



DUN & BRADSTREET

D&B360

Installation Guide for Microsoft Dynamics CRM

Version 3.1

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About this Guide

Audience and Purpose

This guide is for D&B360 for Microsoft Dynamics CRM 2011 and CRM 2013 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&B360 Training and Education](#).

Conventions

NOTE: Notes mean *reader take note* and provide helpful suggestions.

IMPORTANT: 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&B 360 for Microsoft Dynamics CRM User Guide. For more information about using the Microsoft Dynamics CRM, refer to the CRM documentation.

Chapter 1: Getting Started

Considerations for Administrators	1-1
Specifying the Requirements for Your CRM Environment	1-2

NOTE: For more information about the user interface and other features of the Microsoft Dynamics CRM, refer to the user, getting started, installation, and administrator guides for the CRM.

Considerations for Administrators

This guide includes information for running D&B360 on the MSD CRM 2011 and on the MSD CRM 2013. Any instructions or illustrations that differ between the two CRMs are noted, and content for both CRMs is provided.

You will be working within the Microsoft Dynamics CRM 2011 or CRM 2013 (On Demand or On Premise). Take time to familiarize yourself with the operations of your Microsoft Dynamics CRM environment and the location of the documentation. This information will help you successfully complete your tasks as a D&B360 Administrator.

If you are an existing D&B360 administrator user with Batch enabled, your entitlements carry over. You do need to set them up again after you have completed the installation of D&B360 v3.0.

For instructions on configuring your Informatica Cloud account, see "Registering Your Informatica Cloud Account for On Demand CRMs" on page 4-2, or see "Configuring the Secure Agent for an On-Premise Installation" on page 4-12.

After you install v3.0, complete the following steps:

1. In the **Home** page window, click the **Settings** tab.
2. Click the **Batch** tab.

3. In the **Batch Management** window, click **Batch Schedule**.
4. In the **Batch Credentials** window:

In the **User** and **Password** fields, type the user name and password that you used to log on to your Informatica Cloud account.

In the **Connection Name** field, type the connection name provided by Informatica Cloud.

5. Contact Informatica Support (support@informatica.com) if you have any problems or to request deletion of the existing Org ID. All users that belong to this Org ID will also be deleted.

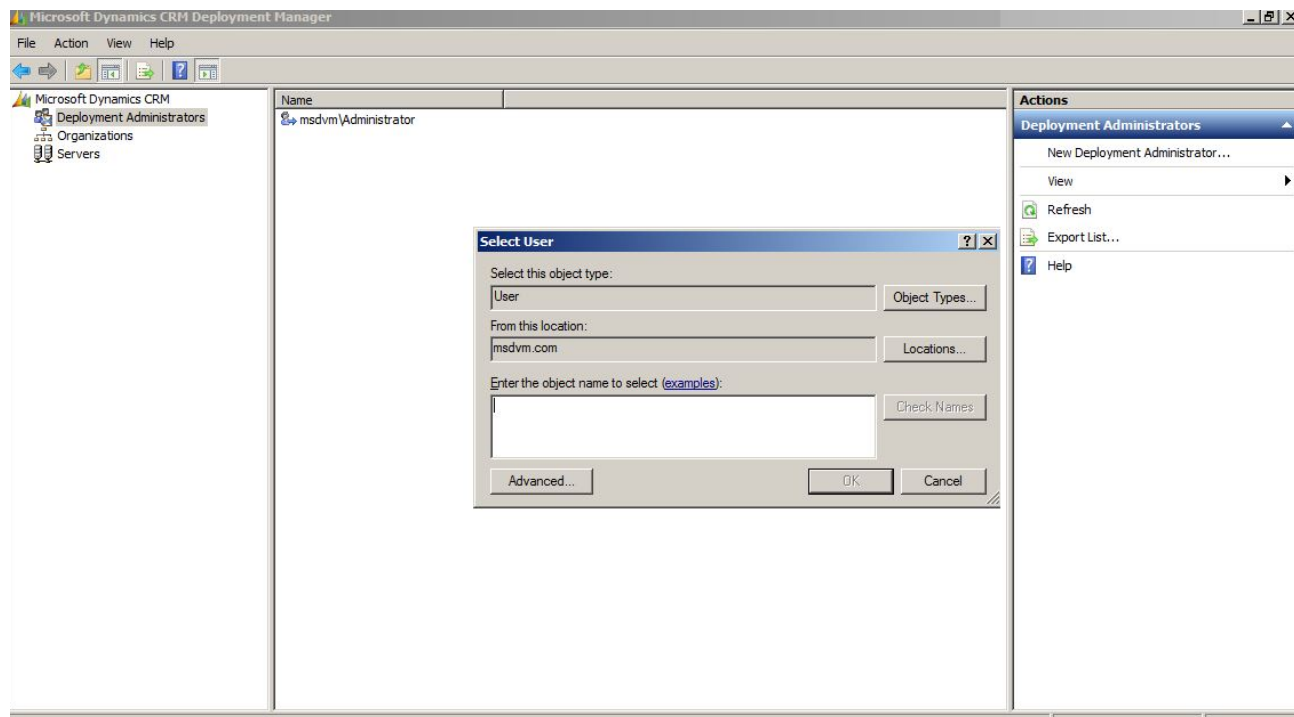
NOTE: During auto-registration, the Org ID will most likely be different from your previous Org ID. Org IDs are generated automatically for all registrations.

For instructions on how to configure your batch credentials after D&B360 is installed, see "Managing Batches & Installing the Informatica Cloud Secure Agent" on page 4-1.

Pre-Requisite

To prepare for when a user might want to install or upgrade D&B360, as the CRM deployment administrator, you need to add any users who will run the installation or upgrade as deployment administrators.

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



Specifying the Requirements for Your CRM Environment

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

Hardware Requirements

Microsoft Dynamics CRM Server

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

Component	Minimum	Recommended
Processor	x64 architecture or compatible dual core 1.5 GHz processor	Quad-core x64 architecture 2 GHz CPU or higher such as AMD Opteron or Intel Xeon systems
Memory	2 GB of RAM	8 GB or more of RAM
Hard Disk	10 GB of available hard disk space	40 GB or more of available hard disk space

NOTE: Computers with more than 16 GB of RAM require more disk space for paging, hibernation, and dump files.

NOTE: Computers with more than 16 GB of RAM require more disk space for paging, hibernation, and dump files.

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

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

Microsoft SQL Server for Microsoft Dynamics Server

Microsoft SQL Server database engine and Microsoft SQL Server Reporting Services are required to install and run on premises versions of Microsoft Dynamics CRM 2011 or CRM 2013. The following table lists the minimum and recommended hardware requirements for Microsoft SQL Server. These requirements assume that additional components such as Microsoft Dynamics CRM Server, Microsoft SQL Server Reporting Services, SharePoint, or Microsoft Exchange Server are not installed or running on the system.

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

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

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

Other Requirements

Client Operating Systems	Windows 7, Windows Server 2008 R2, Windows Server 2008 Service Pack 2, Windows Vista Service Pack 2
Browser	Internet Explorer 9 and Chrome
Server Operating Systems	<ul style="list-style-type: none"> On Premise Only: Microsoft Windows Server 2008 Standard x64 SP2 or later Microsoft Windows Server 2008 R2
Databases	<ul style="list-style-type: none"> On Premise Only: Microsoft SQL Server 2008 Standard x64 SP1 or later Microsoft SQL Server 2008 R2
MS Dynamics Configuration	<p>The Microsoft Dynamics CRM Deployment Manager allows administrators to set the web addresses for the:</p> <ul style="list-style-type: none"> Web Application Server Organization Web Service Discovery Web Service Deployment Web Service <p>For D&B360, these services need to be set to the same URL:</p> <ul style="list-style-type: none"> All machines and users that will access the MSD CRM should be able to resolve this URL. As a best practice, D&B recommends that all of the URLs in the deployment manager be the same as the URL that users will use to access the CRM.

On Premise Only

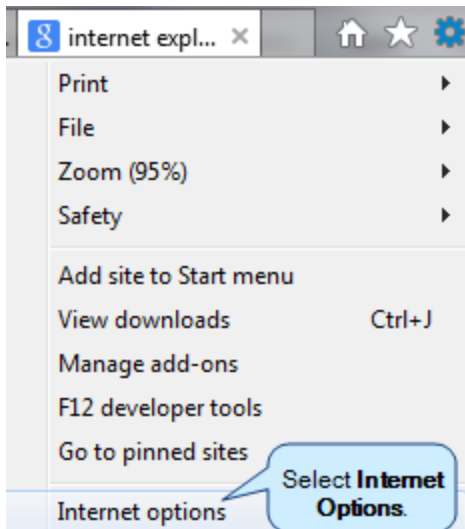
Access to <https://dnb360agent.hoovers.com> required. You must add this URL to your Trusted Sites. For steps on how to do this, "Adding the dnb360agent to Your IE Browser Trusted Sites" below.

Server Operating Systems

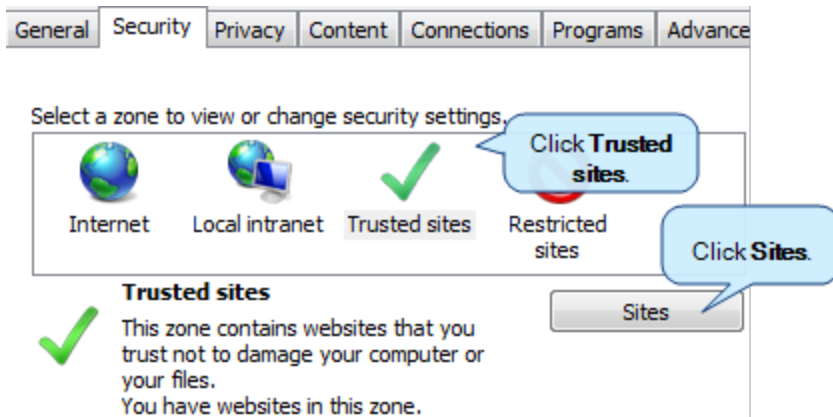
Microsoft Windows server 2008 (Standard, Enterprise, Datacenter) x64 SP2 or later; Microsoft Windows Web Server 2008 x64 SP2 or later; Microsoft Windows Small Business Server 2008 (Standard, Premium) x64 or later*

Adding the dnb360agent to Your IE Browser Trusted Sites

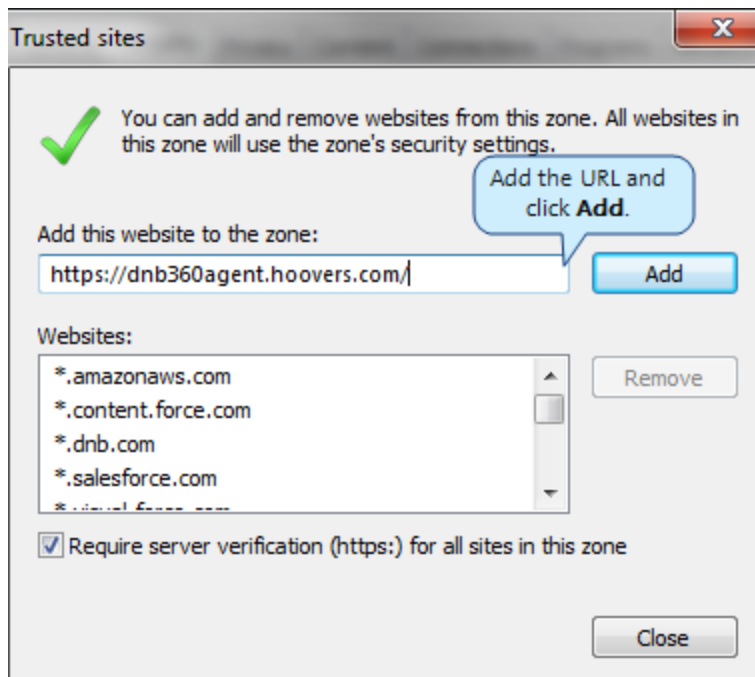
1. In the **Internet Explorer** browser window, click the **Tools** menu and select **Internet Options**.



2. In the **Internet Options** window, select the **Security** tab, click **Trusted Sites**, and then click **Sites**.



3. In the **Trusted Sites** window, **Add this website to the zone** field, enter or copy and paste <https://dnb360agent.hoovers.com/>. If you are installing to a Stand Alone agent, use the URL path to the Stand Alone Server.
4. Click **Add**, then **Close**.



Other Applications that Must Reside on Your Installation Computer

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

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

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

Chapter 2: Installing D&B360

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Starting the Installer

NOTE: We recommend that you create a dedicated CRM user to install D&B360. This user should have these CRM roles: For On Demand (Windows Live and Office 365) the user who installs D&B360 must be assigned the roles of System Administrator and Delegate. For On Premise and CRM Internet Facing Deployment (IFD), the user who installs D&B360 must be assigned the roles of System Administrator, Delegate, and Deployment Administrator.

The steps for installing D&B360 are the same for CRM 2011 and CRM 2013. The only difference is that for CRM 2013, the installation process windows display the name: D&B360 for Microsoft Dynamics CRM Orion.

Complete the following steps if you are doing any of the following:

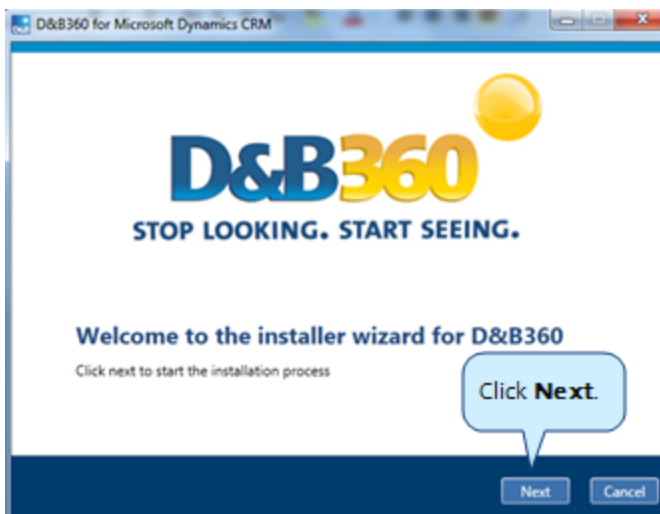
- Installing D&B360 for the first time
 - Upgrading D&B360 from the previous version
 - Registering your agent
 - Uninstalling the application
1. Download the installer from <https://dnbinsight.dnb.com/RegisterforDNB360/mainlaunchpage.htm>, and extract the file to your local directory.

Documents library
D&B360 for Microsoft Dynamics CRM 3.0

Arrange by:

Name	Date modified	Type	Size
D&B360 for Microsoft Dynamics CRM 3.0	9/9/2013 2:55 PM	Application	4,462 KB
360Installer	9/9/2013 2:55 PM	Application	564 KB
DnB360.Utilities.dll	9/9/2013 2:55 PM	Application extension	7 KB
MSDDynamics.dll	9/9/2013 2:55 PM	Application extension	28 KB
REStUtility.dll	9/9/2013 2:55 PM	Application extension	7 KB
360Installer.exe	9/5/2013 12:05 PM	CONFIG File	2 KB
D&B360 for Microsoft Dynamics CRM 3.0.exe	9/5/2013 12:05 PM	CONFIG File	2 KB
microsoft.crm.sdk.dll	1/10/2012 10:22 PM	Application extension	367 KB
microsoft.crm.sdk.proxy.dll	1/10/2012 10:21 PM	Application extension	184 KB

2. Double-click D&B360 for Microsoft Dynamics 3.0 to launch the installer.
3. In the D&B360 for Microsoft Dynamics CRM Welcome window , click Next.



Completing the CRM Connection Data

1. In the **CRM Connection Data** window, complete this information. See the illustration that follows.

In the **Connect type** field, select one of the following: **Microsoft Dynamics CRM On Premise**, **Microsoft Dynamics CRM On Demand**, **Microsoft Dynamics CRM Office 365**, or **Microsoft Dynamics CRM IFD**.

In the **User Name** and **Password** fields, type your user name and password.

- For CRM On Premise and for CRM Internet Facing Deployment (IFD), type the credentials that you use to access Microsoft Dynamic, for example,

yourdomain\yourusername.

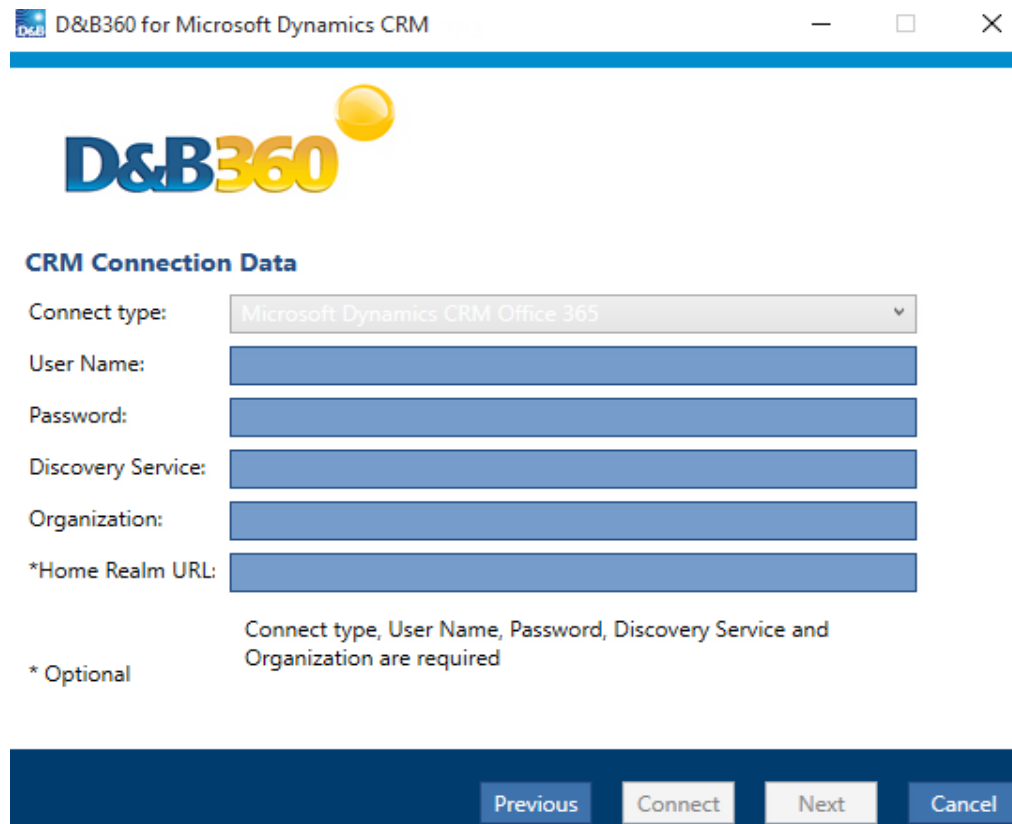
- For CRM On Demand (also called CRM Online or CRM Live), type the credentials that you use to access Microsoft Dynamics, for example, *yourusername@yourorganization.com*. – or *youremail@email.com*.
- For CRM Office 365, type the credentials that you use to access Microsoft Dynamic, for example, *username@organizationname.onmicrosoft.com*.

Enter the **Discover Service** for your CRM. Find the Discovery Service on your CRM by accessing Menu Settings> Customizations>Developer Resources.

In the **Organization** field, type the name of the CRM organization you want to install:

- For CRM On Premise deployments, get the organization name from the URL, for example, *http://servername/orgname*.
- For CRM On Demand, the organization name would be, for example, *https://yourorganization.crm.dynamics.com*.
- For CRM IFD, the organization name would be, for example, *https://organizationname.domain.com*.

Optionally, enter the **Home Realm URL** if your instance requires a Home Realm URL to establish the connection. Home Realm URLs apply when implementing ADFS scenarios.



D&B360 for Microsoft Dynamics CRM

CRM Connection Data

Connect type: Microsoft Dynamics CRM Office 365

User Name:

Password:

Discovery Service:

Organization:

*Home Realm URL:

Connect type, User Name, Password, Discovery Service and Organization are required

* Optional

Previous Connect Next Cancel

2. After you finish completing all fields, click **Connect** to establish CRM connectivity.

The installer checks CRM connectivity.

If the installer is unable to make the connection, an error message that the process was unable to establish a session with the CRM displays.

3. Retype your credentials, and then click **Connect** again.
4. After the installer successfully makes the connection, in the **CRM Connection Data** window, click **Next**.

Installing for the First Time or Upgrading Your Software

If you are installing D&B360 for the first time, or if you are upgrading from a previous version, complete these steps. If you are registering an agent, "Performing the Register Agent Option" on page 2-12. If you are uninstalling your software, see "Uninstalling D&B360" on page 2-15.

NOTE: Before you upgrade D&B360, to correctly see the new D&B360 user interface, your CRM user profile must include a D&B360 admin role. For a first time installation, after you have completed the installation steps, you need to add yourself as a D&B360 admin through the CRM.

1. In the **D&B360 for Microsoft Dynamics CRM** window that opens after you completed the CRM Connection steps:

In the **Installer** options area, click to select **Install / Upgrade D&B360**.

In the **User Name** field, enter the user name that D&B provided to you.

In the **Password** field, enter the password that D&B provided to you.

In the **Confirm Password** field, re-enter the password.

In the **Agent URL** field, enter the URL path that D&B provided to you. If you are installing to a Stand Alone agent, use the URL path to the Stand Alone Server.

If you are installing D&B360 for the first time, this window will display only the option to Install / Upgrade D&B360.

D&B360 for Microsoft Dynamics CRM

D&B360

Installer options

☒ Install / Upgrade D&B360
☐ Register Agent D&B360
☐ Uninstall D&B360

D&B360 Agent

User Name:
Password:
Confirm Password:
Agent URL:

User Name, Password, Confirm Password and Agent URL are required.

Previous Next Cancel

NOTE: To avoid problems, verify your input before you click Next. Make sure you have typed and spelled everything correctly, and that you've not added any extra spaces at the beginning or end of the input.

2. Click Next.

D&B360 for Microsoft Dynamics CRM

D&B360

Installer options

☒ Install / Upgrade D&B360

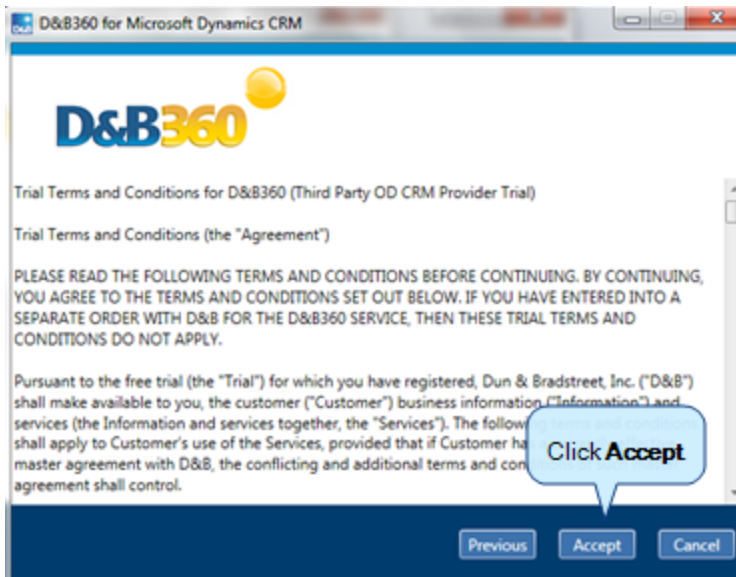
D&B360 Agent

User Name:
Password:
Confirm Password:
Agent URL:

Click Next

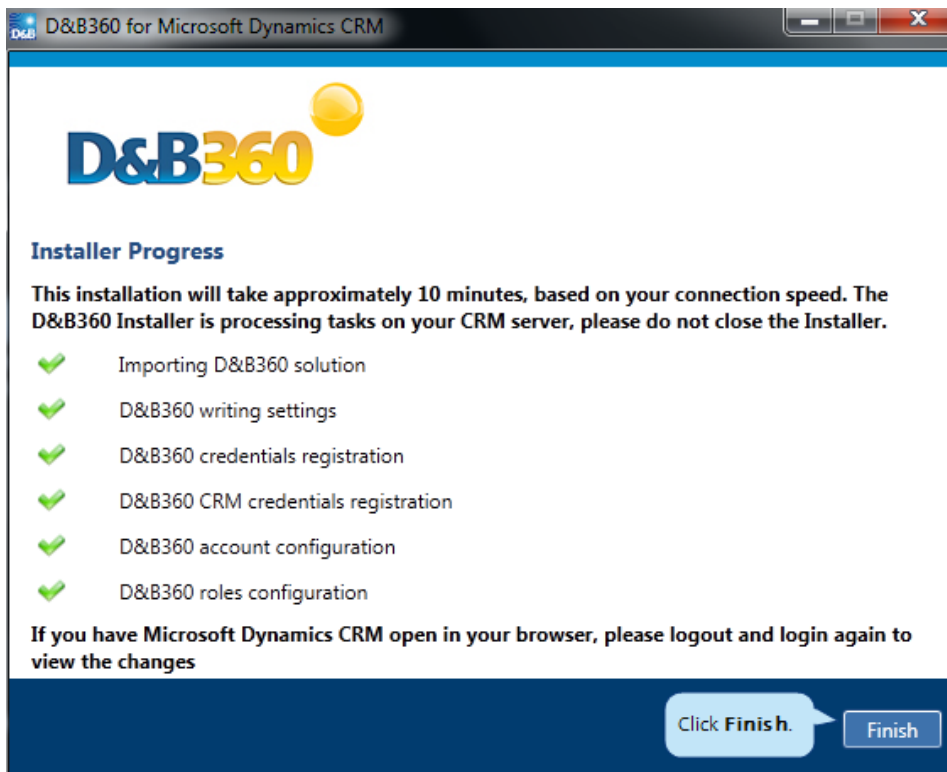
Previous Next Cancel

3. In the **Terms and Conditions** window, click **Accept** to agree to the Terms and Conditions.



The D&B360 installation process begins. As the installation process runs, the **Installer Progress** window displays check marks for each item in the installation list they are completed.

4. After the installation is completed, click **Finish**.



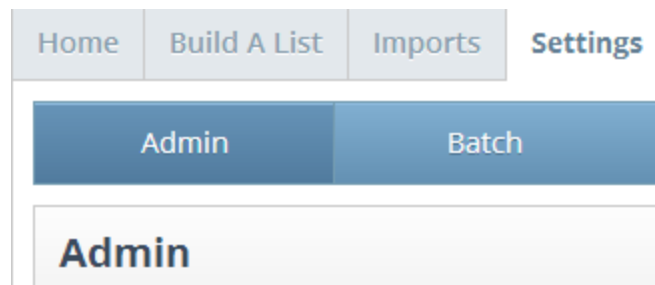
5. If the CRM is open in a browser window, for the changes to take effect, you must log out and log on again.

You might need to wait a few minutes for the changes to take effect.

NOTE: If you are upgrading from a previous version, see "Upgrading from a Previous Version" on page 2-10.

Setting the Country ISO Code

1. From the **Home** page window, click **Settings**, which opens to the **Admin** tab.



2. In the **Configuration** area, **Country** field, selected **Description** or **ISO Code**. This specifies whether countries are imported into the CRM as a full description or a 2-digit ISO code.



3. Click **Save**.

Customizing the Account Record to Include D&B360+

1. In the MSD CRM window main menu, select **Settings**, and then **Customizations**.
2. Click **Customize the System**.

Customization

Which feature would you like to work with?



Customize the System

Create, modify, or delete components of your organization. Components include entities, fields, relationships, forms, reports, processes, and others.

Click **Customize the System**.



Publishers

Create, modify or delete a solution publisher.



Solutions

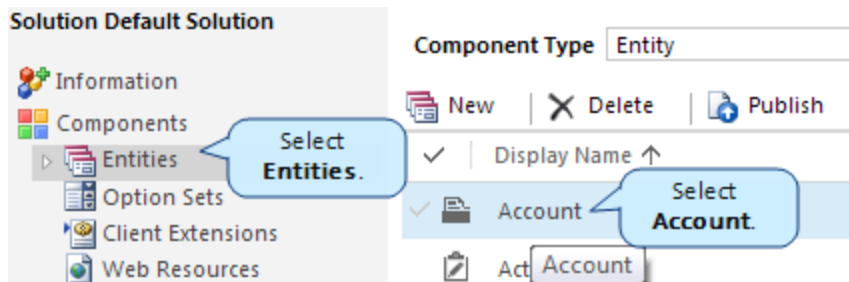
Create, modify, export, or import a managed or unmanaged solution.



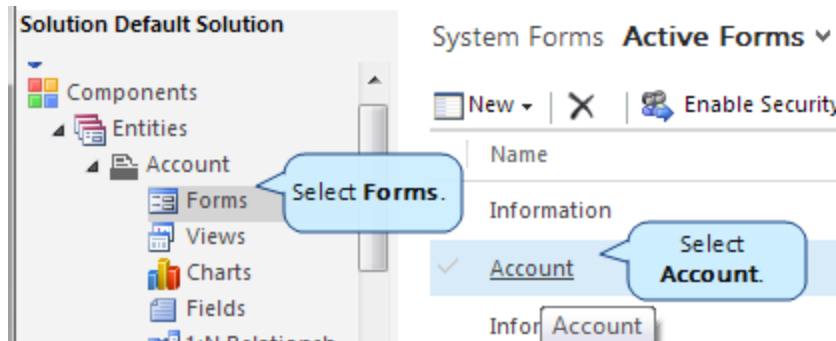
Developer Resources

View information or download files that help you develop applications and extensions for Microsoft Dynamics CRM.

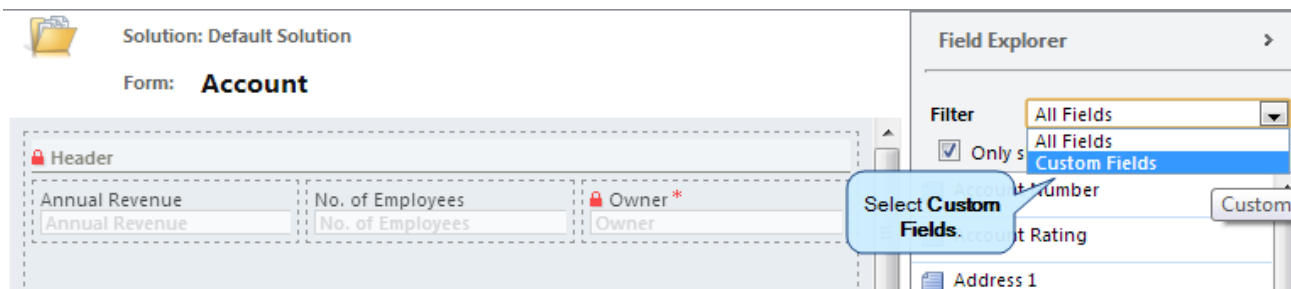
3. In the Solution Default Solution list, select **Entities**, and then **Account**.



4. Select **Forms**, then **Account**.



5. In the Field Explorer area, **Filter** field, select **Custom Fields**.



6. Use your cursor to select and drag **D&B Company** from the **Filter** list to the area on the window layout where you want this to display on the user interface.

Solution: Default Solution

Form: **Account**

Header

Annual Revenue	No. of Employees	Owner *
Annual Revenue	No. of Employees	Owner

Select **D&B Company**.

Summary

ACCOUNT INFORMATION		SOCIAL PANE	Primary Contact
Account Name *	Account Name		Primary Contact
Phone	Main Phone		
Fax	Fax		
Web Site	Website		
Ticker Symbol	Ticker Symbol		
		CONTACTS	CONTACTS

Drag **D&B Company** where you want to display on the UI.

Field Explorer

Filter: Custom Fields

☒ Only show unused fields

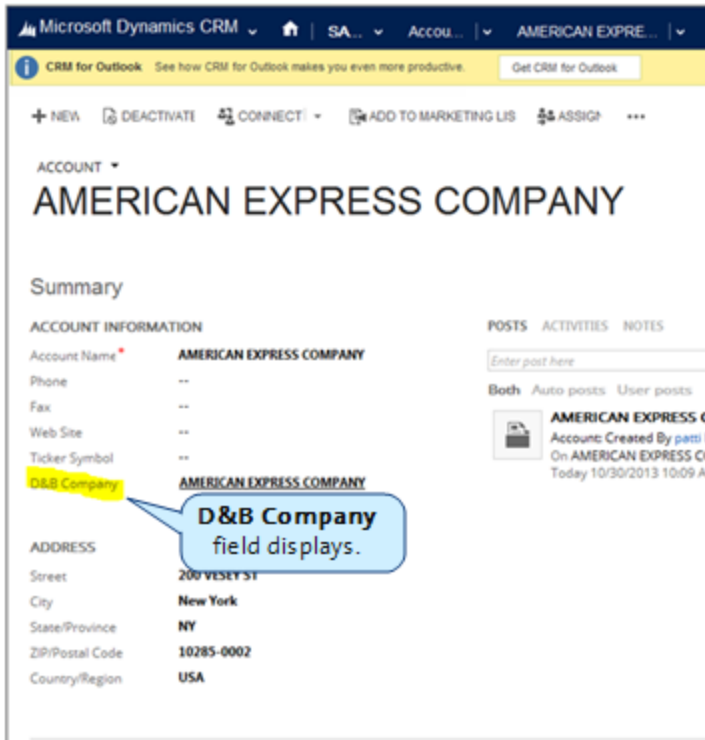
- D&B Company
- D&B Financial
- DNB Initial Association Date
- DNB Initial Association Status
- Update Available

Summary

ACCOUNT INFORMATION	
Account Name *	Account Name
Phone	Main Phone
Fax	Fax
Web Site	Website
Ticker Symbol	Ticker Symbol
D&B Company	D&B Company

7. Click **Save** and close the form window.

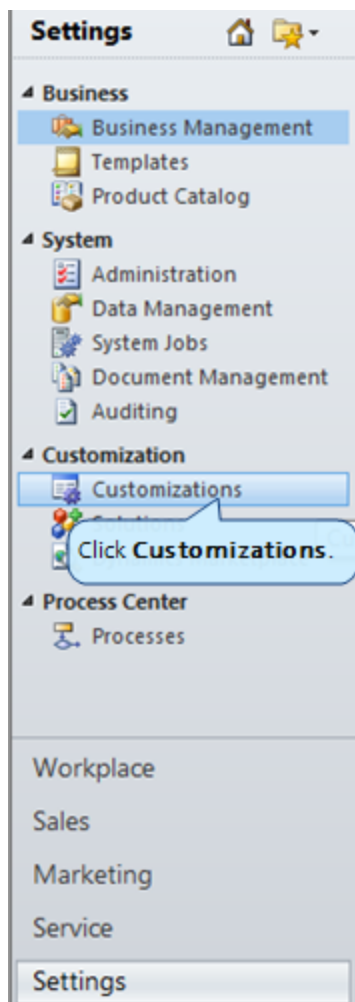
When you select an account in the CRM window, the **D&B Company** field displays.



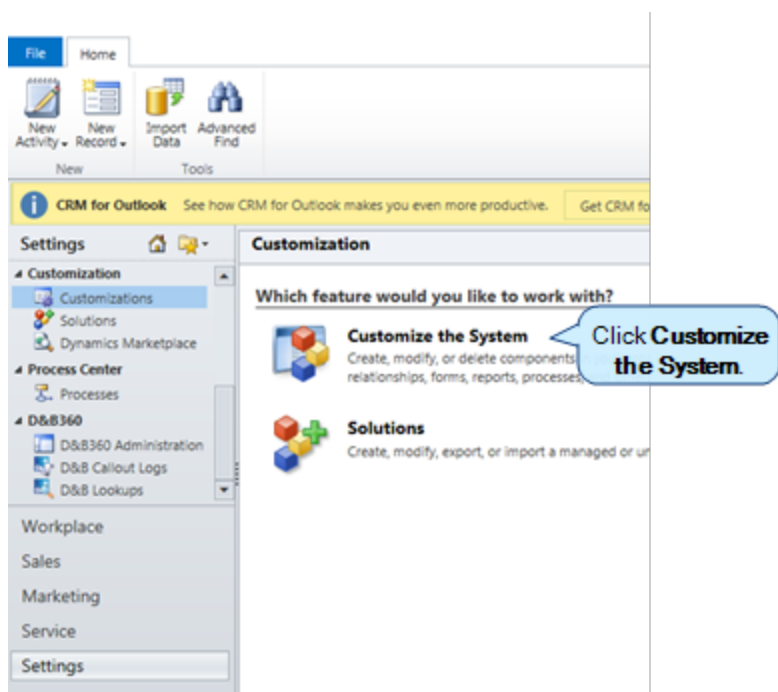
Upgrading from a Previous Version

To complete your upgrade from a previous version, you need to deactivate the plug-ins on the CRM.

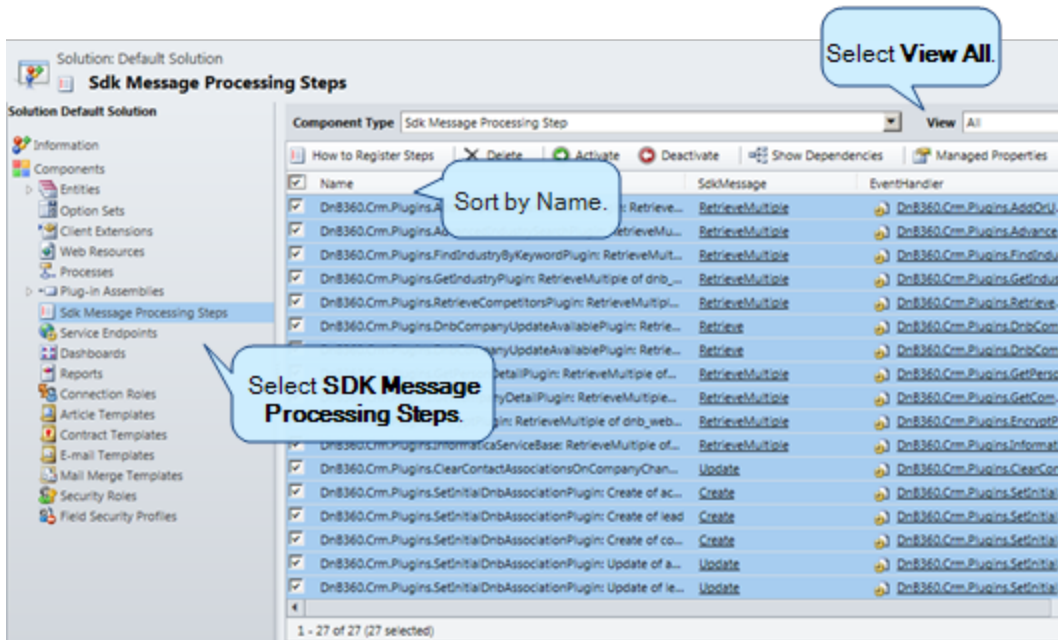
1. On your CRM browser window, click **Settings**.
2. In the **Settings** , **Customization** area, click **Customizations**.



3. In the Customization window, click **Customize the System**.



4. In the Components list on the left, **Plug-in Assemblies** list, select **SDK Message Processing Steps**.
5. In the **View** menu on the top right, select **All**.
6. In the **SDK Message Processing Steps**, click **Name** to sort the results.

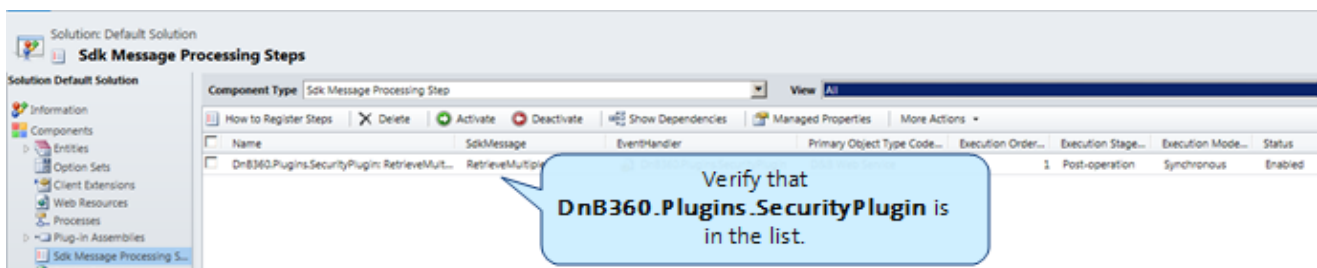


7. From the **Name** list, look for and select all steps that begin with **DnB360.CRM.Plugins** except for the **DnB360.Plugins.SecurityPlugin**.

IMPORTANT: Do not select **DnB360.Plugins.SecurityPlugin**. This plug-in is for v3.0 and must remain in the list.

There are 27 total plugins that start with **DnB360.CRM.Plugins**. You should select 27.

8. Click **Deactivate**.
9. Verify that the only remaining active plugin is **DnB360.Plugins.SecurityPlugin**.



Performing the Register Agent Option

The Register Agent D&B360 option updates the following values, without installing the solution again:

- D&B360 Writing Settings
- D&B360 Credential Registration (MaxCV)
- D&B360 CRM Credentials Registration
- D&B360 Account Configuration
- D&B360 Role Configuration

After D&B360 has been installed on your CRM, these options display on the Installer options window.

- Install/Upgrade D&B360
 - Register Agent D&B360
 - Uninstall D&B360
1. In the D&B360 for Microsoft Dynamics CRM window **Installer options** area, select **Register Agent D&B360**.
 2. In the D&B360 for Microsoft Dynamics CRM window **D&B360 Agent** area:

In the **User Name** field, type or enter the user name that D&B provided to you.

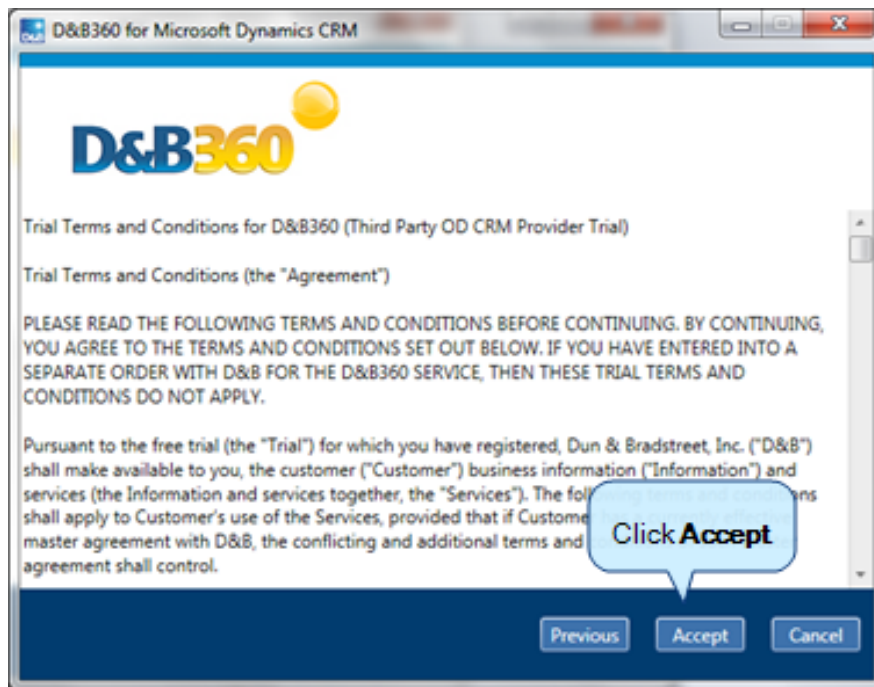
In the **Password** field, type or enter the password that D&B provided to you.

In the **Confirm Password** field, retype the password.

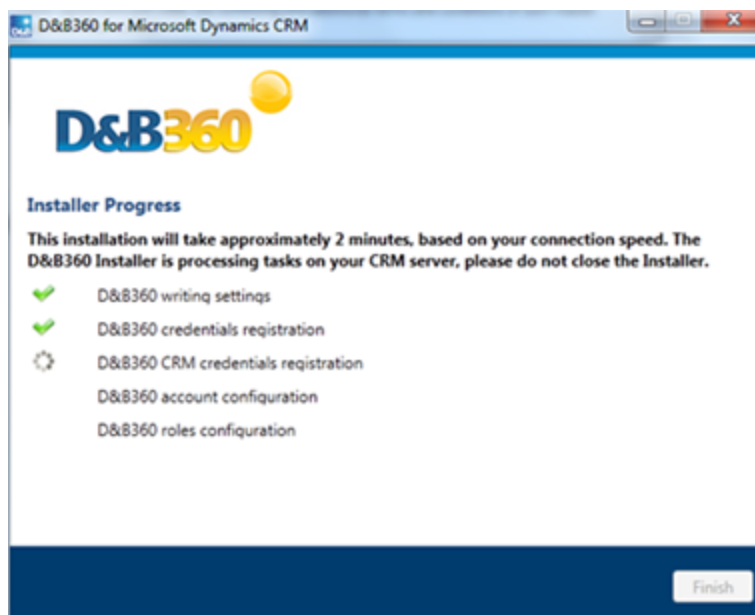
In the **Agent URL** field, type or enter the URL path that D&B provided to you.

3. In the **Installer Options / D&B360 Agent** window, click **Next**.

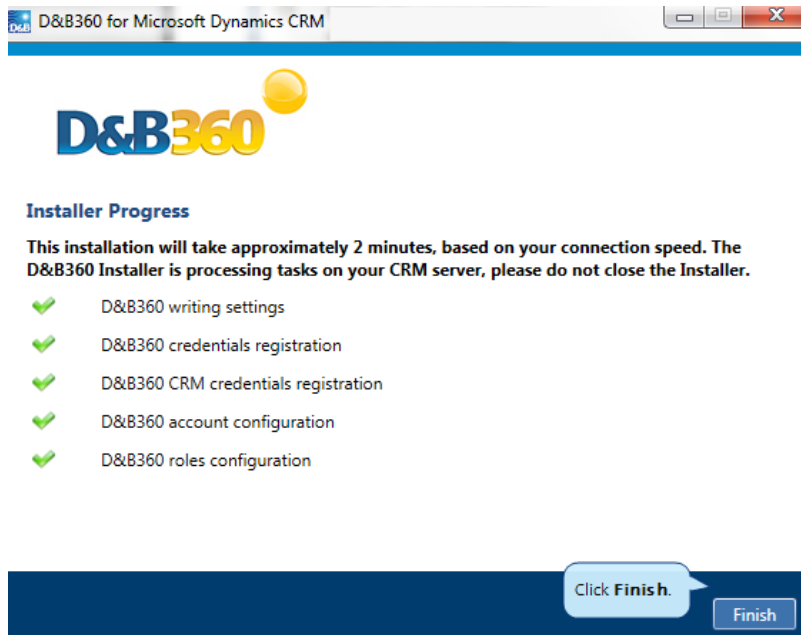
4. In the **Trial Terms and Conditions** window, click **Accept**.



The Register Agent D&B360 Installer process runs. The **Installer Progress** window displays check marks for each item in the installation list as they are completed.



5. After the installation is complete, in the **Installer Progress** window, click **Finish**.



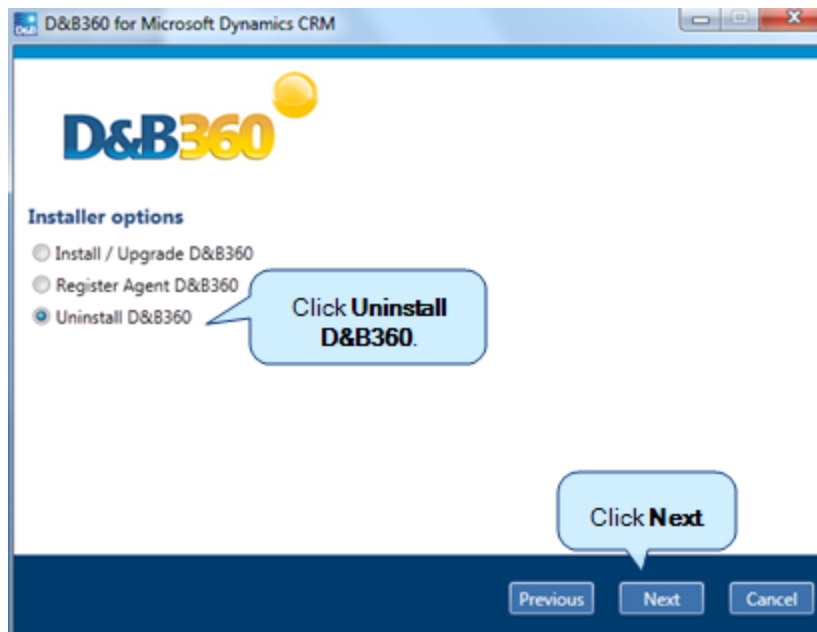
6. If the CRM is open in a browser window, for the changes to take effect, you must log out and log on again.

Uninstalling D&B360

1. In the **Installer Options** window, click **Uninstall D&B360**.

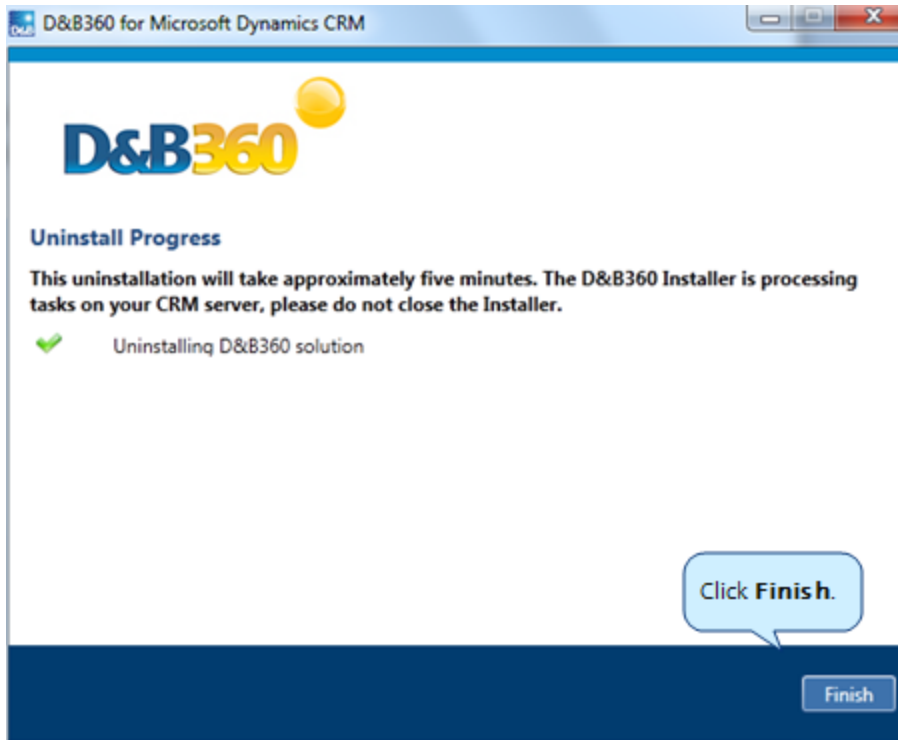
After you click **Uninstall D&B360**, the D&B360 Agent area does not display on the window.

2. Click **Next**.



The D&B360 Uninstall process displays a check mark if the uninstall process was successful, or an X if it failed. The Finish button displays.

3. Click **Finish**.



4. If the CRM is open in a browser window, for the changes to take effect, you must log out and log on again.

You need to wait a few minutes for the uninstall process to complete.

For troubleshooting help when uninstalling D&B360, see "Resolving Installation Issues" on page 5-1.

Resetting Your Credentials

As an administrator user, if your CRM or API credentials change after you have installed D&B360 for an ORG, you can change the credentials in the D&B360 user interface. You don't need to reinstall the software.

NOTE: For this release, resetting your D&B Credentials would be unnecessary.

1. From the **Home** page window, select **Settings** and then **Admin**.
2. To reset your credentials, click **CRM Credentials**, or **API Credentials**.

Contact Customer Support for help with this step if you need to.

Home Build A List Imports Settings

Admin Batch Data Management Role Configurations Terms & Conditions About

Admin

Configuration

Country Description

Click to reset your credentials.

Edition: Tier 3 Trial Indicator: True
Entitlement Type: Custom Expiry Date: 12/31/14

CRM Credentials API Credentials D&B Credentials

3. In the **CRM Credentials** window, type or enter your **User** information and click **Change Password** to reset your password.
4. Click **Save**.

Click Save. Save Cancel

Configure Credentials

CRM Connection Credentials

User MSDDNB360Admin

Hide Password

Password *****

Confirm Password

Complete these fields.

5. In the **API Credentials** window, type or enter your **User** information and click **Change Password** to reset your password.

Click **Save**.

Save

Cancel

Configure Credentials

API Credentials

User

Hide Password

Password

Confirm Password

Complete these fields.

Accessing the Installer to Upgrade D&B 360 and MSD CRM

Access the D&B360 Registration Site and click to select the installation package you want to install.

NOTE: Microsoft has to upgrade your CRM from 2011 to 2013 before you can install a D&B360 package for CRM 2013.

D&B360 Installation Packages

D&B360 Solutions

D&B360 is available for the following CRM platforms. Select your platform below:

D&B360 for Microsoft Dynamics CRM 2011 On-Demand

D&B360 for Microsoft Dynamics CRM 2011 On-Premise

D&B360 for Microsoft Dynamics CRM 2013 On-Demand

D&B360 for Microsoft Dynamics CRM 2013 On-Premise

Need Help? [Customer Support](#) | [Admin Training](#) | [User Training](#)

In the **D&B360 for Microsoft Dynamics CRM** window that you chose, click **Download** to install the installation zip file to your computer.

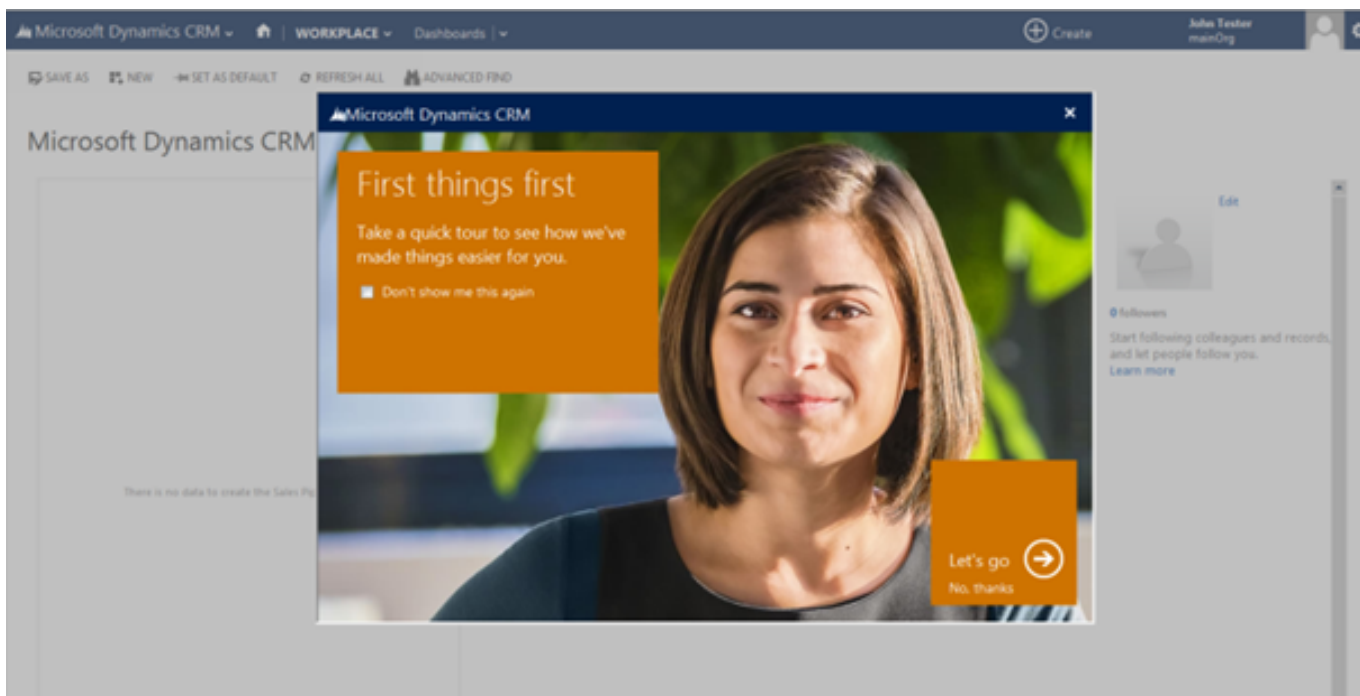
- If you are a new D&B360 customer and want to install D&B360 v3.0 to run on MSD CRM 2011, use the 2011 installer and see "Installing D&B360" on page 2-1.
- If you are an existing D&B360 2.3 customer and you want to upgrade to D&B360 v3.0 and continue to use MSD CRM 2011, use the 2011 Installer. For more information, see "Installing D&B360" on page 2-1.
- If you are a new D&B360 customer, have just installed D&B360 v3.0 to run on MSD CRM 2011, and you want to use MSD CRM 2013, after Microsoft has completed your upgrade to CRM 2013, you would use the 2013 Installer. For more information, see "Upgrading to MSD CRM 2013" on page 2-19.
- If you are already using MSD CRM 2013, and want to install D&B360 v3.0 for the first time, use the 2013 installer and "Installing D&B360" on page 2-1.

Upgrading to MSD CRM 2013

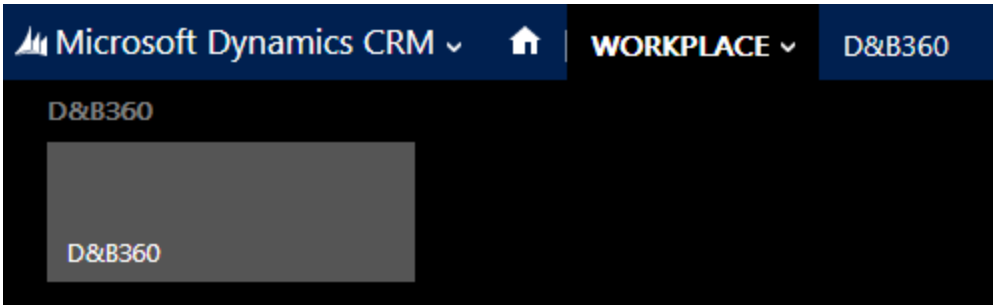
After Microsoft has completed your upgrade to CRM 2013, you can then run the D&B360 v3.0 2013 installer.

- Run the 2013 Installer using the Install Upgrade option.

After the application has finished installing, your CRM window displays as follows:



D&B360 will display in the Workplace. Verify that CRM 2013 has successfully installed before you proceed.



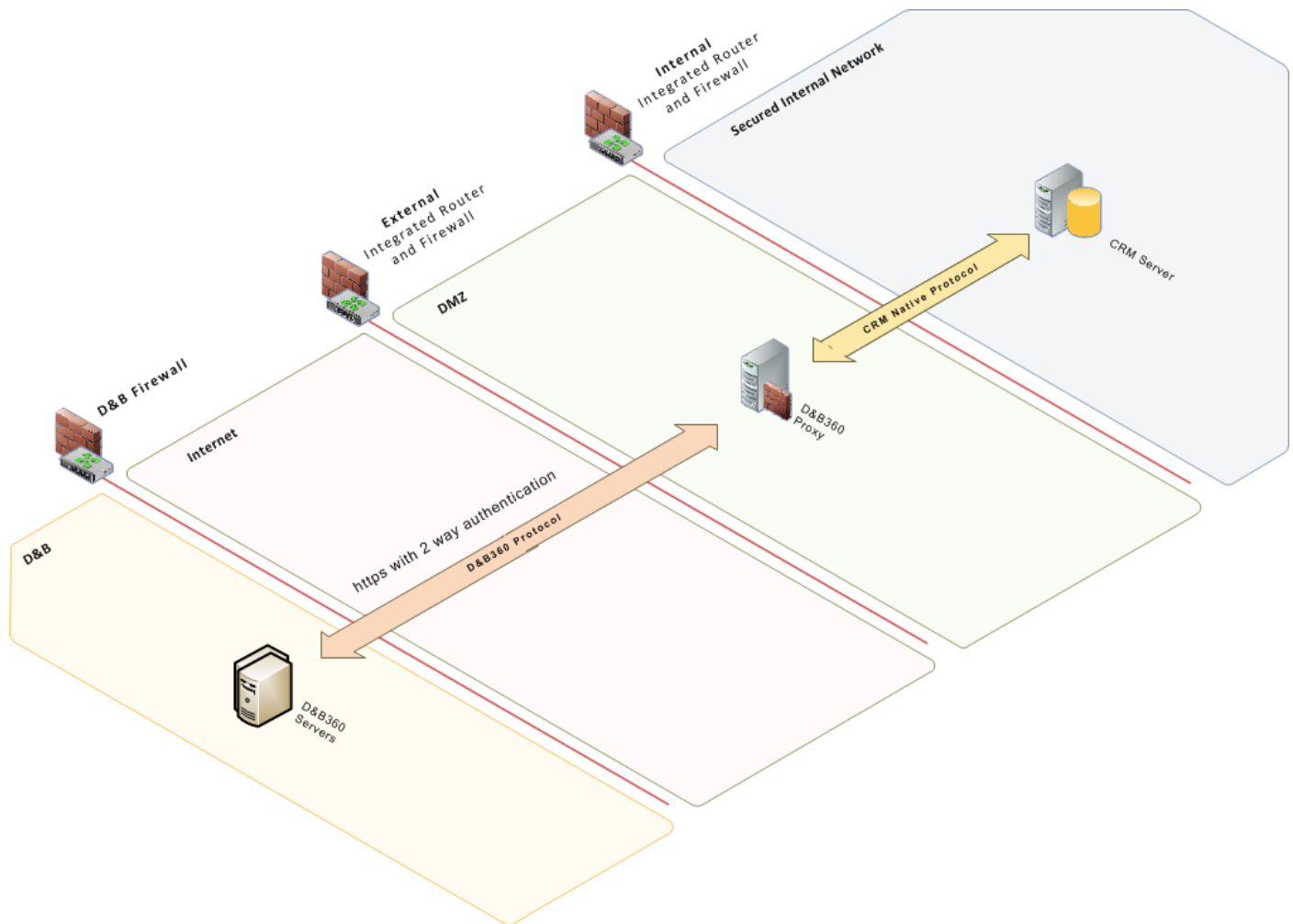
D&B360 Proxy Installation for MSD

To get full advantage of D&B360, our Cloud servers must communicate back to your CRM. We need this when creating Accounts for instance or when checking for duplicates as an example. This is not an issue if your CRM is being hosted on the Cloud (like when using Microsoft Dynamics On Demand), but it poses a challenge if your CRM is On Premise (e.g., Microsoft Dynamics On Premise).

The D&B360 Proxy bridges this gap by enabling a secure communication between our Cloud Servers and your CRM instance, enabling you to get full access to the D&B360 functionality without worrying about your data being at risk.

D&B360 Proxy Architecture

Whenever one of our Cloud Servers (D&B360 Servers) need to connect to your CRM Server, they will execute an https call to the D&B360 Proxy, which will translate that to the native protocol used by the CRM Server:

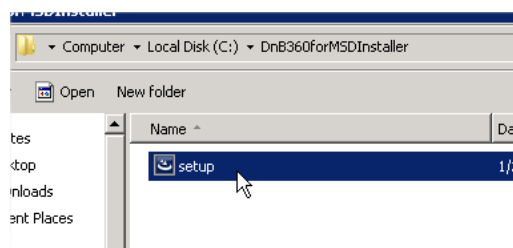


The D&B360 Proxy is prepared to accept and understand a set of predefined requests from the D&B360 Cloud Servers, and will translate them to the language your CRM understands. We are using Microsoft Dynamics SDK and Microsoft's Identity Foundation to natively communicate to Microsoft Dynamics Instances.

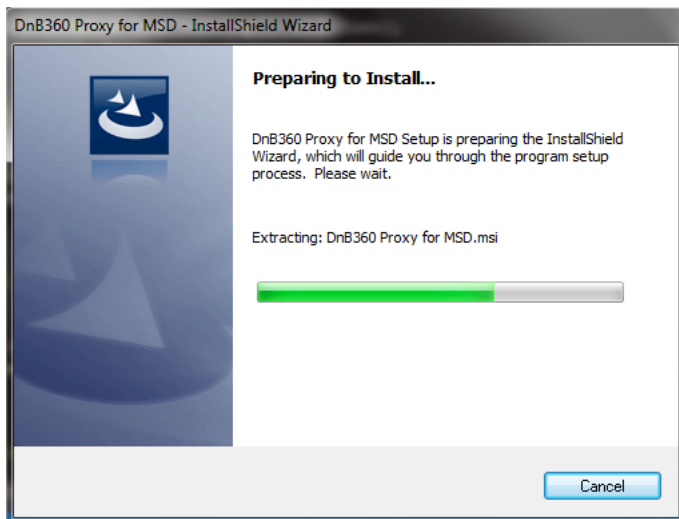
We have added one additional layer of security by using two-way authentication. We want the D&B360 Proxy to allow only traffic coming from one of our Cloud servers and, on the other hand, we want to be certain we are actually talking to a D&B360 Proxy and no one else.

Installing the D&B360 Proxy

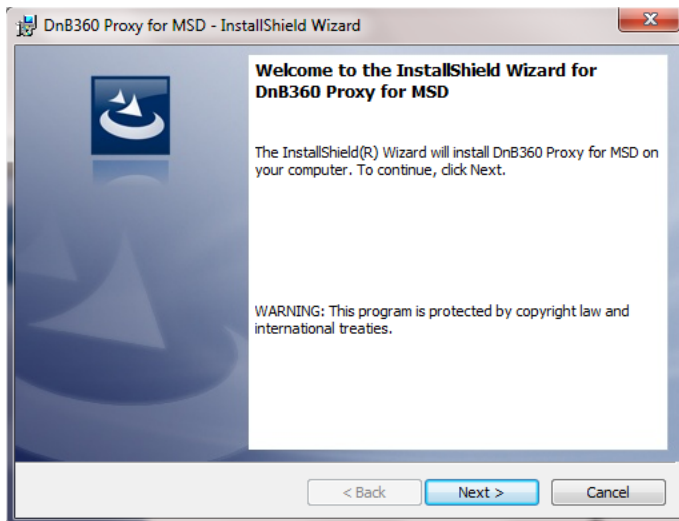
Double-click the setup executable you downloaded from the registration site:



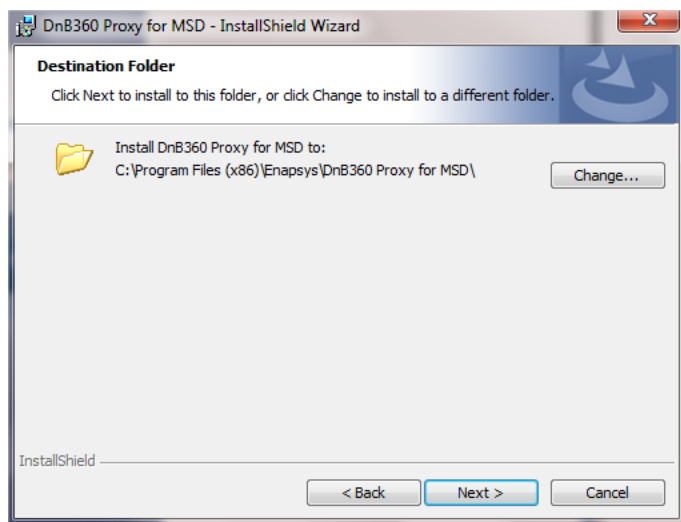
This will open up the InstallShield Wizard that will guide you through the installation process:



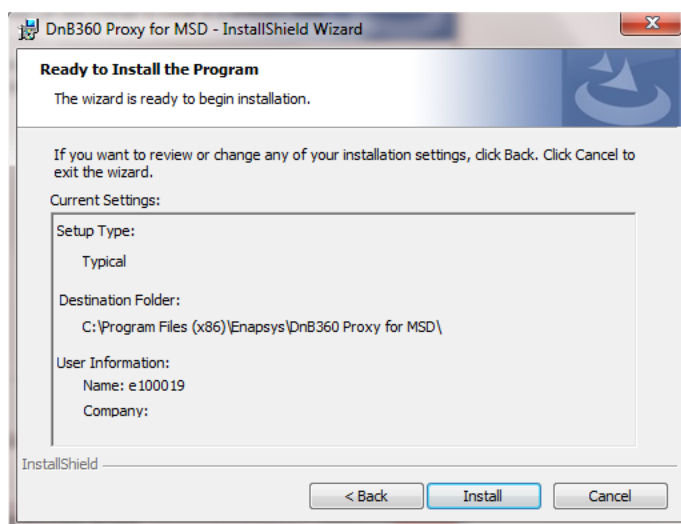
Click Next on the Welcome screen.



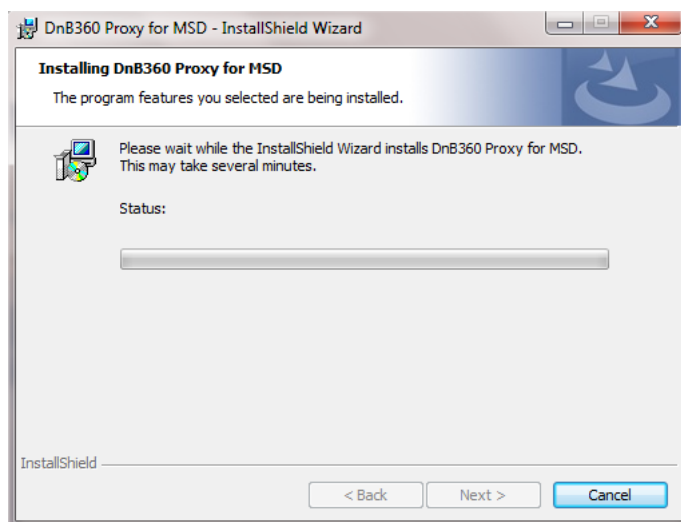
Select the folder where you'd like to install the D&B360 Proxy for MSD. Change the folder if you prefer not to use the default location. Click on Next.



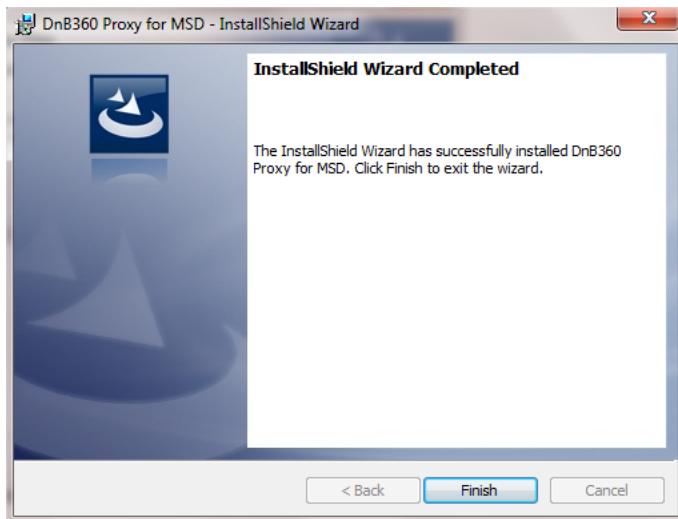
The Wizard will present an overview screen. Click on Install.



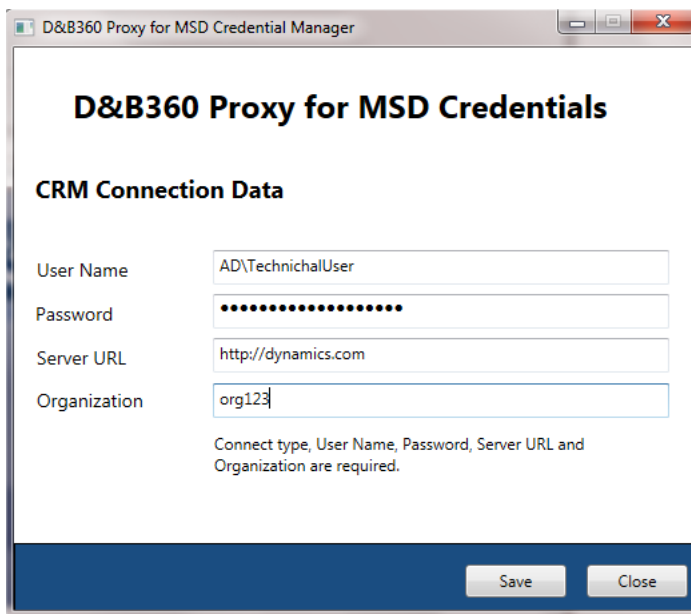
A progress bar will show the progress of the installation.



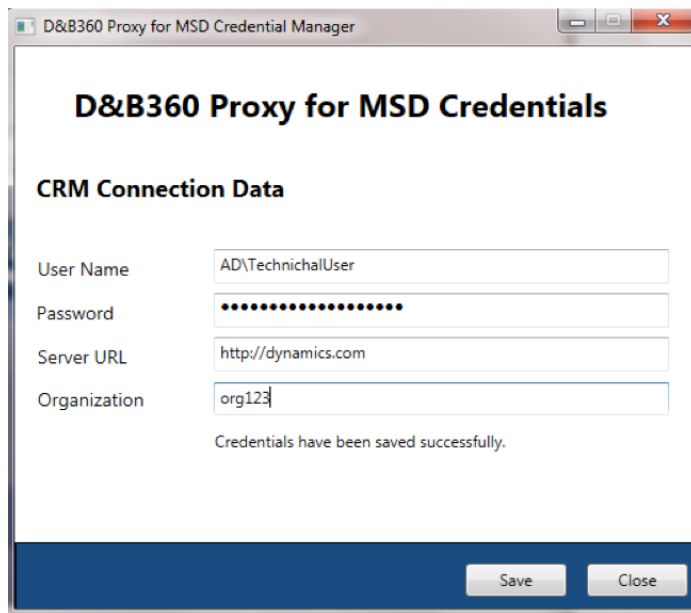
Once the installation finishes, you will see a Summary, click on Finish.



After clicking on Finish, the D&B360 Proxy for MSD Credential Manager will be called, enter the credentials for the technical user you'd like to use with D&B360 and click on Save.

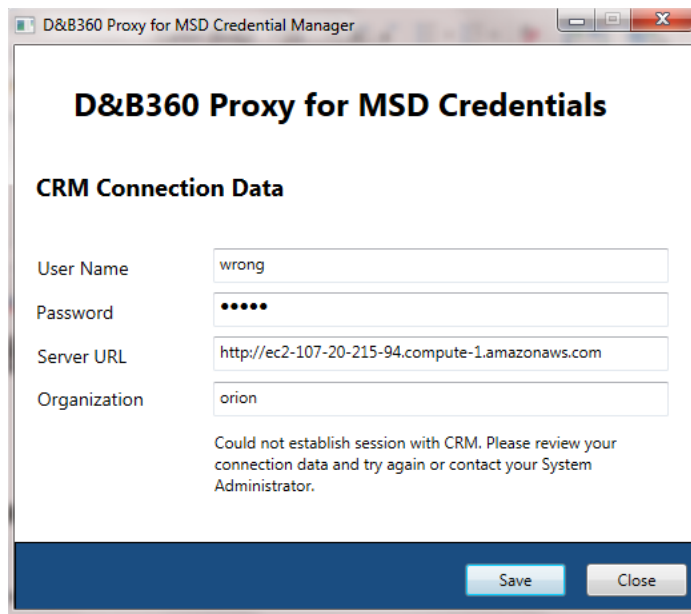


If the credentials are OK and the D&B360 Proxy can connect to the CRM, you will see the following message:



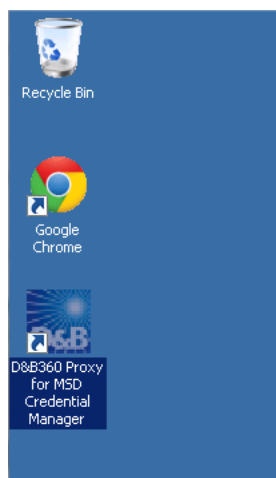
The screenshot shows a window titled "D&B360 Proxy for MSD Credential Manager". Inside, the "CRM Connection Data" section contains four input fields: "User Name" with the value "AD\TechnichalUser", "Password" with masked characters, "Server URL" with the value "http://dynamics.com", and "Organization" with the value "org123". Below these fields, a message states "Credentials have been saved successfully." At the bottom right, there are "Save" and "Close" buttons.

Otherwise, you will see an error message like the following:



The screenshot shows the same window as above, but with an error message. The "User Name" field contains the text "wrong", the "Password" field is masked, the "Server URL" field contains "http://ec2-107-20-215-94.compute-1.amazonaws.com", and the "Organization" field contains "orion". The error message below the fields reads: "Could not establish session with CRM. Please review your connection data and try again or contact your System Administrator." The "Save" and "Close" buttons are still present at the bottom right.

The setup Wizard adds a link on your desktop to the D&B360 Proxy for MSD Credential Manager.



Whenever you need to change the credentials, use the shortcut to open the program and update the credentials.

Chapter 3: Configuring D&B360

Providing D&B Access to Microsoft Dynamics CRM Users	3-1
Assigning Roles to Users	3-1

Providing D&B Access to Microsoft Dynamics CRM Users

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

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

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

Assigning Roles to Users

Users need to be assigned to at least one D&B360 role in order to access D&B360. The default D&B360 security roles (i.e., D&B360 User and D&B360 Administrator) cannot create or update accounts, leads, or contacts within the CRM. This allows clients the flexibility of conferring create and update privileges to targeted sets of users through specific, customized CRM roles.

Role permissions should be configured to correspond to the user's CRM access. For example, if users from the Marketing group should not have privileges to create accounts in the CRM, the "Add/Link Accounts" should be unchecked for the Marketing role in the Role Configurations screen.

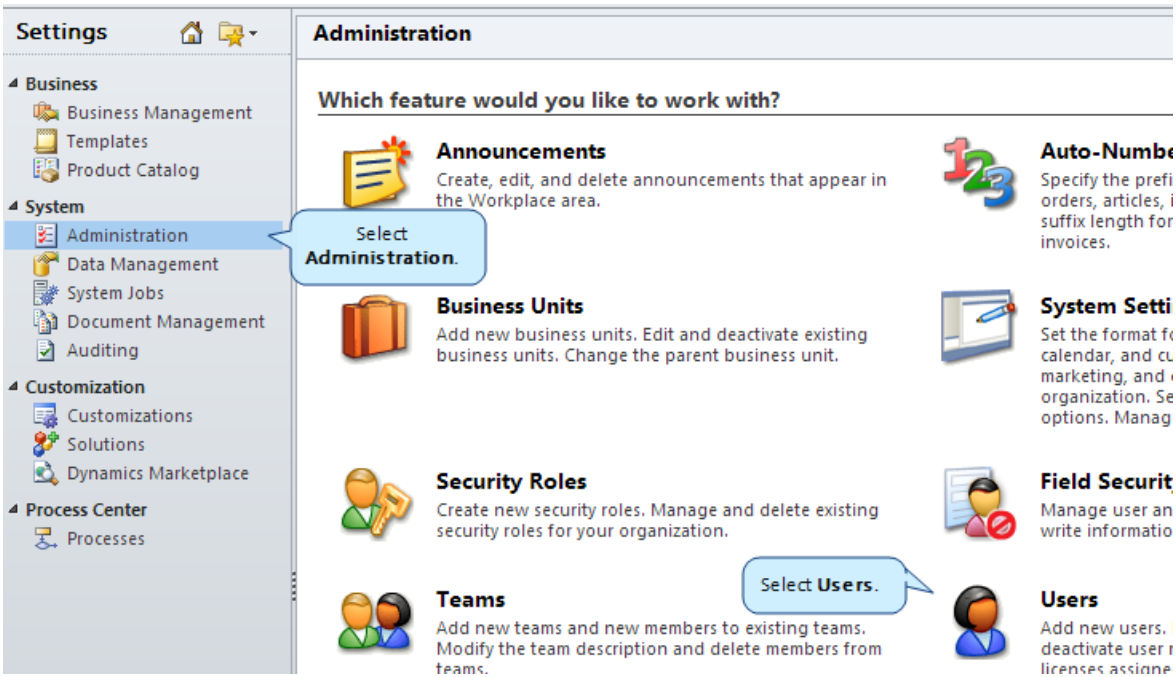
See the D&B360 User Guide section on Assigning D&B360 Roles.

The below are the minimum CRM role permissions required to add or merge accounts, leads, or contacts from within the D&B360 application.

File Save and Close Actions									
Security Role: Customers									
Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Custom Entities	
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share	
Account	🔒	🟢	🔒	🔒	🔒	🔒	🔒	🔒	🔒
Contact	🔒	🟢	🔒	🔒	🔒	🔒	🔒	🔒	🔒
Lead	🔒	🟢	🔒	🔒	🔒	🔒	🔒	🔒	🔒

Assigning Roles in the CRM

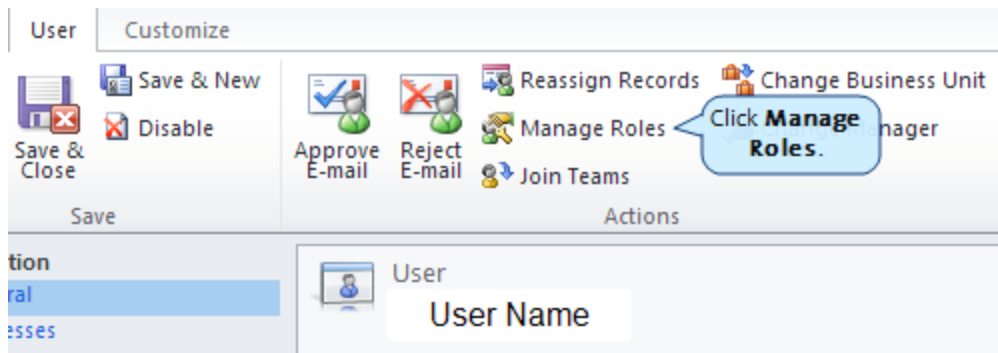
1. In the CRM window, click **Settings**.
2. In the **System** menu, select **Administration**.
3. In the **Administration** window, click **Users**.



4. From the **Enabled Users** list, select a user whose roles you want to configure.

You configure users one at a time.

5. In the CRM User menu, click **Manage Roles**.



6. In the **Manage User Roles** window, **Role Name** list:

Select **D&B360 Administrator** only for administrators that you want to have permission to navigate to the Settings tab.

Select **D&B360 User** for all users who need access to D&B360.

In addition to D&B360 User, you need to assign users to at least one other CRM role, for example assign D&B360 User and Sales Manager to a user.

NOTE: By default D&B360 security roles (i.e., D&B360 User and D&B360 Administrator) cannot create or update accounts, leads, or contacts within the CRM. This allows clients the flexibility of conferring create and update privileges to targeted sets of users through specific, customized CRM roles.

Click **OK**.

Manage User Roles

What roles would you like to apply to the 1 User you have selected?

Role Name	Business Unit
<input type="checkbox"/> Admin User	Business Unit Name
<input type="checkbox"/> All Access to 360	Business Unit Name
<input type="checkbox"/> Arturo Role test	Business Unit Name
<input type="checkbox"/> CareUserEdit	Business Unit Name
<input type="checkbox"/> CareUserFull	Business Unit Name
<input type="checkbox"/> CareUserView	Business Unit Name
<input type="checkbox"/> CEO-Business Manager	Business Unit Name
<input type="checkbox"/> CSR Manager	Business Unit Name
<input type="checkbox"/> Customer Service Representative	Business Unit Name
<input checked="" type="checkbox"/> D&B360 Administrator	Business Unit Name
<input checked="" type="checkbox"/> D&B360 User	Business Unit Name
<input type="checkbox"/> Delegate	Business Unit Name
<input type="checkbox"/> Marketing Manager	Business Unit Name
<input type="checkbox"/> Marketing Professional	Business Unit Name
<input type="checkbox"/> Sales Manager	Business Unit Name

OKCancel

7. In the CRM window, click **Save**.

Chapter 4: Managing Batches & Installing the Informatica Cloud Secure Agent

Configuring Microsoft Dynamics	4-1
Registering Your Informatica Cloud Account for On Demand CRMs	4-2
Configuring the Secure Agent for an On-Premise Installation	4-12

NOTE: If you are installing Microsoft Dynamics CRM for On Demand, also known as CRM Online or CRM Live, see "Registering Your Informatica Cloud Account for On Demand CRMs" on page 4-2.

NOTE: If you are installing Microsoft Dynamics CRM for On Premise, also known as CRM Active Directory, see "Configuring the Secure Agent for an On-Premise Installation" on page 4-12.

Configuring Microsoft Dynamics

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

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

- Installation of Informatica Cloud Secure Agent (see "Configuring the Secure Agent for an On-Premise Installation" on page 4-12).
- Installation of Batch Job Initialization Files
- Configuration of Secure Agent
- Configuration of Batch Job Connection

IMPORTANT: Make note of these requirements:

- To identify the type of configuration for your CRM, contact your System Administrator. For instructions on how to configure your CRM, see "Configuring the Secure Agent for an On-Premise Installation" on page 4-12.
- To install the Informatica Secure Agent, the user must be an administrator user for the CRM, a system administrator for the server where the secure agent is to be installed, and an administrator for the Domain Name Server (DNS) in the network.
- To install the Informatica Secure Agent, the user must be an administrator user and deployment manager on the server.
- Before you can set up and run batches, you must install the Informatica Secure Agent for Microsoft Dynamics. For instructions on installing the Secure Agent, see "Registering Your Informatica Cloud Account for On Demand CRMs" on page 4-2 or see "Registering Your Informatica Cloud Account for On Premise CRMs" on page 4-17.

Registering Your Informatica Cloud Account for On Demand CRMs

NOTE: To create your Informatica Cloud account, open a customer support ticket at <http://dnbus.force.com/support?prod=DNB360>. Before you talk to customer support, review the steps in this chapter to become familiar with the process.

Configuring Your Informatica Cloud Account for an On Demand CRM

For first time users, you need to set up your Informatica Cloud account before you can run batch processing. After you set up your Informatica Cloud account, you can add one or more CRMs that use this Informatica Cloud account. For more information, see "Adding One or More CRMs to Your Informatica Cloud Account" on page A-7.

If you plan to run batch jobs through an On-Demand Organization (org), and you do not already have an Informatica Cloud account, you need to first configure your account on the Informatica Cloud as follows.

1. Access the Informatica Cloud at <https://icosp2.informaticacloud.com/saas>.
2. Click **Don't have an account?**.



3. In the **New Account Registration** window, complete the fields as shown in the following illustration:

User Details

First Name:*	<input type="text" value="DnB360"/>
Last Name:*	<input type="text" value="Administrator"/>
Job Title:*	<input type="text" value="Admin"/>
Email Address:*	<input type="text" value="youremail.com"/>
Confirm Email Address:*	<input type="text" value="youremail.com"/>
Phone Number:*	<input type="text" value="512-555-1212"/>
<input checked="" type="checkbox"/> Use my email address as my user name.	

Complete the fields in this window.

Organization Details

Organization Name:*	<input type="text" value="Your MaxCV Username"/>
Address:*	<input type="text" value="12 Main Street"/>
City:*	<input type="text" value="Anywhere"/>
State:*	<input type="text" value="New Jersey"/>
Postal Code:*	<input type="text" value="07901"/>
Country:*	<input type="text" value="United States"/>
Number of Employees:*	<input type="text" value="101 - 500 employees"/>
Time Zone:	<input type="text" value="Eastern Daylight Time, New York"/>

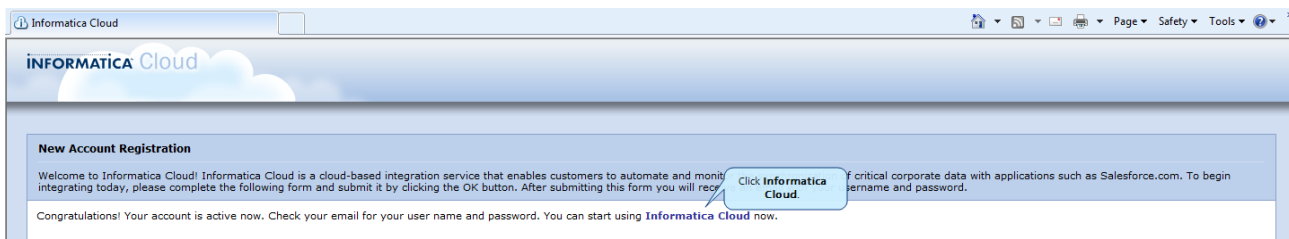
What CRM systems do you use?

- ☐ Salesforce
☒ Microsoft Dynamics
☐ Other

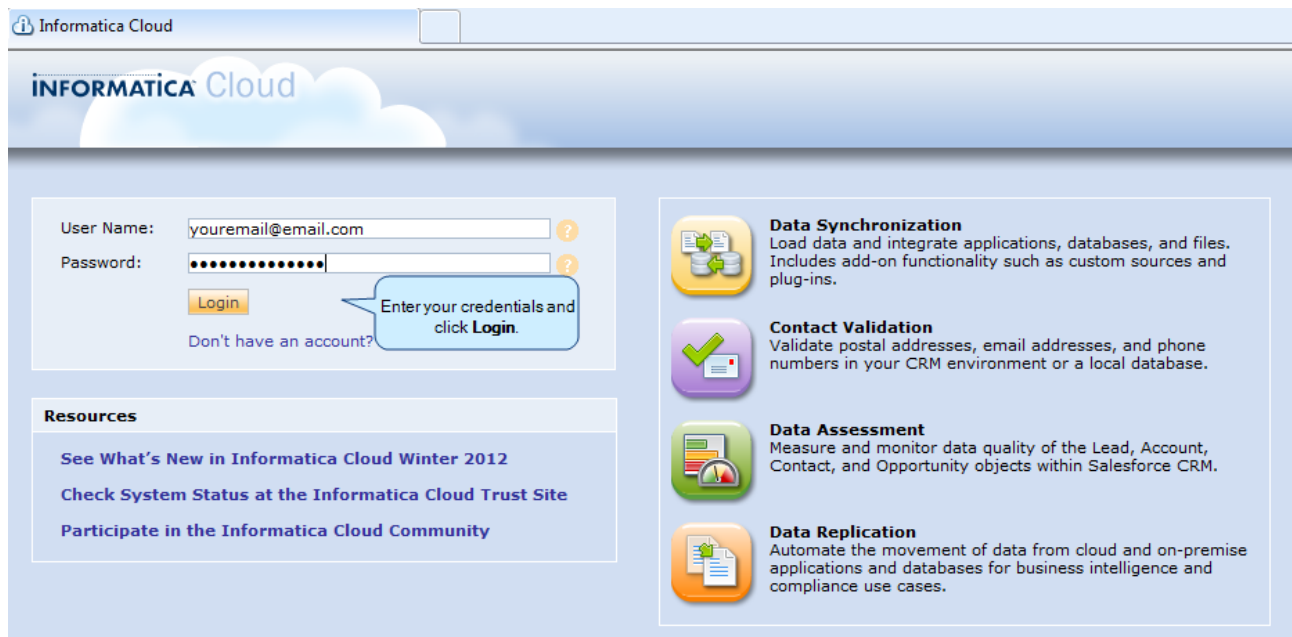
☒ I have read and agreed to the [Subscription Agreement](#)

The **New Account Registration** window displays a Congratulations message. You will receive an email from osp2admin@informaticacloud.com with the account information and your temporary password.

- Click **Informatica Now** to open the Informatica Cloud login window.



- In the **Informatica Cloud** window, enter your user name and password, then click **Login**.



Informatica Cloud

INFORMATICA Cloud

User Name: ?

Password: ?

Don't have an account? Enter your credentials and click **Login**.

Resources

- [See What's New in Informatica Cloud Winter 2012](#)
- [Check System Status at the Informatica Cloud Trust Site](#)
- [Participate in the Informatica Cloud Community](#)

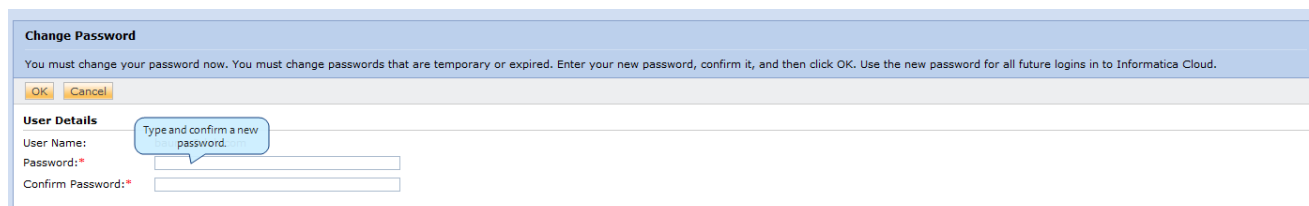
Data Synchronization
Load data and integrate applications, databases, and files. Includes add-on functionality such as custom sources and plug-ins.

Contact Validation
Validate postal addresses, email addresses, and phone numbers in your CRM environment or a local database.

Data Assessment
Measure and monitor data quality of the Lead, Account, Contact, and Opportunity objects within Salesforce CRM.

Data Replication
Automate the movement of data from cloud and on-premise applications and databases for business intelligence and compliance use cases.

6. In the **Change Password** window, **User Details** area, complete the **User Name**, **Password**, and **Confirm Password** fields, and then click **OK**.
7. Be sure to make a note of these credentials, which you will need to connect your CRM with Informatica Cloud.



Change Password

You must change your password now. You must change passwords that are temporary or expired. Enter your new password, confirm it, and then click OK. Use the new password for all future logins in to Informatica Cloud.

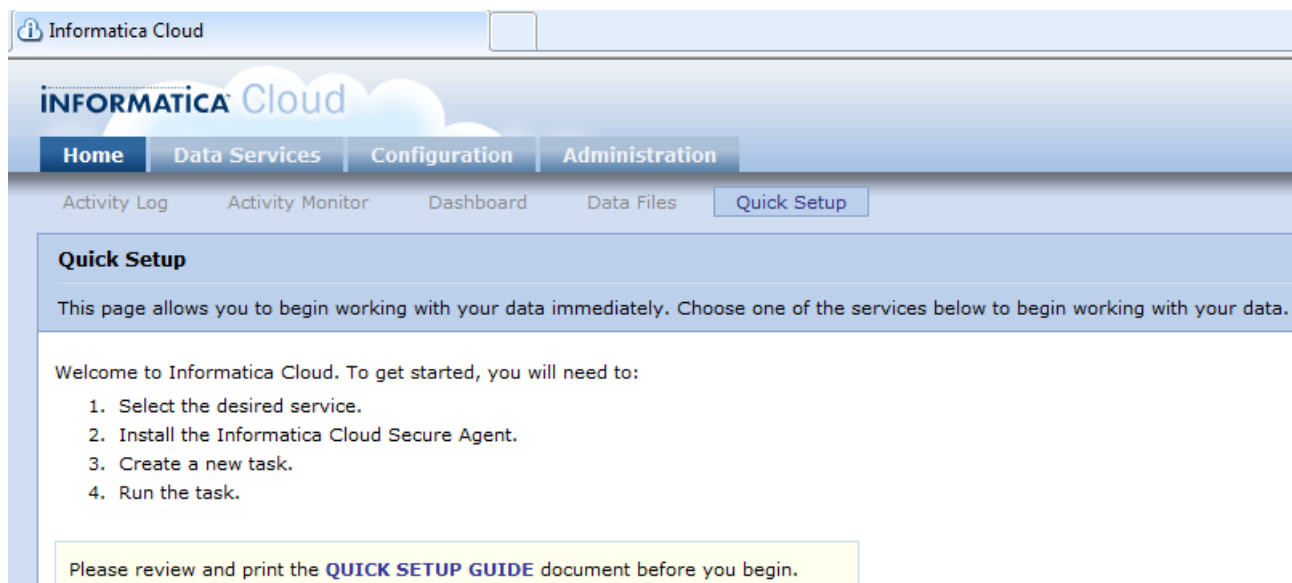
User Details

User Name:

Password:* Type and confirm a new password.

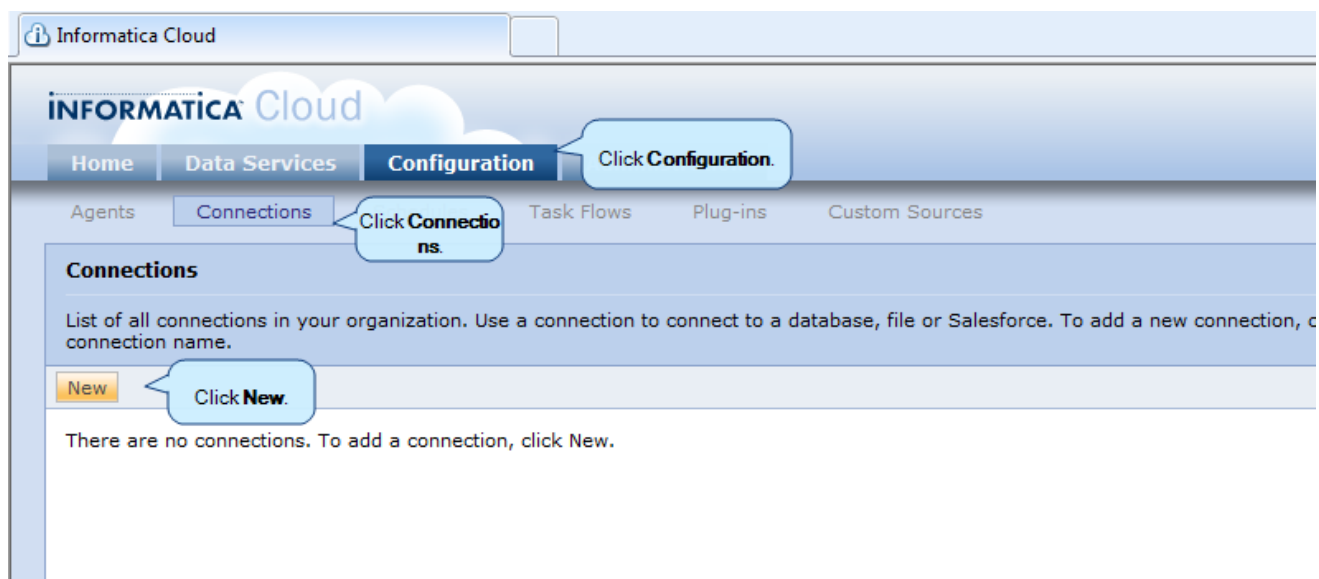
Confirm Password:*

The **Informatica Cloud Quick Setup** window opens.



NOTE: For adding more than one CRM to use your Informatica Cloud account, see "Adding One or More CRMs to Your Informatica Cloud Account" on page A-7 and start with the next step.

8. Click the **Configuration** tab, the **Connections** tab, and then click **New**.



9. In the **New Connection** window, complete the required fields, and then click **OK**.

New Connection

You can create a new connection here. Use a connection to access a database

OK Click OK

Connection Details

Connection Name: CRM Organization Name Complete the required fields.

Description:

Type: Select...

- Select...
- Oracle
- SqlServer
- MySQL
- Flat File
- ODBC
- MS Access
- FTP/SFTP
- SAP
- Web Service
- Oracle CRM On Demand
- NetSuite
- Microsoft Dynamics CRM

10. In the **New Connection** window, enter the CRM information to connect the Informatica Cloud account to the CRM:

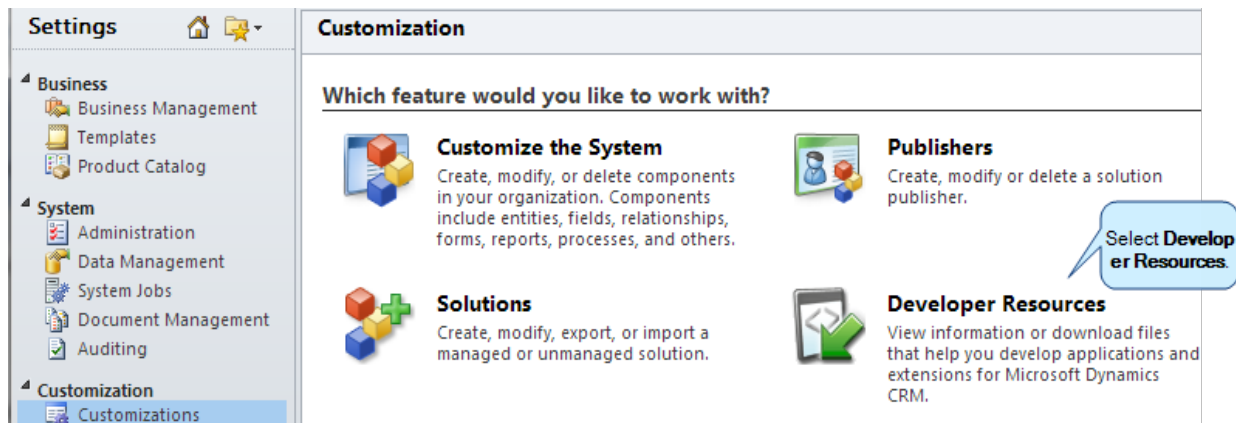
On the CRM window, click **Settings**.

In the **Customization** menu, **Customizations**.

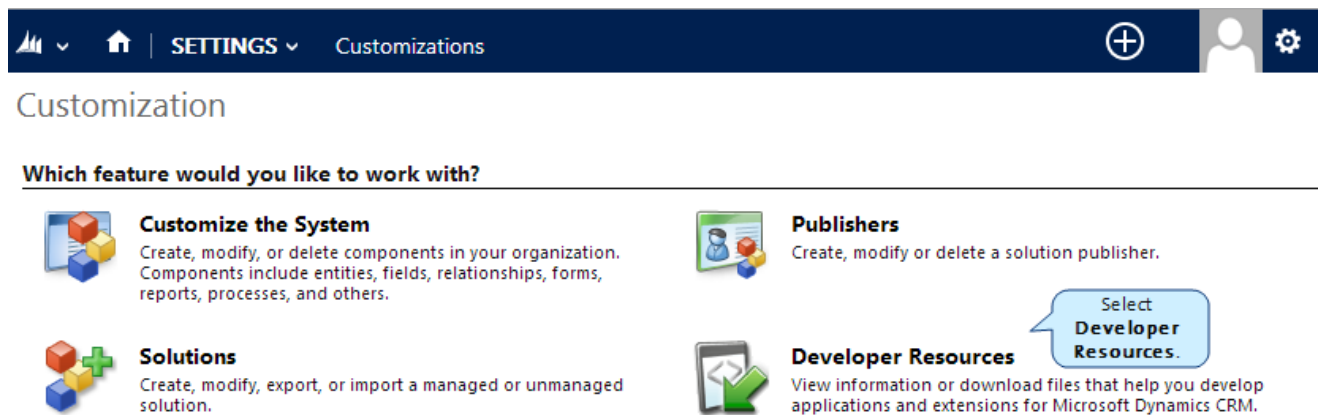
In the **Customization** window, select **Developer Resources**.

NOTE: You can find the service URL as follows. On the CRM window, click **Settings**, and then click **Customization**, **Developer Resources**, and **Service Endpoints: Discovery Service**. An example Discovery Service URL might be
<https://disco.crm.dynamics.com/XRMServices/2011/Discovery.svc>.

In Microsoft Dynamics CRM 2011:



In Microsoft Dynamics CRM 2013:



In the Developer Resources window, Service Endpoints area, select a Discovery Service URL..

NOTE: In the following illustrations, the Organization Unique Name field displays the unique name of your organization. When you enter the name of your organization in the New Connection window, enter it exactly as you see it in the Organization Unique Name field.

In Microsoft Dynamics CRM 2011:

Developer Resources

Your Organization Information:

Organization Unique Name

DnB360Beta

Developer Center


 [Download documentation, tools and sample code](#)

Service Endpoints:

Discovery Service

Protocol: SOAP

<http://msdynamics.com/XRMServices/2011/Discovery.svc>

 [Download WSDL](#)

Select a **Discovery Service**.

In Microsoft Dynamics CRM 2013:



Developer Resources


Your Organization Information:

Organization Unique Name

30regression2

Windows Azure Service Bus Issuer Certificate

Issuer Name: crm.dynamics.com

 [Download Certificate](#)

Developer Center

 [Download documentation, tools and sample code](#)

Service Endpoints:

Discovery Service

Protocol: SOAP

<https://disco.crm.dynamics.com/XRMServices/2011/Discovery.svc>

 [Download WSDL](#)

Select a **Discovery Service**.

NOTE: In the previous illustrations, the Organization Unique Name field displays your ORG's unique name. When you enter the Org name in the New Connection window, enter it exactly as you see it in the Organization Unique Name field.

11. In the New Connection window, Microsoft Dynamics CRM Connection Properties area, complete the information and in the Service URL field, enter the URL from the previous steps.
12. Click OK.

New Connection

You can edit the connection here. Use a connection to access a database,

OK Test

Connection Details

Connection Name:* CRM Organization Name

Description:

Type:* Microsoft Dynamics CRM

Microsoft Dynamics CRM Connection Properties

Authentication Type:* Microsoft Live

User Name:* CRM username

Password:*



Organization Name:* CRM Organization Name

Service URL:* https://disco.crm.dynamics.com/XRMServices/

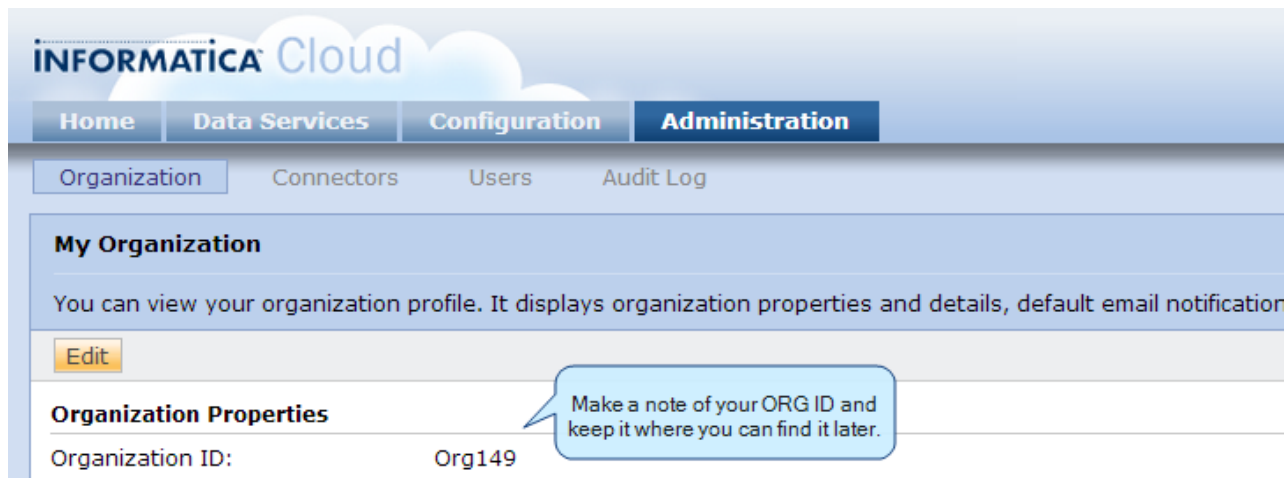
Complete these fields.

Enter the Service URL.

The Informatica Cloud Connections window displays that the connection is completed.

INFORMATICA Cloud			
Home Data Services Configuration Administration			
Agents Connections Schedules Task Flows Plug-ins			
Connections			
List of all connections in your organization. Use a connection to connect to a database, file or Salesforce. To add a connection, click the connection name.			
New			
Actions	Name▲	Type	Service URL
 	CRM Org 1	Microsoft Dynamics CRM	https://dev.crm.dynamics.com/XRMServices/2011/Discovery.svc

- Make a note of your Connection name, which you will need to enter on the CRM Batch Connection window. Also note your Organization ID and put this Org number in a safe place where you can find it again for future reference to the batch process.

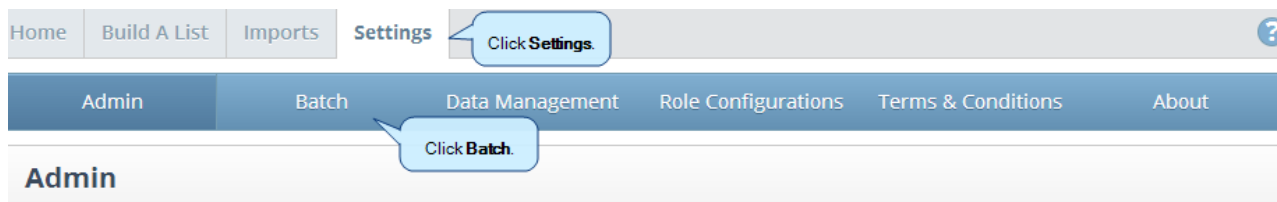


To add other CRMs to your Informatica Cloud Account, see "Adding One or More CRMs to Your Informatica Cloud Account" on page A-7

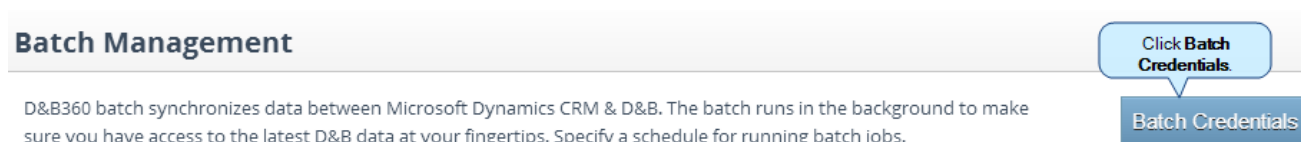
Registering Your On Demand Account for Batch Processing

NOTE: For this procedure, you should call Customer Support to guide you through and answer any questions. You will need your Informatica Cloud login information and Org number from step 13.

1. On the **Home** page window, click **Settings** and then **Batch**.



2. In the **Batch Management** area, click **Batch Credentials**.



NOTE: Your User Name and Password are sent to you by email. Be sure to have this email available for when you need to enter your credentials.

3. In the **Configure Credentials** window, enter your credentials and then click **Save**.

The batch credentials you enter in this step are from the Informatica steps, not your CRM credentials (see this step on page 4-5.)

Configure Credentials

Batch Credentials

User

Hide Password

Password

Confirm Password

Connection Name

After you have completed these steps, contacted Customer Support, and your cloud account has been updated, you are ready to schedule new and refresh batch jobs.

Configuring the Secure Agent for an On-Premise Installation

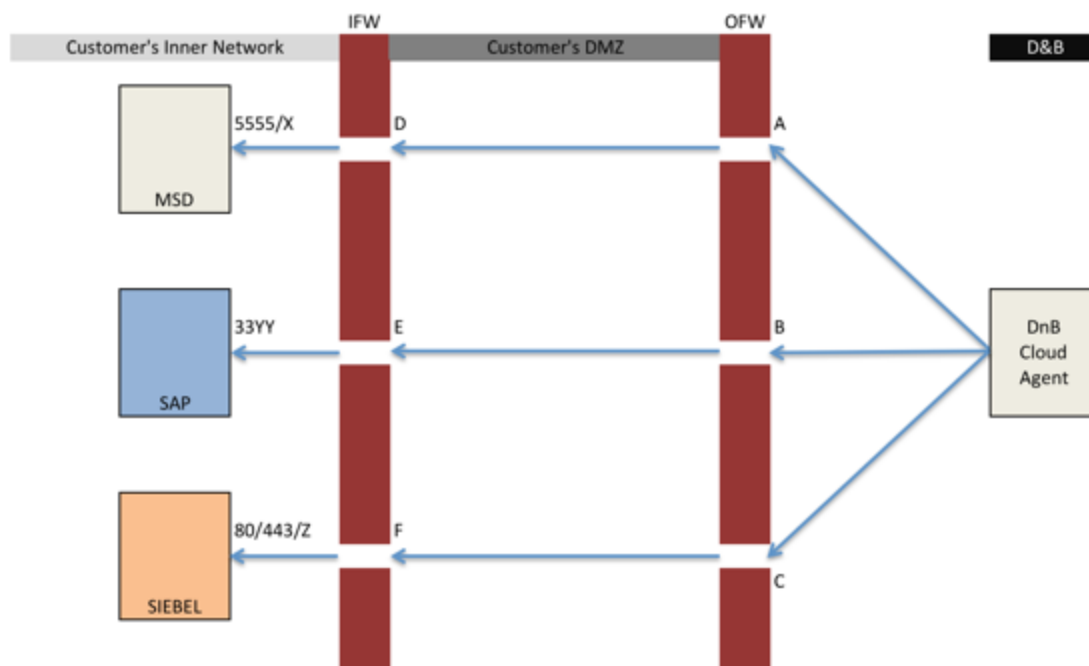
You need to go through this section if you have not yet set up batch. If you already have the account and Secure Agent set up in D&B360 v2.3, you only need to update your connections on the Informatica Cloud and enter your credentials in the CRM.

Special Setup Instructions for On-Premise Customers

The D&B360 application is hosted on the cloud. As an On Premise Customer, you have two options to chose from to access D&B360.

Option 1: Port Forwarding

Cisco calls this Port Address Translation (PAT). Linux calls it ipchains or packet filtering (pf) rules.



This option requires changes in your network infrastructure to forward a specified port on the outer firewall, also known as the network edge firewall, and the inner firewall. The rules are as follows.

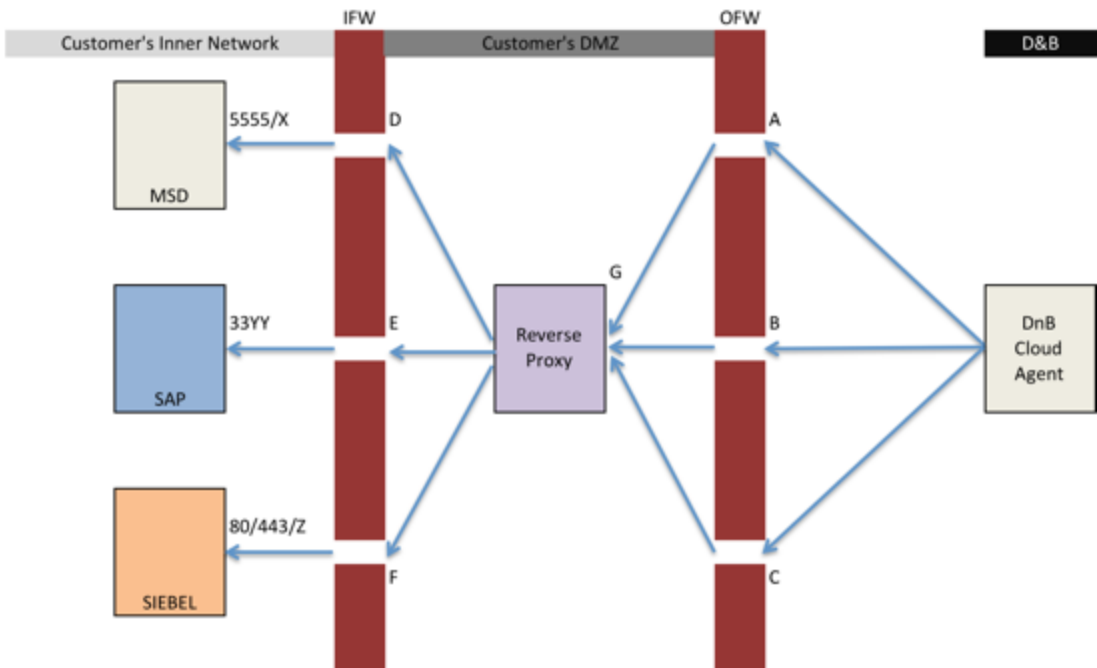
Server	Port	Forward to	Port
outerfirewall.customer.com	A	innerfirewall.customer.com	D
innerfirewall.customer.com	D	msdcrm.customer.com	5555/X
outerfirewall.customer.com	B	innerfirewall.customer.com	E
innerfirewall.customer.com	E	msdcrm.customer.com	33YY
outerfirewall.customer.com	C	innerfirewall.customer.com	F
innerfirewall.customer.com	F	msdcrm.customer.com	80/443/Z

- A, B, C, D, E & F: can be any combination of port numbers.
- 5555/X: an MSD installation defaults to port 5555, but you can change this to any X port.
- 33YY: SAP RFC protocol works on port 33YY, YY being the instance number (that is, 3300 to 3399).

Option 2: Reverse Proxy

This option requires you to install an intermediate Reverse Proxy server (Apache or IIS would do the job) that would act on behalf of the CRM. This server should be placed between the outer and inner firewall. This configuration requires using the Proxy Array Table (PAT) and Reverse Proxying, but a potential attacker is not directly hitting the CRM. The only advantage of this option is that you can configure the Reverse Proxy

to allow access to certain CRM URLs. By doing this you would be restricting the access to the CRM application.

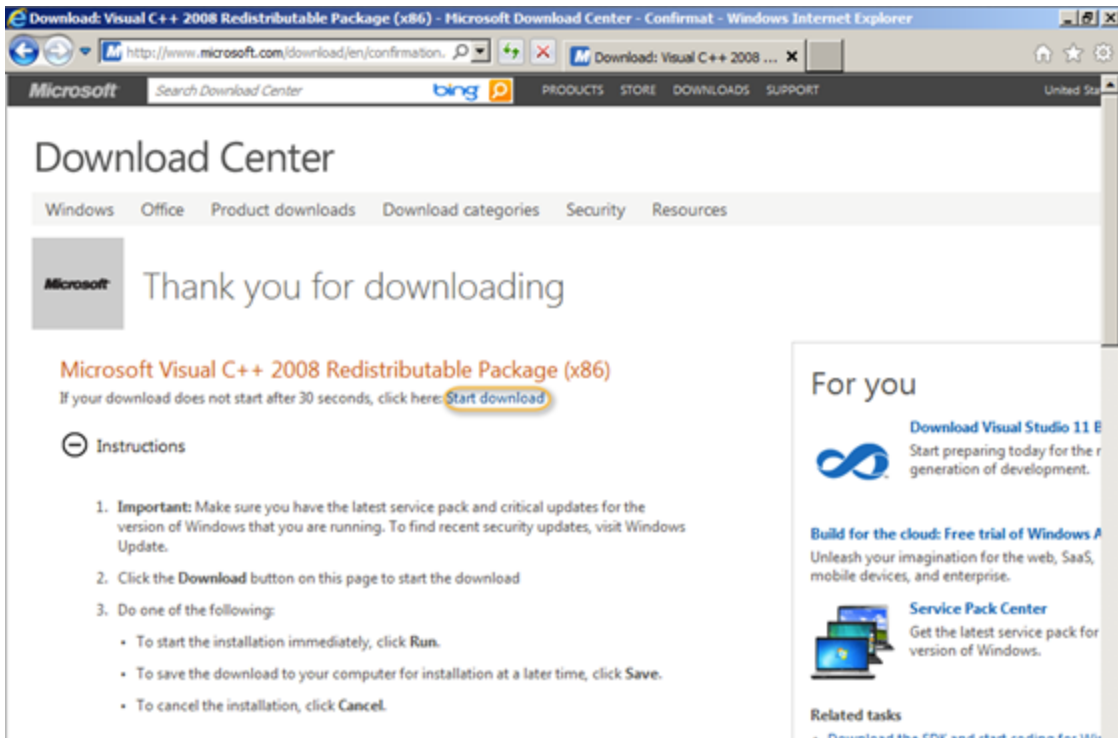


Server	Port	Foward to	Port
outerfirewall.customer.com	A	innerfirewall.customer.com	G
innerfirewall.customer.com	D	msdcrm.customer.com	5555/X
outerfirewall.customer.com	B	innerfirewall.customer.com	G
innerfirewall.customer.com	E	msdcrm.customer.com	33YY
outerfirewall.customer.com	C	innerfirewall.customer.com	G
innerfirewall.customer.com	F	msdcrm.customer.com	80/443/Z

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

Installing the VC++ Redistributable Package (x86)

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

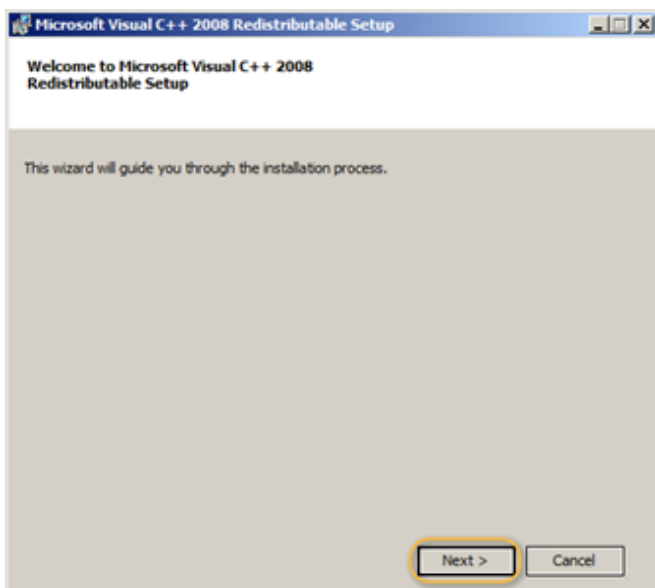


3. When you are prompted to run or save the .exe file, click **Run**.

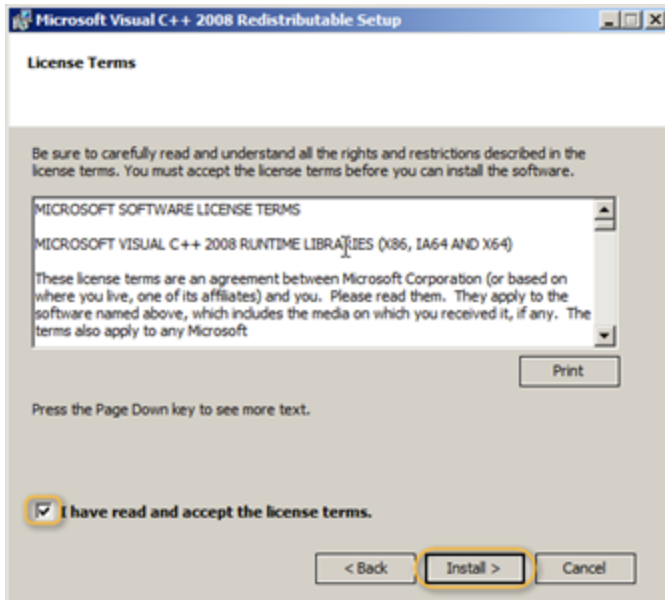


The Welcome to Microsoft Visual C++ 2008 Redistributable Setup wizard opens.

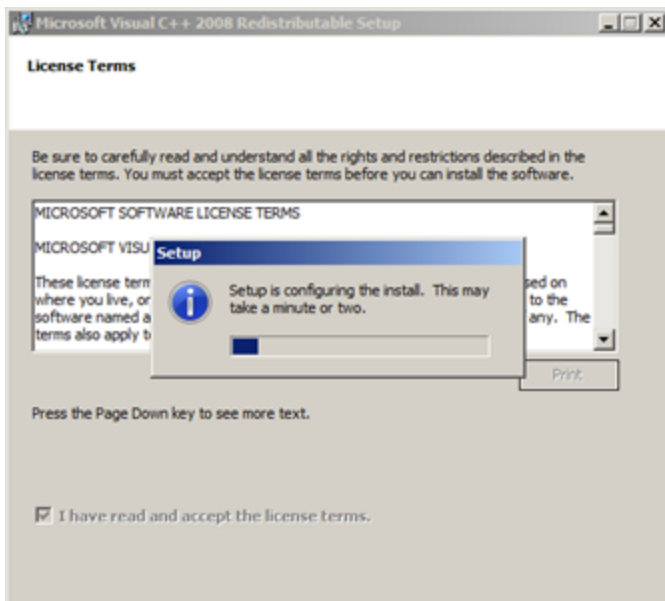
4. In the first wizard window, click **Next**.



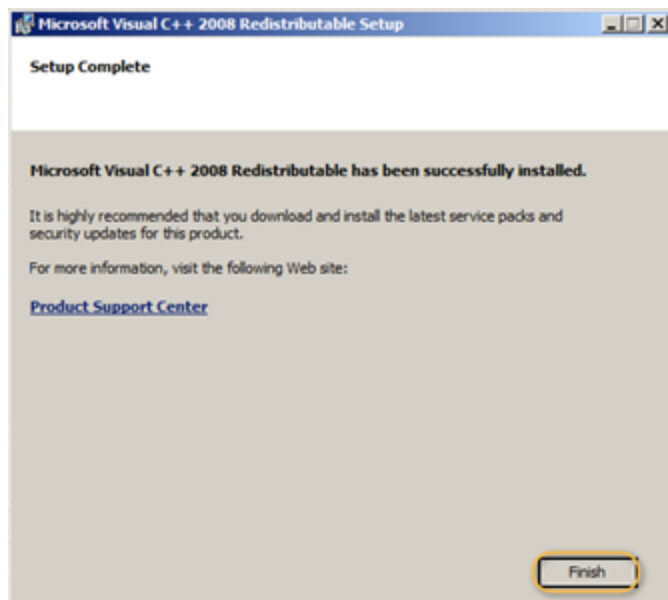
5. In the **License Terms** window, I have read and accept the license terms field, select the check box.
6. Click **Install**.



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



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



Registering Your Informatica Cloud Account for On Premise CRMs

NOTE: To create your Informatica Cloud account, open a customer support ticket at <http://dnbus.force.com/support?prod=DNB360>. Before you talk to customer support, review the steps in this chapter to become familiar with the process.

If you plan to run batch jobs through an On-Premise Organization (org), and you do not already have an Informatica Cloud account, you need to first configure your account on the Informatica Cloud as follows.

1. Access the Informatica Cloud at <https://icosp2.informaticacloud.com/saas>.
2. Click **Don't have an account?**.



3. In the **New Account Registration** window, complete the fields as shown in the following illustration.
4. In the **Organization Details** area, **Organization Name** field, enter your MaxCV user name.

The screenshot displays the 'New Account Registration' window. It is divided into two main sections: 'User Details' and 'Organization Details'. In the 'User Details' section, fields for First Name, Last Name, Job Title, Email Address, Confirm Email Address, and Phone Number are filled out. A callout bubble points to these fields with the text 'Complete these fields.' Below these fields is a checkbox labeled 'Use my email address as my user name.' which is checked. The 'Organization Details' section contains fields for Organization Name, Address, City, State, Postal Code, Country, Number of Employees, and Time Zone. A callout bubble points to the Organization Name field with the text 'Organization Name should be the your MaxCV user name.' Below these fields is a section titled 'What CRM systems do you use?' with checkboxes for Salesforce, Microsoft Dynamics (checked), and Other. At the bottom of the form is a checkbox labeled 'I have read and agreed to the Subscription Agreement' which is checked, followed by 'OK' and 'Cancel' buttons.

User Details

First Name:* DnB360

Last Name:* Admin

Job Title:* Administrator

Email Address:* youremail.com

Confirm Email Address:* youremail.com

Phone Number:* 512-555-1212

☒ Use my email address as my user name.

Organization Details

Organization Name:* Your CRM organization name

Address:* 12 Main St

City:* Anywhere

State:* New Jersey

Postal Code:* 07901

Country:* United States

Number of Employees:* 51 - 100 employees

Time Zone: Eastern Daylight Time, New York

What CRM systems do you use?

☐ Salesforce

☒ Microsoft Dynamics

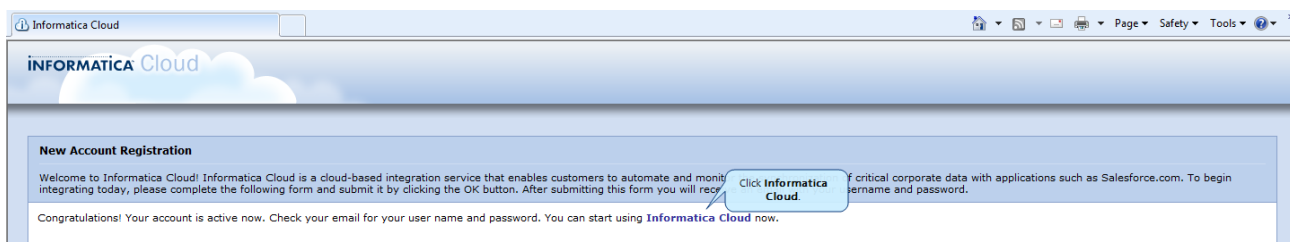
☐ Other

☒ I have read and agreed to the **Subscription Agreement**

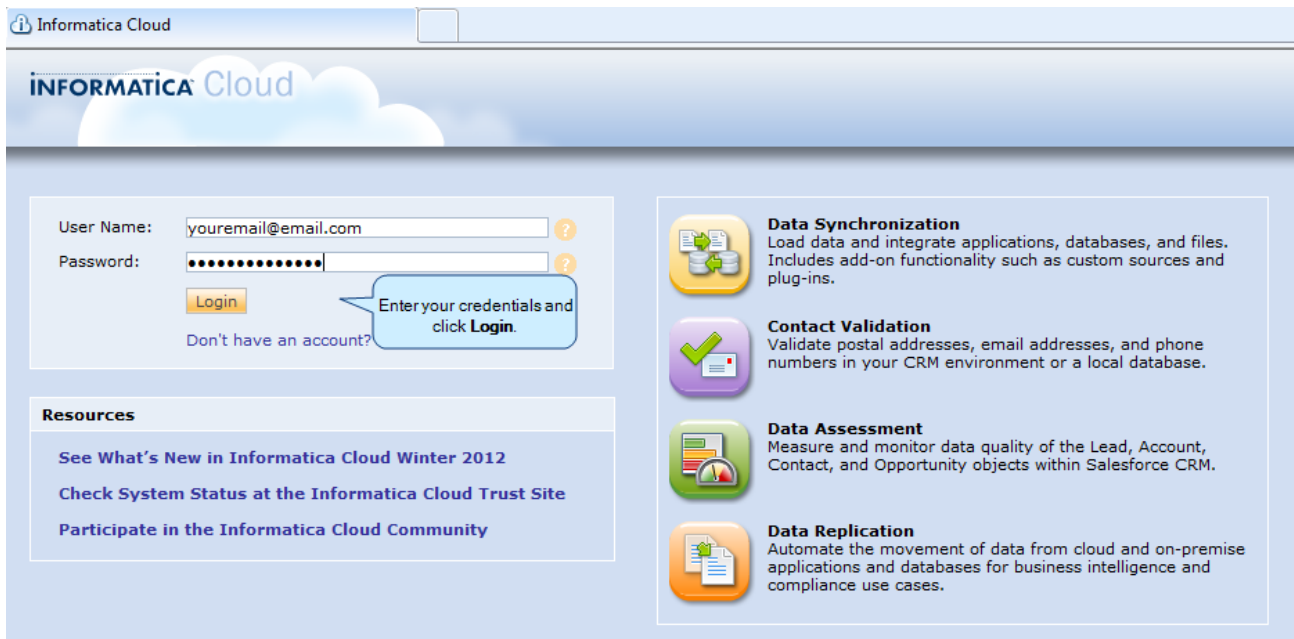
OK Cancel

The **New Account Registration** window displays a Congratulations message. You will receive an email from `osp2admin@informaticacloud.com` with the account information and your temporary password.

5. Click **Informatica Now** to open the Informatica Cloud login window.



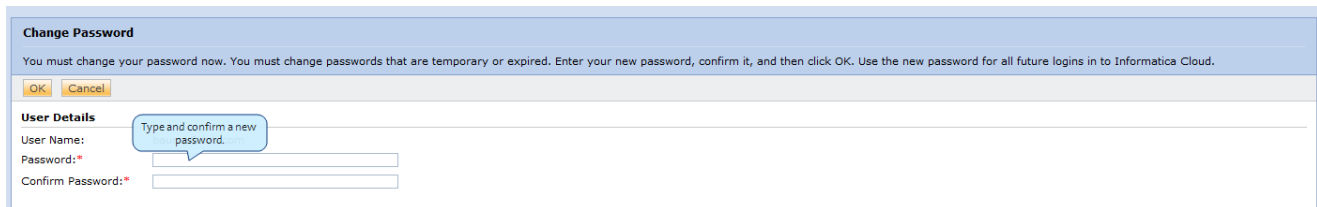
6. In the **Informatica Cloud** window, enter your user name and password, then click **Login**.



The Informatica Cloud login window features a header with the Informatica Cloud logo and a search bar. The main content area is divided into two sections. On the left, the 'User Name' field contains 'youremail@email.com' and the 'Password' field is masked with dots. A 'Login' button is positioned below the password field. A blue callout bubble points to the login area with the text 'Enter your credentials and click Login.' Below the login fields is a link that says 'Don't have an account?'. On the right, there are four feature cards: 'Data Synchronization' (Load data and integrate applications, databases, and files. Includes add-on functionality such as custom sources and plug-ins.), 'Contact Validation' (Validate postal addresses, email addresses, and phone numbers in your CRM environment or a local database.), 'Data Assessment' (Measure and monitor data quality of the Lead, Account, Contact, and Opportunity objects within Salesforce CRM.), and 'Data Replication' (Automate the movement of data from cloud and on-premise applications and databases for business intelligence and compliance use cases.).

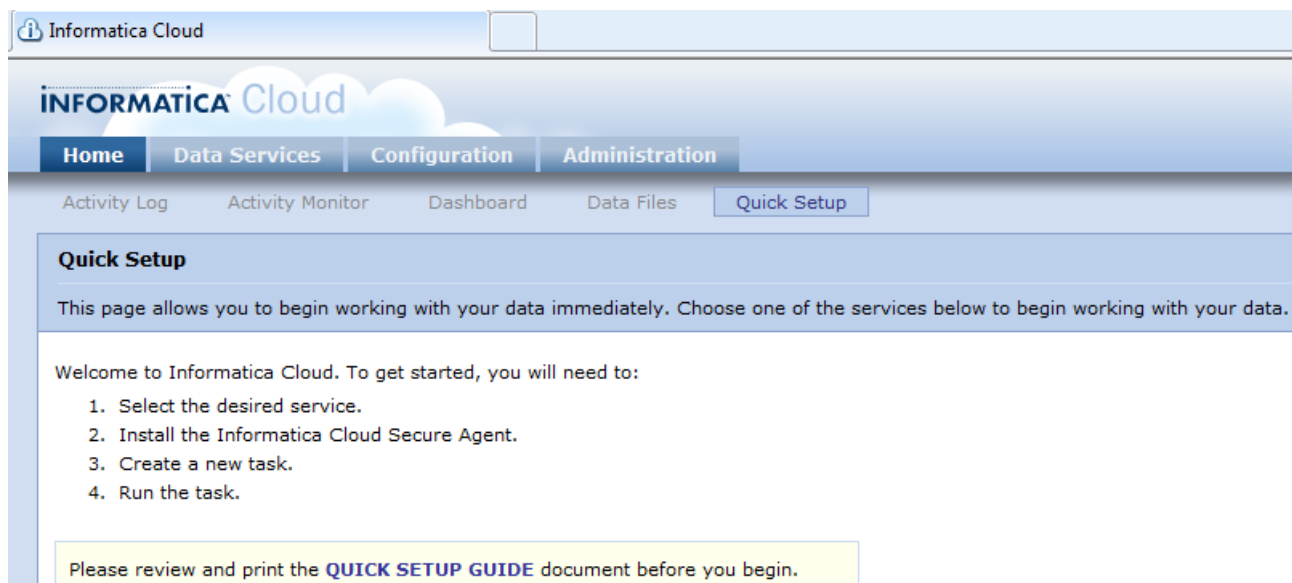
7. In the **Change Password** window, **User Details** area, complete the **User Name**, **Password**, and **Confirm Password** fields, and then click **OK**.

IMPORTANT: Be sure to make a note of these credentials, which you will need to connect your CRM with Informatica Cloud.

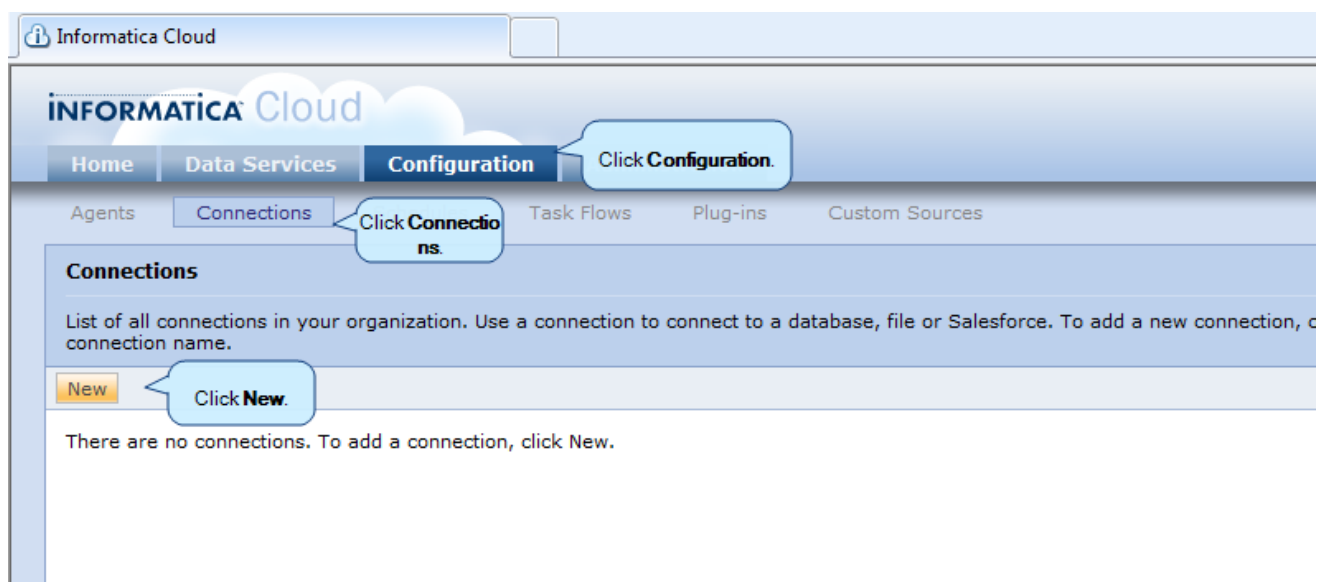


The 'Change Password' window has a title bar and a header section with the text: 'You must change your password now. You must change passwords that are temporary or expired. Enter your new password, confirm it, and then click OK. Use the new password for all future logins in to Informatica Cloud.' Below the header are 'OK' and 'Cancel' buttons. The 'User Details' section contains three fields: 'User Name:', 'Password: *', and 'Confirm Password: *'. A blue callout bubble points to the password fields with the text 'Type and confirm a new password.'

The Informatica Cloud Quick Setup window opens.



8. Click the **Configuration** tab, the **Connections** tab, and then click **New**.



9. In the **New Connection** window, complete the required fields, and then click **OK**.

10. In **Connection Name** field, if you have named each of your connections the same name as the corresponding ORG, you can enter that here.

New Connection

You can create a new connection here. Use a connection to access a d

OK Click OK Test

Connection Details

Connection Name:* MSD Complete the required fields.

Description:

Type:* Select...

- Select...
- Oracle
- SqlServer
- MySQL
- Flat File
- ODBC
- MS Access
- FTP/SFTP
- SAP
- Web Service
- Oracle CRM On Demand
- NetSuite
- Microsoft Dynamics CRM

11. Click OK.

New Connection

You can create a new connection here. Use a connection to access a database, file

OK When finished, click OK. Test

Connection Details

Connection Name:* MSD

Description:

Type:* Microsoft Dynamics CRM

Microsoft Dynamics CRM Connection Properties Complete these fields.

Secure Agent:* ? Select...

Authentication Type:* Active Directory

User Name:* MSDDNB360DEVADMIN

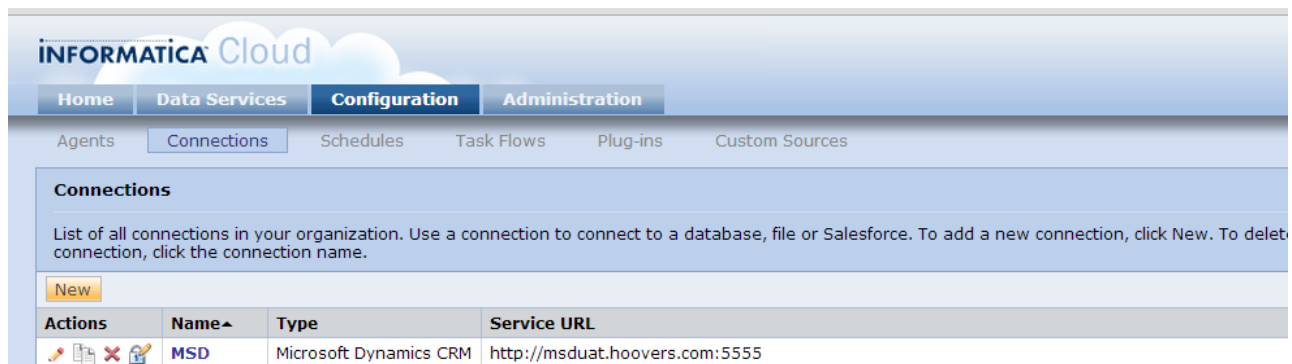
Password:* *****

Organization Name:* DnB

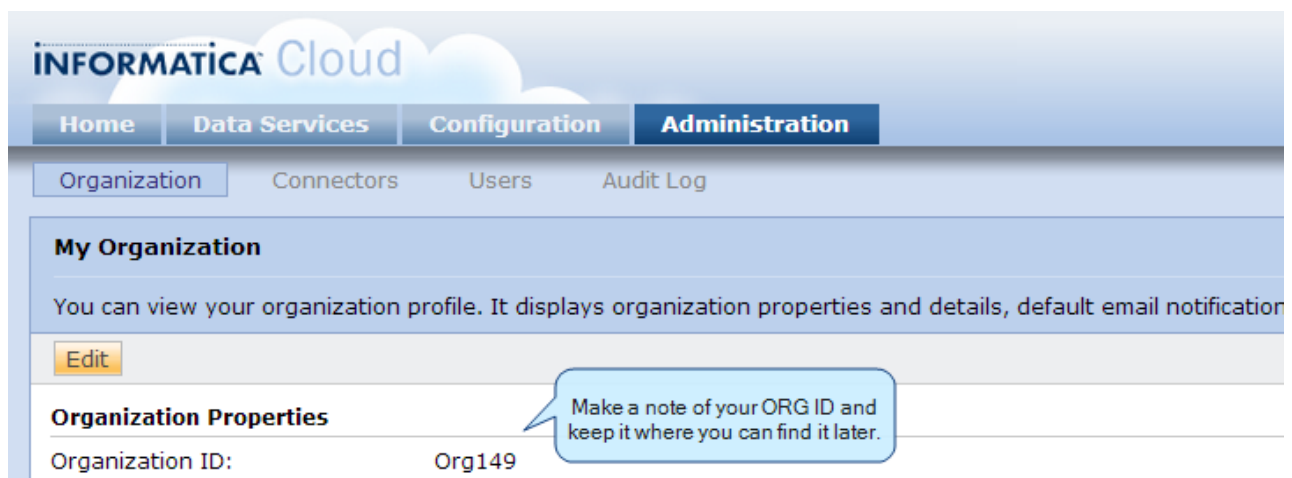
Domain:* AD.AUSTIN.HOOVERS.COM

Service URL:* http://<server.company.com>:<port>

The **Informatica Cloud Connections** window displays that the connection is completed. Make a note of the connection name in the **Name** field of this window. You will need to enter the Connection Name on the CRM Batch Connection window.



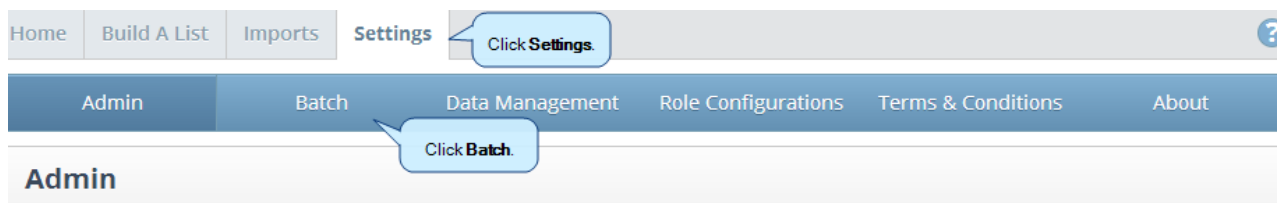
12. Make a note of your Organization ID and put this Org number in a safe place where you can find it again for future reference to the batch process.



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

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

1. On the **Home** page window, click **Settings**.
2. On the **Settings** tab, click **Batch**.



3. In the **Batch Management** area, click **Batch Credentials**.

Batch Management

Click **Batch Credentials**.

Batch Credentials

D&B360 batch synchronizes data between Microsoft Dynamics CRM & D&B. The batch runs in the background to make sure you have access to the latest D&B data at your fingertips. Specify a schedule for running batch jobs.

4. In the **Configure Credentials** window, type your credentials and then click **Save**.

NOTE: The batch credentials are your Informatica user name and password and your Connection Name (see this step on page 4-22).

Click **Save**.

Save

Cancel

Configure Credentials

Batch Credentials

User

Hide Password

Password

Confirm Password

Connection Name

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

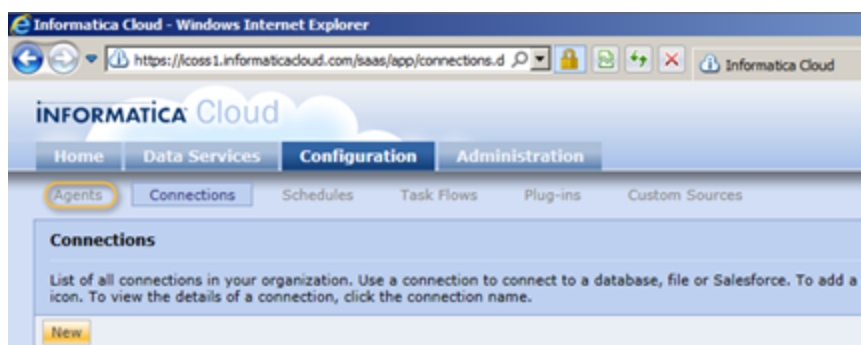
IMPORTANT: Make a note of your user name and password, because you will use these later to register the Secure Agent.

Logging in to the Informatica Cloud Secure Agent

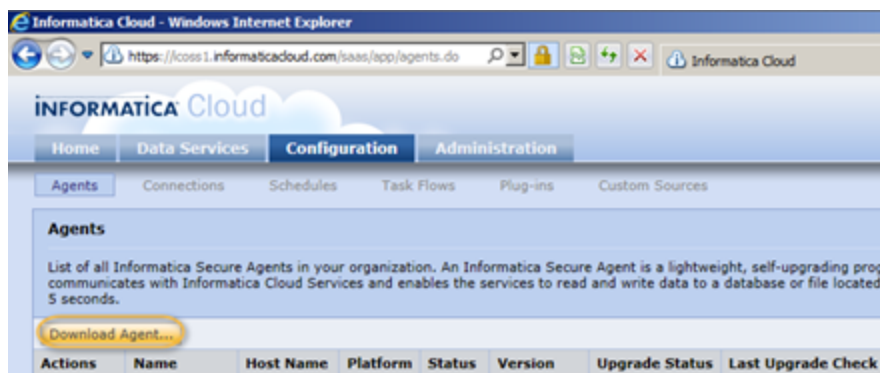
1. Access the Informatica Cloud window at this URL: <https://icosp2.informaticacloud.com/saas>.
2. In the **Informatica Cloud** window, type the user name and password for the CRM that you made note of previously, and then click **Login**.



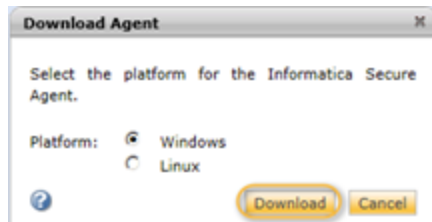
3. In the Informatica Cloud window, click the **Configuration** tab, then click the **Agents** tab.



4. Click **Download Agent**.



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

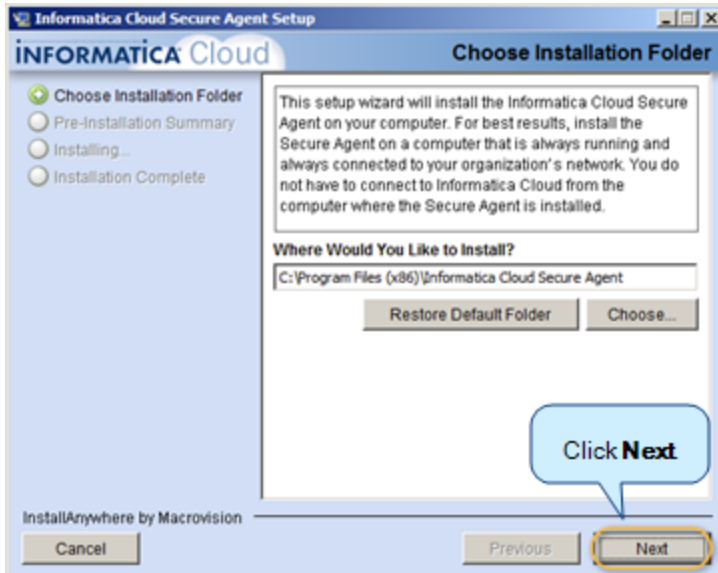


6. At the prompt to run or save the .exe file, click **Run**.

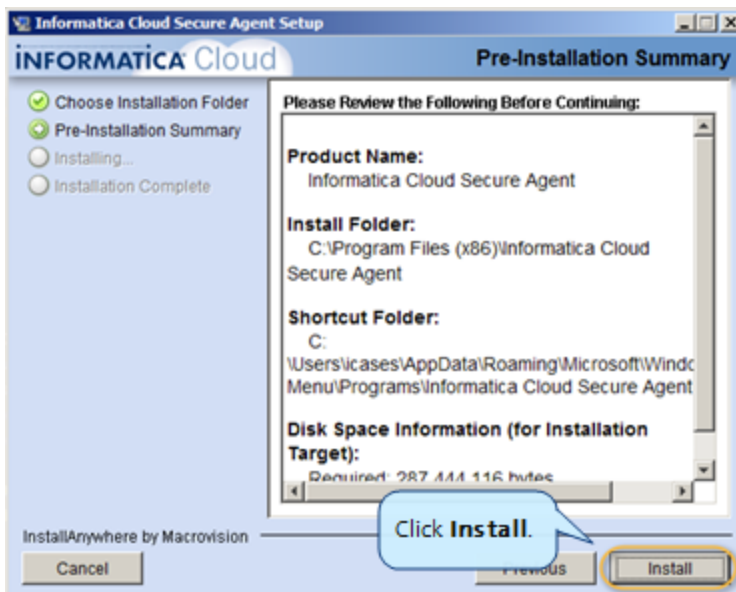


Running the Informatica Cloud Secure Agent Installation Program

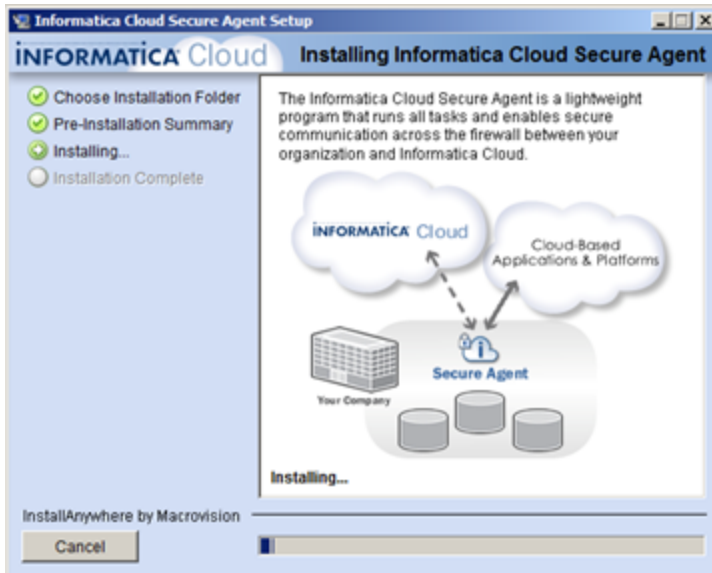
1. In the **Informatica Cloud Secure Agent Setup** window, **Choose Installation Folder** area, leave the default program directory or click **Choose** to specify a different location.
2. To install the secure agent, click **Next**.



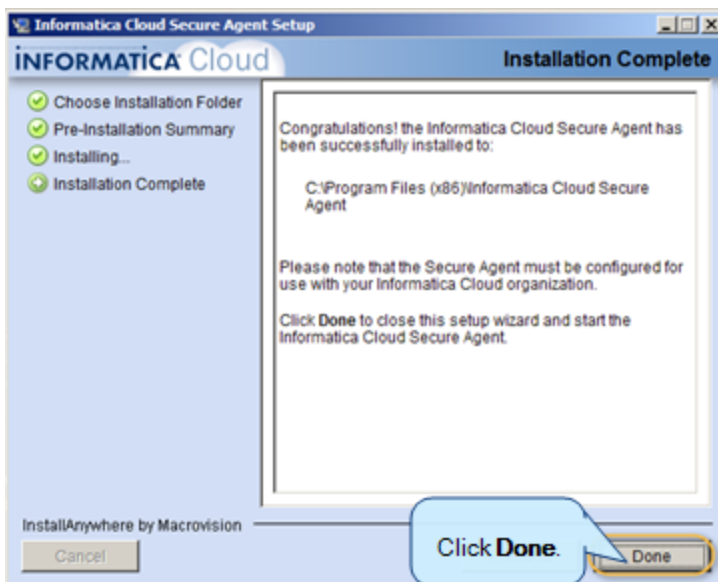
3. In the **Pre-Installation Summary** window, review the settings and if everything is correct, click **Install**.



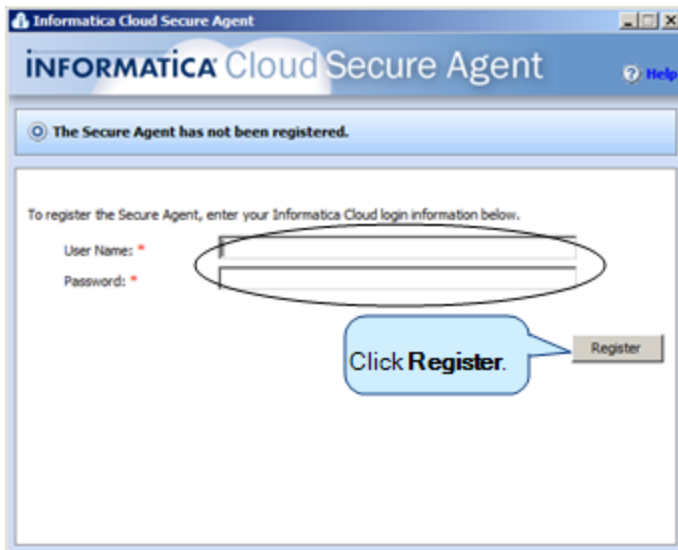
The **Installing** window displays the progress of the installation process.



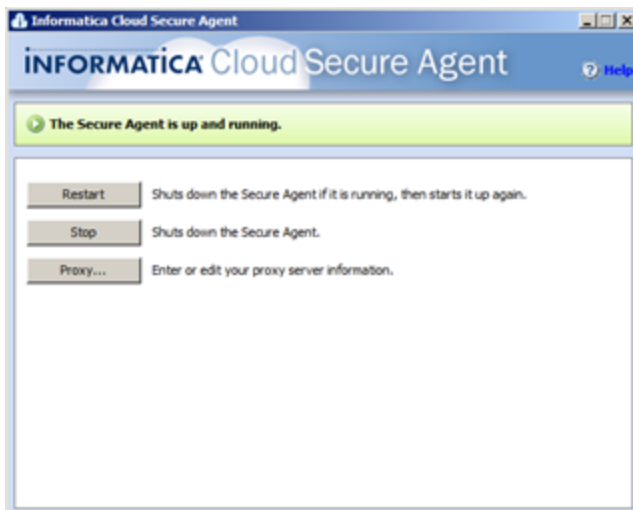
4. In the **Installation Complete** window, review the summary of the installation, and then click **Done**.



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



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



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



7. In the **D&B360 User Registration and Secure Agent Installation** window, **Deployment Type** field, select **On Premise**, then click **Next**.

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

8. To connect to the CRM, on the **Admin** window, click **CRM Credentials**, and in the **Configure Credentials** window, type your **User** and **Password** information.

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

Preparing Your MSD and Active Directories for the Informatica Cloud Secure Agent

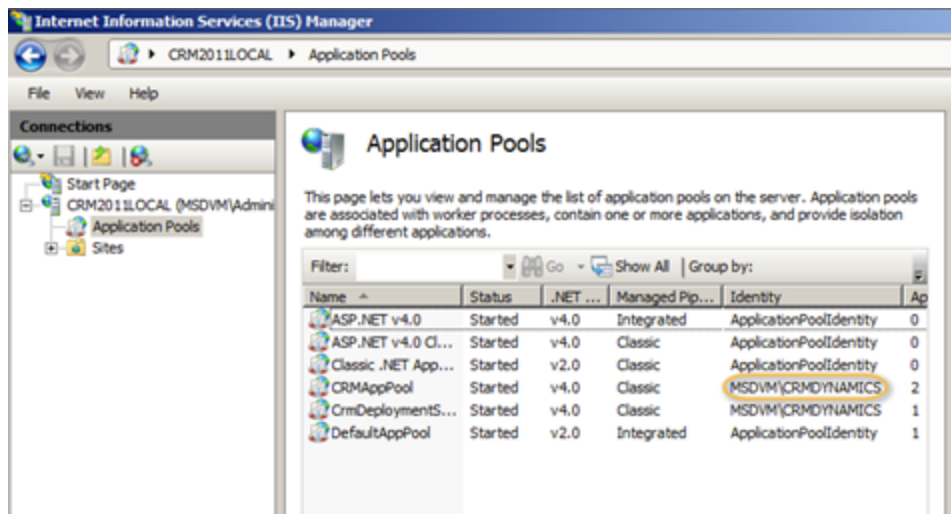
Examples in this section show 2011, but these should be the same for 2013. If you have any questions or concerns about the steps in this section, contact Customer Support.

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

NOTE: If you need help with the Informatica Cloud registration process, open a customer support ticket at <http://dnbus.force.com/support?prod=DNB360>.

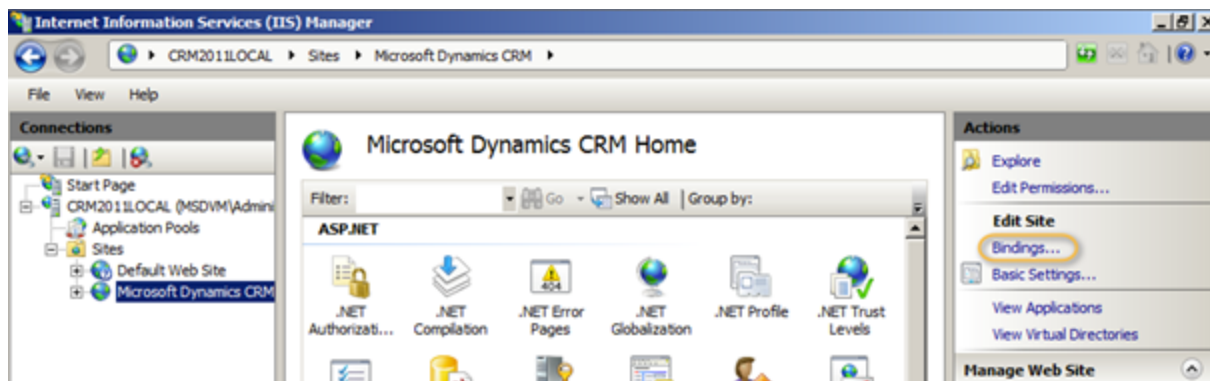
Specify the Identify for CRMAppPool

- Log in to your MSD Application server.

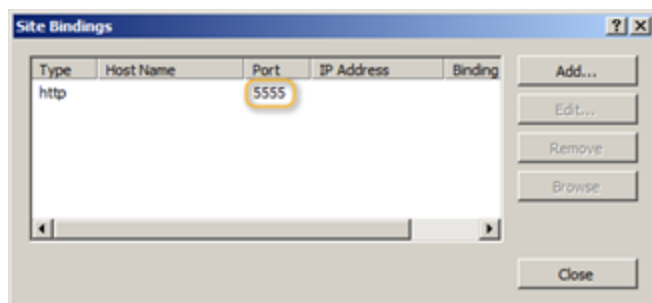


Identify the Port for Your CRM Dynamics Instance

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



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



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

IMPORTANT: If the CRMAppPool is running as *Network Service*, skip all of the steps in this section:

1. Log in to the Domain Controller.

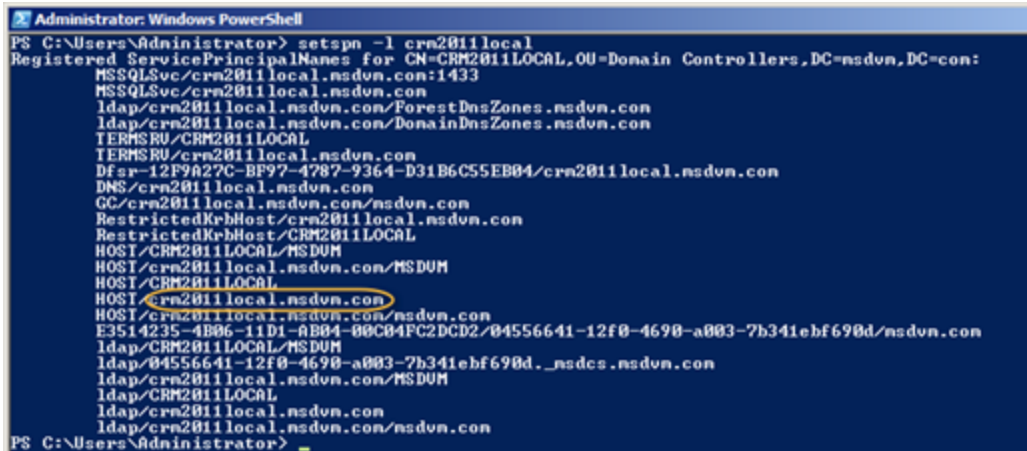
The Administrator: Windows Powershell window opens.

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



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

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



```
Administrator: Windows PowerShell
PS C:\Users\Administrator> setspn -l crm2011local
Registered ServicePrincipalNames for CN=CRM2011LOCAL,OU=Domain Controllers,DC=msdvm,DC=com:
MSSQLSvc/crm2011local.msdvm.com:1433
MSSQLSvc/crm2011local.msdvm.com
ldap/crm2011local.msdvm.com/ForestDnsZones.msdvm.com
ldap/crm2011local.msdvm.com/DomainDnsZones.msdvm.com
TERMSRV/CRM2011LOCAL
TERMSRV/crm2011local.msdvm.com
Dfsr-12f9a27c-bf97-4787-9364-d31b6c55eb04/crm2011local.msdvm.com
DNS/crm2011local.msdvm.com
GC/crm2011local.msdvm.com/msdvm.com
RestrictedKrbHost/crm2011local.msdvm.com
RestrictedKrbHost/CRM2011LOCAL
HOST/CRM2011LOCAL/MSDUM
HOST/crm2011local.msdvm.com/MSDUM
HOST/CRM2011LOCAL
HOST/crm2011local.msdvm.com
HOST/crm2011local.msdvm.com/msdvm.com
E3514235-4B06-11D1-AB04-00C04FC2DCD2/04556641-12f0-4690-a003-7b341ebf690d/msdvm.com
ldap/CRM2011LOCAL/MSDUM
ldap/04556641-12f0-4690-a003-7b341ebf690d._msdcs.msdvm.com
ldap/crm2011local.msdvm.com/MSDUM
ldap/CRM2011LOCAL
ldap/crm2011local.msdvm.com
ldap/crm2011local.msdvm.com/msdvm.com
PS C:\Users\Administrator>
```

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

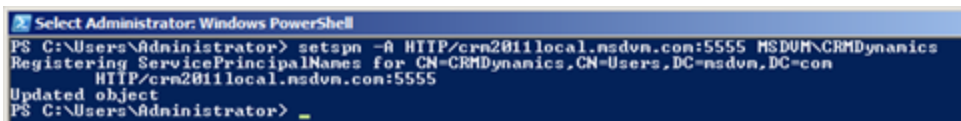
4. Enter the following command with the values obtained in the previous steps as follows:

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

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

In our example, this is

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



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

5. Enter the command:

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

In our example, this is

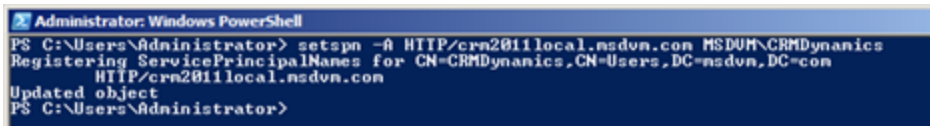
```
setspn -A HTTP/crm2011local.msdrv.com:5555 MSDVM\CRMDynamics setspn -A  
HTTP/<spn> <user>
```

6. Enter the command:

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

In our example, this is

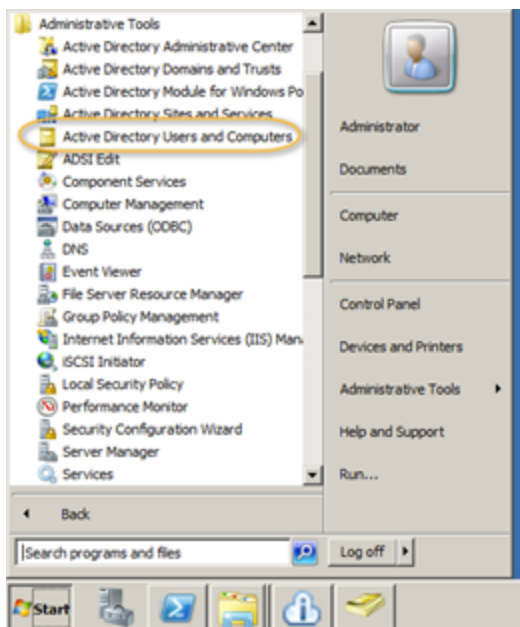
```
setspn -A HTTP/crm2011local.sdvm.com MSDVM\CRMDynamics
```



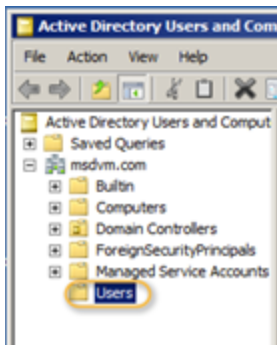
Setting Delegation

IMPORTANT: If the CRMAppPool is running as *Network Service*, skip all of the steps in this section.

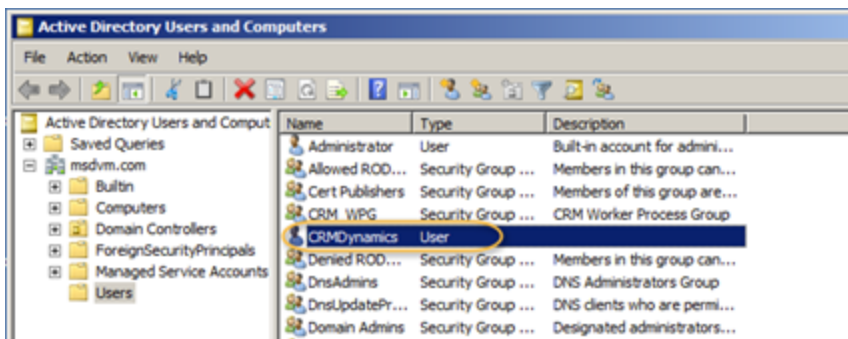
1. Log in to your Domain Controller and select **Active Directory Users and Computers**.



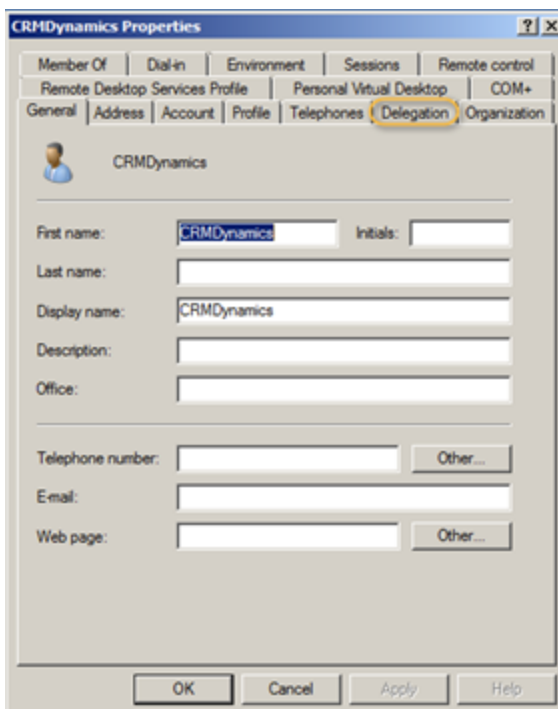
2. In the **Active Directory Users and Computers** window, select **msdrv.com/Users**.



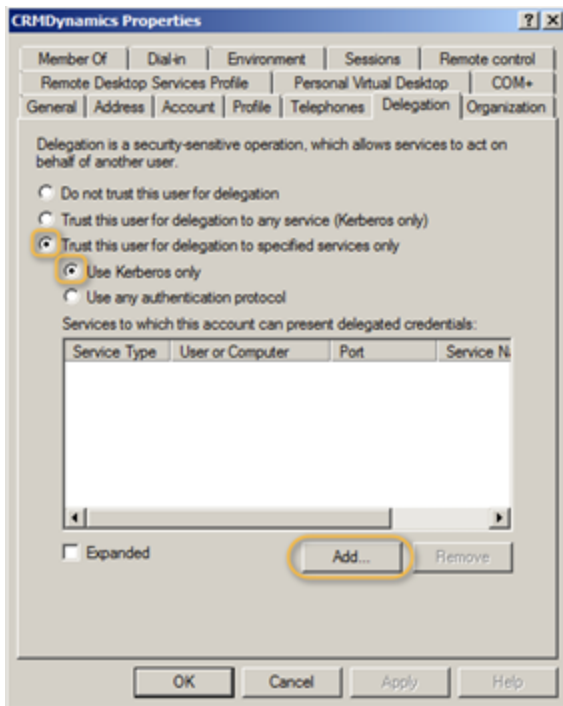
3. In the Users directory, locate the User identified in the Step 1 and double-click it (see this step on page 4-29).



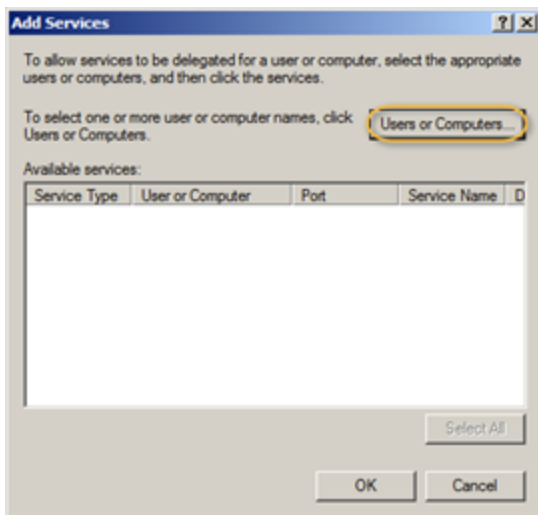
4. In the CRMDynamics Properties window, select the Delegation tab.



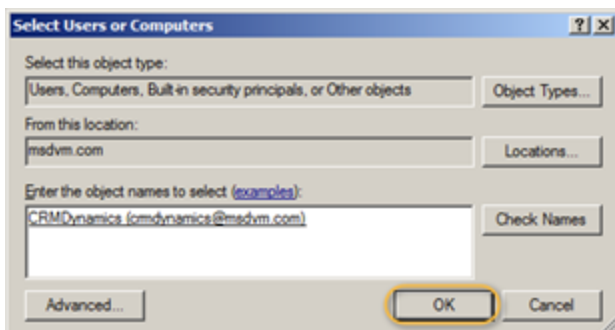
5. Select the Trust this user for delegation to specified services only and Use Kerberos only options, and then click Add.



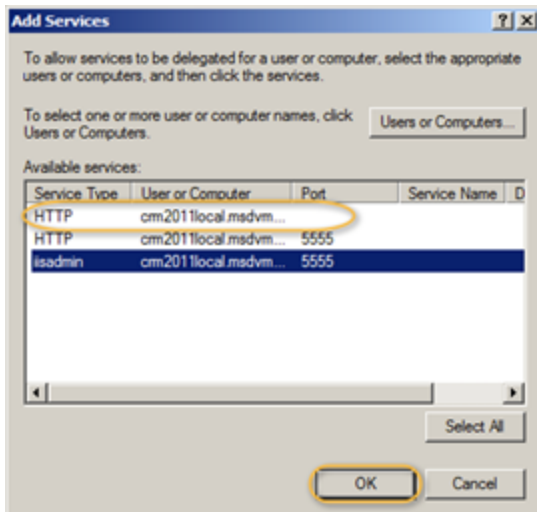
6. Click Users or Computers.



7. Enter the user name identified in Step 1 and then click OK (see this step on page 4-29).



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



Post-Installation Steps

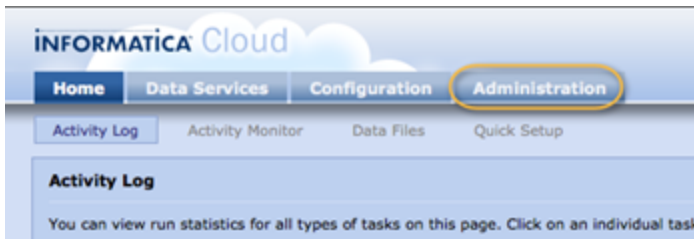
1. In the **Informatica Cloud Secure Agent Setup** window, click **Stop**.

The Secure Agent shuts down.



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

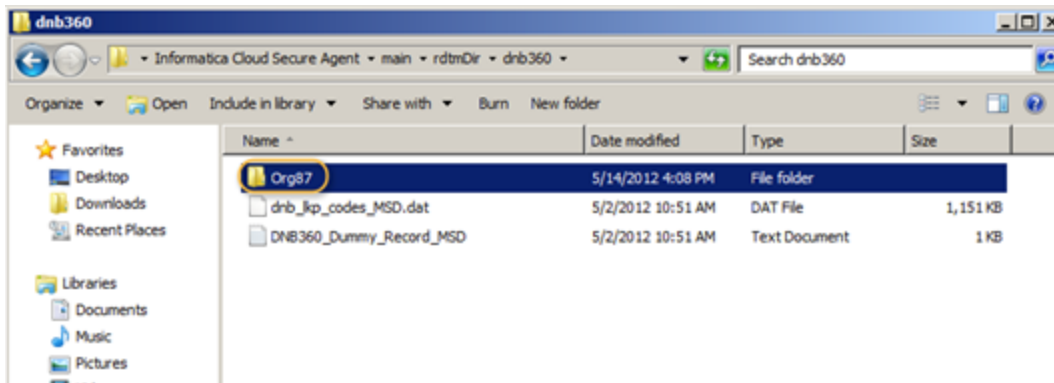
2. In the **Informatica Cloud** window, click the **Administration** tab.



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



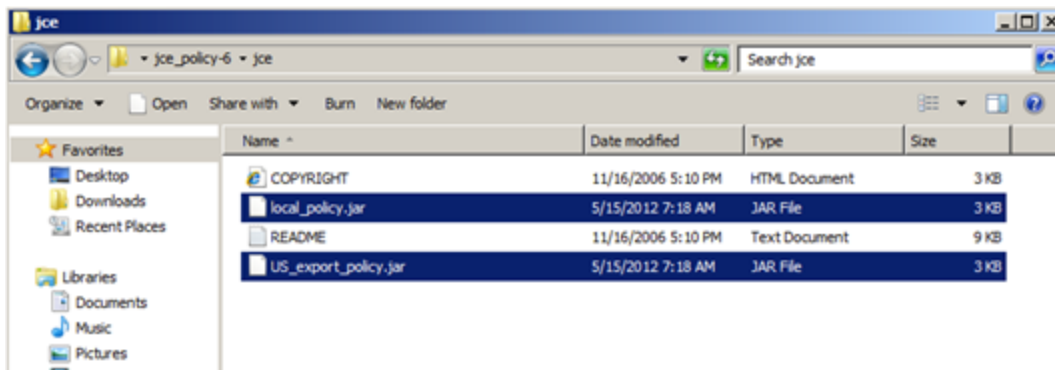
5. In the Secure Agent `..\Informatica Cloud Secure Agent\main\rdtmDir\dnb360\` directory, create a folder with the Organization ID name.



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

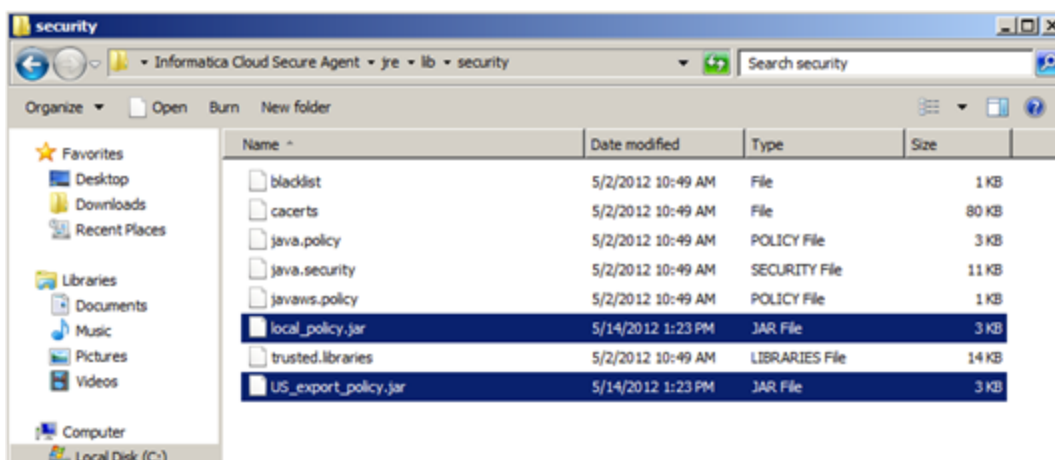
7. Unzip the zip package and copy:

`local_policy.jar` and `US_export_policy.jar`



8. Paste the unzipped files in the

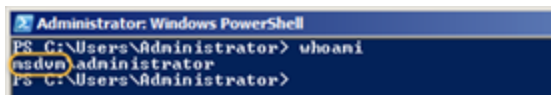
Program Files (x86)\Informatica Cloud Secure Agent\jre\lib\security directory and overwrite the existing files.



Adjusting the Settings for Your System

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

In our example, the domain name is MSDVM.



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

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

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

The following is an example `krb5.conf` file.

```
[libdefaults]

    default_realm = MSD.SAMPLE.COM

    default_tkt_enctypes = rc4-hmac

    default_tgs_enctypes = rc4-hmac

    permitted_enctypes = rc4-hmac

[realms]

    MSD.SAMPLE.COM = {}

        kdc = xxx.msd.sample.com

        default_domain = MSD.SAMPLE.COM

}

[domain_realm]

    .MSD.SAMPLE.COM = MSD.SAMPLE.COM
```

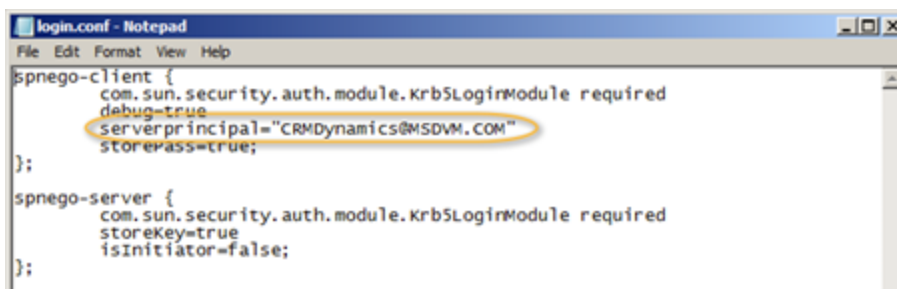
3. Save the file.

IMPORTANT: If the CRMAppPool is running as *Network Service*, skip the following step:

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

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

directory, and enter the values for your system.



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

5. Save the file.

Completing the Optional Steps

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

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

1. Configure the Java Security for Microsoft Dynamics Active Directory (MSD AD) instance.
2. Generate the root and intermediate Secure Socket Layer (SSL) certificates for HTTPS URL (.cer files).
3. Use the command line to install certificates (certs) for JRE.

Use CMD and navigate to <agentdir>/jre/bin/

Type the command: `keytool -importcert -alias <certificate alias name> -file "<certificate path>\<certificate filename>" -keystore ..\lib\security\cacerts -trustcacerts`

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

Example: Root certificate = RootCA1.cer

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

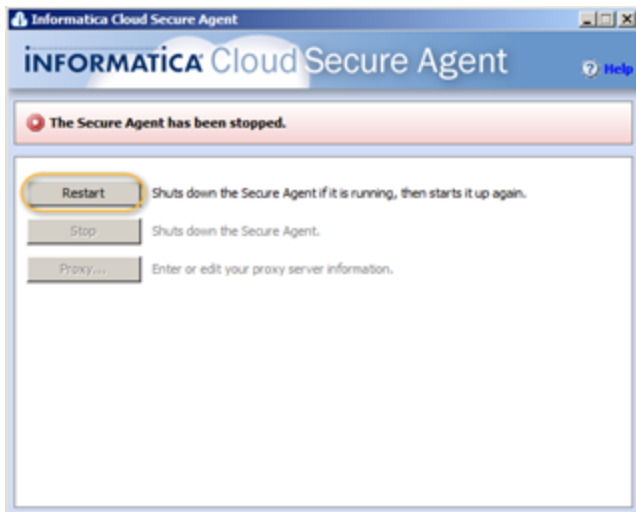
Default JRD password: changeit

Optional Step When the DNS Is Unable to Perform Host Resolution

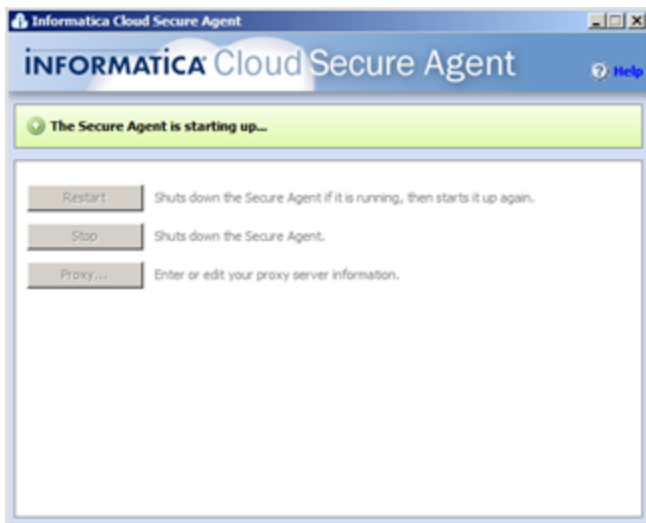
If the DNS is improperly set, you might need to add the IP address and hostname to your hosts file to resolve the hosts used for MSD deployment. For example, in Windows 7, the IP address can be found in this directory -- C:\Windows\System32\drivers\etc.

Restarting the Secure Agent

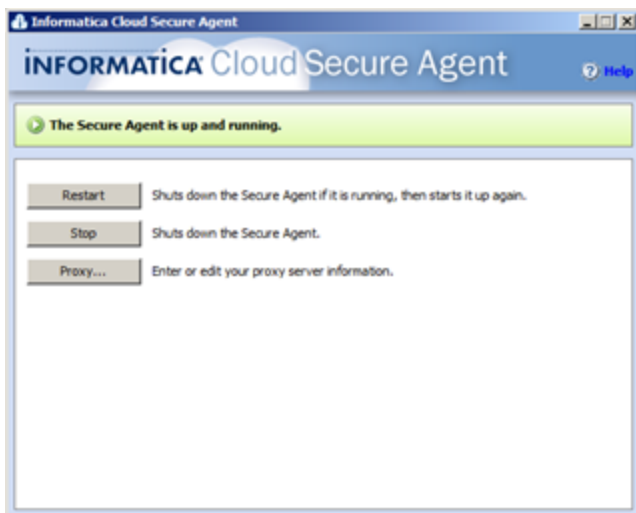
- Open the **Informatica Cloud Secure Agent** window, and click **Restart**.



The Informatica Cloud Secure Agent starts up.



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



After you have completed these steps, users are ready to schedule new and refresh batch jobs.

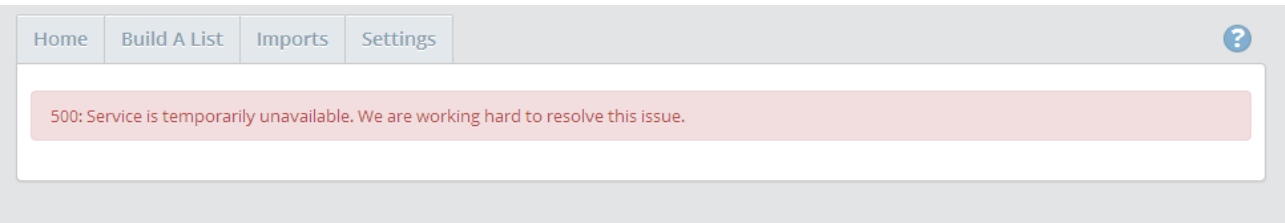
Chapter 5: Troubleshooting

Resolving Installation Issues	5-1
Contacting D&B Customer Support	5-4

Resolving Installation Issues

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

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

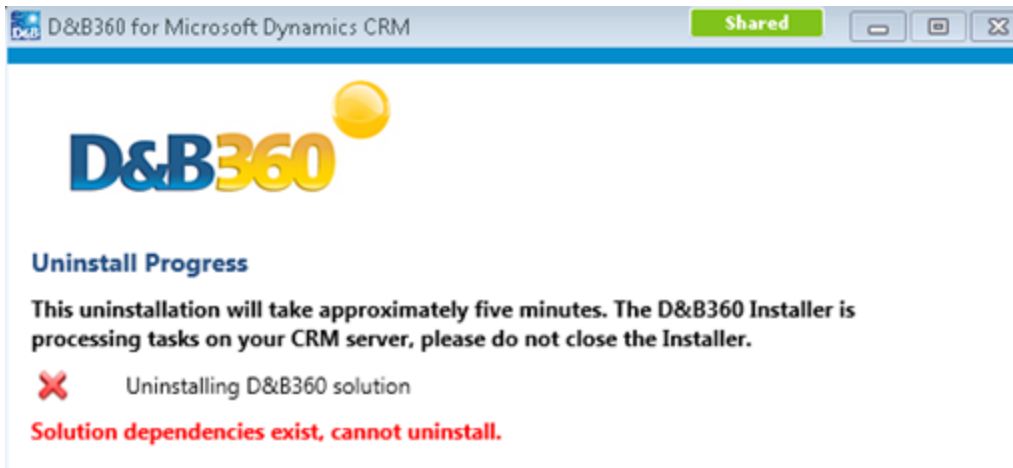


If you get this error, it is possible that the CRM username/password is incorrect. You need to reinstall using the "Register Agent" option and provide proper credentials.

2. If Internet Explorer warns you when accessing mixed content (secure and insecure), verify you have set your Trusted Sites options correctly. For more information,
3. It's possible that you have not been assigned DnB role. Make sure that you have either the "D&B360 Administrator" or "D&B User Security" role assigned to you.
4. It's possible that DnB360 is being updated. Wait approximately 15 minutes and try again.

Resolving Issues when Uninstalling D&B360

Problem: Uninstall fails and this message displays, "Solution dependencies exist, cannot uninstall."



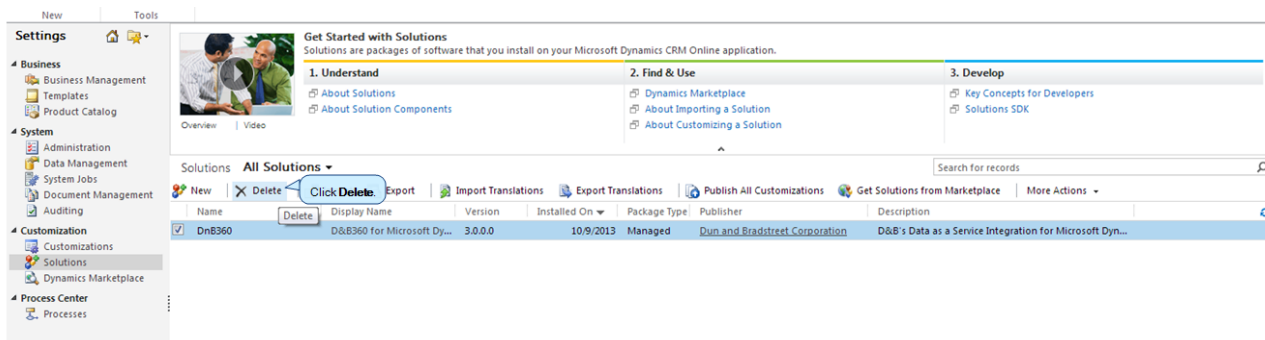
Description: If you have created or modified any forms or reports in the CRM to include D&B Data fields and you attempt to uninstall D&B360, this error message will display. The CRM detects and enforces this dependency before you run an uninstall to ensure that forms and reports that use D&B fields will not be inadvertently impacted by the uninstall.

Solution: You need to manually remove the D&B data fields from the customized forms or reports before you uninstall the product.

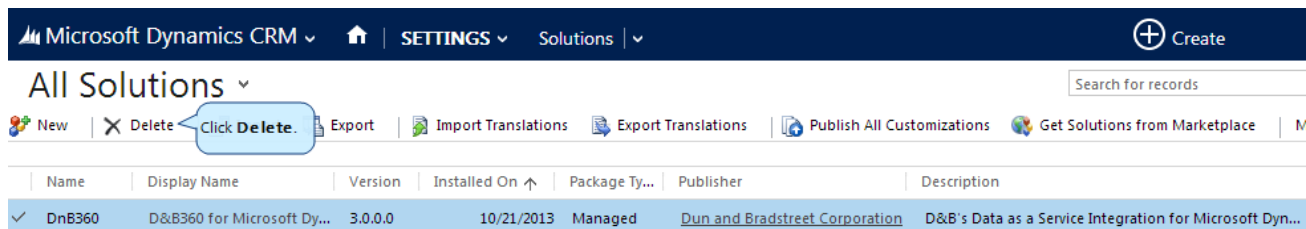
Steps to Find the Dependencies:

1. On the CRM menu, select **Settings** and then select **Solutions**.
2. In the **Solutions All Solutions** window, select the **D&B360** check box.
3. Click **Delete**.

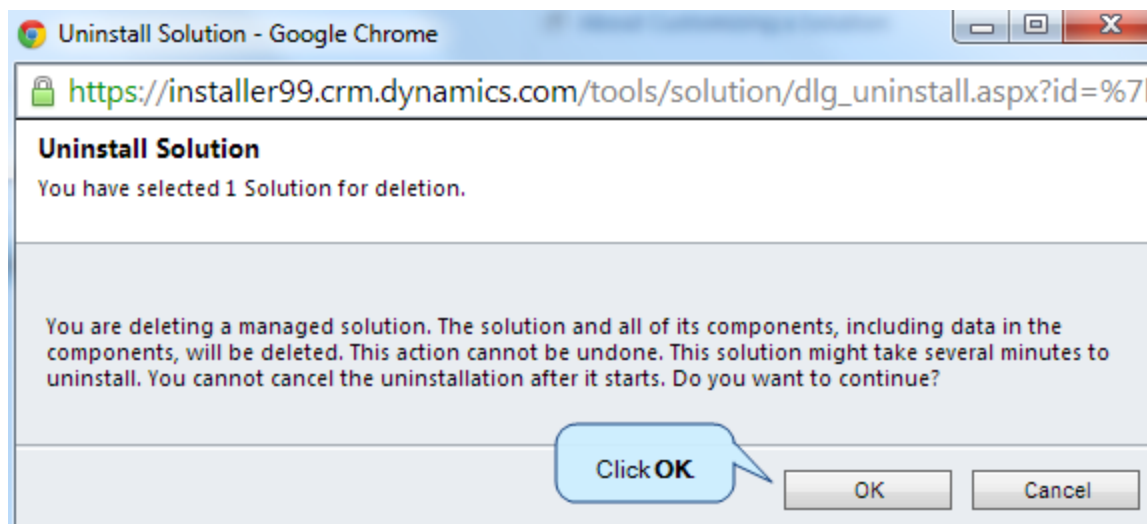
In Microsoft Dynamics CRM 2011:



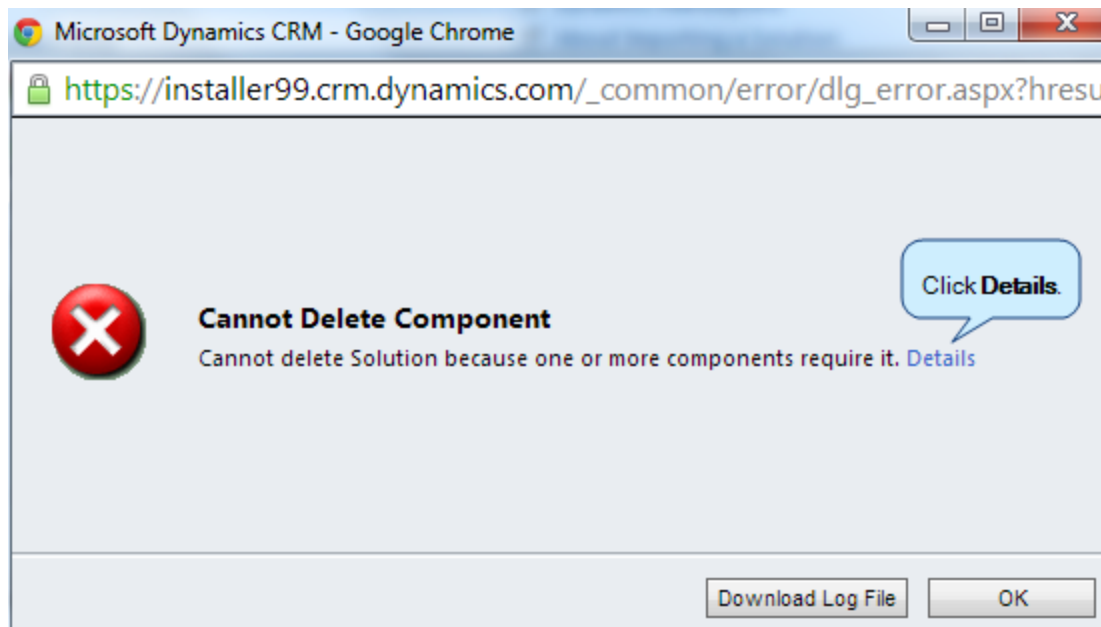
In Microsoft Dynamics CRM 2013:



4. In the **Uninstall Solution** window, click **OK**.



5. In the error message window, click **Details**.



6. In the **Dependency Details** window, follow the process for removing customizations and remove the first two rows: Account (D&B Company) and Account (dnb_dnb_company_account....). Remove any other D&B fields that were added to the customized forms.

Dependency Details - Google Chrome

https://installer99.crm.dynamics.com/tools/dependency/dependencyviewdialog.aspx?objectid=%7bd56196e1-

Dependency Details

✖ Solution D&B360 for Microsoft Dynamics CRM cannot be deleted. The following components are required by other components in the system.

Display Name ▲	Name/Id	Type	Managed Solution	Required by ▲
Account (D&B Company)		Field	D&B360 for Microsoft ...	Account (Form)
Account (dnb_dnb_company_acco...	Remove the first two rows. dnb_dnb_company_acco...	EntityRelationship	D&B360 for Microsoft ...	Account (Form)
dnb_/Pages/dnb_entity_agent.htm	dnb_/Pages/dnb_entity_ag...	Web Resource	D&B360 for Microsoft ...	Account (Form)
dnb_/Pages/dnb_entity_agent.htm	dnb_/Pages/dnb_entity_ag...	Web Resource	D&B360 for Microsoft ...	Contact (Form)
dnb_/Pages/dnb_entity_agent.htm	dnb_/Pages/dnb_entity_ag...	Web Resource	D&B360 for Microsoft ...	Lead (Form)

- Click **OK**.
- Start the reinstall process again.

Contacting D&B Customer Support

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

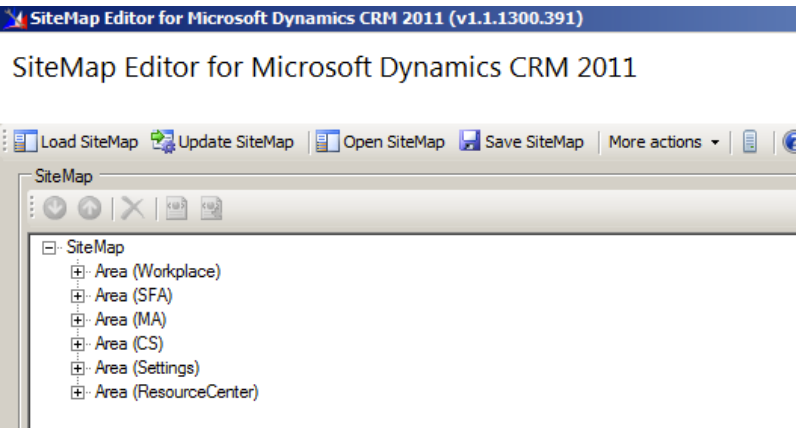
To submit a ticket, go to this URL: <http://dnbus.force.com/support?prod=dnb360>. You will be prompted to enter your e-mail address and then fill out a form.

Chapter A: Appendix

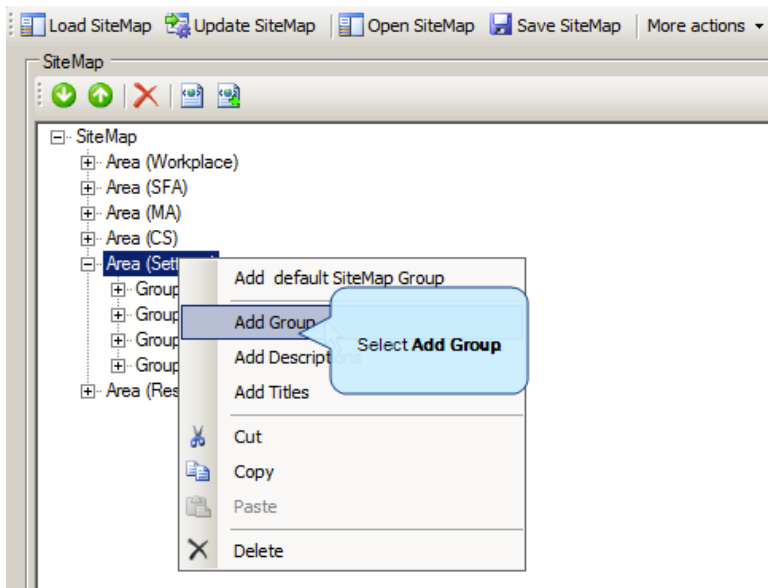
Enabling D&B360 Administration on a Customized SiteMap	A-1
Adding One or More CRMs to Your Informatica Cloud Account	A-7
Configuring CRM Endpoints	A-11
Viewing Available D&B360 Roles	A-14

Enabling D&B360 Administration on a Customized SiteMap

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

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

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

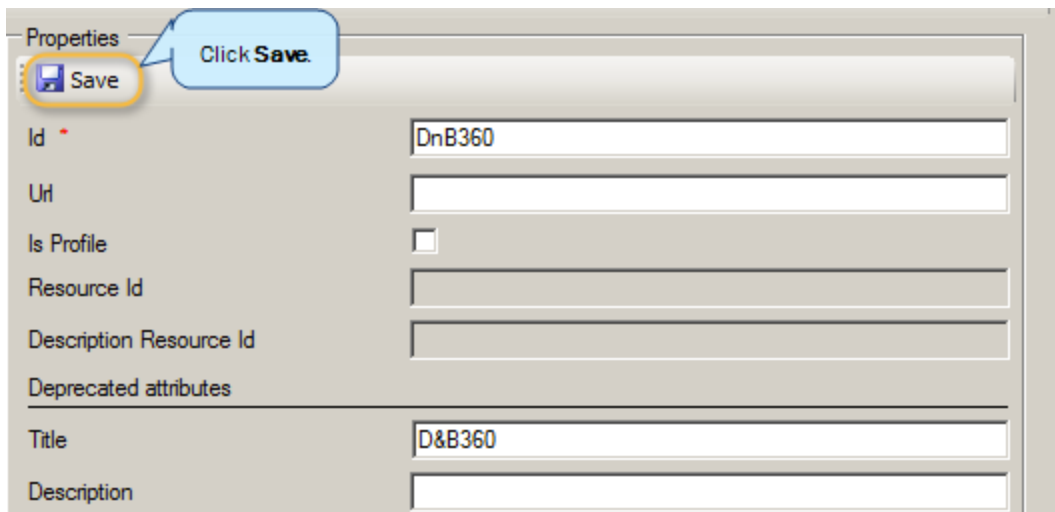
SiteMap Editor for Microsoft Dynamics CRM 2011



3. In the **Properties** window:

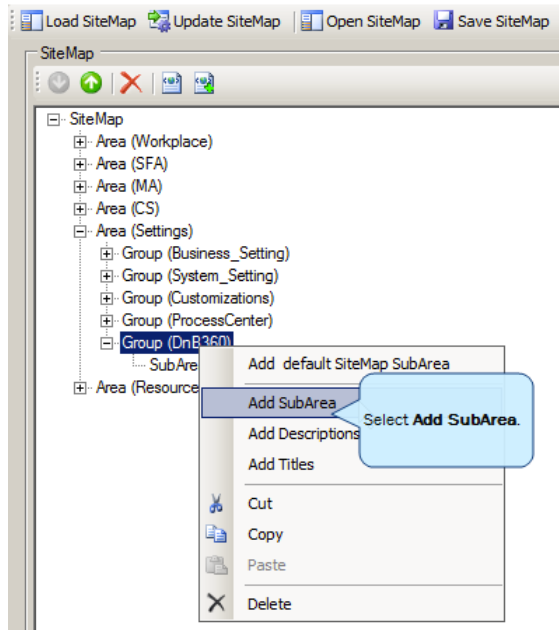
In the **Id** field, type **DnB360**.

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



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

SiteMap Editor for Microsoft Dynamics CRM 2011



5. In the **Properties** window:

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

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

In the **Url** field, enter:

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

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

Click **Save**.

The Properties window is shown with the following fields and values:

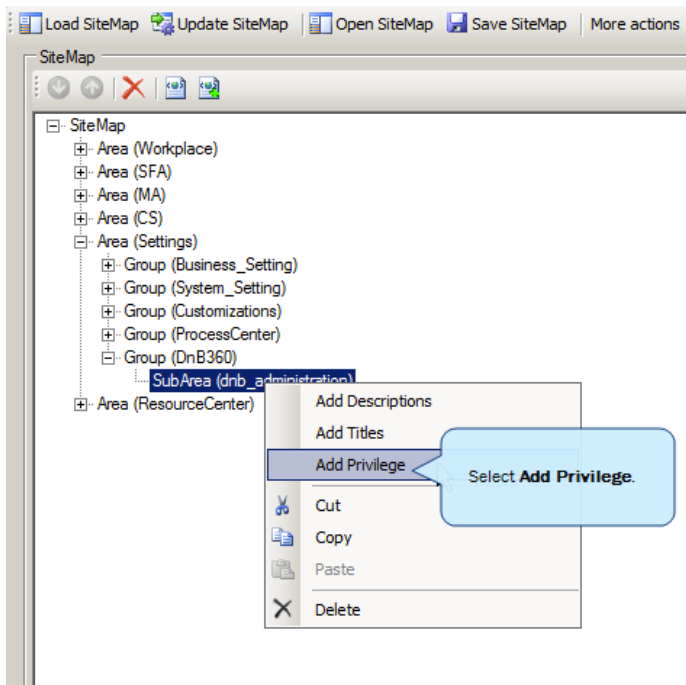
- Id:** dnb_administration
- Available Offline:** ☐
- Pass Params:** ☐
- Client:** ☐ All ☐ Outlook ☐ Outlook Laptop Client ☐ Web ☐ Outlook Workstation Client
- Entity:** dnb_settings (with a "Select entity" button)
- Get Started Pane Path:** (empty)
- Get Started Panel Path Admin Outlook:** (empty)
- Get Started Pane Path Admin:** (empty)
- Get Started Pane Path Outlook:** (empty)
- Icon:** (empty) (with a browse button "...")
- Outlook Shortcut Icon:** (empty)
- Sku:** ☐ All ☐ OnPremise ☐ Live ☐ SPLA
- Url:** ces/DnB360.Crm.WebResources.Administration.html (with a browse button "...")
- Resource Id:** (empty)
- Description Resource Id:** (empty)
- Deprecated attributes:** (empty)
- Title:** D&B360 Administration

A blue callout bubble points to the "Save" button in the top left corner, containing the text "Click Save."

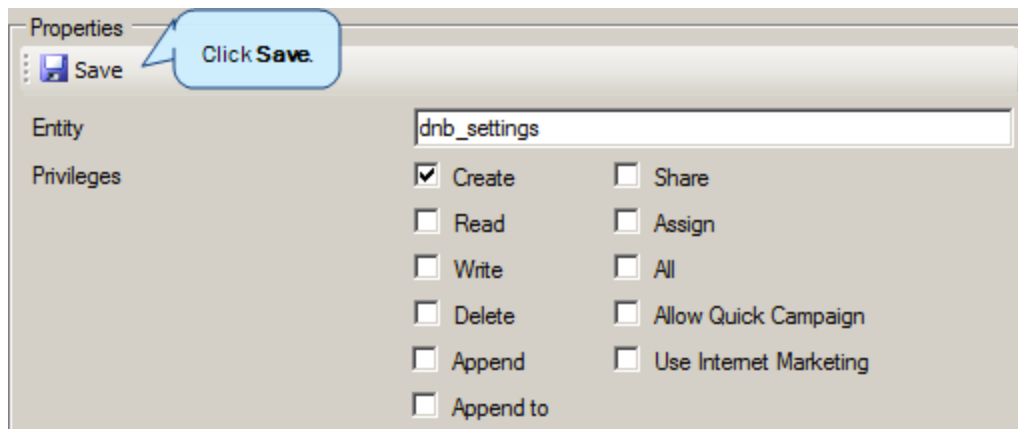
6. In the Site Map Editor window, right-click SubArea (dnb_administration) and select Add Privilege.

SiteMap Editor for Microsoft Dynamics CRM 2011 (v1.1.1300.391)

SiteMap Editor for Microsoft Dynamics CRM 2011



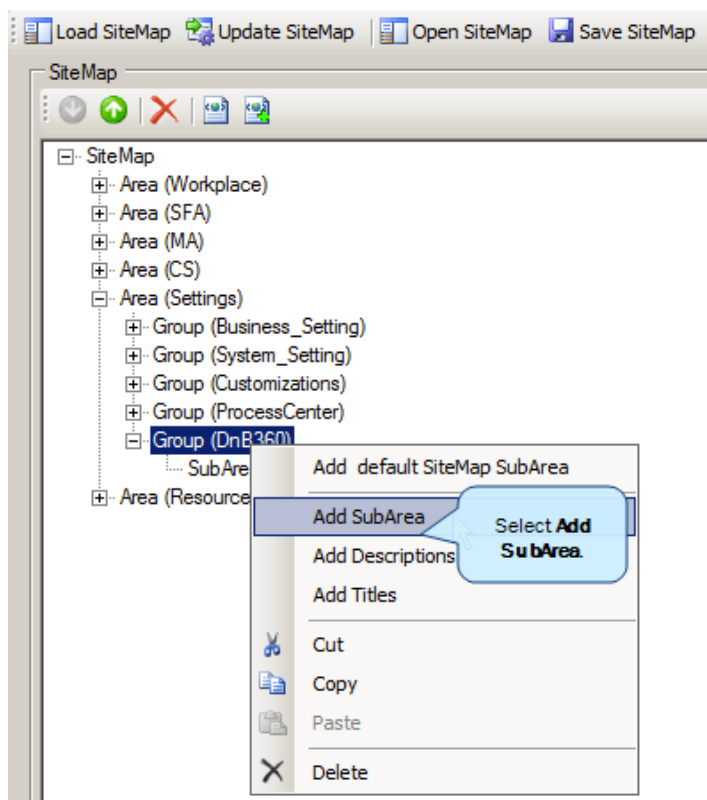
7. In the Properties window, Entity field, type dnb_settings, select Create, and then click Save.



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

SiteMap Editor for Microsoft Dynamics CRM 2011 (v1.1.1300.391)

SiteMap Editor for Microsoft Dynamics CRM 2011



9. In the **Properties** window:

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

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

Click **Save**.

Properties

Save Click **Save.**

Id

Available Offline ☐

Pass Params ☐

Client ☐ All ☐ Outlook ☐ Outlook Laptop Client
☐ Web ☐ Outlook Workstation Client

Entity

Get Started Pane Path

Get Started Panel Path Admin Outlook

Get Started Pane Path Admin

Get Started Pane Path Outlook

Icon

Outlook Shortcut Icon

Sku ☐ All ☐ OnPremise ☐ Live ☐ SPLA

Url

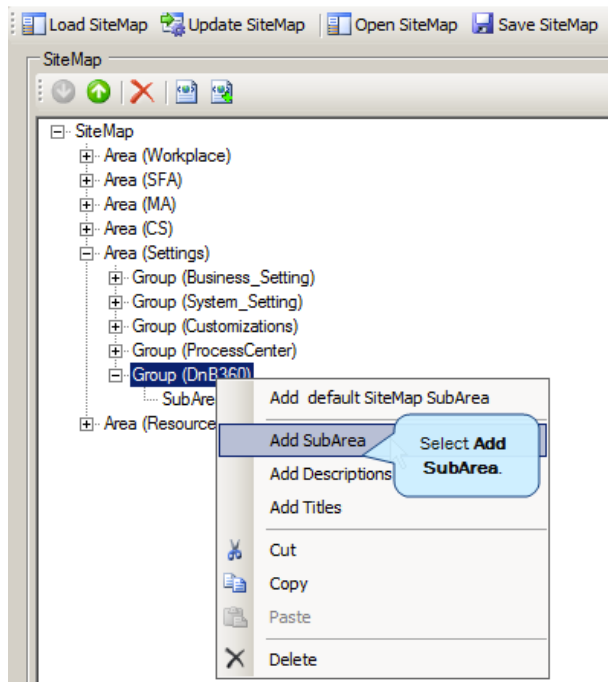
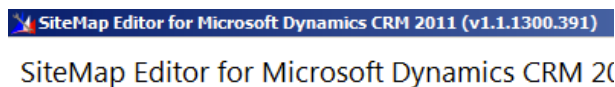
Resource Id

Description Resource Id

Deprecated attributes

Title

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

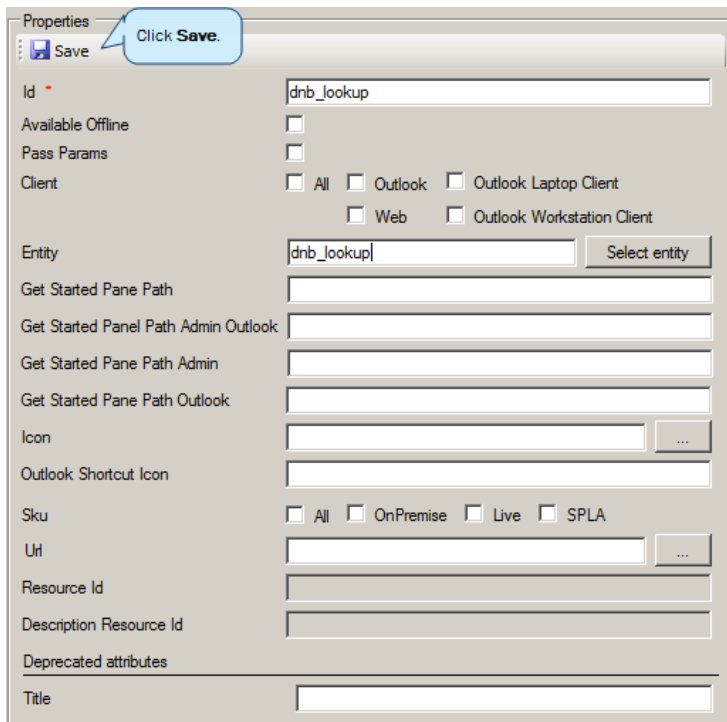


11. In the **Properties** window:

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

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

Click **Save**.



Properties

Save Click **Save**.

Id dnb_lookup

Available Offline ☐

Pass Params ☐

Client ☐ All ☐ Outlook ☐ Outlook Laptop Client ☐ Web ☐ Outlook Workstation Client

Entity dnb_lookup Select entity

Get Started Pane Path

Get Started Panel Path Admin Outlook

Get Started Pane Path Admin

Get Started Pane Path Outlook

Icon

Outlook Shortcut Icon

Skus ☐ All ☐ OnPremise ☐ Live ☐ SPLA

Url

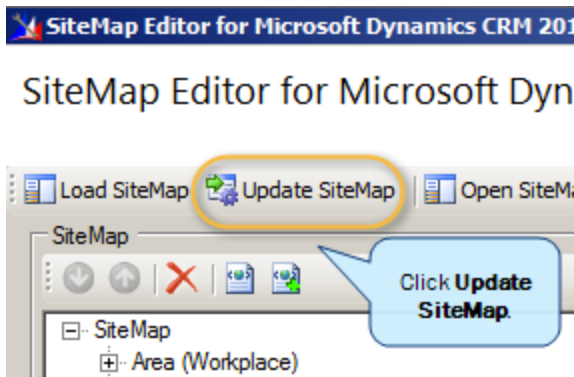
Resource Id

Description Resource Id

Deprecated attributes

Title

12. Click **Update SiteMap**.



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

Adding One or More CRMs to Your Informatica Cloud Account

If your organization has multiple CRMs that will use the batch process, each CRM must have its own connection in your Informatica Cloud account. To do this, make sure that your Informatica Cloud account was created using your Max CV user name as the organization name. After you have created your




Informatica Cloud account and connected to your first CRM, you need to create a connection on the Informatica Cloud for the any other CRMs that you want to include.

NOTE: Batch jobs can be run from the CRMs only one at a time because there is only one task for new and refresh batch.

For each CRM ORG, perform the steps in *Registering Your Informatica Cloud Account for On Demand CRMs* starting with **step 8**. Be sure to name the CRM connection in a way that distinguishes the connections.

See the following examples:

In the Connections window, the first example CRM displays in the Name column.

Home	Data Services	Configuration	Administration
Agents	Connections	Schedules	Task Flows
Plug-ins	Custom Sources		
Connections			
List of all connections in your organization. Use a connection to connect to a database, file or Salesforce. To add a new connection, click the connection name.			
New			
Actions	Name▲	Type	Service URL
  	My_Org_Sales	Microsoft Dynamics CRM	https://disco.crm.dynamics.com/XRMServices/2011/Discovery.svc

In the New Connection window, we add a second connection.

New Connection
You can create a new connection here. Use a connection to access a datab

OKCancelTest

Connection Details

Connection Name:*My_Org_Support
Description:
Type:*Microsoft Dynamics CRM

Microsoft Dynamics CRM Connection Properties

Authentication Type:*Microsoft Live
User Name:*pattieb6@gmail.com
Password:*
Organization Name:*myorgsupport
Service URL:*https://disco.crm.dynamics.com/XRMServices/

Now the Connections window displays these two organization names.

INFORMATICA Cloud

Home

Data Services

Configuration

Administration

Agents

Connections

Schedules

Task Flows

Plug-ins

Custom Sources

Connections

List of all connections in your organization. Use a connection to connect to a database, file or Salesforce. To add a new connection, click the connection name.

New

Actions	Name▲	Type	Service URL
	My_Org_Sales	Microsoft Dynamics CRM	https://disco.crm.dynamics.com/XRMServices/2011/Discovery.svc
	My_Org_Support	Microsoft Dynamics CRM	https://disco.crm.dynamics.com/XRMServices/2011/Discovery.svc

In the Configure Credentials window, Batch Credentials area, we enter the User Name and Password for our Informatica Cloud account, which we set up in *Registering Your Informatica Cloud Account for On Demand CRMs* starting with **step 8**. These instructions are in the section for an On Demand CRM, but also apply to On Premise CRMs when adding one or more CRMs to your Informatica Cloud account.

Configure Credentials

Batch Credentials

User

User Name

Hide Password

Password

●●●●●●●●

Confirm Password

●●●●●●●●

Connection Name

My_Org_Support

In the Modify Batch Schedule window, we enter the settings for a New Batch.

Modify Batch Schedule

New Batch

Start Time

11/26/13

at

08

40

AM

Repeat Frequency

None

Confidence Code

8

The Data Services tab, DNB360 Batches area lists the new batch that we set in the previous step.

INFORMATICA Cloud

Home

Data Services

Configuration

Administration

Data Synchronization




PowerCenter

DNB360

DNB360 Batches

List of DNB360 batches in your organization. A DNB360 batch defines the process for synchronizing data between Salesforce and DNB.

New

Actions	Name	Type	Connection	Schedule
  	DNB360 New Batch for Microsoft Dynamics CRM Account	New Batch	My_Org_Sales	NEW_BATCH_JOB

Submitting a New or Refresh Batch Job

When you are ready to submit a new or refresh batch job, you must modify the connection on the Informatica Cloud. To do this, you need to edit the batch task on the Informatica Cloud to use the connection to the CRM organization where you want to run batch.

NOTE: If more than one CRM uses your Informatica Cloud account, all CRMs that use this account will display in the activity logs.

1. On your Informatica Cloud account, select the **Data Services** tab.
2. Click **DnB360**.
3. In the **Actions** column, click the pencil icon to edit the batch job that you want to use.
4. Select the connection for the CRM.
5. Click **Save**.

You can create DNB360 batch here. A DNB360 batch defines the process for synchronizing data between Sale

Save **Click Save.** **Complete these fields.**

DNB360 Batch Details

Application Type:

Object Type:

Batch Type:

DNB360 New Batch for Microsoft Dynamics CRM Account consists of following steps:

- DNB360 New Batch Extract for Microsoft Dynamics CRM Account
 - New Batch Initialization
 - New batch records submitted to DnB for processing
 - New Batch Record Ids from DnbAdimnReview
 - New Batch Records that failed DQ check
- DNB360 New Batch Retrieve for Microsoft Dynamics CRM Account
 - New batch records validated for DUNS duplicates
 - New Batch Record Ids from DnbCompany (first time)
 - New batch records posted to DnB Company
 - New Batch Record Ids from DnbCompany (second time)
 - New Batch association between Account and DnB Company
 - New Batch Record Ids from DnbAdimnReview
 - New Batch below Confidence Code records posted to DnB Admin Review
 - New Batch record count is updated for the current job run
 - New Batch record count is reset for the next job run

Connection: **View...** **New...**

Schedule: **Run this task on schedule.** **New...**

Row Limit: ☒ Use default limit ☐ Limit data to rows

- On the CRM window, verify that the Connection name you have entered for batch and the Connection name on the Informatica Cloud account are the same. Also verify that the user name and password information are the same.

INFORMATICA Cloud

Home **Data Services** Configuration Administration

Data Synchronization PowerCenter **DNB360**

DNB360 Batches

List of DNB360 batches in your organization. A DNB360 batch defines the process for synchronizing data between Salesforce and DNB.

New

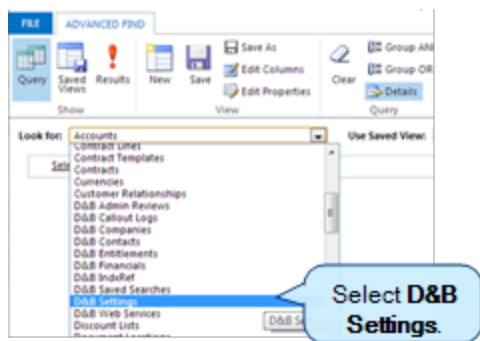
Actions	Name	Type	Connection	Schedule
	DNB360 New Batch for Microsoft Dynamics CRM Account	New Batch	My_Org_Sales	NEW_BATCH_JOB
	DNB360 Refresh Batch for Microsoft Dynamics CRM Account	Refresh Batch	My_Org_Support	REFRESH_BATCH_SCHEDULE

Configuring CRM Endpoints

If your configuration includes a proxy service, you will need to configure a CRM endpoint to use the external URL in order to establish communication between the agent and D&B360.

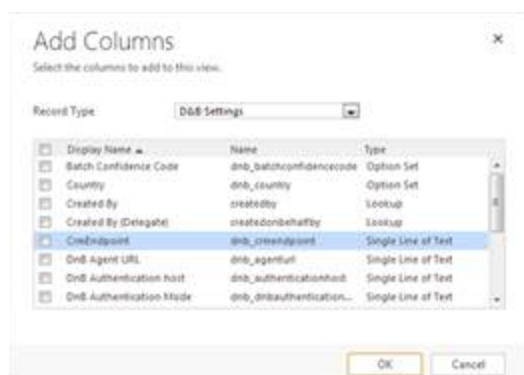
- In the MSD CRM window, navigate to Advanced Find.

2. In the Look for menu, select D&B Settings.



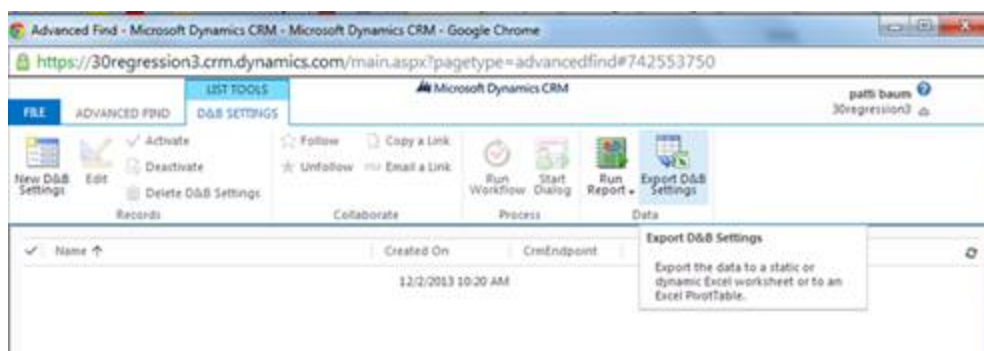
3. In the D&B Settings window, select Edit Columns, and then click Add Columns.

4. In the Add Columns window, select CrmEndpoint, and then click OK twice to close the window.

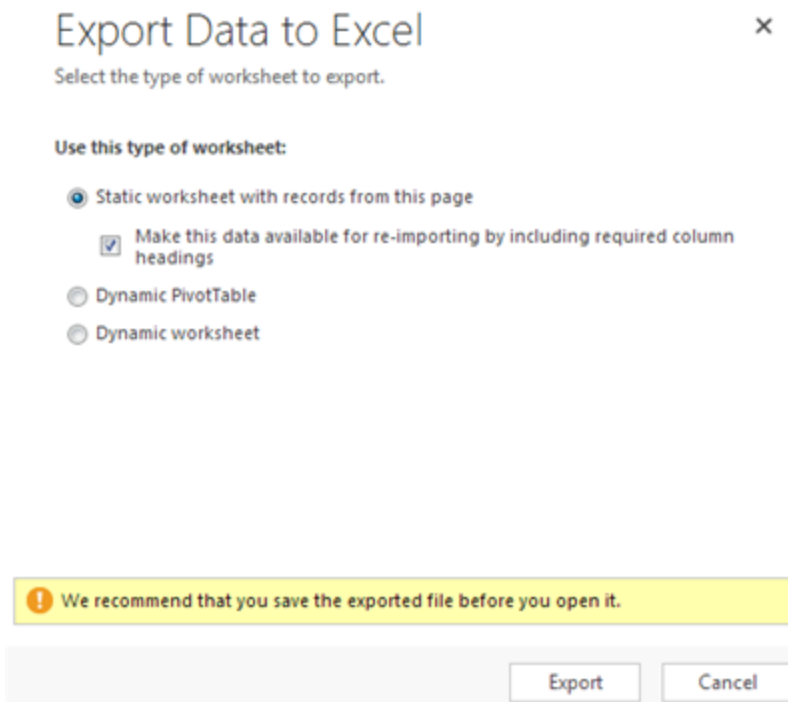


5. Click Results.

6. Click Export D&B Settings.

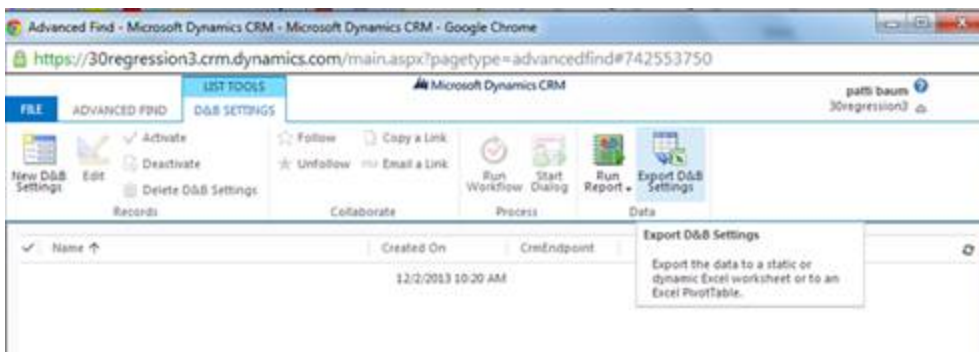


7. In the **Export Data to Excel** window, Use this type of **Worksheet** area, select **Make this data available for re-importing ...**, and then click **Export**.



An Excel file is exported to your local directory named **For Re-Import – D&B Settings Advanced Find View**.

8. When the .csv file opens in Excel, edit the file to include the URL needed for access and save the Excel file.
9. Return to the **Advanced** window and select **File**, then **Tools**, then **Import Data**.

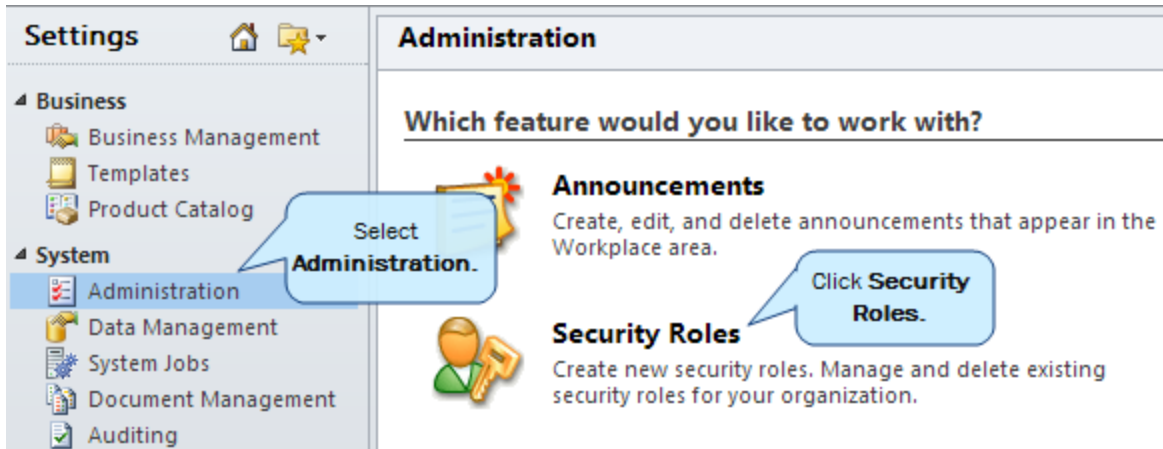


10. Search for and enter the file that you just edited, and then click **Next**.
11. Click **Finish**.
12. Wait a few minutes and then click on **Results** again to run the query.

When processed, input will display below the column **CrmEndpoint**.

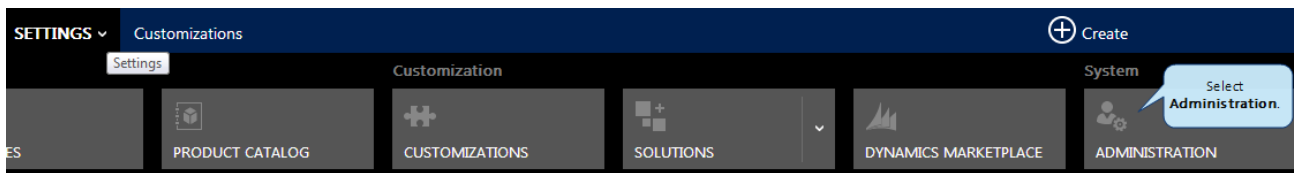
Viewing Available D&B360 Roles

1. On the CRM 2011 window, **Settings** menu, **System** menu, select **Administration**.
2. Click **Security Roles** to display the security roles available to you

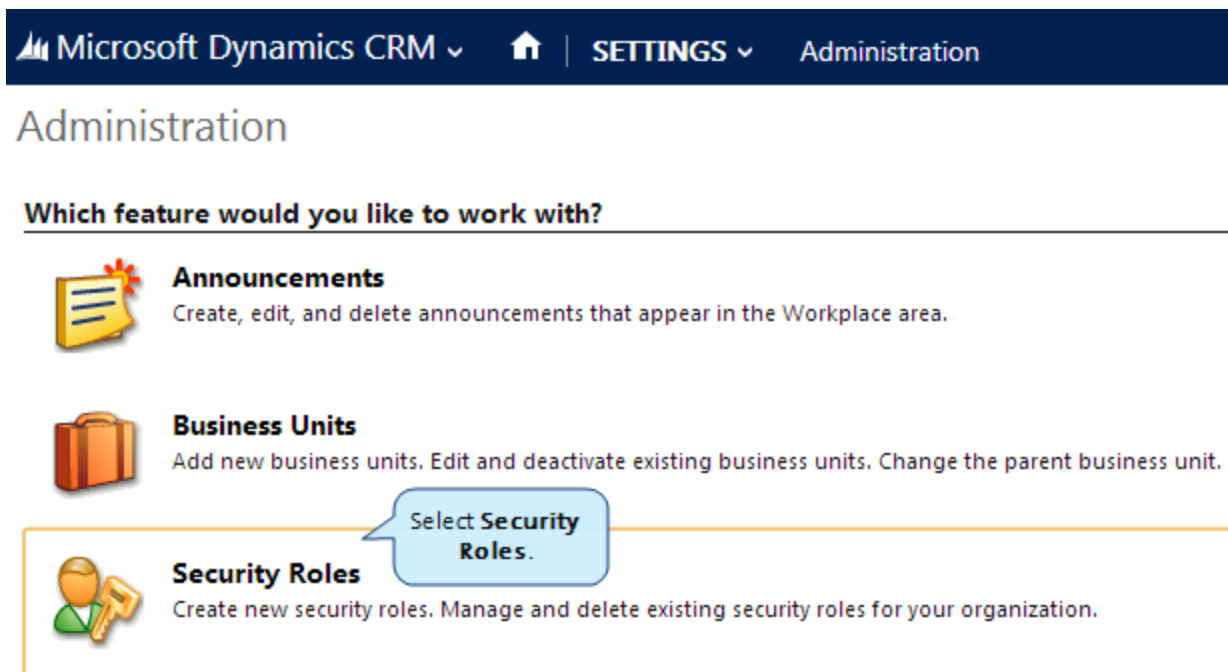


– or –

3. On the CRM 2013 window, **Settings** menu, **System** menu, select **Administration**.



4. Click **Security Roles** to display the security roles available to you



The **Security Roles** list displays the available roles.

Security Roles	
New [icon] [icon] More Actions	
<input type="checkbox"/>	Name
<input type="checkbox"/>	CEO-Business Manager
<input type="checkbox"/>	CSR Manager
<input type="checkbox"/>	Customer Service Representative
<input type="checkbox"/>	D&B360 Administrator
<input type="checkbox"/>	D&B360 User
<input type="checkbox"/>	Delegate
<input type="checkbox"/>	Marketing Manager
<input type="checkbox"/>	Marketing Professional
<input type="checkbox"/>	Sales Manager
<input type="checkbox"/>	Salesperson
<input type="checkbox"/>	Schedule Manager
<input type="checkbox"/>	Scheduler
<input type="checkbox"/>	System Administrator
<input type="checkbox"/>	System Customizer
<input type="checkbox"/>	Vice President of Marketing
<input type="checkbox"/>	Vice President of Sales

To view which tasks are permitted for the components of each role, complete the steps that follow. You can select from these tasks, which are permitted for a variety of components:

- Create
- Read
- Write
- Delete
- Append
- Append To
- Assign
- Share


1. In the **Security Roles** window, double-click a role to select it.

Security Roles	
New [icon] [icon] More Actions	
<input type="checkbox"/>	Name
<input type="checkbox"/>	Business Unit
<input type="checkbox"/>	CEO-Business Manager
<input type="checkbox"/>	CSR Manager
<input type="checkbox"/>	Customer Service Representative
<input type="checkbox"/>	D&B360 Administrator
<input type="checkbox"/>	D&B360 User
<input type="checkbox"/>	Delegate
<input type="checkbox"/>	Marketing Manager
<input type="checkbox"/>	Marketing Professional
<input type="checkbox"/>	Sales Manager
<input type="checkbox"/>	Salesperson
<input type="checkbox"/>	Schedule Manager
<input type="checkbox"/>	Scheduler
<input type="checkbox"/>	System Administrator
<input type="checkbox"/>	System Customizer
<input type="checkbox"/>	Vice President of Marketing
<input type="checkbox"/>	Vice President of Sales

Double-click a role to select it.

2. In the **Security Role: D&B360 Administrator** window, click **Customization** to display permissions associated with this role.

Details Core Records Marketing Sales Service Business Management Service Management Customization Custom Entities

Role Name * Business Unit *  Click **Customization**.

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

D&B360 Administrator Permissions

In the **Security Role: D&B360 Administrator** window, **Customization** tab, administrator permissions are indicated by green (user type) circles.

Security Role: D&B360 Administrator								
Details Core Records Marketing Sales Service Business Management Service Management Customization Custom Entities								
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Attribute Map	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Customizations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Dialog Session	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Entity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Entity Map	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>		
Field	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Import Job		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Option Set	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Plug-in Assembly	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Plug-in Type	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Process Configuration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>					
Publisher	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Relationship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Sdk Message	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Sdk Message Processing Step	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Sdk Message Processing Step Image	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Sdk Message Processing Step Secure Configuration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Service Endpoint	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Solution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
System Chart	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
System Form	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
System Job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
View	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Web Resource	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Miscellaneous Privileges								
Configure Yammer	<input type="radio"/>				Execute Workflow Job			<input type="radio"/>
Export Customizations	<input type="radio"/>				Import Customizations			<input type="radio"/>
ISV Extensions	<input type="radio"/>				Modify Customization constraints			<input type="radio"/>
Publish Customizations	<input type="radio"/>							

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

Security Role: D&B360 Administrator									
Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Custom Entities	
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share	
D&B Admin Review	●	●	●	●	●	●			
D&B Callout Log	●	●	○	●	●	●			
D&B Company	●	●	●	●	●	●			
D&B Contact	●	●	●	●	●	●			
D&B Entitlement	●	●	●	●	●	●			
D&B Financial	●	●	●	●	●	●			
D&B IndxRef	●	●	●	●	●	●	●	●	
D&B Saved Search	●	●	●	●	●	●	○	○	
D&B Settings	●	●	●	●	●	●			
D&B Web Service	●	●	●	○	○	○			

D&B360 User Permissions

For On-Premise and On-Demand CRMs:

Security Role: D&B360 User									
Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Custom Entities	
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share	
D&B Admin Review	○	○	○	○	○	○			
D&B Callout Log	●	●	○	○	●	●			
D&B Company	●	●	●	●	●	●			
D&B Contact	●	●	●	●	●	●			
D&B Entitlement	○	●	○	○	○	○			
D&B Financial	●	●	●	●	●	●			
D&B IndxRef	●	●	●	●	●	●	●	●	
D&B Saved Search	●	●	●	●	●	●	○	○	
D&B Settings	○	●	○	○	○	○			
D&B Web Service	●	●	●	○	○	○			

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