



DUN & BRADSTREET

D&B360

SAP Cloud for Customer Setup Guide

Version 1.0

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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

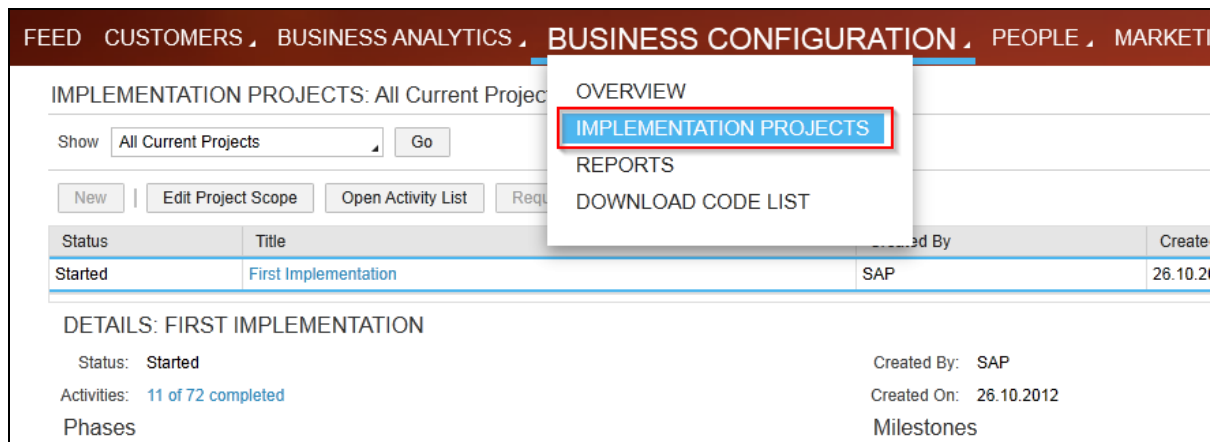
D&B360 integration with the SAP Cloud for Customer CRM incorporates the following steps:

- 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**.

IMPLEMENTATION PROJECTS: All Current Projects (1)

Show

Status	Title	Created By	Created On
Started	First Implementation	SAP	26.10.2012

DETAILS: FIRST IMPLEMENTATION

Status: **Started** Created By: SAP
 Activities: 11 of 72 completed Created On: 26.10.2012
 Phases Milestones

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

EDIT PROJECT SCOPE: FIRST IMPLEMENTATION


1 Country and Type of Business 2 Implementation Focus 3 Scoping 4 Questions 5 Review 6 Confirmation

|

Country and Type of Business

COUNTRY

Review the countries where you will implement the solution. Your solution will include specific options for these countries, such as language and financial settings.

Flag	Country
	Austria

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

EDIT PROJECT SCOPE: FIRST IMPLEMENTATION

1 Country and Type of Business 2 Implementation Focus 3 Scoping 4 Questions 5 Review 6 Confirmation

|

IMPLEMENTATION FOCUS

You can implement capabilities from the complete SAP solution.

Select Implementation Focus

Implementation Focus
SAP Cloud for Customer

- 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**.

EDIT PROJECT SCOPE: FIRST IMPLEMENTATION

1 Country and Type of Business 2 Implementation Focus 3 Scoping 4 Questions 5 Review 6 Confirmation

< Previous Next > Finish Cancel | Save Draft

Communication and Information...	<input checked="" type="checkbox"/>	
Business Process Manage...	<input checked="" type="checkbox"/>	
People Collaboration, Intran...	<input checked="" type="checkbox"/>	
Office and Desktop Integrati...	<input checked="" type="checkbox"/>	
Integration with External Ap...	<input checked="" type="checkbox"/>	
Integration Scenarios wi...	<input type="checkbox"/>	
Integration with SAP ERP	<input type="checkbox"/>	
Integration with SAP CRM	<input type="checkbox"/>	
Integration of Master D...	<input type="checkbox"/>	
Integration into Sales, S...	<input type="checkbox"/>	
Integration with Central ...	<input type="checkbox"/>	
Integration with SAVO's ...	<input checked="" type="checkbox"/>	
360 Overview - Account	<input checked="" type="checkbox"/>	
Additional information fo...	<input checked="" type="checkbox"/>	
Compliance	<input checked="" type="checkbox"/>	

Group By Business Are

Element	Action
---------	--------

6. Click **Next**.

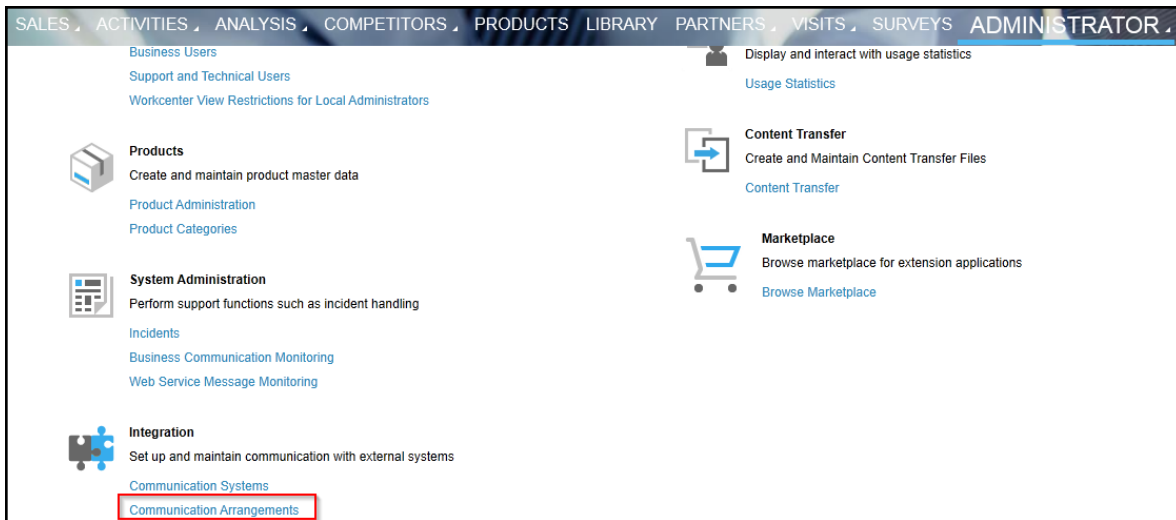
7. Click **Next** through the following screens: 4-Questions, 5-Review and 6-Confirmation.

Communication Arrangements

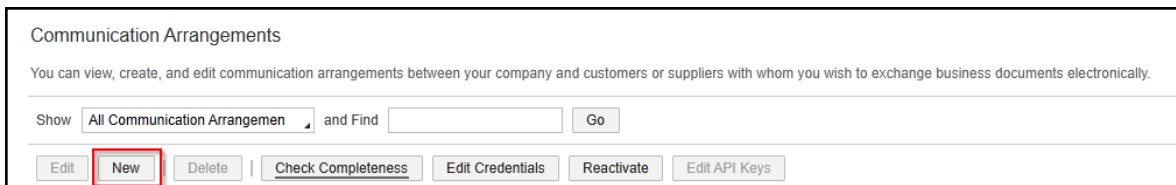
This section will specify the process for setting up Communication Arrangements for each of the following 3 scenarios:

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

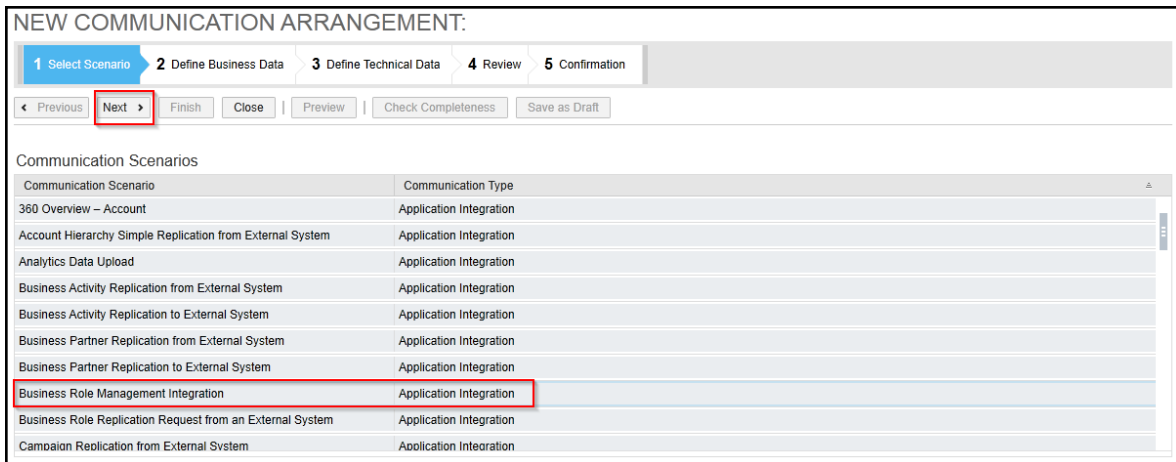
- On the Top Menu, select **ADMINISTRATOR -> GENERAL SETTINGS** and click on **Communication Arrangements**.



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.

NEW COMMUNICATION ARRANGEMENT: BUSINESS ROLE MANAGEMENT

1 Select Scenario
2 Define Business Data
3 Define Technical Data
4 Review
5 Confirmation

< Previous
Next >
Finish
Close
Preview
Check Completeness
Save as Draft

COMMUNICATION SYSTEM

*System Instance ID:

Communication System: MARKETO

MY COMMUNICATION DATA

My System: 0M1PPGT

CONTACT

Contact Name: Nithyanandan S
 Phone:
 E-Mail: nithyanandan.s@sap.com

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

NEW COMMUNICATION ARRANGEMENT: BUSINESS ROLE MANAGEMENT INTEGRATION

1 Select Scenario
2 Define Business Data
3 Define Technical Data
4 Review
5 Confirmation

< Previous
Next >
Finish
Close
Preview
Edit Advanced Settings
Check Completeness
Save as Draft

Communication Method:

INBOUND COMMUNICATION: BASIC SETTINGS

Inbound Communication Enabled:

*Application Protocol:

*Authentication Method:

*User ID: [Edit Credentials](#)

OUTBOUND COMMUNICATION: BASIC SETTINGS

No Outbound Communication

Services Used

Query Business Role	Uses Basic Settings	Enabled
---------------------	---------------------	---------

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

NEW COMMUNICATION ARRANGEMENT: BUSINESS ROLE MANAGEMENT INTEGRATION

1 Select Scenario
2 Define Business Data
3 Define Technical Data
4 Review
5 Confirmation

< Previous
Next >

Finish

Close
Preview
Check Completeness
Save as Draft

COMMUNICATION SYSTEM

System Instance ID: MARKETO
 Communication System ID: MARKETO
 My System: 0M1PPGT

MY COMMUNICATION DATA

Company ID:
 Company Name:

CONTACT DATA

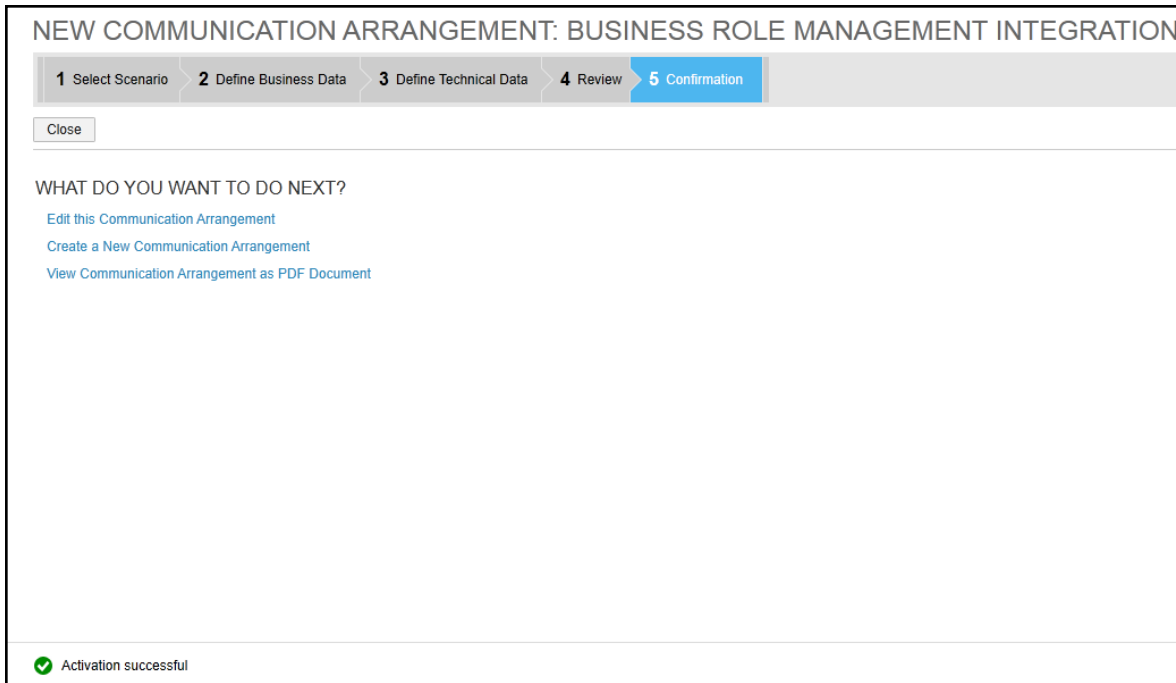
Contact Name: Nithyanandan S
 Phone:
 E-Mail: nithyanandan.s@sap.com

Inbound Communication

Service	Service URL
Query Business Role	https://my302340.crm.ondemand.com/sap/bc/srt/scs/sap/queryidentitybusinessrolein

LIST OF ALL SERVICE URLS FOR INBOUND COMMUNICATION

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**.

Communication Scenario	Communication Type	Communication Partner	My Company	Status	Pr...	Changed On
Manage Sales Leads	Application Integration	MARKETO		Active	<input type="checkbox"/>	10.06.2013 04:06
Manage Leads	Application Integration	MARKETO		Active	<input type="checkbox"/>	10.06.2013 04:11
Manage Contacts	Application Integration	MARKETO		Active	<input type="checkbox"/>	10.06.2013 04:02
Manage Accounts	Application Integration	MARKETO		Active	<input type="checkbox"/>	10.06.2013 03:16
JAM Integration				Active	<input checked="" type="checkbox"/>	12.01.2013 12:14
Google Docs Integration				Active	<input checked="" type="checkbox"/>	29.10.2012 10:54
Customer Service Portal Integration	Application Integration	PORTAL		Active	<input type="checkbox"/>	23.09.2013 21:50
Customer Service Portal Integration	Application Integration	PORTAL_OD		In Preparation	<input type="checkbox"/>	09.11.2013 00:21
Business Role Management Integration	Application Integration	MARKETO		In Preparation	<input type="checkbox"/>	14.08.2014 20:45
Access documents via WebDAV				Active	<input checked="" type="checkbox"/>	29.10.2012 10:54

10. Repeat steps 1-8 to create a Communication Arrangement for the “Query Identity To Get Roles” scenario.

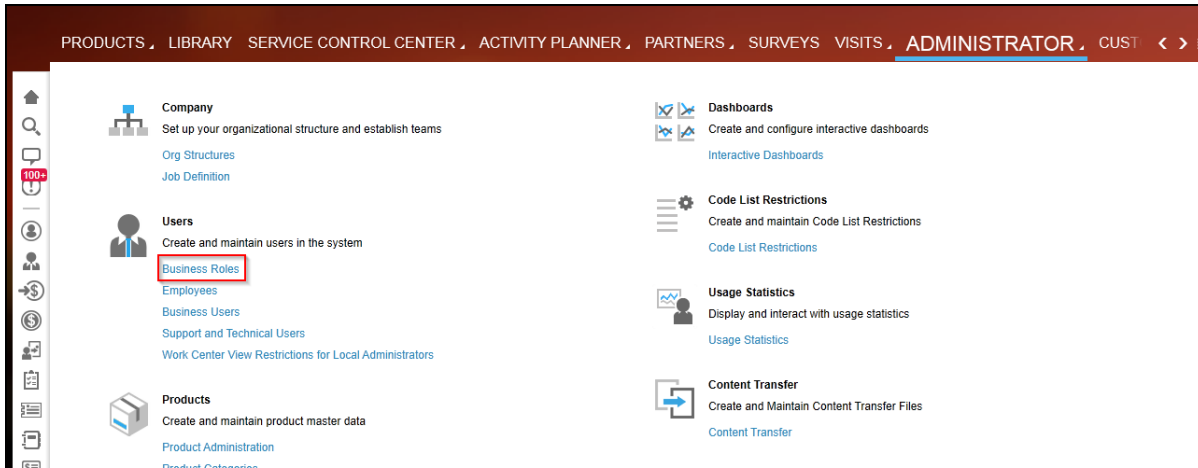
a. In step 3, select the “Query Identity To Get Roles” scenario.

11. Repeat steps 1-8 to create a Communication Arrangement for the “External Business Partner Info-Integration” scenario.

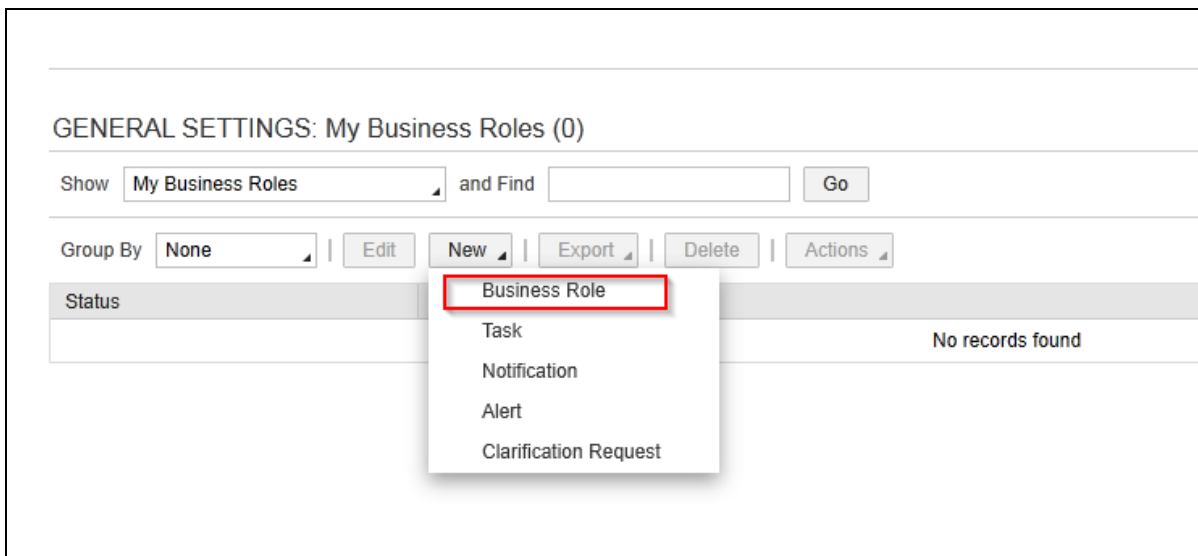
a. In step 3, select the “External Business Partner Info-Integration” scenario.

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**.

Save Close Copy Assigned Users Actions

GENERAL WORK CENTER AND VIEW ASSIGNMENTS ACCESS RESTRICTIONS UI SWITCHES FIELDS & ACTIONS

Business Role ID: D&B_ADMIN_ROLE
 Business Role Name: D&B_ADMIN_Role
 Description:

Scope: Local
 Select Scope Manually:

Users Responsible

Add Row Remove

User ID	Employee ID	Name
USSALESOPS	E1009	Michael Johnes

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

BUSINESS ROLE: D&B_ADMIN_ROLE - D&B_ADMIN_ROLE

Status: In Preparation Obsolete: No

Save Close Copy Assigned Users Actions

GENERAL WORK CENTER AND VIEW ACCESS RESTRICTIONS UI

*Business Role ID: D&B_ADMIN_ROLE
 Business Role Name: D&B_ADMIN_Role
 Description:

Activate
 Set to Obsolete
 Undo Obsolete
 Check Access Rights Consistency

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

GENERAL SETTINGS: My Business Roles (1)

Show My Business Roles and Find Go

Group By None Edit New Export Delete Actions

Status	O...	Business Role ID	Business Role Name
Active	<input type="checkbox"/>	D&B_ADMIN_ROLE	D&B_ADMIN_Role

Details: D&B_ADMIN_ROLE-D&B_ADMIN_Role

General Assigned Work Centers and Views

Description:

ADMINISTRATIVE DATA

Created On: 14.08.2014 21:36 UTC
 Created By: Michael Johnes (K80GFLZEIOB)
 Last Changed On: 18.08.2014 20:57 UTC
 Last Changed By: Michael Johnes (K80GFLZEIOB)

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

BUSINESS ROLE: D&B_ADMIN_ROLE - D&B_ADMIN_ROLE

Status: **Active** Obsolete: **No**

Save Close Copy Assigned Users Actions

GENERAL WC **From Business Role** From User ASSIGNMENTS ACCESS RESTRICTIONS UI SWITCHES FIELDS & ACTIONS

*Business Role ID: D&B_ADMIN_ROLE

Business Role Name: D&B_ADMIN_Role

Description:

Scope: Local

Select Scope Manually:

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

Copy Access Rights from User

Select the user from which you want to copy the access rights.

User ID: USSALESOPS

Copy Access Restrictions:

OK Cancel

Assigning the Business Role

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

PRODUCTS LIBRARY SERVICE CONTROL CENTER ACTIVITY PLANNER PARTNERS SURVEYS VISITS

Company
Set up your organizational structure and establish teams
Org Structures
Job Definition

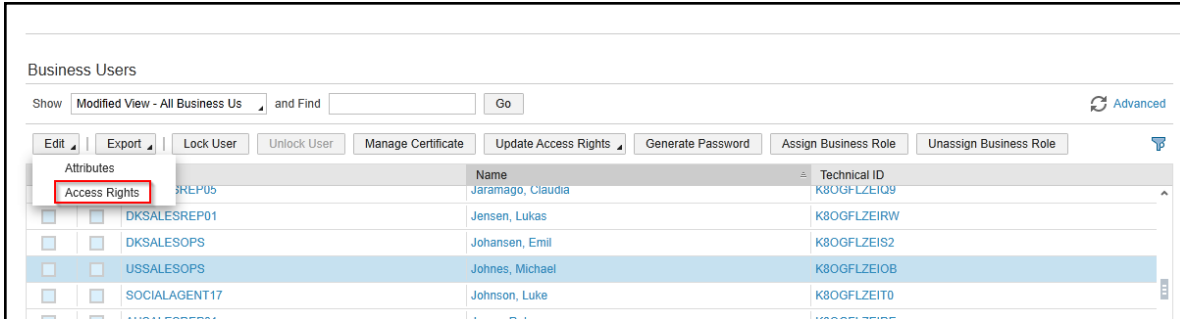
Users
Create and maintain users in the system
Business Roles
Employees
Business Users
Support and Technical Users
Work Center View Restrictions for Local Administrators

Dashboards
Create and configure interactive dashboards
Interactive Dashboards

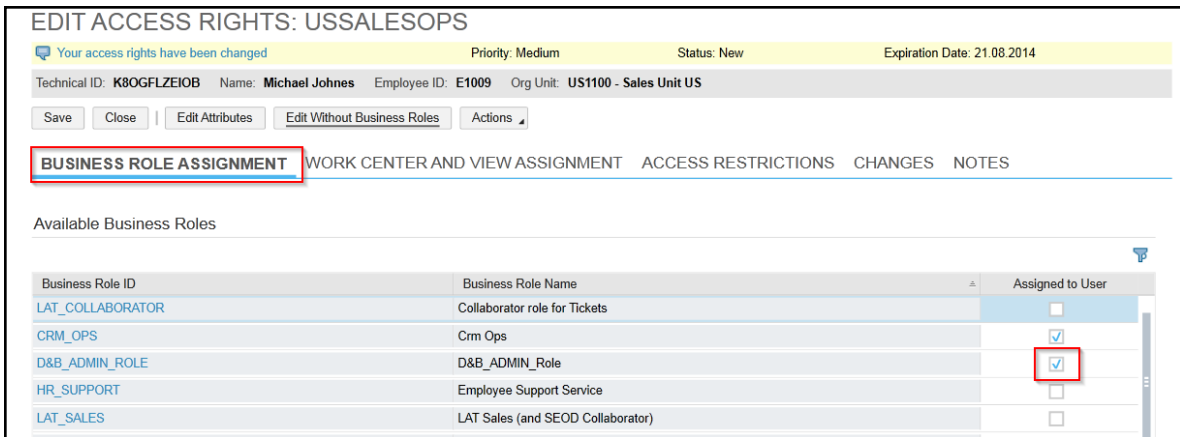
Code List Restrictions
Create and maintain Code List Restrictions
Code List Restrictions

Usage Statistics
Display and interact with usage statistics
Usage Statistics

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 AUTHORIZING** 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 AUTHORIZING** 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 AUTHORIZING** 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>

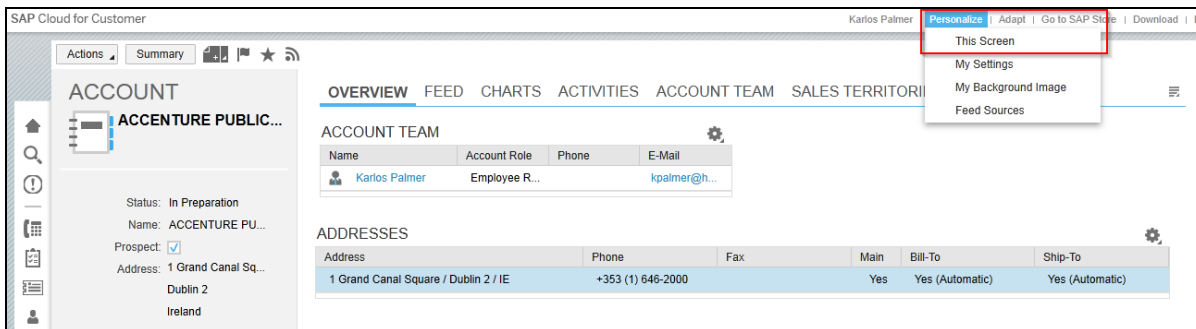
Height
500

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

ACCOUNT
Home Depot Georgia ...

Status: Active
Name: Home Depot Geor...
Prospect:
Address: 4635 Presidential ...
Macon GA 31206
United States
Phone: +1 (404) 676-2121
Fax: +1 (404) 676-2122
Top Level Account: Home Depot
Parent Account: Home Depot
Web Site: www.homede...
Primary Contact: John Miller
Owner: Bob Menson
ABC Classification: A-Account

OVERVIEW FEED BW REPORT SALES DATA CHARTS

ACCOUNT TEAM

Name	Accou...	Phone	E-Mail
Bob M...	Empl...	+1 (6...	USS...
Eddie ...	Acco...	+1 (6...	Admi...
Kate J...	KAM ...	+1 (4...	kjaco...

ADDRESSES

Address	Phone	Fax	Main	Bill-To	Ship-To
4635 Presidential Way / Mac...	+1 (404) 67...	+1 (404) 67...	Yes	Yes (Autom...	Yes (Autom...

Personalize

Save Discard

Screen Layout
Mashups and Web Services

Show: All Mashups New

Name	Visible
Business & Finance	
BW Report Days Sal...	<input checked="" type="checkbox"/>
SALES INFORMATI...	<input checked="" type="checkbox"/>
Tweets by Handle	<input type="checkbox"/>
D&B360	<input type="checkbox"/>
D&B360 Account	<input checked="" type="checkbox"/>
D&B360 Contact	<input type="checkbox"/>
Sales Intelligence for...	<input type="checkbox"/>
Location & Travel	

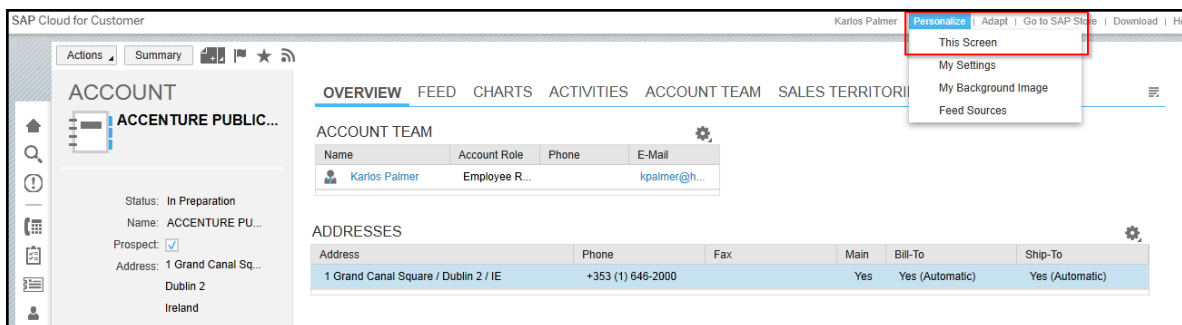
Properties

Type: HTML Mashups
Port Binding: DNB360 Mashup Integration
ID: CM00013
Name: D&B360 Account
Appearance: Embedded Near Untitled
Full Width:

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

The screenshot shows a CRM interface for a contact named John Miller. The main content area displays the 'PERSONAL ADDRESSES' section, which is currently empty with the message 'No records found'. On the right side, a 'Personalize' sidebar is open, showing a list of mashups under the 'Business & Finance' category. The 'D&B360 Contact' mashup is selected and highlighted with a red box. Below the list, the 'Properties' section for the selected mashup is also highlighted with a red box, showing 'Appearance: Embedded Near Unlitt...' and 'Full Width: '. The contact details on the left include: Status: Active, Name: John Miller, Title: Home Depot Georgia #1772, Account: Home Depot..., Job Title: Operations, Function: Operations Manag..., Department: R&D Dept, Business Address: 4635 Presidential..., Macon GA 31206, United States, Phone: +1 6502768366, Fax: John@hd.com, and E-Mail: John@hd.com.

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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