



Troubleshooting

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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.

| SETTINGS ~ Cu | ustomizations | | | | Œ | Create |
|---------------|-----------------|---------------|----------------|---|----------------------|-----------------|
| Settin | gs | Customization | | | | Select |
| ES | PRODUCT CATALOG | | * SOLUTIONS | > | DYNAMICS MARKETPLACE | Administration. |

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



Auministration

Which feature would you like to work with?



Announcements

Create, edit, and delete announcements that appear in the Workplace area.



Business Units

Add new business units. Edit and deactivate existing business units. Change the parent business unit.



Select Security Roles.

Security Roles

Create new security roles. Manage and delete existing security roles for your organization.

The Security Roles list displays the available roles.

| Se | curity Roles |
|----|---------------------------------|
| 8 | New 🎒 🕱 More Actions 🗸 |
| | Name 🔺 |
| | CEO-Business Manager |
| | CSR Manager |
| | Customer Service Representative |
| | D&B360 Administrator |
| | D&B360 User |
| | Delegate |
| | Marketing Manager |
| | Marketing Professional |
| | Sales Manager |
| | Salesperson |
| | Schedule Manager |
| | Scheduler |
| | System Administrator |
| | System Customizer |
| | Vice President of Marketing |
| | 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.

| Se | ecurity Roles | |
|----|---------------------------------|-----------------|
| | | |
| 8 | New 📑 🕱 More Actions 🗸 | |
| | Name 🔺 | Business Unit |
| | CEO-Business Manager | DnB360SalesDemo |
| | CSR Manager | DnB360SalesDemo |
| | Customer Service Representative | DnB360SalesDemo |
| | D&B360 Administrator | DnB360SalesDemo |
| | D&B360 User select it. | DnB360SalesDemo |
| | Delegate | DnB360SalesDemo |
| | Marketing Manager | DnB360SalesDemo |
| | Marketing Professional | DnB360SalesDemo |
| | Sales Manager | DnB360SalesDemo |
| | Salesperson | DnB360SalesDemo |
| | Schedule Manager | DnB360SalesDemo |
| | Scheduler | DnB360SalesDemo |
| | System Administrator | DnB360SalesDemo |
| | System Customizer | DnB360SalesDemo |
| | Vice President of Marketing | DnB360SalesDemo |
| | Vice President of Sales | DnB360SalesDemo |

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

| Details | Core Re | cords | Marketing | Sales | Service | Business Management | Service I | Management | Customization | Custom Entities |
|---------|---------|-------|----------------|-------|---------|---------------------|-----------|------------|----------------|-----------------|
| Role Na | me * | D&B36 | 50 Administrat | or | | Busines | s Unit * | Click C | 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 A | dministrator | | | | | | | | | |
|---|---------------|------------|-----------|--------------|--------|-------------------|-------------|-----------|--------|-------|
| Details Core Records Marketing | Sales Service | Business M | anagement | Service Mana | gement | Customization | Custom Ent | tities | | |
| Entity | | | Create | Read | Write | Delete | Append | Append To | Assign | Share |
| Attribute Map | | | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Customizations | | | 0 | 0 | 0 | 0 | | | | |
| Dialog Session | | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Entity | | | 0 | 0 | 0 | 0 | | | | |
| Entity Map | | | 0 | 0 | 0 | 0 | | 0 | | |
| Field | | | 0 | 0 | 0 | 0 | | | | |
| Import Job | | | | 0 | 0 | 0 | | | | |
| Option Set | | | 0 | 0 | 0 | 0 | | | | |
| Plug-in Assembly | | | 0 | • | 0 | 0 | | | | |
| Plug-in Type | | | 0 | • | 0 | 0 | | | | |
| Process | | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Process Configuration | | | 0 | 0 | 0 | | | | | |
| Publisher | | | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Relationship | | | 0 | 0 | 0 | 0 | | | | |
| Sdk Message | | | 0 | • | 0 | 0 | | | | |
| Sdk Message Processing Step | | | 0 | • | 0 | 0 | | | | |
| Sdk Message Processing Step Image | | | 0 | • | 0 | 0 | | | | |
| Sdk Message Processing Step Secure Conf | iguration | | 0 | 0 | 0 | 0 | | | | |
| Service Endpoint | | | 0 | 0 | 0 | 0 | | | | |
| Solution | | | 0 | 0 | 0 | 0 | 0 | 0 | | |
| System Chart | | | 0 | 0 | 0 | 0 | | | | |
| System Form | | | 0 | 0 | 0 | 0 | | | | |
| System Job | | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| View | | | 0 | 0 | 0 | 0 | | | | |
| Web Resource | | | 0 | • | 0 | 0 | | | | |
| Miscellaneous Privileges | | | | | | | | | | |
| Configure Yammer | | 0 | | | Execu | ute Workflow Job | | | | 0 |
| Export Customizations | | 0 | | | Impo | rt Customizations | | | | 0 |
| ISV Extensions | | 0 | | | Modi | ify Customization | constraints | | | 0 |
| Publish Customizations | | 0 | | | | | | | | |

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

| sec | urity Role: I | D&B360 A | dminis | trator | | | | | | | | |
|----------|---------------|-----------|----------|---------|-------|-------------|------|-------|-------------------------|------------|----------|-----------------|
| Details | Core Records | Marketing | Sales | Service | Busir | ness Manage | ment | Servi | ice Manageme | ent Custon | nization | Custom Entities |
| Entity | | | Create | Rea | d | Write | Del | ete | Append | Append To | Assign | Share |
| D&B Adr | nin Review | | • | | | • | | | • | • | | |
| D&B Call | lout Log | | ٠ | | | 0 | | | • | ٠ | | |
| D&B Cor | npany | | • | • | | • | | | • | • | | |
| D&B Cor | ntact | | • | | | • | | | • | • | | |
| D&B Ent | itlement | | • | • | | • | | | • | • | | |
| D&B Fina | ancial | | • | • | | • | | | • | • | | |
| D&B Ind | xRef | | • | • | | • | | | • | • | • | • |
| D&B Sav | ed Search | | <u>_</u> | 6 | | \sim | 6 | | $\overline{\mathbf{Q}}$ | <u> </u> | 0 | 0 |
| D&B Set | tings | | • | | | • | | | • | • | | |
| D&B We | b Service | | • | • | | • | C |) | 0 | 0 | | |

D&B360 User Permissions

For On-Premise and On-Demand CRMs:

| see | curity Role: | D&B360 | User | | | | | | | | | | |
|------------------|--------------|-----------|-------|---------|--------------|---------|-------------------------|---------|---------------|-------------------------|------------|--------|-------|
| Details | Core Records | Marketing | Sales | Service | Business Man | agement | Service Mana | agement | Customization | Custom En | tities | | |
| Entity D&B Ad | min Review | | | | | Create | Read | Write | Delete O | Append | Append To | Assign | Share |
| D&B Cal | llout Log | | | | | • | • | 0 | 0 | • | • | | |
| D&B Co | mpany | | | | | • | • | • | • | • | • | | |
| D&B Co | ntact | | | | | • | • | • | • | • | • | | |
| D&B Ent | titlement | | | | | 0 | • | 0 | 0 | 0 | 0 | | |
| D&B Fin | ancial | | | | | • | • | • | • | • | • | | |
| D&B Ind | ixRef | | | | | • | • | • | • | • | • | • | • |
| D&B Sav | ved Search | | | | | \odot | $\overline{\mathbf{Q}}$ | \sim | \sim | $\overline{\mathbf{Q}}$ | \bigcirc | 0 | 0 |
| D&B Set | ttings | | | | | 0 | • | 0 | 0 | 0 | 0 | | |
| D&B We | eb Service | | | | | ٠ | • | • | 0 | 0 | 0 | | |

Changing Administrator-User Names and Passwords

To manage the connections that D&B360 maintains for integration with the CRM, D&B stores three sets of administrator user names and their associated passwords in the database. You can update these credentials on the D&B360 user interface Settings tab.

If you anticipate that any of these three sets of credentials will change, we recommend that you update them on D&B360 before you update them globally. In general, it is usually only the CRM password that will change. Before you complete these steps, make sure you know the administrator user name and password change you plan to make.

Note: You will need to supply the correct old password before creating a new one.

(!) Important Note: Be sure to update the user name and password credentials on D&B360 *before* you make the change on the CRM.

- 1. On the Home page window, click Settings.
- 2. On the Admin window, click CRM Credentials.

| Home Build | A List Im | ports Alerts | Settings Click S | ettings. | | D&B360 |
|----------------------------------|-------------|----------------------|---------------------------------|---------------------|---------------------------------|-----------------|
| Admin | | Batch | Data Management | Role Configurations | Terms & Conditions | About |
| Admin | | | | | | |
| Configura | tion | | | | | |
| Country | ISO Cod | e | • | | | |
| Edition: Tier 2 Entitlement T | ype: Custom | Trial In Expiry I | dicator: True Date: 11/12/14 | CRM Credentials | Credentials. AFT Credentials | D&B Credentials |

- 3. In the Configure Credentials window that opens:
 - a. In the **Current Username** field, type the current user name. This is the value that is currently stored in D&B360.
 - b. In the **Current Password** field, type the current password. This is the value that is currently stored in D&B360.
 - c. In the **New Username** field, type the new user name.
 - d. In the **New Password** field, type the new password.
 - e. In the Confirm Password field, retype the new password.
 - f. Click Save.

| | _ | Save | Cancel |
|--|-----------------------|------|--------|
| | Configure Credentials | | |
| CRM Connection C | redentials | | |
| Current Username Current Password * | | | |
| New Username * New Password * Confirm Password * | | | |
| | | | |

Note: For D&B360 to run, you must update the user's credentials on the CRM.

- 4. On the CRM, click **Settings**, and in the **System Area**, click **Administration**.
- 5. On the Administration window, click Users.
- 6. Reset that user's User Name and Password.

Note: If for some reason an administrator user's credentials are updated on the CRM before you are able to update them on D&B360, re-run the installer, and install only the Agent. At that point you can specify new credentials. If you have any problems with this, contact <u>D&B360</u> Customer Support.

Encryption Standards

D&B360 passwords are encrypted and stored in the database using password-based cryptography standards (PKCS #5), which use MD5 and DES algorithms. The password used to encrypt and decrypt is stored in a secure key on the production servers, which users do not have access to.

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:

| 500: Service is temporarily unavailable. We are working h | |
|---|-------------------------------|
| | g hard to resolve this issue. |
| | |

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:

| Business Business | | 1. Understand | 2. Fi | nd & Use | 3. Develop | | |
|-------------------------|----------------------|--|---------------------|---------------------------------------|----------------------------------|------------------------|--|
| Templates | | About Solutions | 8 D | mamics Marketplace | 🗗 Key Concept | ts for Developers | |
| Product Catalog | | 🗗 About Solution Components | 5 A | pout Importing a Solution | Solutions SC | DK . | |
| 4 System Overview Video | | | | About Customizing a Solution | | | |
| Administration | | | | ^ | | | |
| 🚰 Data Management | Solutions All Soluti | ions 🕶 | | | Search for records | | |
| System Jobs | 🐉 New 🛛 🗙 Delete < | Click Delete. Export 👰 Import Translations 📓 | 🜲 Export Translatio | ns 🛛 👔 Publish All Customizations 🛛 🚳 | Get Solutions from Marketplace | More Actions 👻 | |
| Auditing | Name | lete Display Name Version Installe | ed On 👻 🛛 Packa | ge Type Publisher | Description | | |
| Customization | DnB360 | D&B360 for Microsoft Dy 3.0.0.0 | 10/9/2013 Mana | ged Dun and Bradstreet Corporation | D&B's Data as a Service Integrat | tion for Microsoft Dyn | |
| | | | | | | | |
| Customizations | | | | | | | |
| Solutions | | | | | | | |

In Microsoft Dynamics CRM 2013:



4. In the Uninstall Solution window, click OK.

| Oninstall Solution - Google Chrome | | | |
|---|---|--|---|
| 🔒 https://installer99.crm.dynamic | s.com/tools/solutio | n/dlg_uninst | tall.aspx?id=%7 |
| Uninstall Solution You have selected 1 Solution for deletion. | | | |
| You are deleting a managed solution. The so components, will be deleted. This action can uninstall. You cannot cancel the uninstallatio | ulution and all of its comp not be undone. This solut on after it starts. Do you w Click OK . | onents, including tion might take s vant to continue OK | g data in the everal minutes to ? Cancel |

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

| 📀 Microsoft D | ynamics CRM - Google Chrome | |
|---------------|---|--|
| 🔒 https://i | nstaller99.crm.dynamics.com/_common/error/dlg | _error.aspx?hresu |
| 8 | Cannot Delete Component Cannot delete Solution because one or more components requi | Click Details . re it. Details |
| | Download Log | File OK |

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.

| https://installer99.crm.dvna | amics.com/tools/depend | lency/dependenc | vviewdialog.aspx?obi | ectid=%7bd5619 |
|---|---|--|--|---|
| an an dan av Dataila | | ····// | , | |
| ependency Details | | | | |
| | | | | |
| | | | | |
| | | | | |
| 😵 Solution D&B360 for Microsoft D | ynamics CRM cannot be deleted. | The following compor | ents are required by other co | omponents in the syste |
| Solution D&B360 for Microsoft D | ynamics CRM cannot be deleted. Name/Id | The following compor | nents are required by other of Managed Solution | omponents in the system |
| Solution D&B360 for Microsoft D Display Name 🔺 Account (D&B Company) | ynamics CRM cannot be deleted. Name/Id Remove the first | The following compor Type Field | Managed Solution D&B360 for Microsoft | Required by A Account (Form) |
| Solution D&B360 for Microsoft D Display Name 🔺 Account (D&B Company) Account (dnb_dnb_company_acco | ynamics CRM cannot be deleted. Name/Id Remove the first two rows. account | The following compor Type Field EntityRelationship | Managed Solution D&B360 for Microsoft D&B360 for Microsoft | omponents in the syste Required by Account (Form) Account (Form) |
| Solution D&B360 for Microsoft D Display Name Account (D&B Company) Account (dnb_dnb_company_acco dnb_/Pages/dnb_entity_agent.htm | ynamics CRM cannot be deleted. Name/Id Remove the first two rows. account dnb_/Pages/dnb_entity_ag | The following compor Type Field EntityRelationship Web Resource | Managed Solution D&B360 for Microsoft D&B360 for Microsoft D&B360 for Microsoft D&B360 for Microsoft | emponents in the syste Required by A Account (Form) Account (Form) Account (Form) |
| Solution D&B360 for Microsoft D Display Name Account (D&B Company) Account (dnb_dnb_company_acco dnb_/Pages/dnb_entity_agent.htm dnb_/Pages/dnb_entity_agent.htm | Name/Id Remove the first two rows. account dnb_/Pages/dnb_entity_ag dnb_/Pages/dnb_entity_ag | The following comport Type Field EntityRelationship Web Resource Web Resource | Managed Solution D&B360 for Microsoft D&B360 for Microsoft D&B360 for Microsoft D&B360 for Microsoft D&B360 for Microsoft | Required by A Account (Form) Account (Form) Account (Form) Contact (Form) |

- 7. Click OK.
- 8. Start the reinstall process again.

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 (v1.1.1300.391) |
|--|
| SiteMap Editor for Microsoft Dynamics CRM 2011 |
| 📳 Load SiteMap 🛛 😪 Update SiteMap 📲 Open SiteMap 🚽 Save SiteMap 🛛 More actions 🔹 |
| - SiteMap |
| |
| |
| E. SiteMap |
| |
| ⊞ Area (MA) |
| 🕀 Area (CS) |
| Area (Sett Add default SiteMap Group Add default SiteMap Group |
| H Group Add Group |
| Group Add Descript Add Group. |
| |
| 🔏 Cut |
| Сору |
| Paste |
| × Delete |
| |

- 3. In the **Properties** window:
 - a. In the Id field, type DnB360.
 - b. In the **Title** field, type **D&B360**.

| Properties Click Save. | |
|-------------------------|--------|
| ld * | DnB360 |
| UH | |
| Is Profile | |
| Resource Id | |
| Description Resource Id | |
| Deprecated attributes | |
| Title | D&B360 |
| Description | |

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



- 5. In the **Properties** window:
 - a. In the Id field, type dnb_administration.
 - b. In the Entity field, type dnb_settings.
 - c. In the Url field, enter:
 \$webresource:dnb_/WebResources/DnB360.Crm.WebResources.Administration.html
 - d. In the Title field, type D&B360 Administration.

e. Click Save.

| Properties Save Click Save. | |
|--------------------------------------|--|
| ld * | dnb_administration |
| Available Offline | |
| Pass Params | |
| Client | All Outlook Outlook Laptop Client |
| | 🔲 Web 🔲 Outlook Workstation Client |
| Entity | dnb_settings Select entity |
| Get Started Pane Path | |
| Get Started Panel Path Admin Outlook | |
| Get Started Pane Path Admin | |
| Get Started Pane Path Outlook | |
| Icon | |
| Outlook Shortcut Icon | |
| Sku | 🗖 All 🗖 OnPremise 🗖 Live 🗖 SPLA |
| Url | ces/DnB360.Cm.WebResources.Administration.html |
| Resource Id | |
| Description Resource Id | |
| Deprecated attributes | |
| Title | D&B360 Administration |

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

| 🔀 SiteMap Editor for Microsoft Dynamics CRM 2011 (v1.1.1300.391) | |
|--|-----|
| SiteMap Editor for Microsoft Dynamics CRM 2011 | |
| | |
| 📳 Load SiteMap 🔮 Update SiteMap 📳 Open SiteMap 🚽 Save SiteMap 🛛 More actions | s · |
| _ SiteMap | |
| | |
| ⊡- SiteMap | _ |
| 🕀 Area (Workplace) | |
| ⊞ Area (SFA) | |
| III Area (MA) | |
| Head (CS) | |
| ⊕ Group (Business_Setting) | |
| ⊞ Group (System_Setting) | |
| Group (Customizations) | |
| Group (Processcenter) | |
| SubArea (dnb_administration) | |
| Area (ResourceCenter) Add Descriptions | |
| Add Titles | |
| Add Privilege Select Add Privilege. | |
| X Cut | |
| Сору | |
| Paste | |
| × Delete | |
| | |
| | |
| | |

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

| Properties Click Save. | | |
|------------------------|--------------|------------------------|
| Entity | dnb_settings | |
| Privileges | Create | Share |
| | Read | Assign |
| | ☐ Write | All |
| | Delete | Allow Quick Campaign |
| | Append | Use Internet Marketing |
| | Append to | |

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



- 9. In the **Properties** window:
 - a. In the **Id** field, type **dnb_calloutlog**.
 - b. In the Entity field, type dnb_calloutlog.
 - c. Click Save.

| Properties Click Save. | |
|--------------------------------------|---------------------------------------|
| ld * | dnb_calloutlog |
| Available Offline | |
| Pass Params | |
| Client | All 🔲 Outlook 🔲 Outlook Laptop Client |
| | 🗖 Web 🗖 Outlook Workstation Client |
| Entity | dnb_calloutlog Select entity |
| Get Started Pane Path | |
| Get Started Panel Path Admin Outlook | |
| Get Started Pane Path Admin | |
| Get Started Pane Path Outlook | |
| lcon | |
| Outlook Shortcut Icon | |
| Sku | 🗖 All 🗖 OnPremise 🗖 Live 🗖 SPLA |
| Uil | |
| 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:
 - a. In the **Id** field, type **dnb_lookup**.
 - b. In the Entity field, type dnb_lookup.
 - c. Click Save.

| Properties Click Save. | |
|--------------------------------------|---------------------------------------|
| ld * | 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 | |
| Sku | 🗖 All 🗖 OnPremise 🗖 Live 🗖 SPLA |
| Uri | |
| 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.

Processing Batches – Standard Level Expectation

The standard level expectation (SLE), for batch processing turnaround time, is as follows:

Domestic Batches - 12 hour turnaround

- United States and Canada
- Batch sizes of 50,000 or less
- 90% of files

Global Batches - 24 to 48 hour turnaround

- · Any batch containing files outside the United States or Canada
- Batch sizes of 50,000 or less
- 90% of files

Note: System maintenance for D&B Systems occurs Saturday 11 P.M. to Sunday 9 A.M. Eastern. Any batches you submit during this time might be delayed.

(!) Important Note: For batch jobs with more than 500 K (500 thousand) records, you will need to open a customer support ticket.

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.

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



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

| 2007 S | ved Results | New Save | Edit Columns Edit Columns Edit Properties View | Cear Cear Query |
|------------------|--|--|---|-----------------------|
| ook for: Sele | Accounts Contract Line Contract Tem Contracts Currencies Customer Rei D&B Admin F D&B Contact D&B Contact D&B Contact D&B Entitien D&B Entitien | s plates lexiews Logs ties s ents c | | C Use Saved View |
| | Didle Financia Didle IndikRef Didle Saved S Didle Viveb Se | earches nices | DAR S | Select D&B |

- 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.

| Reco | ril Type | D685 | effings | • | | |
|------|---------------------|-----------|-------------------------|-----|---------------------|----|
| | Display Name . | | Name | | Type | |
| 10 | Batch Canfidence C | ode: | dnb_batchconfidenceco | 104 | Option Set | |
| 8 | Cauntry | | deb_country | | Option Set | |
| 63 | Created by | | createdby | | Lookup | 14 |
| Ð | Created By (Delegab | | createdonbehalfby | | Lang | |
| | Contratpoint | | and, creatidy and | | Single Line of Test | |
| 5 | One Agent URL | | drib_agentiuri | | Single Line of Test | |
| 1 | Ov8 Authentication | nast . | drb_authenticationhad | | Single Line of Text | |
| 10 | Ov8 Authentication | hituide - | drib drikauthentication | | Single Line of Text | |

- 5. Click Results.
- 6. Click Export D&B Settings.

| at Lanu | INCED END | LIST TOOLS | A Microsoft Dynamics CRM | | | | | 30 | patti baum | | |
|-----------|--|----------------------------|---------------------------|---|-----------------------|----------------|----------|------------------------|-------------------------------|--|---|
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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.

| Exp Select th | ort Data to Excel ne type of worksheet to export. | × |
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| 🕕 We reco | ommend that you save the exported file before you open it. | |
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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.

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- 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.



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