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D&B360

SAP Cloud for Customer Setup Guide

Version 1.0

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Contents

Introduction

This guide walks through the steps for configuring the SAP Cloud for Customer CRM for integration with D&B360.

System Requirements

- IE9 or greater
- SAP Cloud for Customer UI Version: 1408 and higher
- Silverlight version 5 (5.1.30514.0) or later
    - It is recommended that you use the latest version of Silverlight. You can download the latest version of Silverlight from: http://www.microsoft.com/silverlight/.

Installation Instructions

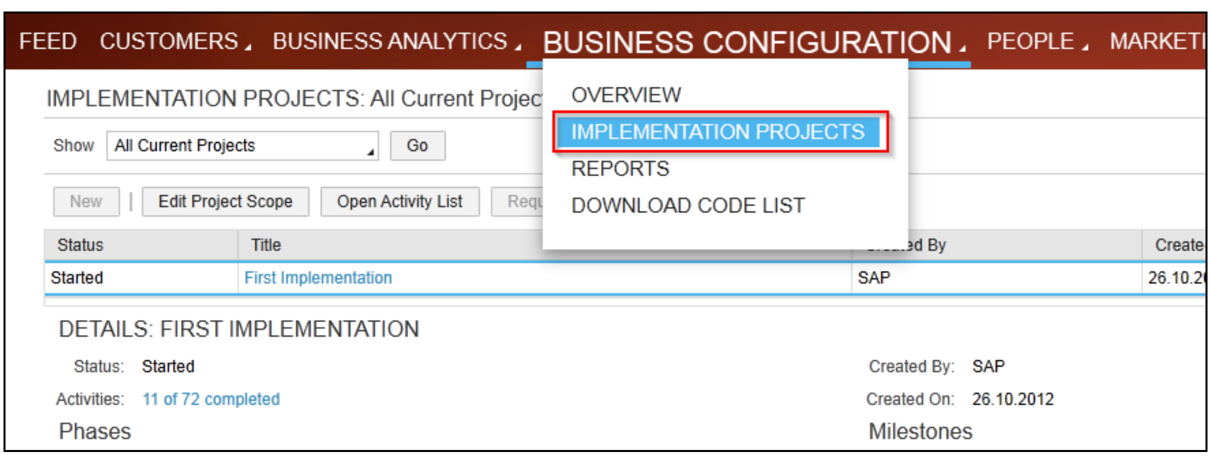
D&B360 integration with the SAP Cloud for Customer CRM incorporates the following steps:

- Setting up Communication Scenarios
- Setting up a D&B360 Administrator Role
- Assigning the business role
- Configuring Mashups
- Registering D&B360 for access

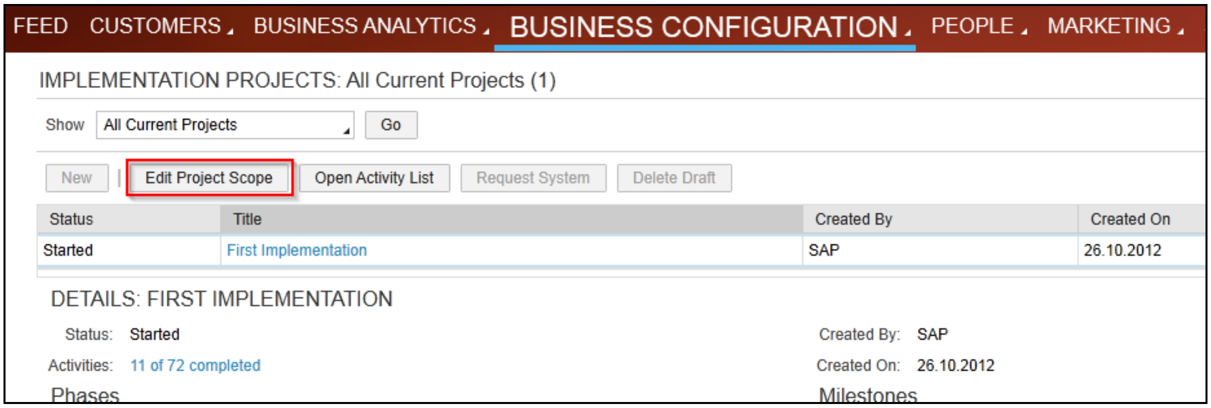
The following sections will illustrate the process of completing these steps.

Enabling D&B360 Communication Scenarios

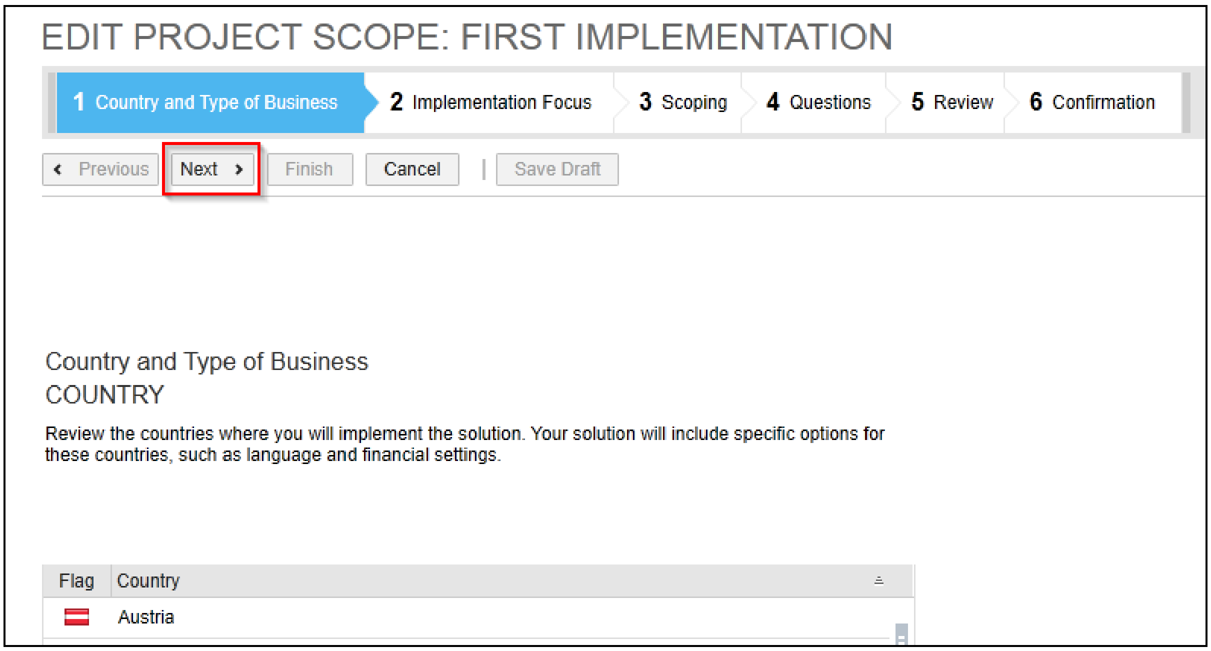
1. On the Top Menu, select **BUSINESS CONFIGURATION -> IMPLEMENTATION PROJECTS.**



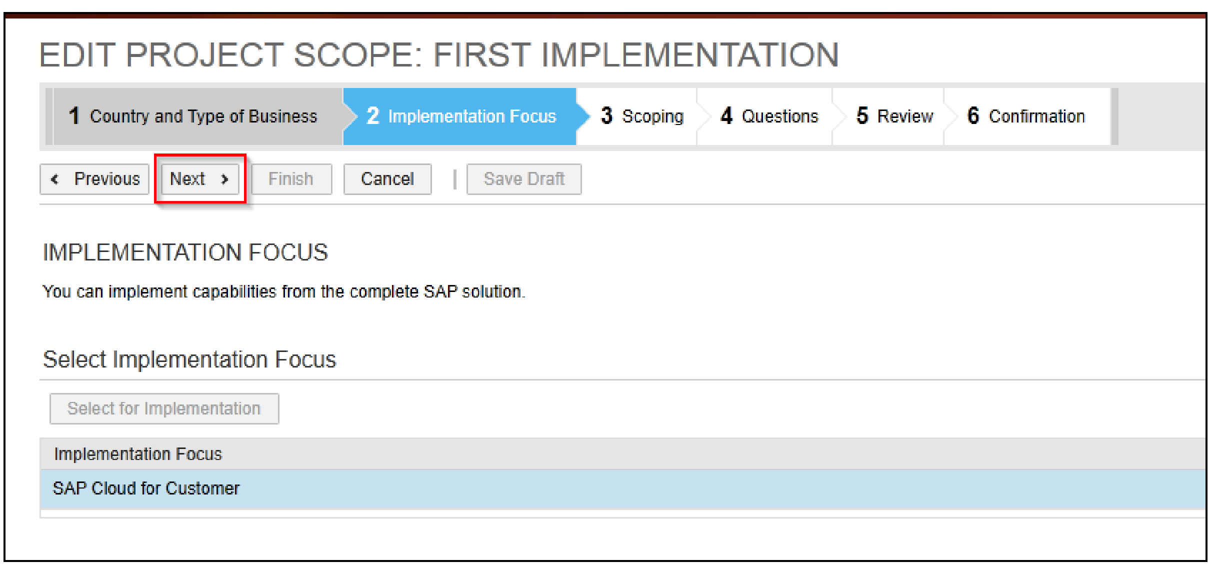
2. Select the First Implementation row and click **Edit Project Scope.**



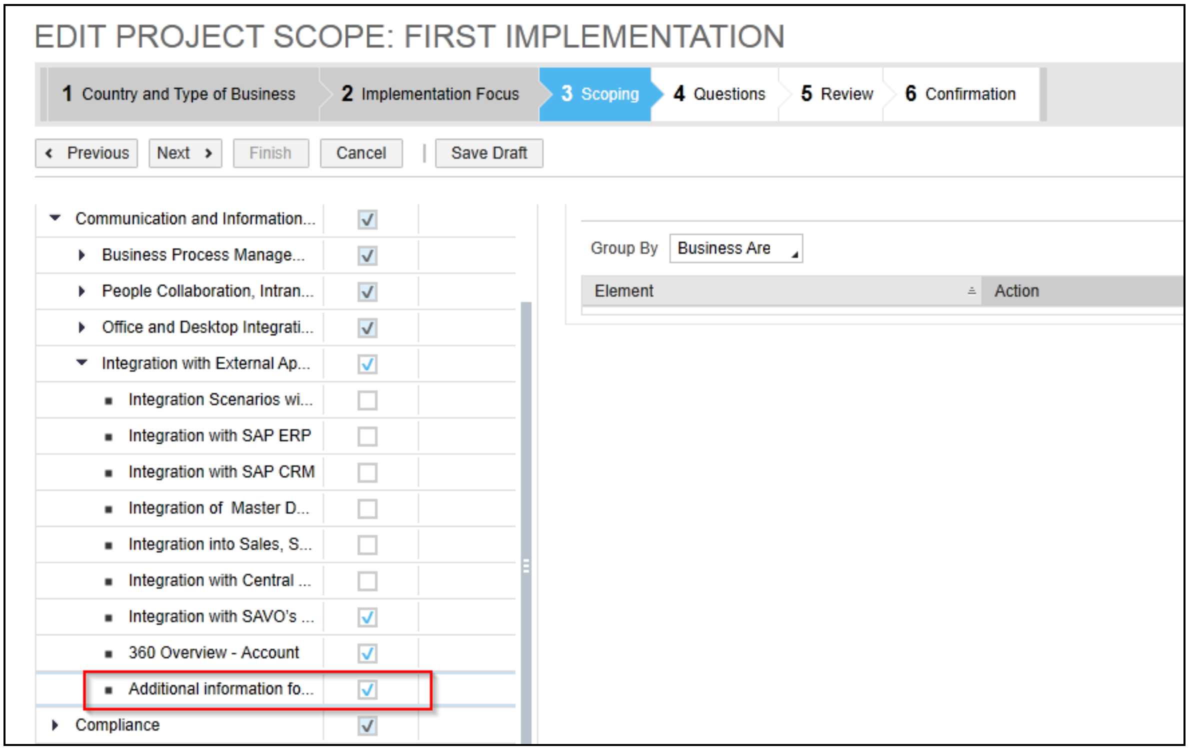
3. On the 1 Country and Type of Business screen, click **Next**.



4. On the 2 Implementation Focus screen, click **Next**.



5. On the 3 Scoping screen, expand the **Communication and Information Exchange** node from the tree, and then expand **Integration with External Applications and Solutions**, please select (check) the option for **Additional information for business partner**.



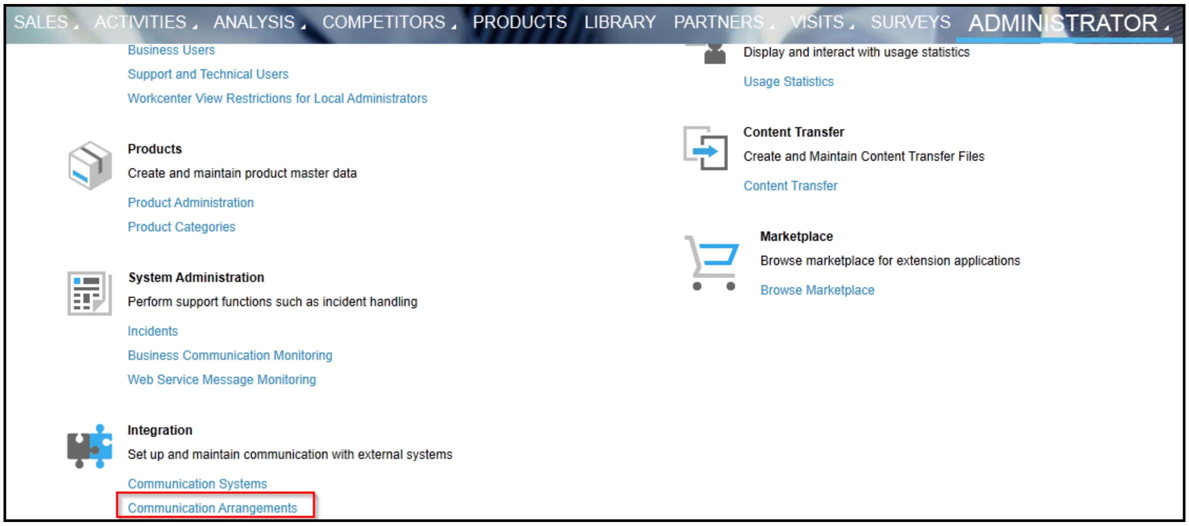
6. Click **Next.**
7. Click **Next** through the following screens: 4-Questions, 5-Review and 6-Confirmation.

Communication Arrangements

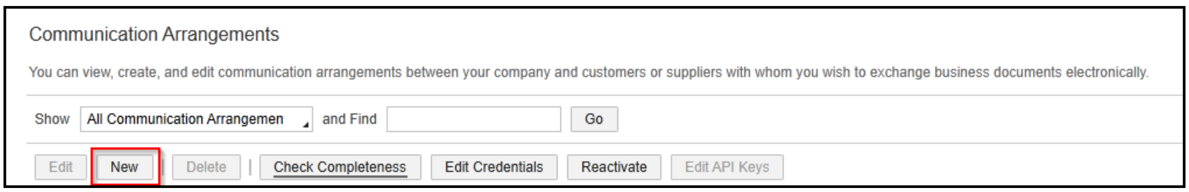
This section will specify the process for setting up Communication Arrangements for each of the following 3 scenarios:

- Business Role Management Integration
- Query Identity To Get Roles
- External Business Partner Info-Integration

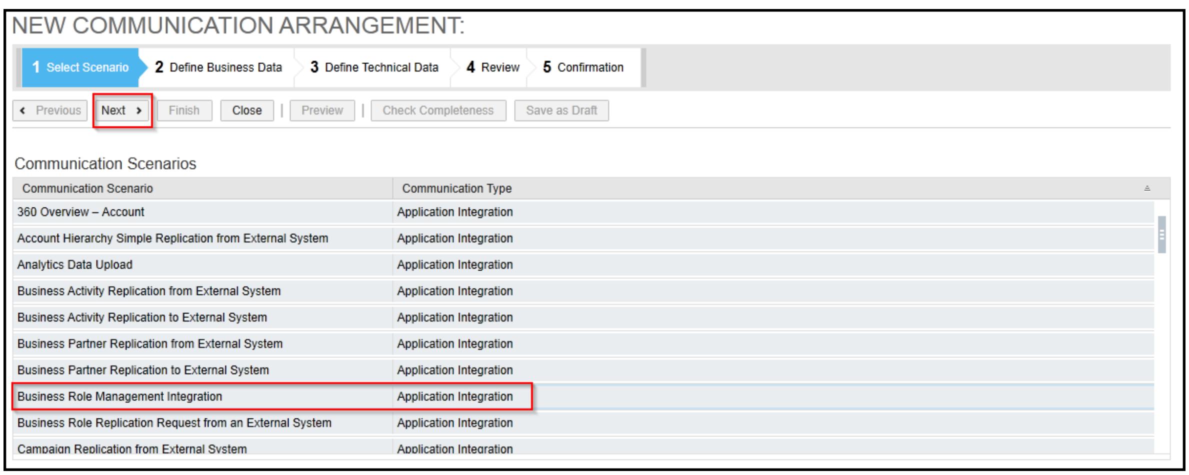
1. On the Top Menu, select **ADMINISTRATOR -> GENERAL SETTINGS** and click on **Communication Arrangements.**



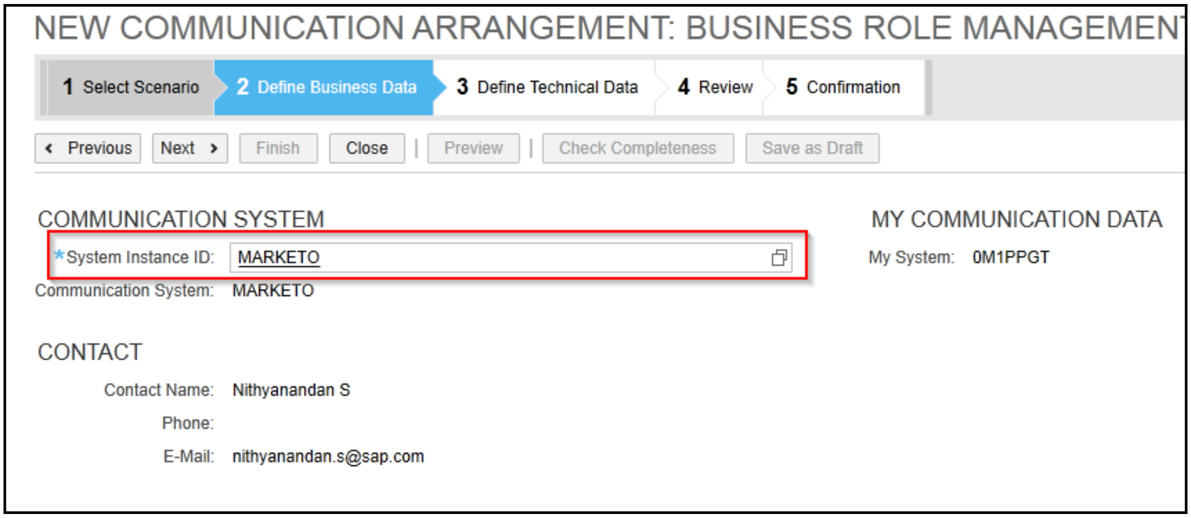
2. Click on **New.**



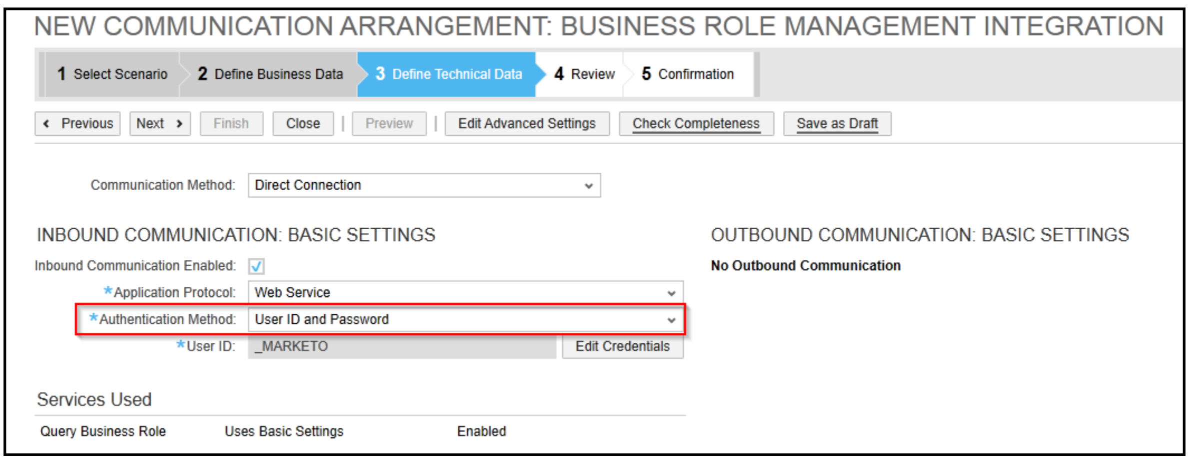
3. On the 1 Select Scenario Screen, select **Business Role Management Integration** row and then click on **Next.**



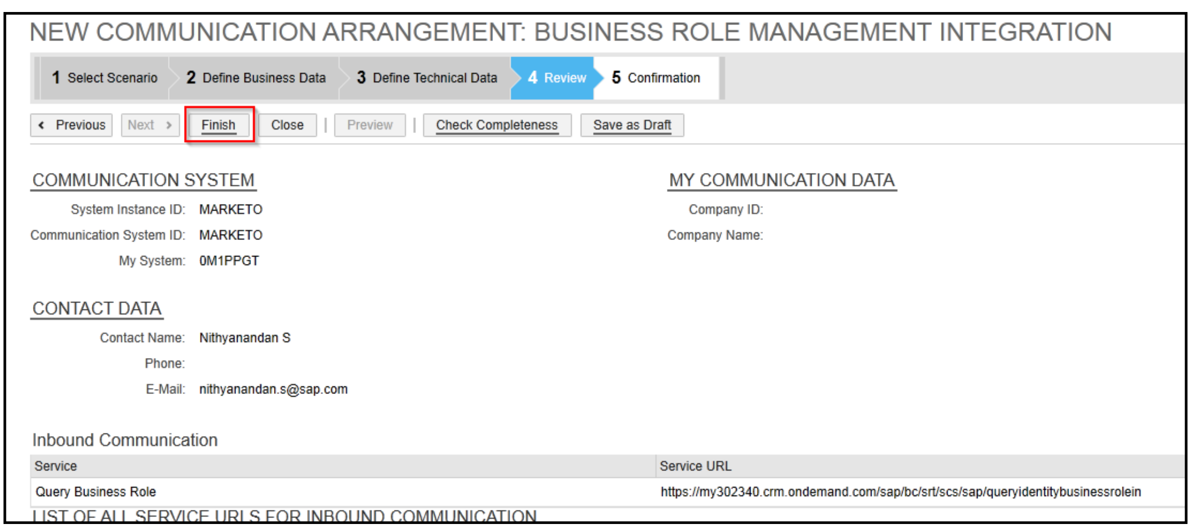
4. On the 2 Define Business Data screen, select the user account that the D&B360 application will use to access the C4C instance.



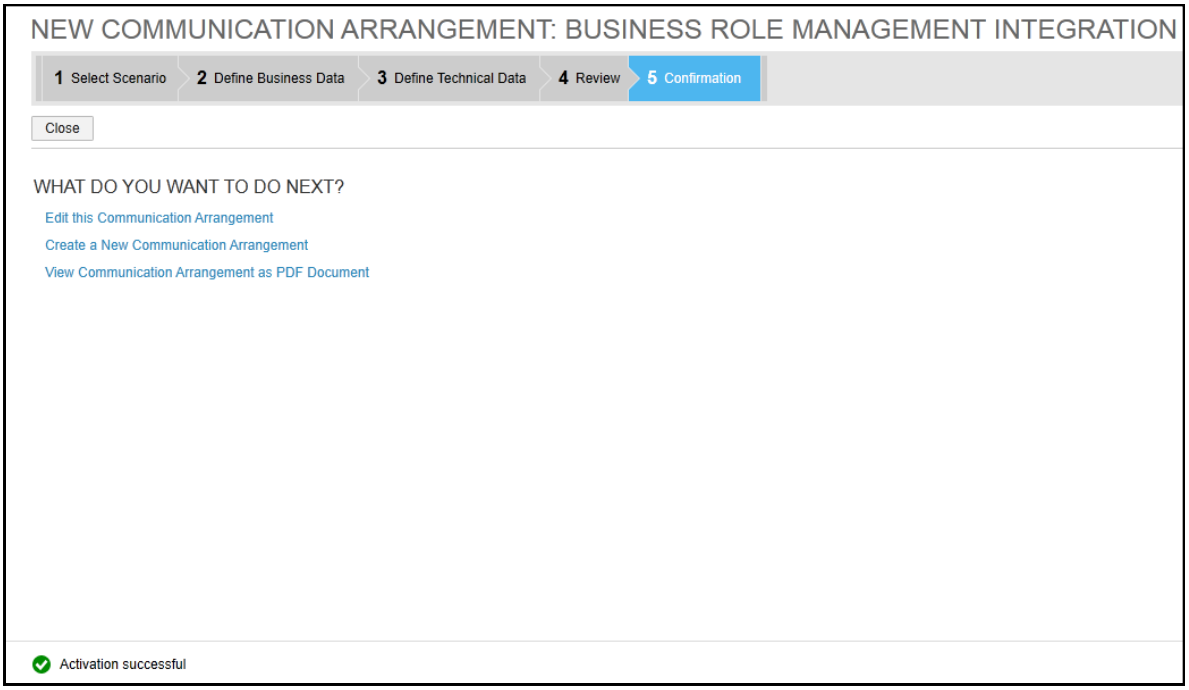
5. On the 3 Define Technical Data screen, select the **Authentication Method: User Id and Password** and then click on **Next.**



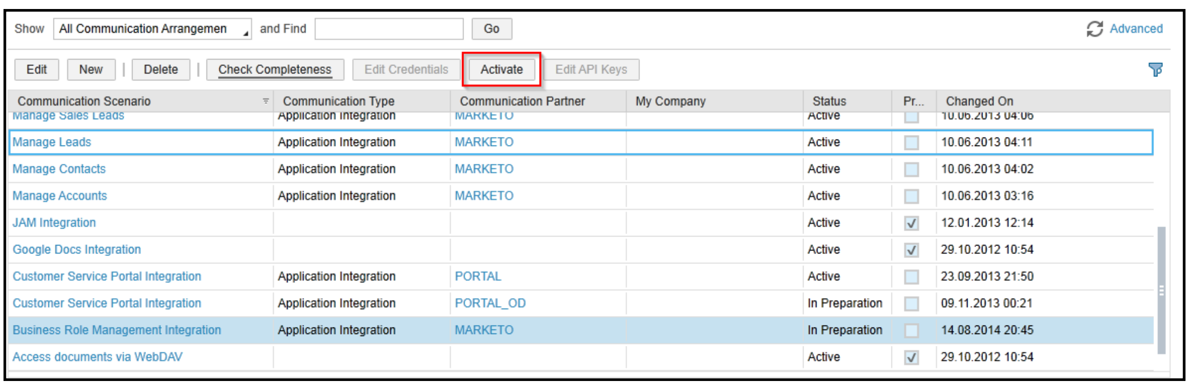
6. On the 4 Review screen, please click on **Finish.**



7. You will get a confirmation screen similar to the following:



8. On the top side of your screen, click on the refresh icon to update the list.
9. If the Communication Scenario we have just created is In Preparation Status, select the row and click on **Activate.**

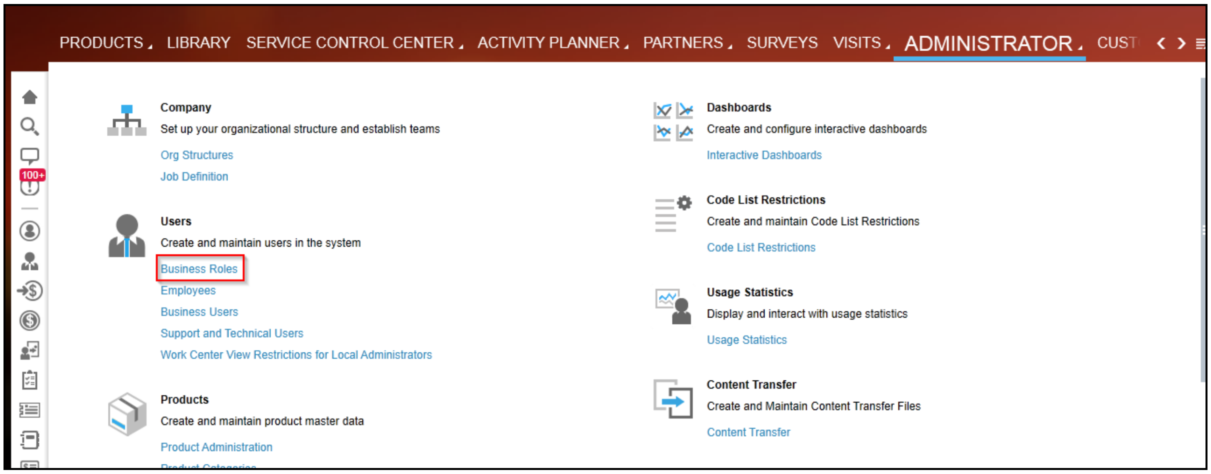


10. Repeat steps 1-8 to create a Communication Arrangement for the "Query Identity To Get Roles" scenario.
    a. In step 3 , select the "Query Identity To Get Roles" scenario.

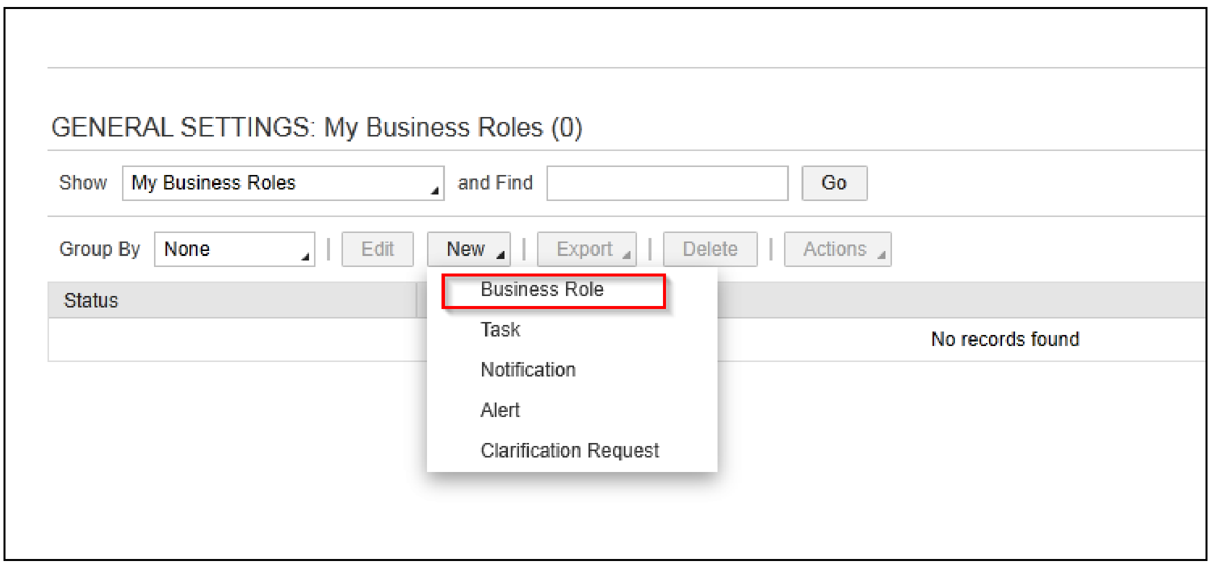
11. Repeat steps 1-8 to create a Communication Arrangement for the "External Business Partner Info-Integration" scenario.
    a. In step 3 , select the "External Business Partner Info-Integration" scenario.

Creating the D&B360 Administration Role

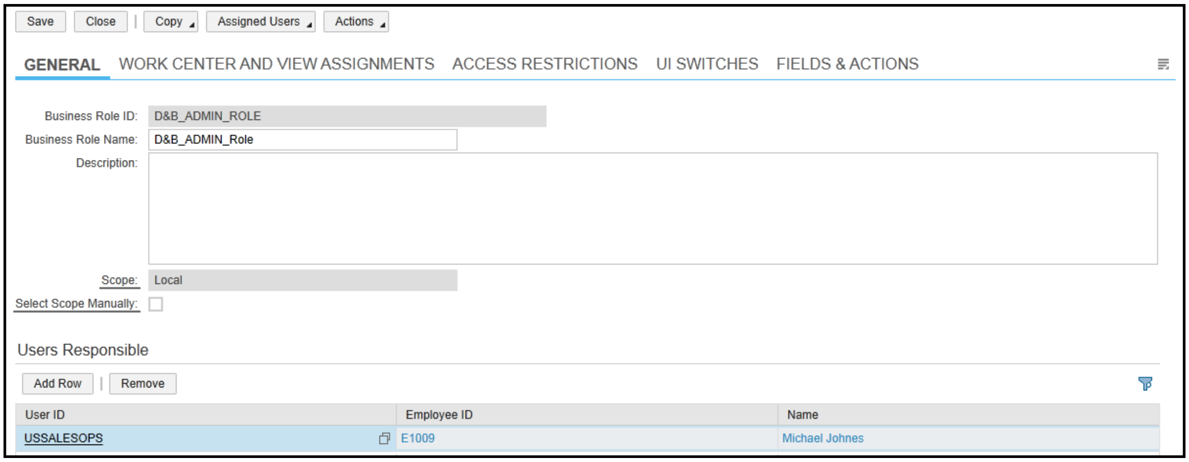
1. On the top menu, please select ADMINISTRATOR -> GENERAL SETTINGS and then click on **Business Roles.**



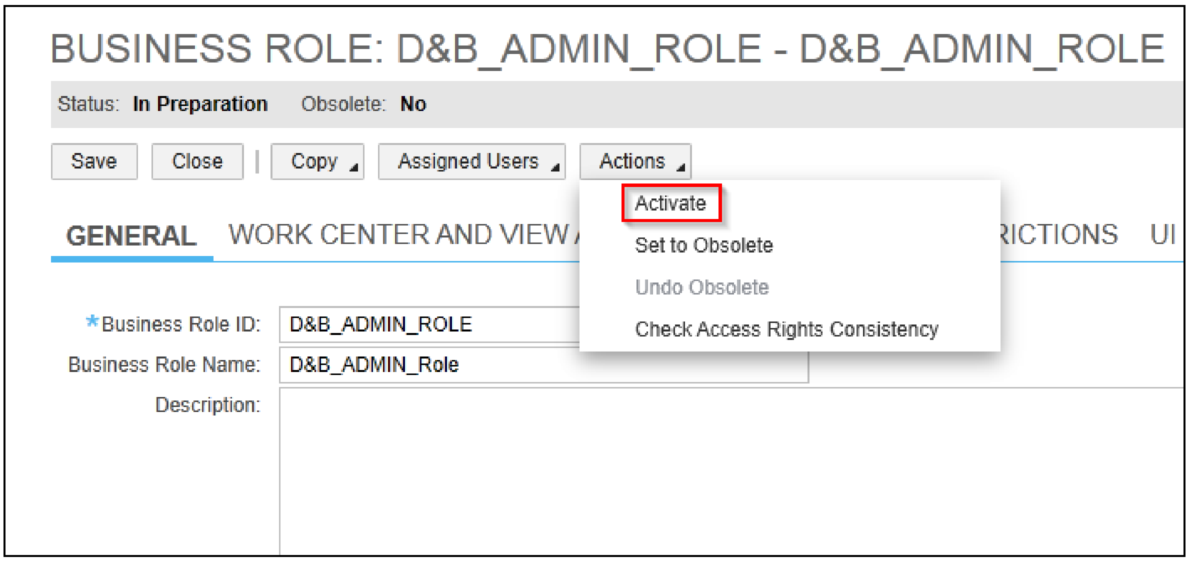
2. Click on **New** and select **Business Role.**



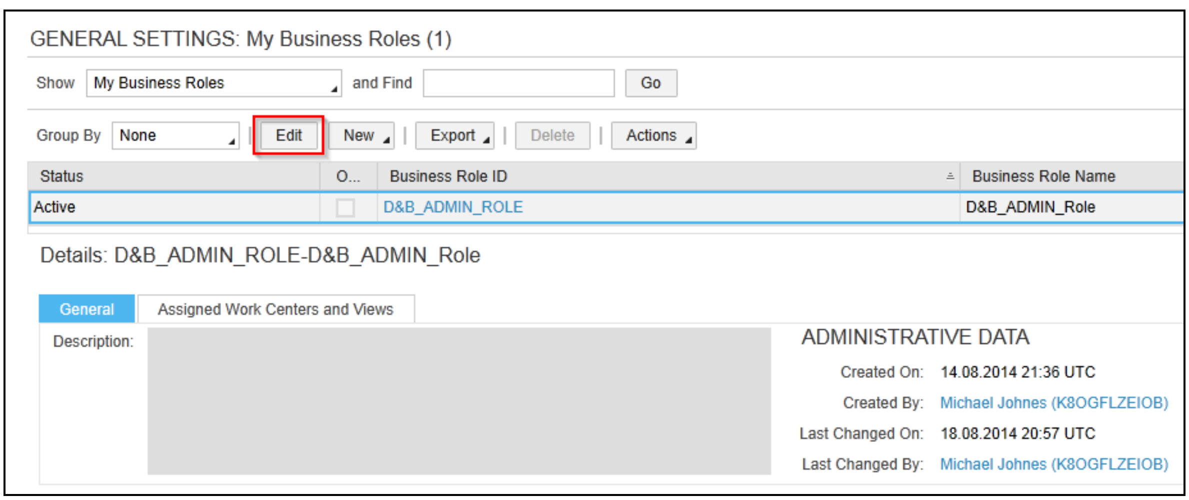
3. Enter the following information:
   - Business Role Id: D&B_ADMIN_ROLE
   - Business Role Name: D&B_ADMIN_Role
4. Click **Save.**



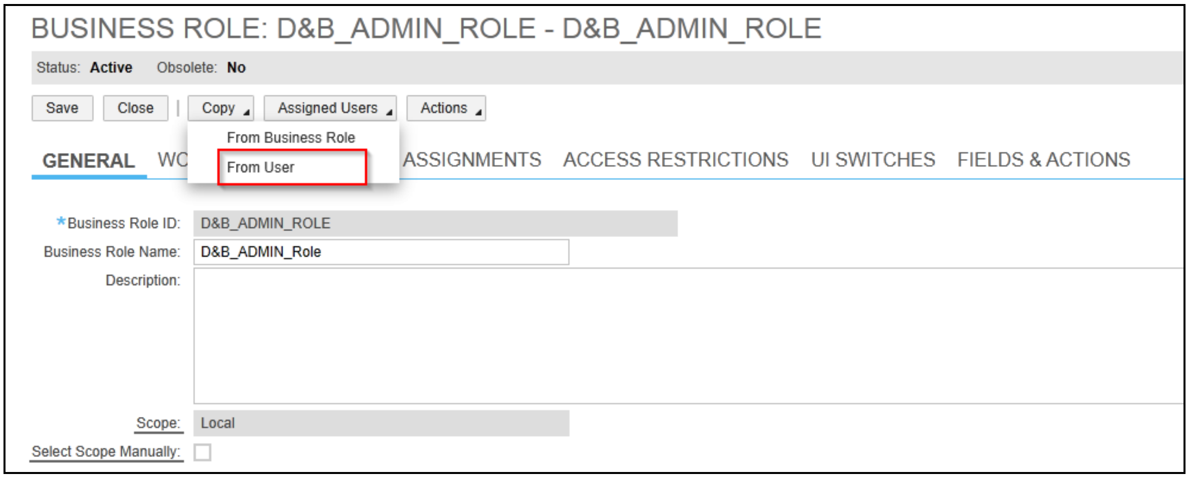
5. Select menu **Actions** and click **Activate**.



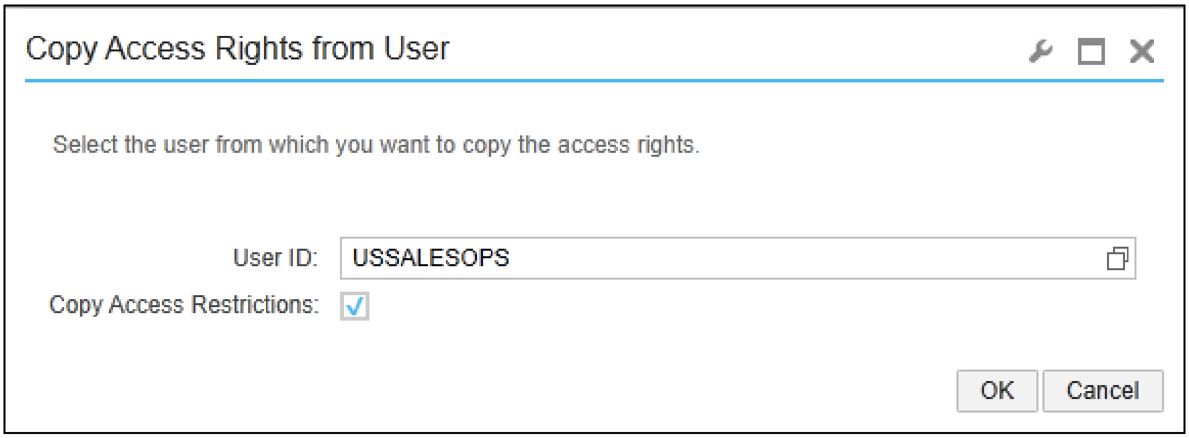
6. Select the **D&B_ADMIN_ROLE** row and click **Edit.**



7. Click **Copy** and then **From User**.

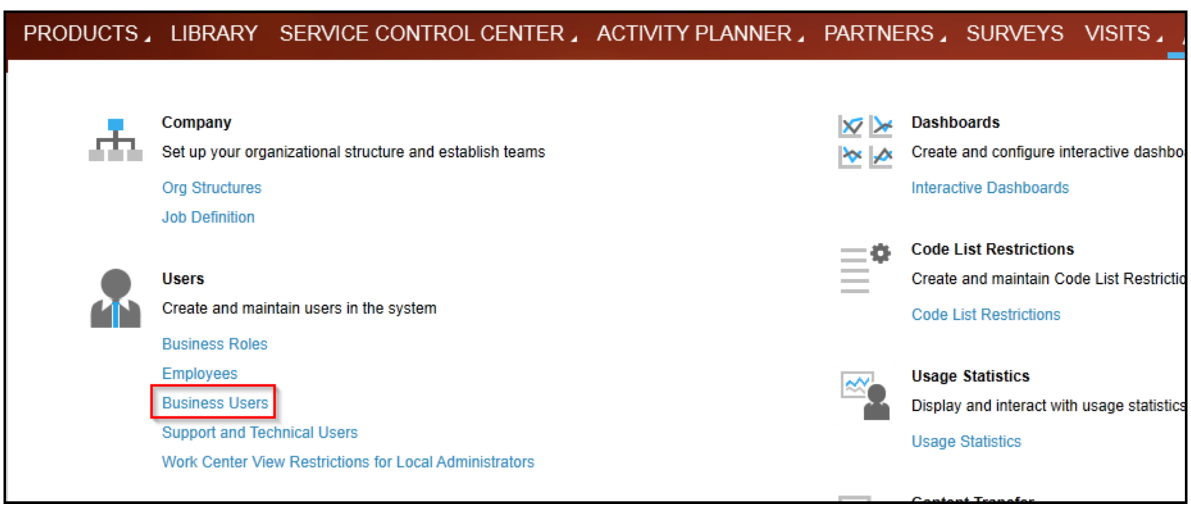


8. Select your user and click **OK** to Save your Role.

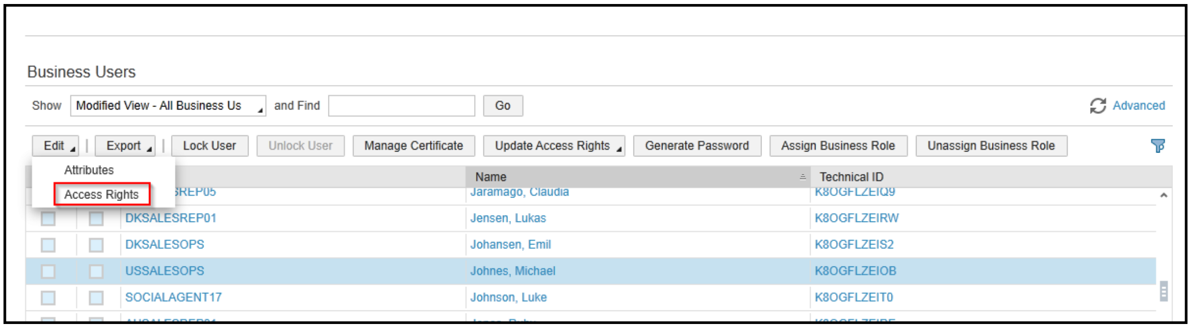


Assigning the Business Role

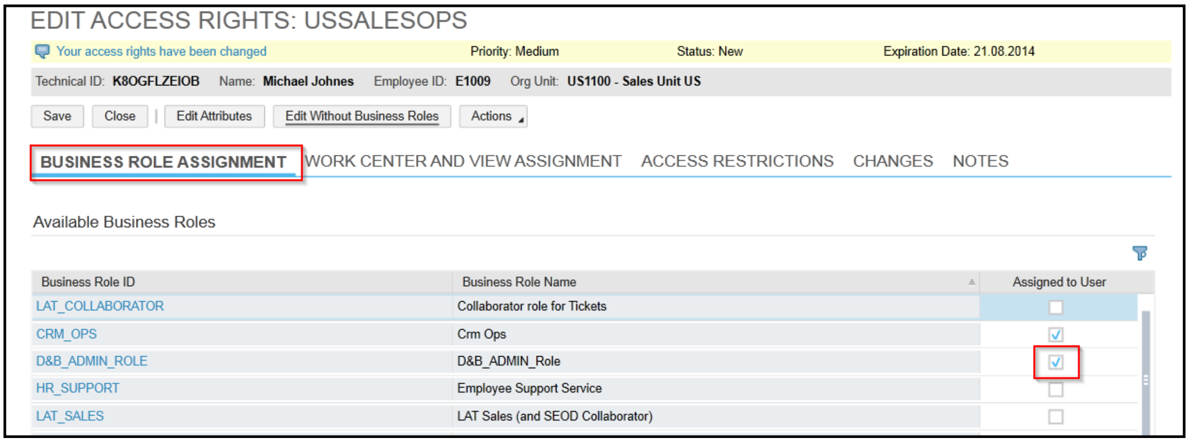
1. On the top menu, select ADMINISTRATOR -> GENERAL SETTINGS and then click on **Business Users**.



2. Select the business user row you want to assign the business role to and then click **Edit** and select **Access Rights**.



3. Select the **Business Role Assignment** tab on the Available Business Roles section. Select the checkbox for **D&B360_ADMIN_ROLE** Business Role to assign it. Click **Save**.



Creating the D&B360 Main Mashup

1. Create a New HTML Mashup with the Mashup Settings configuration:
   Navigate to **ADMINISTRATOR -> MASHUP AUTHORING** and click on **New -> HTML Mashup**.

Mashup Settings
Mashup Category Business & Finance
Port Binding DNB360 Mashup Integration
Mashup Name D&B360
Description (optional) D&B360 Main
Status Active
Configuration Information

Mashup Settings

Type URL	
URL https://dnb360agent.hoovers.com/DNB360UIAgent/content/DnB360/html/index.html#/auth	
Height 600	

2. Add the parameters. It's important to use the correct case on the parameter values for "Name" and "Constant".

Name	Constant	Parameter Binding	Mandatory
platform	SAP		
tpcid	<User ID supplied by D&B> example: BC8F3A6AE4-4865-78DA-3C4B428992C22		
crmurl	my309782.vlab.sapbydesign.com (C4C URL without protocol and port)		
port	443 (C4C URL port)		
protocol	https (C4C URL protocol)		
authenticationmode	Basic		
orgid	my309782 (C4C URL tenant name)		
authenticationhost	null		
userid		UserAlias	
employee		UserHCMEmployeeID	

Creating the Account HTML Mashup

1. Create a New HTML Mashup with the following configuration:
   Navigate to **ADMINISTRATOR -> MASHUP AUTHORING** and click on **New -> HTML** Mashup

Mashup Settings

Mashup Category Business & Finance	
Port Binding DNB360 Mashup Integration	
Mashup Name D&B360 Account	
Description (optional) D&B360 Account	
Status Active	
Configuration Information	
Type URL	
URL https://dnb360agent.hoovers.com/DNB360UIAgent/content/DnB360/html/crm-entity.html#/auth	
Height 500	

2. Add the parameters. It's important to use the correct case on the parameter values for "Name" and "Constant".

Name	Constant	Parameter Binding	Mandatory
platform	SAP		
tpcid	<User ID supplied by D&B> example: BC8F3A6AE4-4865-78DA-3C4B428992C22		
crmurl	my309782.vlab.sapbydesign.com (C4C URL without protocol and port)		
port	443 (C4C URL port)		
protocol	https (C4C URL protocol)		
authenticationmode	Basic		
orgid	my309782 (C4C URL tenant name)		
authenticationhost	null		
typeEntityName	account		
userid		UserAlias	
employee		UserHCMEmployeeID	
entityId		EntityId	

Creating the Contact HTML Mashup

1. Create a New HTML Mashup with the following configuration:
   Navigate to **ADMINISTRATOR -> MASHUP AUTHORING** and click on **New -> HTML Mashup**

Mashup Settings
Mash-up Category Business & Finance
Port Binding DNB360 Mashup Contact
Mashup Name D&B360
Description (optional) D&B360 Contact
Status Active

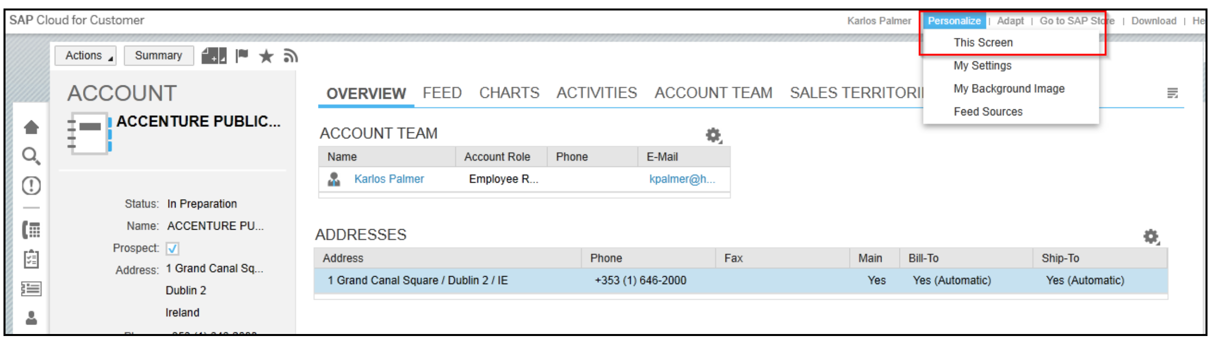
Mashup Settings
Configuration Information
Type URL
URL https://dnb360agent.hoovers.com/DNB360UIAgent/content/DnB360/html/crm-entity.html#/auth
Height 500

2. Add the parameters. It's important to use the correct case on the parameter values for "Name" and "Constant".

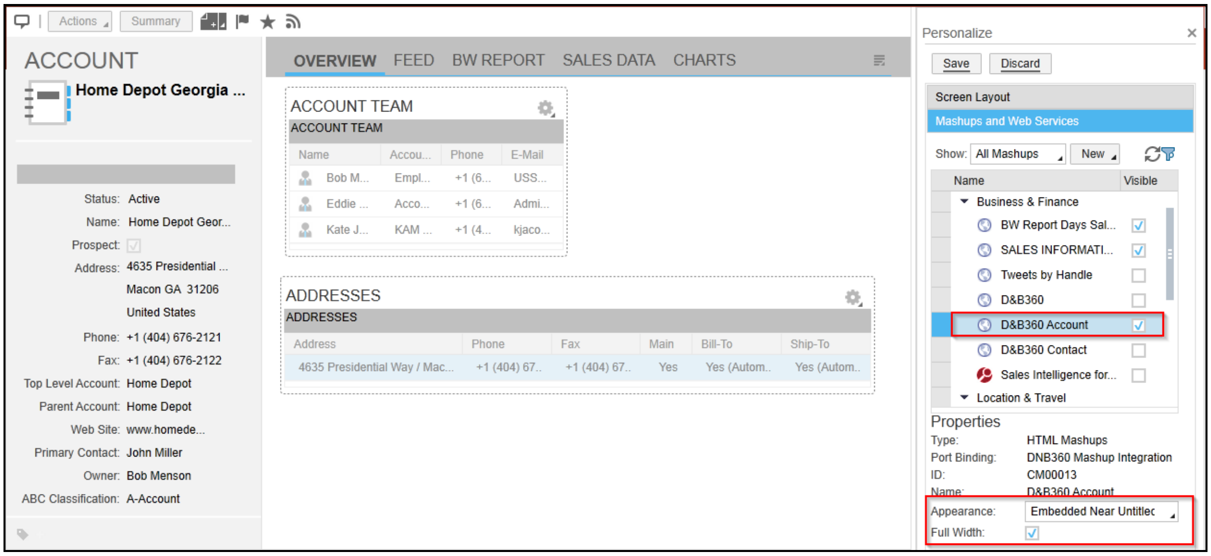
Name	Constant	Parameter Binding	Mandatory
platform	SAP		
tpcid	<User ID supplied by D&B> (example: BC8F3A6AE4-4865-78DA-3C4B428992C22)		
crmurl	my306504.vlab.sapbydesign.com (C4C URL without protocol and port)		
port	443 (C4C URL port)		
protocol	https (C4C URL protocol)		
authenticationmode	Basic		
orgid	my306504 (C4C URL tenant name)		
authenticationhost	null		
typeEntityName	contact		
userid		UserAlias	
employee		UserHCMEmployeeID	
entityId		EntityId	

Making the D&B360 Account Mashup Visible on an Account Screen

1. From the top menu, select **CUSTOMERS** and then **ACCOUNTS**. Select any existing account. From the **Personalize** menu option, select **This Screen.**



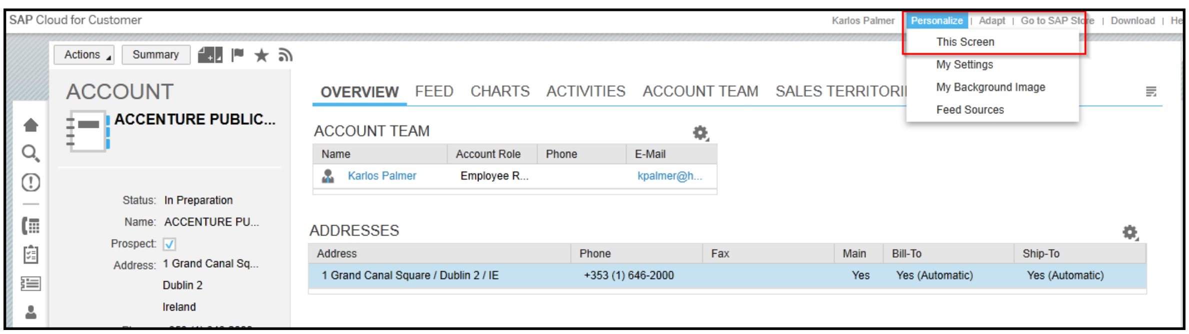
2. Select the **Mashups and Web Service** section and select **D&B360 Account Mashup** and enter the following properties:
    - Appearance: Embedded Near Untitled Section
    - Full With: Checked



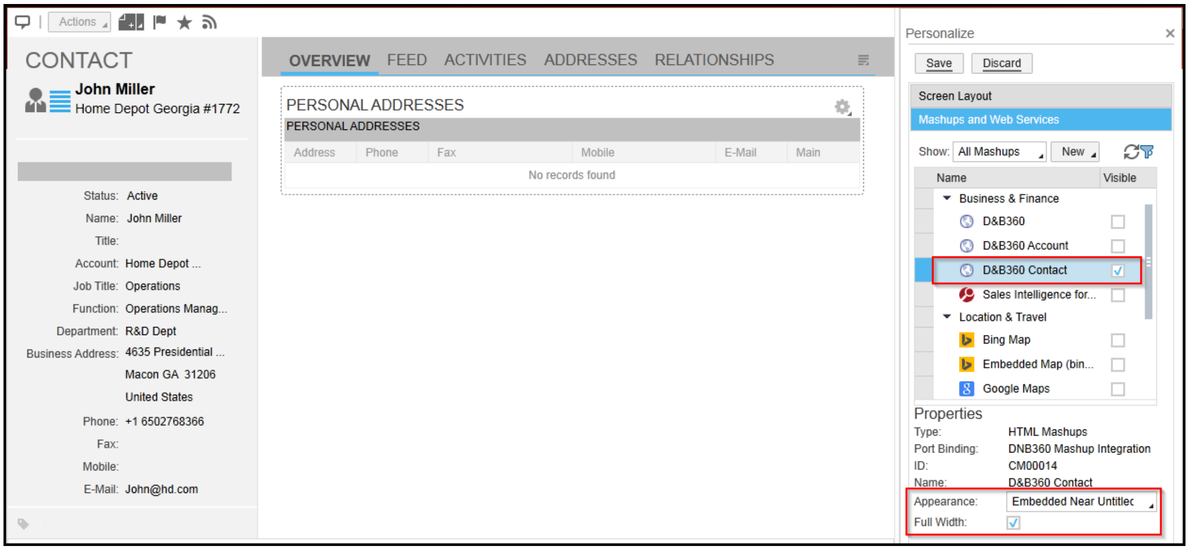
3. Click on **Save** and close the Personalize section.

Making the D&B360 Contact Mashup Visible on a Contact Screen

1. From the top menu, select **CUSTOMERS** and then **CONTACTS**. Select any existing contact. From the **Personalize** menu option, select **This Screen.**



2. Select the **Mashups and Web Service** section. Select **D&B360 Account Mashup** and enter the following properties:
   - Appearance: Embedded Near Untitled Section
   - Full With: Checked



3. Click on **Save** and close the Personalize section.

Running the D&B360 Registration Endpoint

URL: https://dnb360agent.hoovers.com/DNB360UIAgent/rest/agent/registration

Method: POST

HEADERS

TPCID: BC8F3A-6AE4-4865-78DA-3C4B428992C22

(TPCID value is provided in the D&B360 Welcome mail, User Name)

PLATFORM: SAP

Content-Type: application/json

Payload:


```
{
        "credentials": [
        {"type": "CRM","username": "<CRM_username>","password":
"<CRM_password>"},
        {
        "type": "MAX_CV",
        "username": "<MaxCV_username>",
        "password": "<MaxCV_password>"
     }
    ],
    "roles": [
        {
            "id": "D&B_ADMIN_ROLE",
            "name": "D&B_ADMIN_ROLE",
```

```
            "access": true,
            "features": {
                "preventDuplicates": true,
                "isAdmin": true
            }
        }
    ]
}
```

Parameter Examples

CRM Credentials: In this example we will use the CRM credentials that were used to set up the Communication Arrangements:

```
<CRM_username> = _MARKETO
<CRM_password> = ExampleCRMPassword
```

MaxCV Credentials: For the following elements we will use the Username and Password that were provided in the D&B360 Welcome email.

```
<MaxCV_username> = BC8F3A-6AE4-4865-78DA-3C4B428992C22
<MaxCV_password> =  ExampleMaxCVPassword
```

After replacing the values the body should see like this:


```
{
        "credentials": [
        {"type": "CRM","username": "MARKETO","password":
"ExampleMaxCVPassword"},
        {
        "type": "MAX_CV",
        "username": "BC8F3A-6AE4-4865-78DA-3C4B428992C22",
        "password": "ExampleMaxCVPassword"
     }
    ],
    "roles": [
        {
            "id": "D&B_ADMIN_ROLE",
            "name": "D&B_ADMIN_ROLE",
            "access": true,
            "features": {
                "preventDuplicates": true,
                "isAdmin": true
            }
        }
    ]
}
```

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