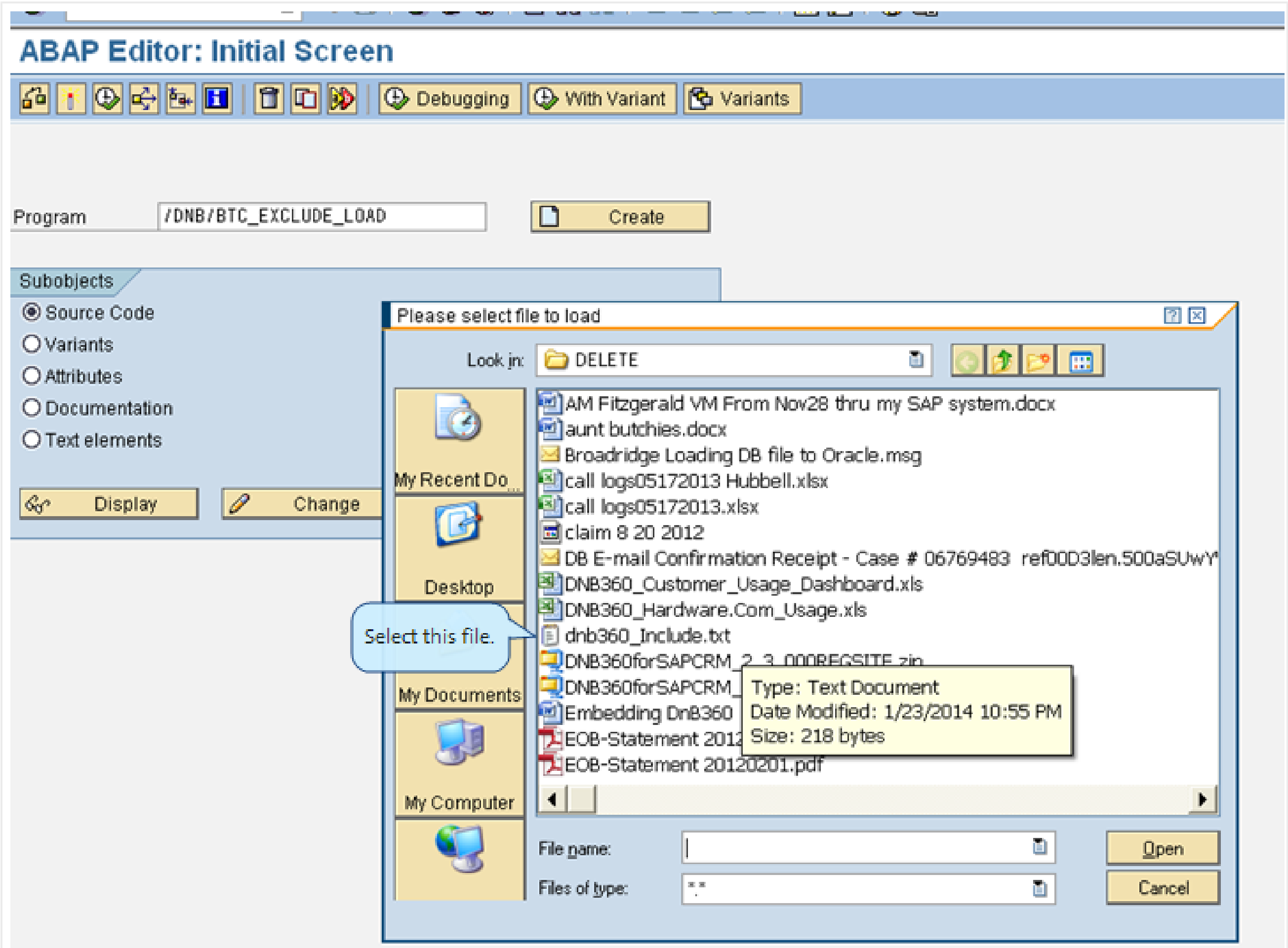
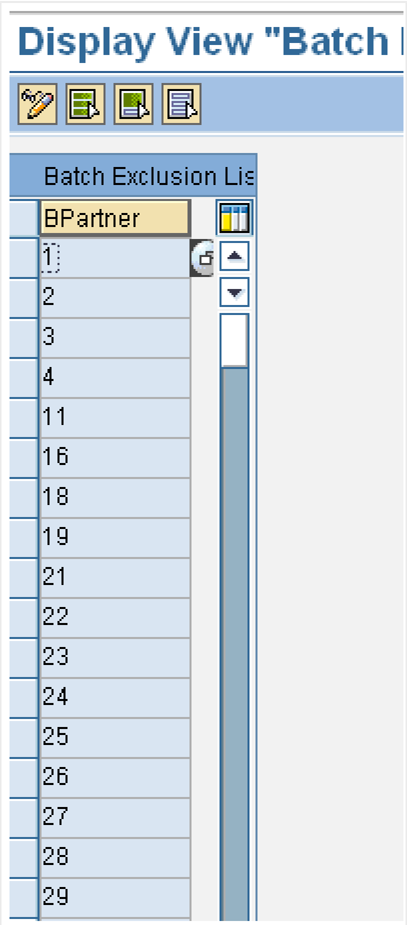
Include and Exclude files should be .CSV files. The following is an example that can be used with /DNB/BTC_EXCLUDE_LOAD OR /DNB/BTC_INCLUDE_LOAD

- 0010000000001,
- 0010000000002,
- 0010000000003,
- 0010000000004,
- 0010000000011,
- 0010000000016,
- 0010000000018,
- 0010000000019,
- 0010000000021,
- 0010000000022,
- 0010000000023,
- 0010000000024,
- 0010000000025,
- 0010000000026,
- 0010000000027,
- 0010000000028,
- 0010000000029

When you execute the report, either through SA38 or through the transaction of the report itself, /DNB/BTC_EXCLUDE_LOAD (or ...INCLUDE...) a window opens to prompt you for the input file:

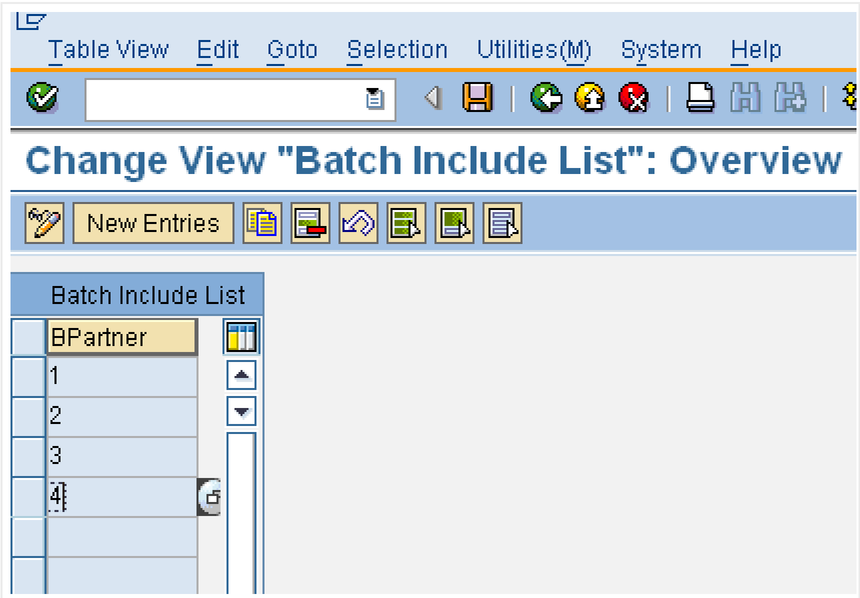

ABAP Editor: Initial Screen
Debugging
With Variant
Variants
Program
/DNB/BTC_EXCLUDE_LOAD
Create
Subobjects
Source Code
Variants
Attributes
Documentation
Text elements
Display
Change
Please select file to load
Look in:
DELETE
My Recent Do...
Desktop
My Documents
My Computer
Select this file.
AM Fitzgerald VM From Nov28 thru my SAP system.docx
aunt butchies.docx
Broadridge Loading DB file to Oracle.msg
call logs05172013 Hubbell.xlsx
call logs05172013.xlsx
claim 8 20 2012
DB E-mail Confirmation Receipt - Case # 06769483 ref00D3len.500aSUwY
DNB360_Customer_Usage_Dashboard.xls
DNB360_Hardware.Com_Usage.xls
dnb360_Include.txt
Type: Text Document
Date Modified: 1/23/2014 10:55 PM
Size: 218 bytes
EOB-Statement 20120201.pdf
File name:
Files of type:
.
Open
Cancel

After you select the file, the table automatically updates:



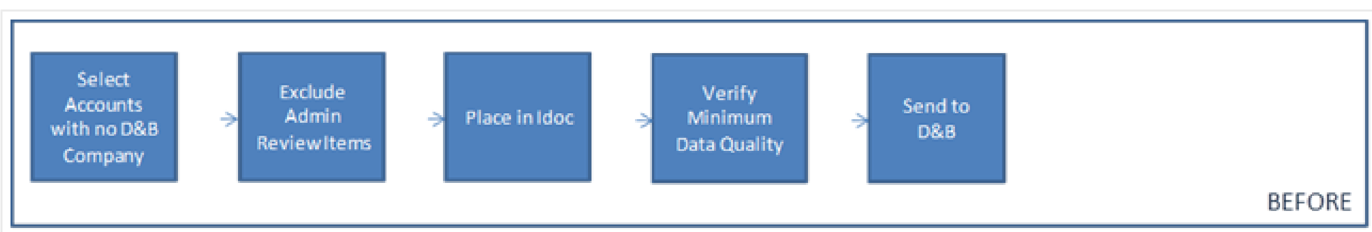
– or –

You can choose to manually load the tables in SM30 as shown in the following illustration:

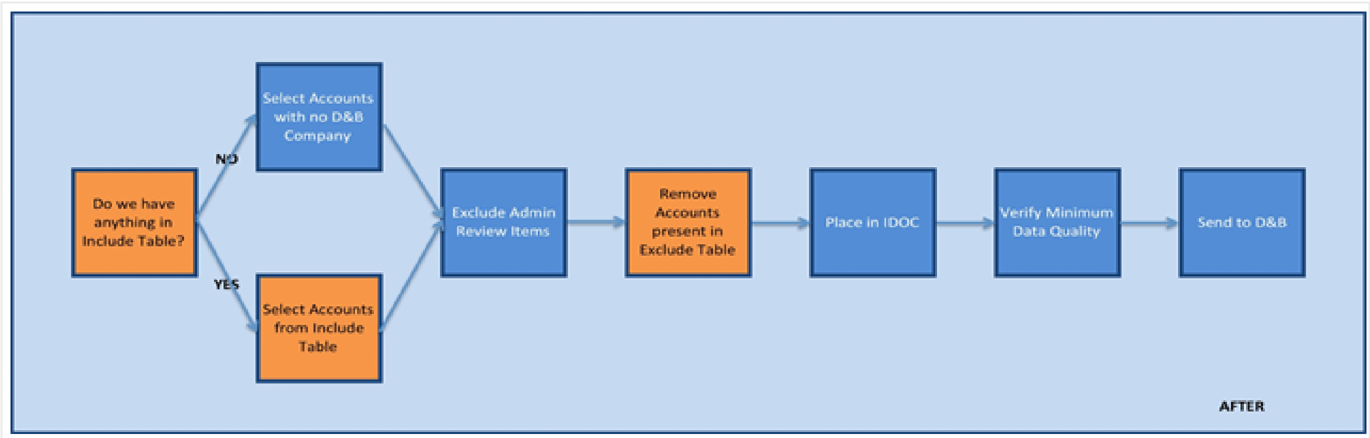


The criteria you selected for the Include and Exclude tables remain in place unless you manually schedule the clean-up job to run. You can execute either the transactions or the programs as stated previously.

The following is a diagram of the logic flow with the former batch scenario:



The following is a diagram of the logic flow with the the new batch scenario using Include and Exclude tables:



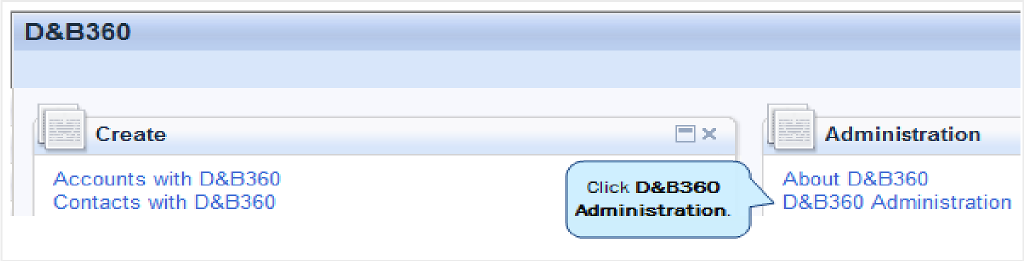
8 Reviewing Activity Logs, the Admin Review List, and D&B360 Reports

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

Reviewing Activity Logs

Navigating to the SAP CRM Monitoring Tools

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



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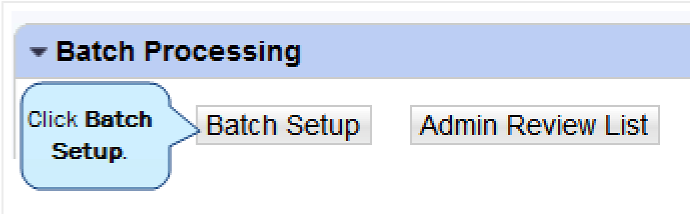
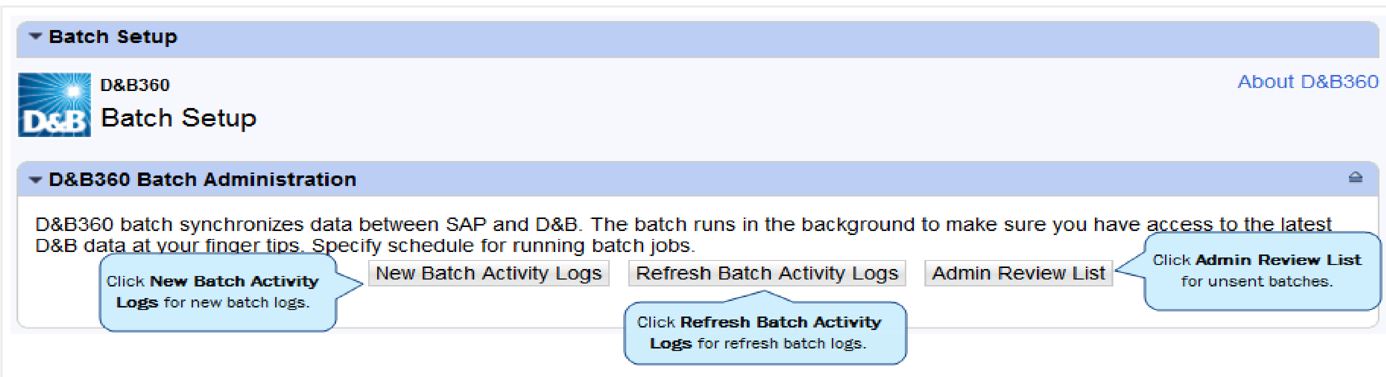
2. In the **Batch Processing** area, click **Batch Setup**.



3. In the **D&B Batch Administration** area:

a. To monitor new batch jobs — click **New Batch Activity Logs**.
b. To monitor refresh batch jobs — click **Refresh Batch Activity Logs**.
c. To review records for jobs that were unable to run automatically — click **Admin Review List**.



Viewing Activity Logs

The New Batch and Refresh Batch Activity logs both contain 2 entries for each submitted jobs.

- Submit type displays the number of accounts sent to D&B.
- Receive type displays the number of accounts that D&B returned.

You can use pagination and sort to locate the information you are looking for.

Column Name	Displays ...
Start Time	The time a job started.
End Time	The time a job ended.
Status	The Submit task type for records sent to D&B. Displays the Receive task type for records D&B returned.
Total Accounts Processed	The number of records involved in a Submit or Receive task.

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

New Batch Activity Log

D&B360
New Batch Activity Log
About D&B360

Start Time	End Time	Status	Total Accounts Processed	# Accounts Updated	# of Accounts that Failed DQ Check	# of Accounts below Confidence Code	# of Failure rows	Error Message
03/20/2012 03:21:23 PM	03/20/2012 04:...	Receive	506	493	0	13	0	
03/20/2012 06:21:23 PM	03/20/2012 07:...	Receive	0	0	0	0	0	
03/21/2012 08:16:23 AM	03/21/2012 09:...	Receive	170	151	0	19	0	
03/21/2012 09:11:17 AM	03/21/2012 10:...	Receive	0	0	0	0	0	
03/21/2012 09:41:23 AM	03/21/2012 11:...	Receive	193	154	2	37	0	
03/21/2012 10:26:23 AM	03/21/2012 12:...	Receive	176	153	3	20	0	
03/28/2012 10:26:24 AM	03/28/2012 11:...	Receive	152	149	1	2	0	

Refresh Batch Activity Log

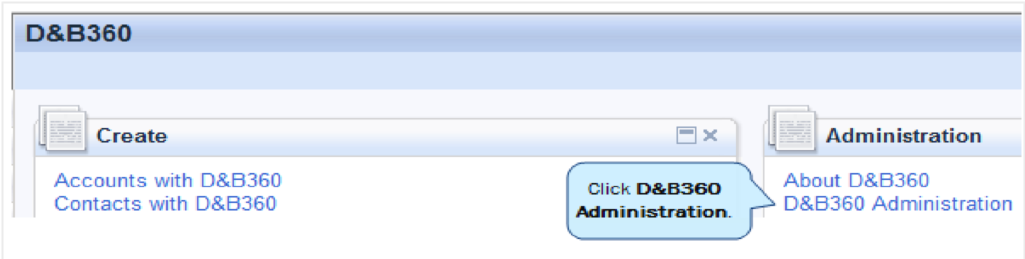
D&B360
Refresh Batch Activity Log
About D&B360

Start Time	End Time	Status	Total Accounts Processed	Number of Account refrehsed	# of Failures	Error Message
03/20/2012 03:26:17 PM	03/20/2012 04:11:19 PM	Receive	1,001	993	0	
03/20/2012 06:21:23 PM	03/20/2012 06:23:04 PM	Submit	0	0	0	
03/21/2012 09:11:23 AM	03/21/2012 09:13:03 AM	Submit	0	0	0	
03/21/2012 10:31:17 AM	03/21/2012 11:22:23 AM	Receive	1,001	993	0	

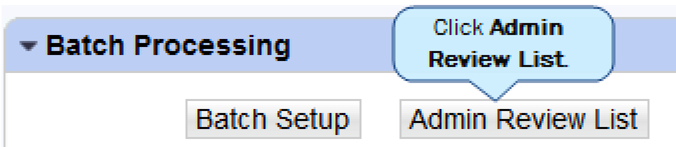
Accessing and Using the Admin Review List

To access the Admin Review List:

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

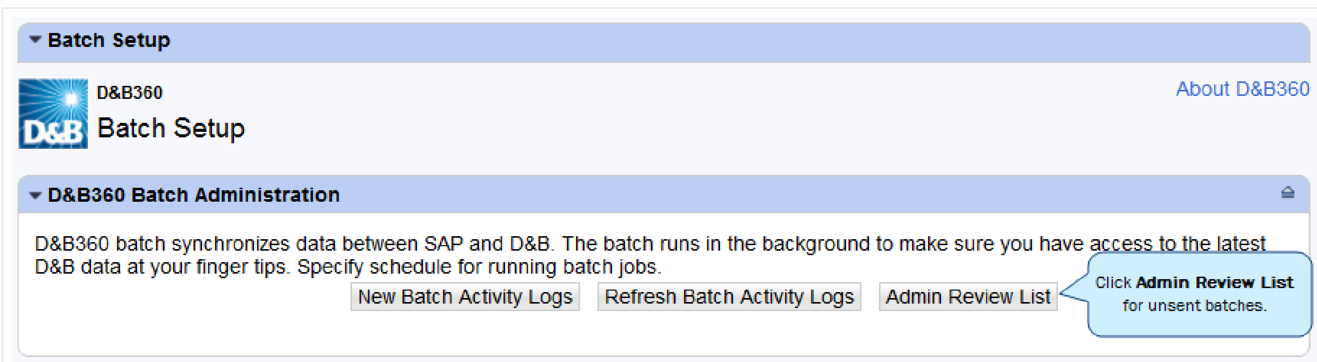


2. In the **Batch Processing** area, click **Admin Review List**.



— or —

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



To use the Admin Review List:

1. For each failed record that you, as the administrator, need to resolve, click to edit.
2. After you find the match for the correct company, add it to the D&B360 object.

   The record will no longer display in the Admin Review List.

The failure types that display in the Admin Review List include:

Failure	Description
ACCT DQ	The data quality of the Account Record did not meet the minimum requirements that were set for D&B360 Batch Processing.
Below CC Threshold	The D&B record that matched the input record was below the confidence code assigned for the batch.

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 D-U-N-S 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. 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 **Merge**.

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.

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

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

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

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

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

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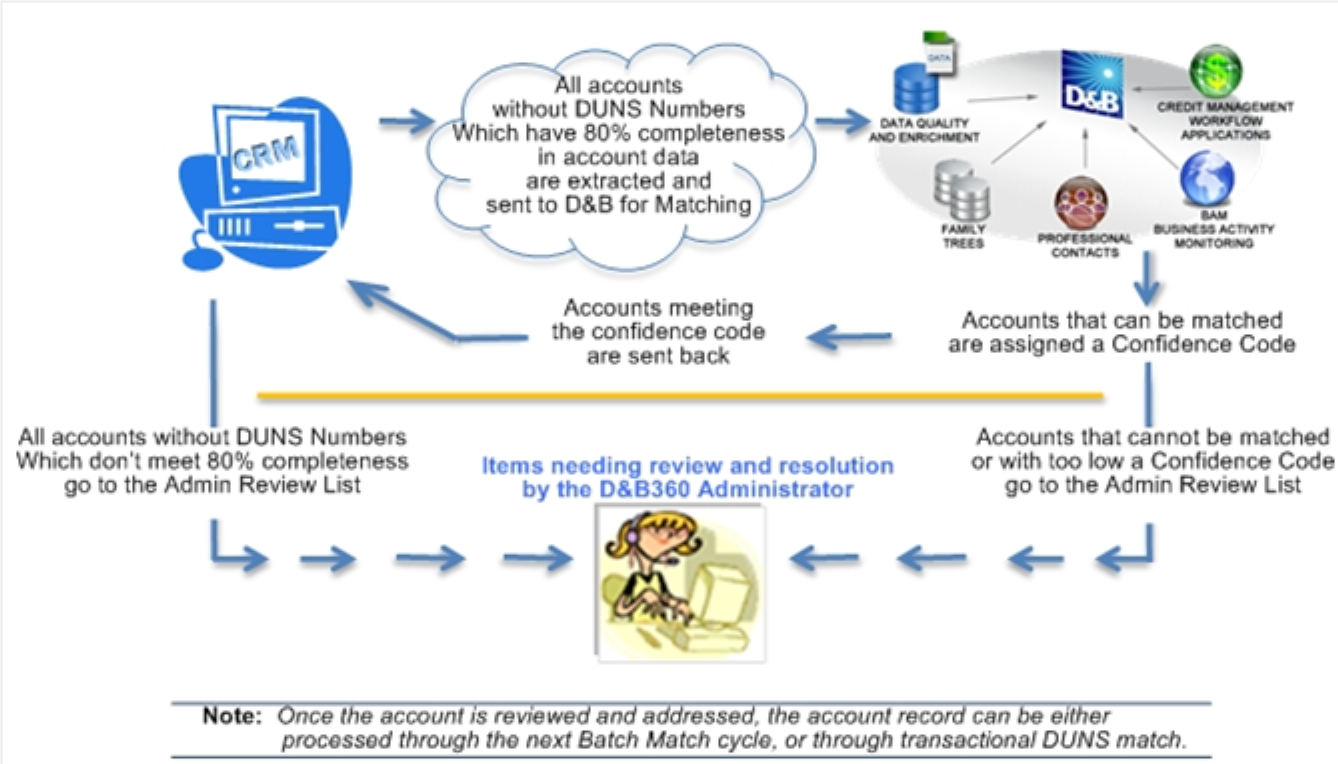
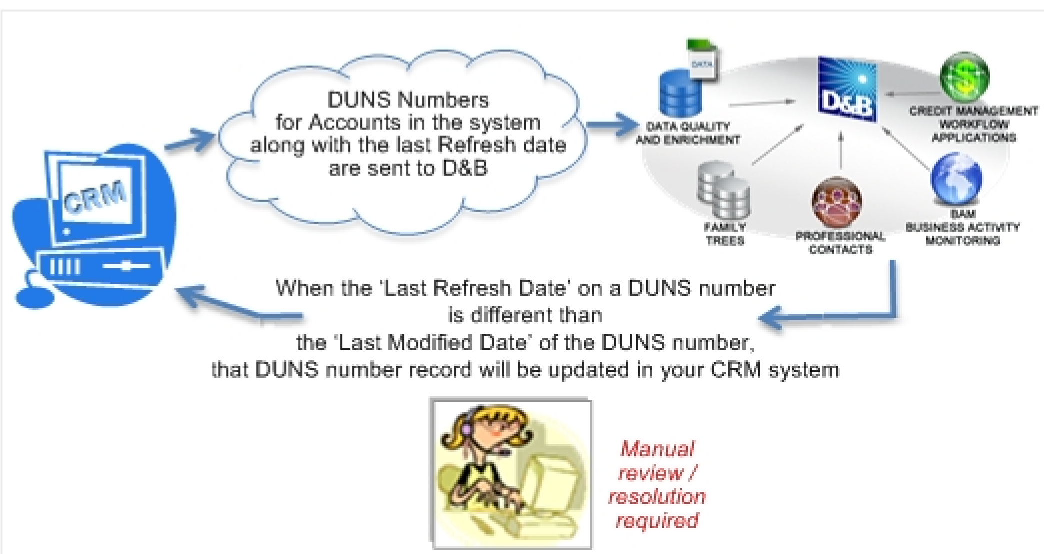


Refresh batch results can also produce items that you must manually review and resolved. For example, you need to change or accept the modified data.



Appendix A: Installing Support Packages and Uninstalling D&B360

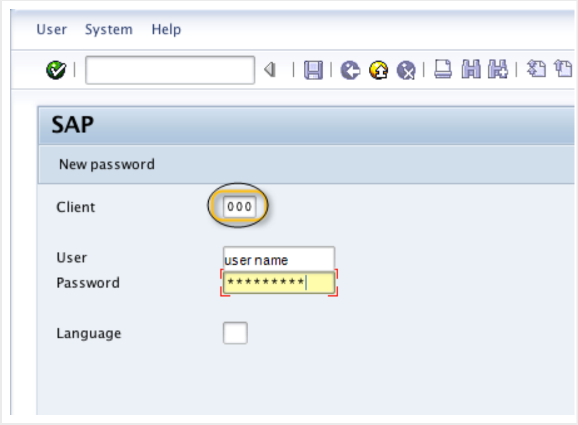
Installing D&B360 Support Packages in Your SAP CRM Environment

The D&B360 Support Packages are packaged in the same .SAR file that you used to install the D&B360 software. The software package on the registration site contains the latest Support Packages for D&B360. The process of importing the Support Package is the same as importing any SAP Support package, so the steps should be familiar to you.

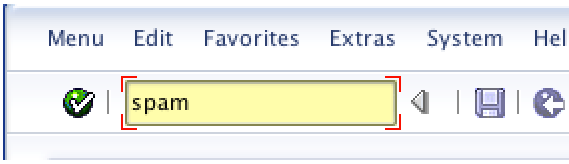
Note: You must be a user with a minimum of basic administrator privileges.

1. In the **SAP** log in window, log in to your development machine.

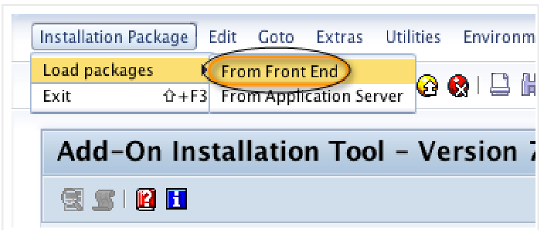
a. In the **Client** field, type **000**.
b. In the **User** field, type your user name.
c. In the **Password** field, type your password.



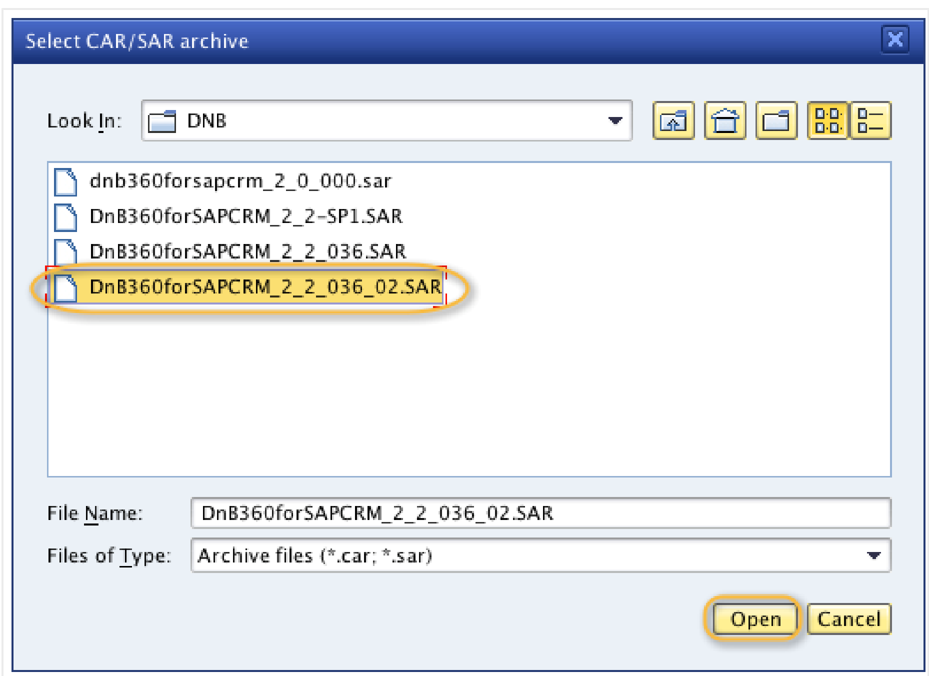
2. In the Command field, execute the transaction **spam**.



3. In the **Add-On Installation Tool** window, select **Installation Package** > **Load packages** > **From Front End**.

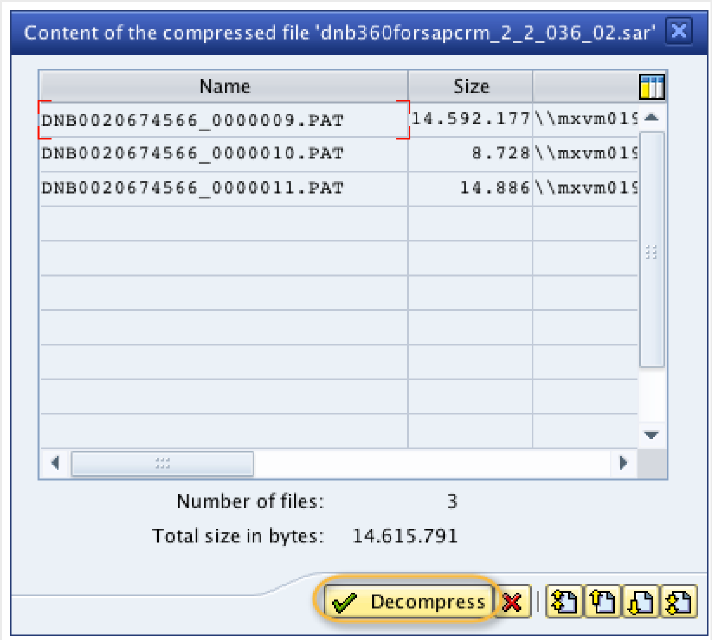


4. In the **Select CAR/SAR archive** window, navigate to the folder where you saved the .SAR file that you downloaded from the registration site.

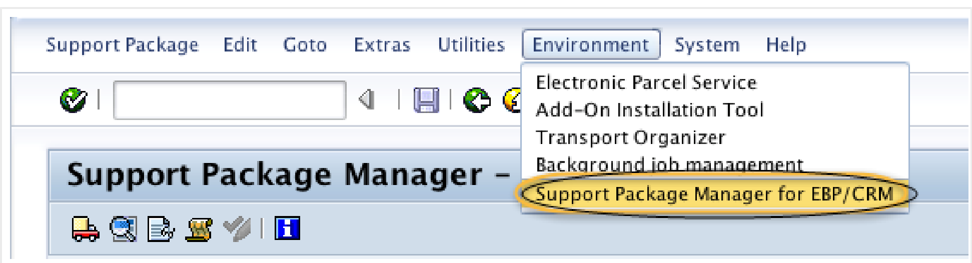


A message displays that the system is reading archive contents.

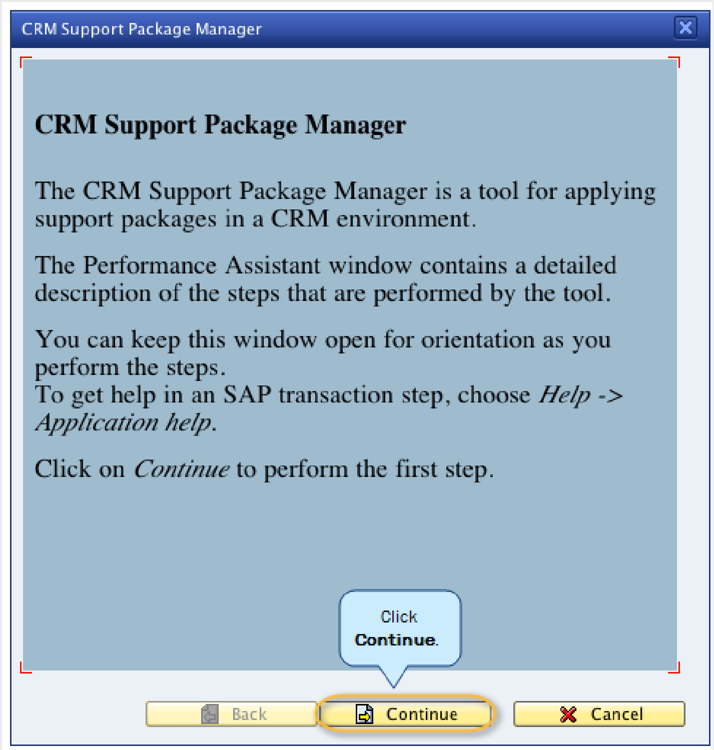
5. In the next window click **Decompress**.



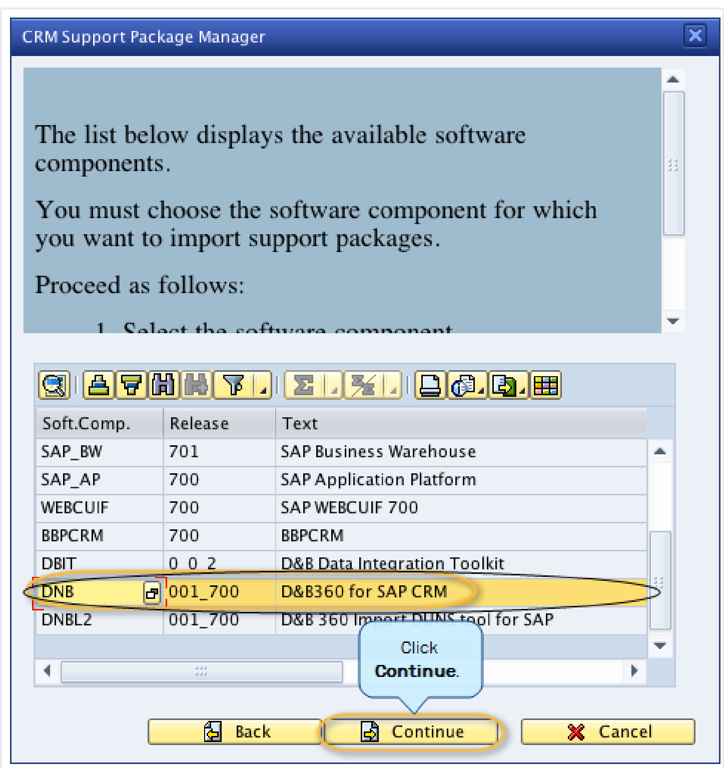
6. In the **Support Package Manager** (SPAM) window, **Environment** menu, select **Support Package Manager for EBP/CRM**.



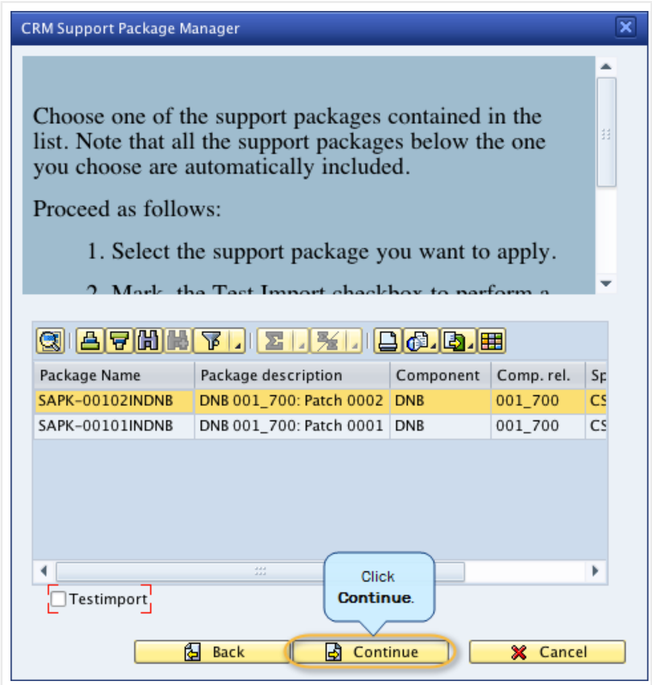
7. In the **CRM Support Package Manager** window, click **Continue**.



8. In the next **CRM Support Package Manager** window, select **D&B360 for SAP CRM**, and click **Continue**.

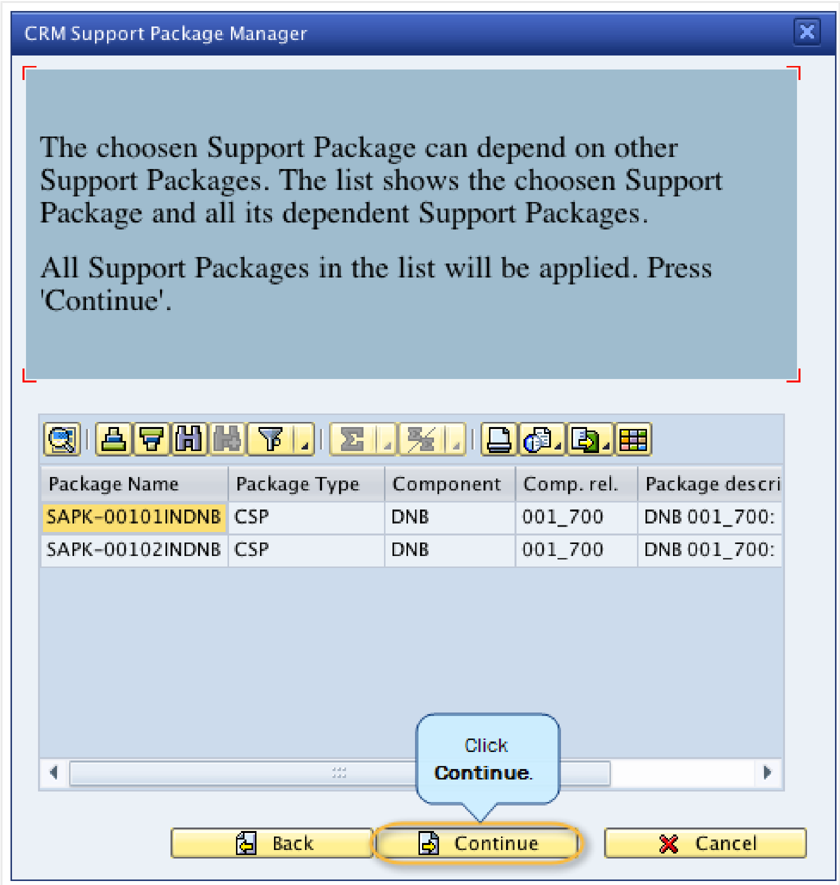


9. In the next **CRM Support Package Manager** window, select the D&B360 support package, and click **Continue**.



The CRM Support Manager window displays a list of the required support packages.It might also display a list of tasks you should perform before you import the Support Package and prompt you to confirm that you have completed them.

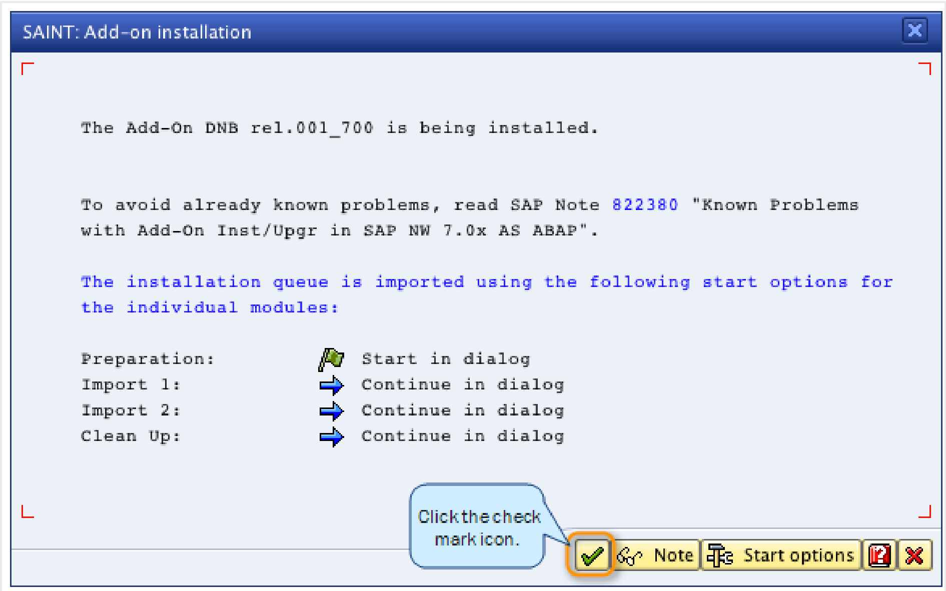
10. Click **Continue**.



Importing the Support Package

You can complete the import process either online or offline. These steps show how to do it online.

1. In the **Saint Add-on installation** window, press the check mark icon.

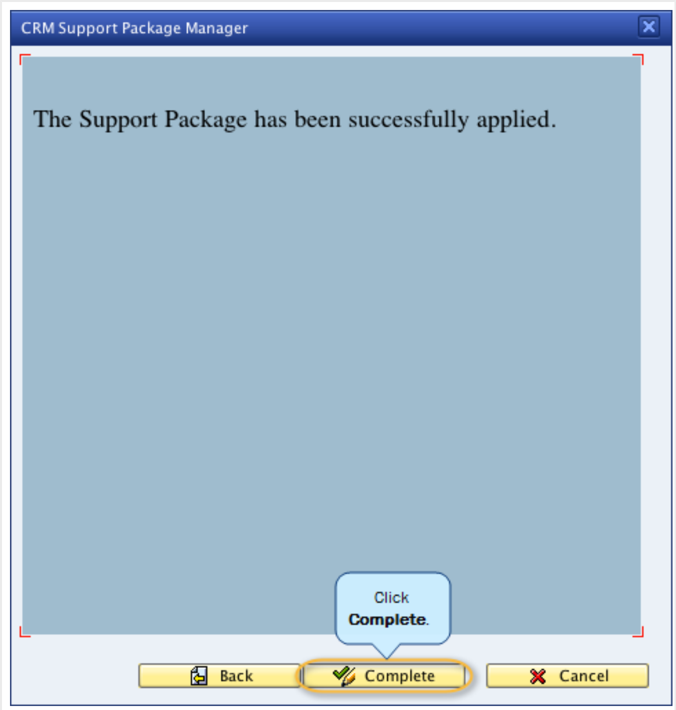


   The status bar displays the system processes.

2. In the **CRM Support Package Manager** window, review the results, then click **Continue**.

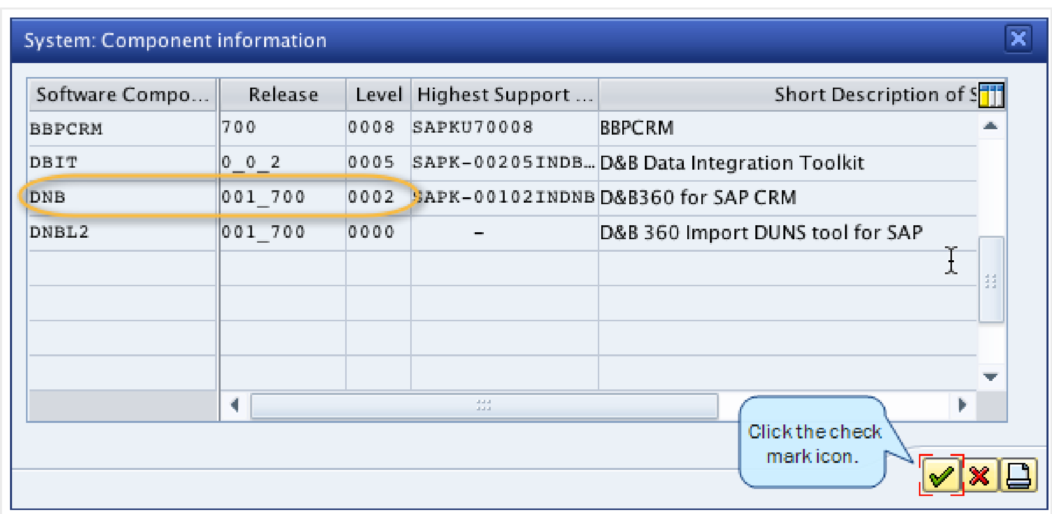
   The D&B360 support package is now successfully installed.

3. In the **CRM Support Package Manager** window, click **Complete**.



The System Component Information window displays the new Level for the DNB Software component.

4. Click the check mark icon.

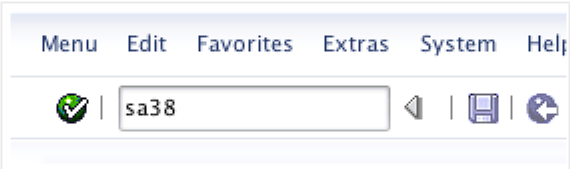


Uninstalling D&B360 from Your SAP CRM Environment

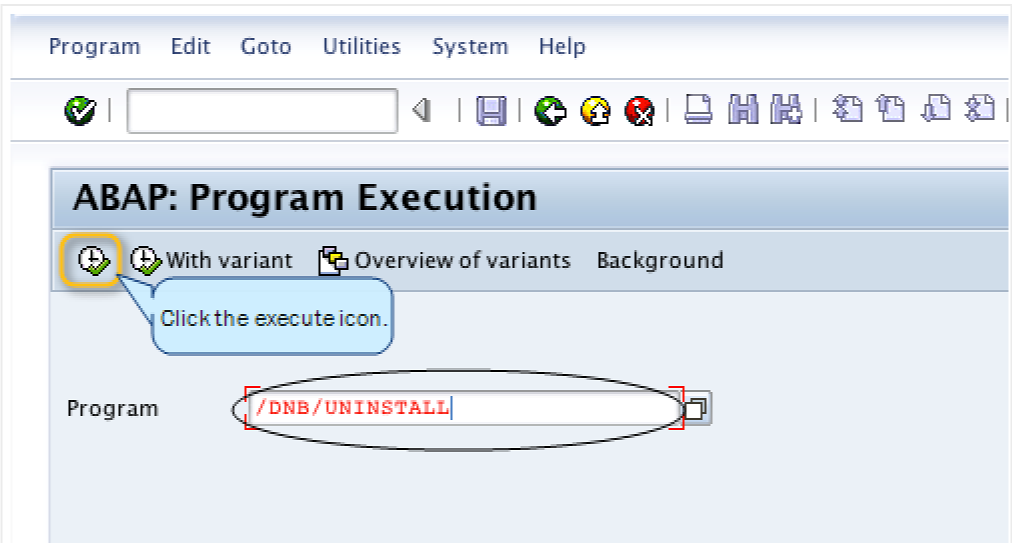
If you decide to discontinue using the D&B360 application — either during or after the trial period — you need to purge all of D&B360 data. For more information refer to Section 6 of the Termination of the Trial

License Agreement.

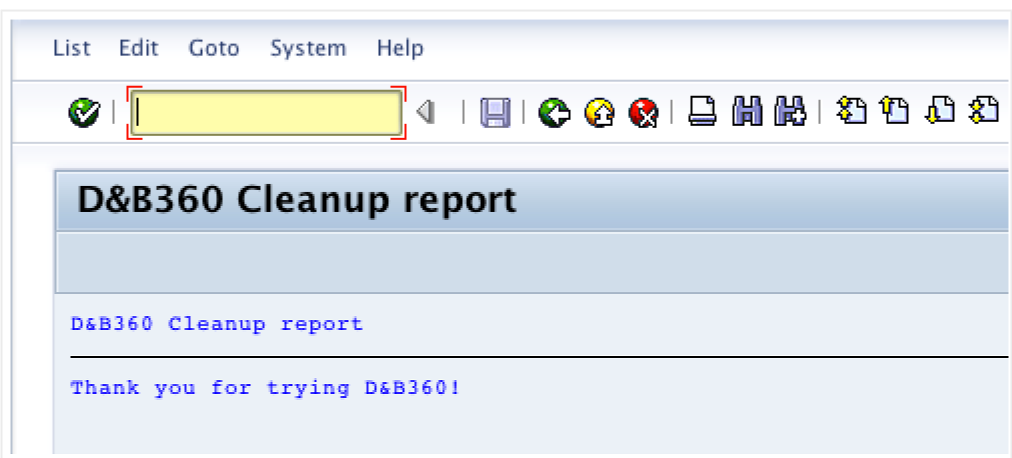
1. In the **Command** field, execute transaction **SA38**.



2. In the **ABAP Program Execution** window, **Program** field, type **DNB/UNINSTALL**, then click the execute button.



The program cleans the D&B360 tables. The **D&B360 Cleanup Report** window displays.



The program cleans these D&B360 tables:

- /dnb/company
- /dnb/contact

- /dnb/credit
- /dnb/credit_del
- /dnb/credit_fail
- /dnb/adminreview
- /dnb/calloutlog
- /dnb/if_queue

Appendix B: Troubleshooting and Housekeeping

Troubleshooting

Frequently Asked Questions

Question	Answer
Can D&B360 for SAP CRM be installed one time and accessed by multiple instances (or ORGs) of SAP CRM?	No. During the installation, the system uses the SAP CRM ORG ID to create a unique key in order to access the D*B360 DaaS platform. A separate D&B360 for SAP CRM installation is needed for each SAP CRM instance (or ORG) that needs access to D&B360.
What steps should I take if my existing implementation of D&B360 for SAP CRM has expired?	Follow these steps to re-install D&B360 after it has expired: • Verify that the existing D&B360 application has expired. • If expired, contact D&B360 Support and ask them to re-activate your SAP CRM ORGID (Administration Setup /Company Profile/Company Information). **Note:** If for some reason D&B360 Support is unable to immediately comply with your request, they will communicate this to you and will help you get the issue resolved as quickly as possible. • Install the latest D&B360 application.

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:

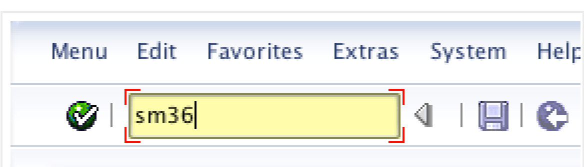
- 8 A.M. – 6 P.M. local time, Monday through Friday
- Excluding D&B holidays

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.

Creating Background Jobs for D&B360 Housekeeping

The D&B360 application uses tables for internal functioning that increase in size over time. The following is a Housekeeping program that cleans up old table entries that are no longer required. We recommend that you create a background job to perform this housekeeping task.

1. In the **Command** field, type transaction **sm36**.



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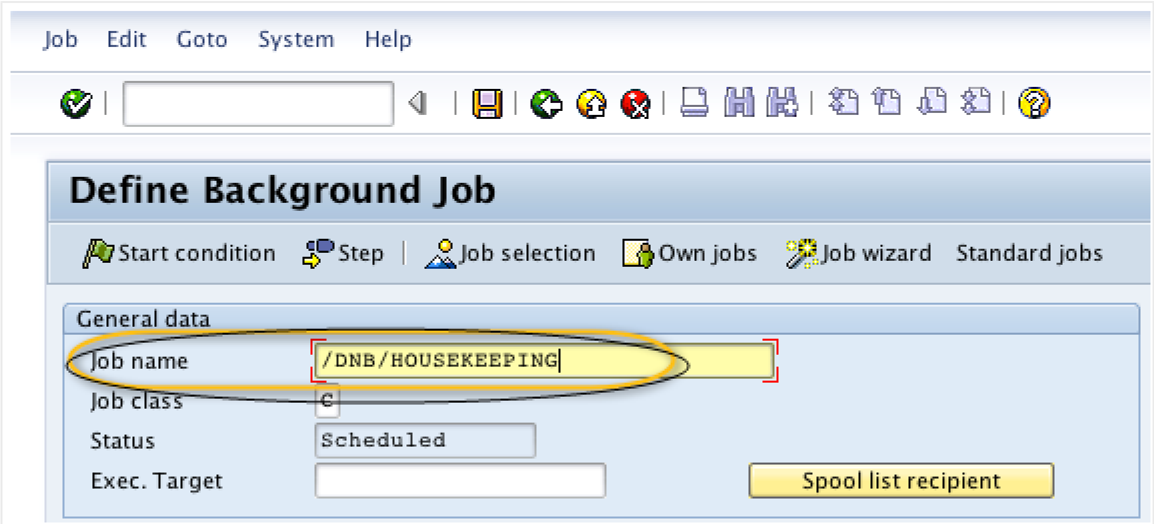
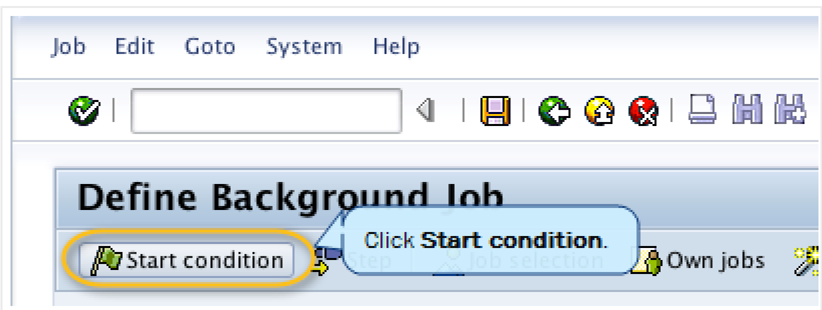
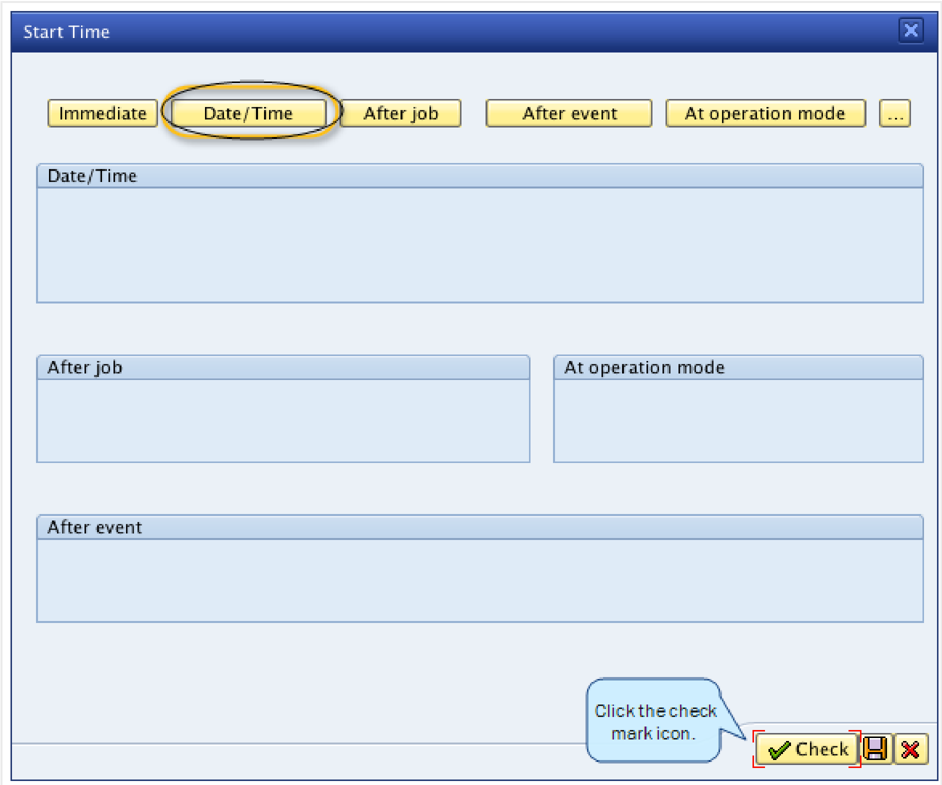
2. In the **Define Background Job** window, type a name for your job that makes sense to you, for example /DNB/HOUSEKEEPING.



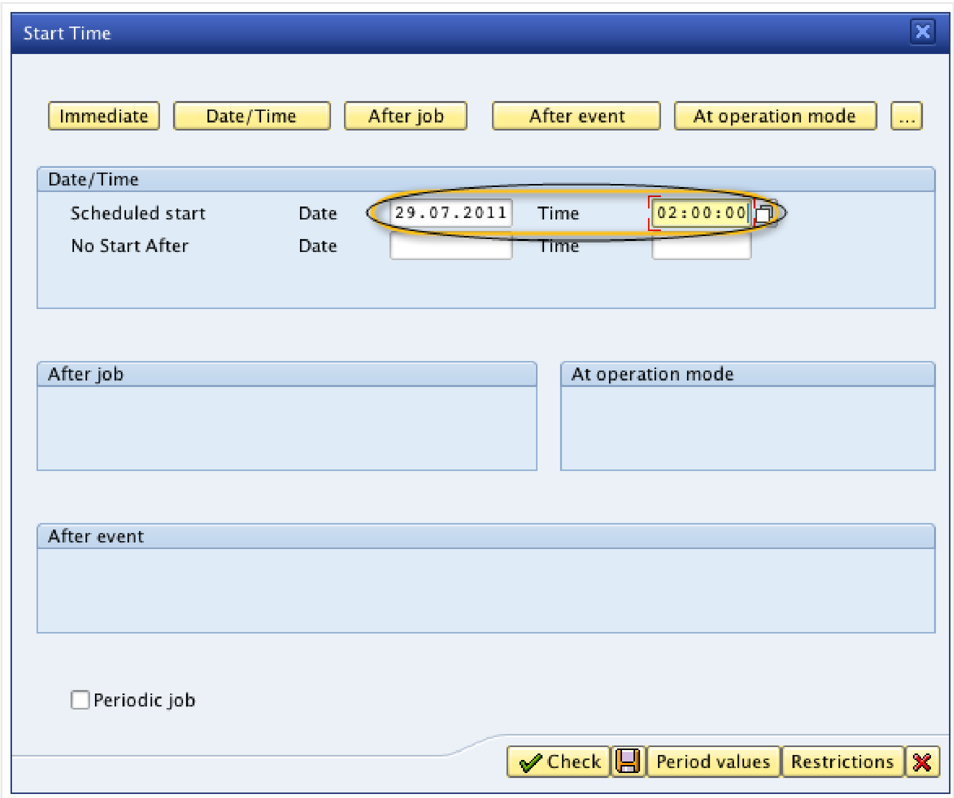
3. In the next **Define Background Job** window, click **Start** condition.



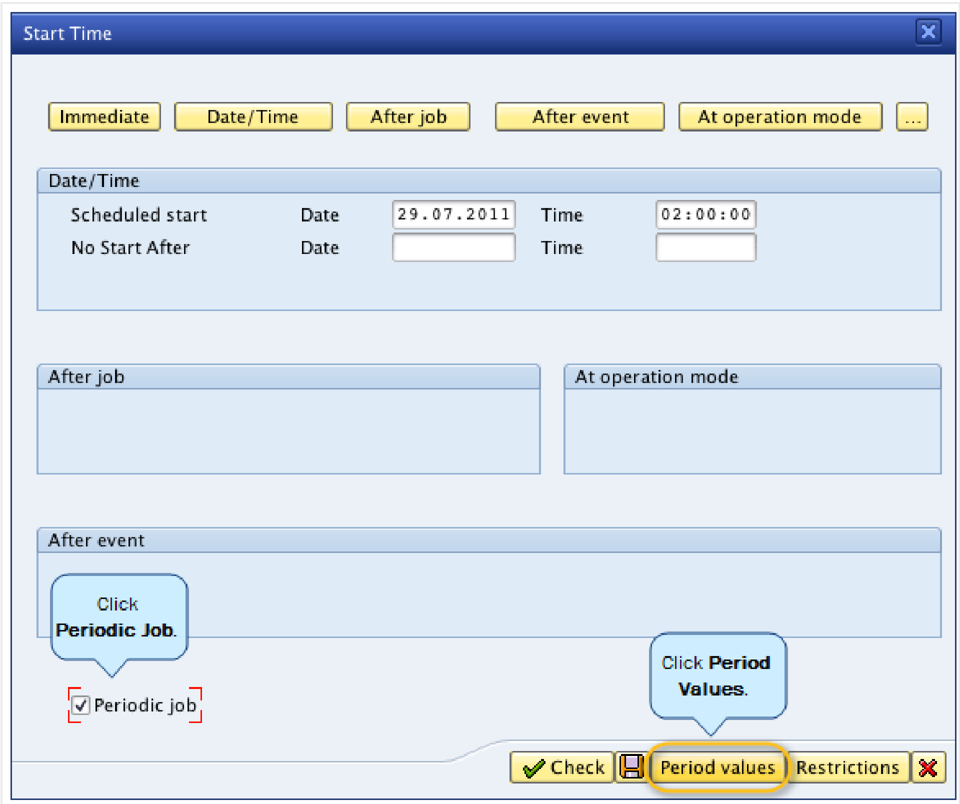
4. In the **Start Time** window, click **Date/Time**, then the check mark icon.



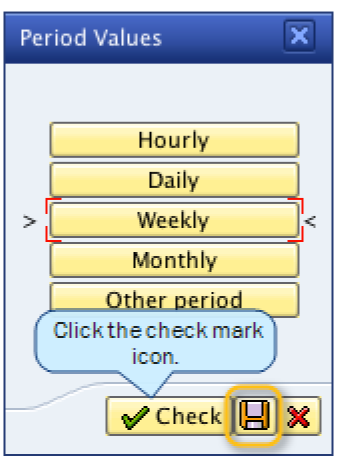
5. As an administrator, define when you want the job to run.
6. In the **Date/Time** area, **Scheduled** start field, enter the **Date** and **Time**.



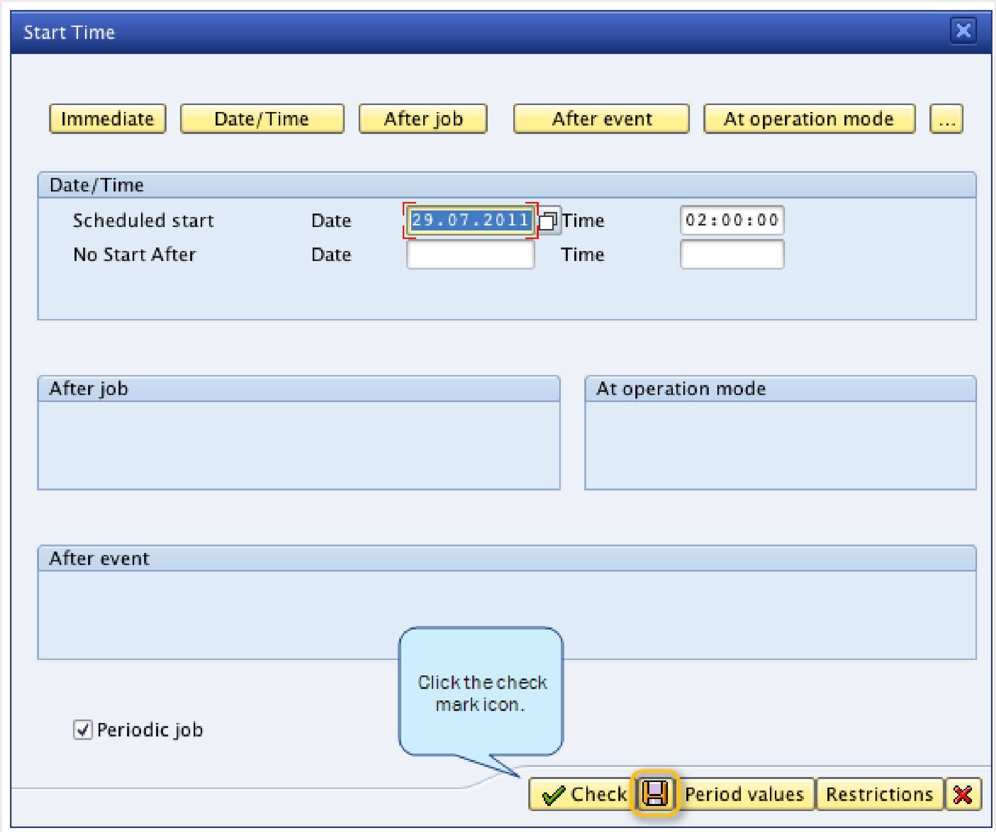
7. To specify that the job is to be run periodically, click **Periodic** Job.
8. To define the period for the schedule, click **Period values**.



9. In the **Period Values** window, click the value that represents how often the housekeeping tasks should run. You can define this with your administrator — or if you are the administrator, you can define this.
10. Click the check mark icon to save the schedule.

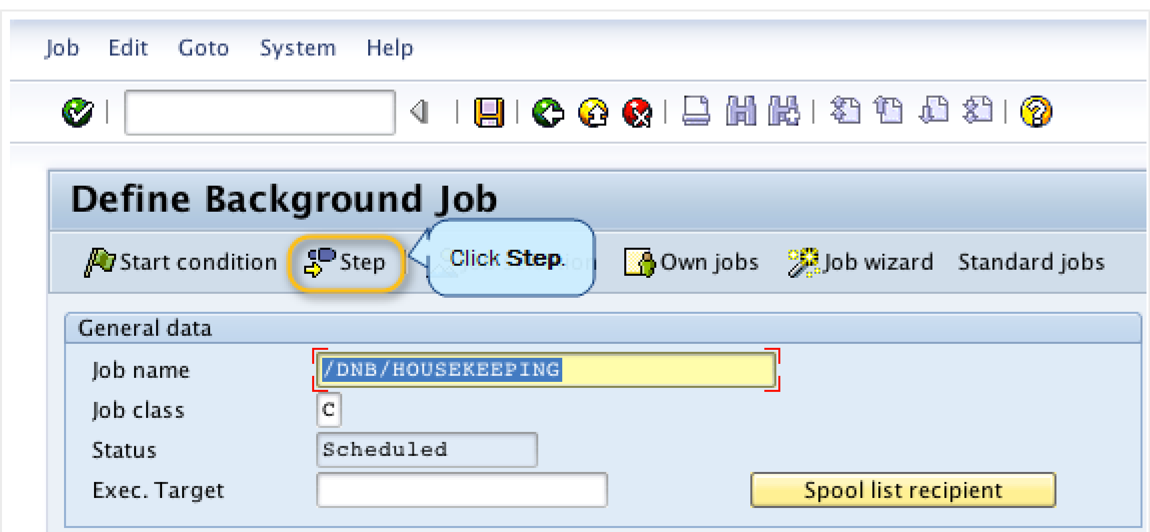


11. To save the settings for the **Schedule start Date** and **Time**, in the **Start Time** window, click the check mark icon .

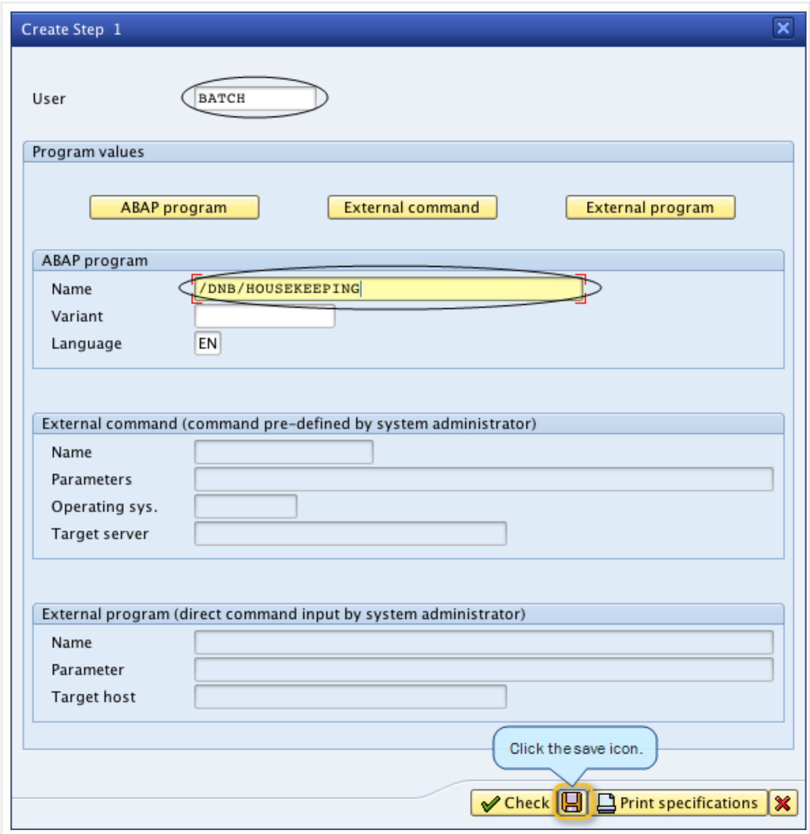


Defining the Execution Program for the Housekeeping Job

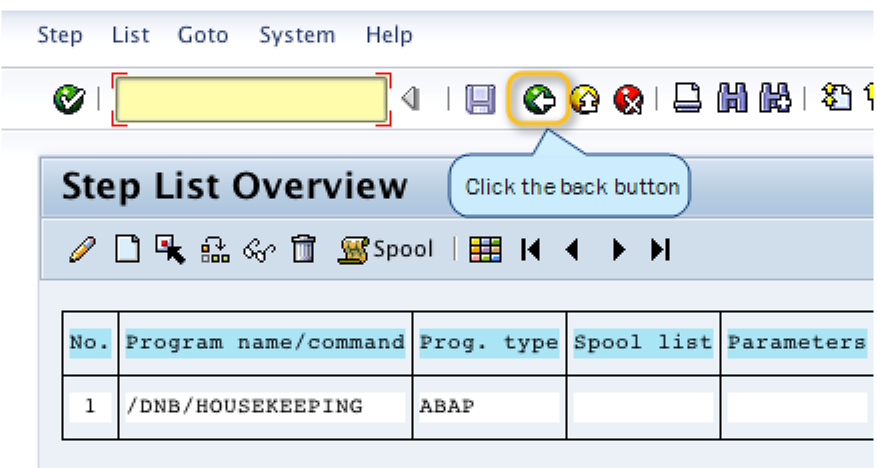
1. In the **Define Background Job** window, click **Step**.



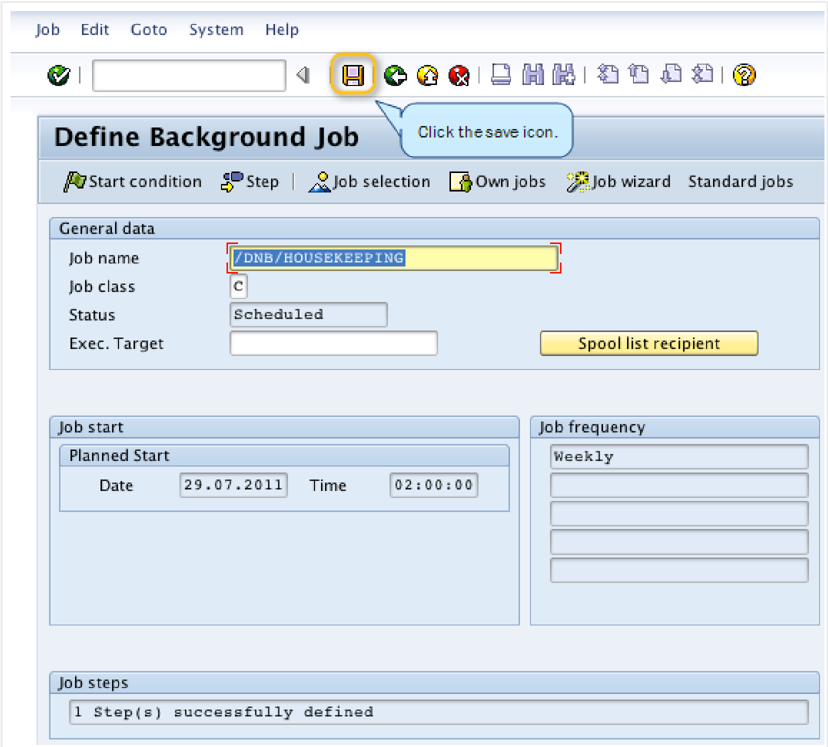
2. In the **Create Step 1** window, **User** field, type the user ID of the appropriate admin user who will execute the report.
3. In the **ABAP program** area, **Name** field, type **DNB/HOUSEKEEPING**.
4. Click the save icon.



The Step List Overview window displays the information about your job. You can click the left-arrow (back) button to go back to the Define Background Job window.



5. In **the Define Background Job** window, click the save icon to save this job and the schedule you specified for it to run.



A confirmation message displays:

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