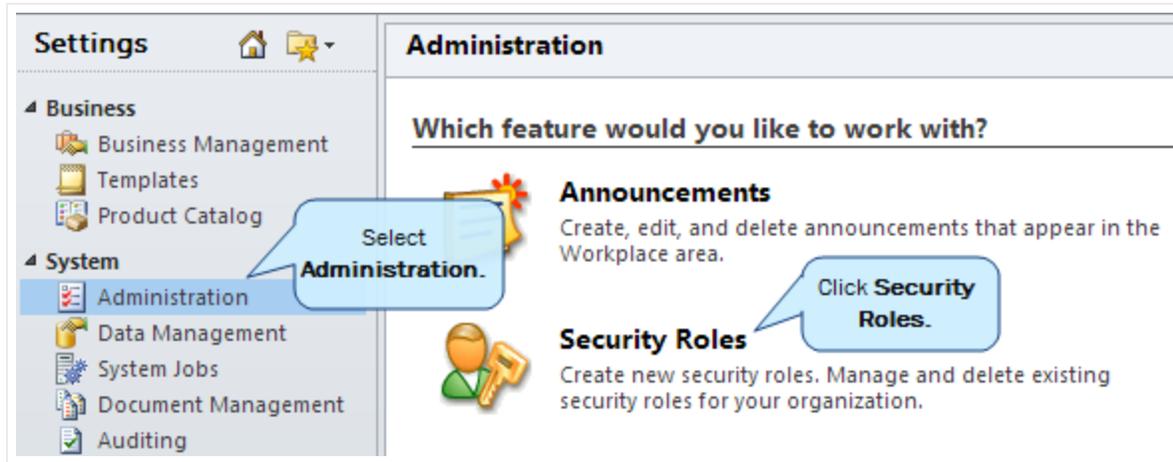


Troubleshooting

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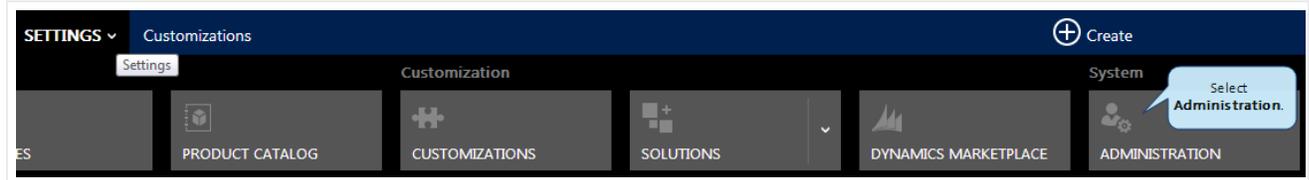
Viewing Available D&B360 Roles

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

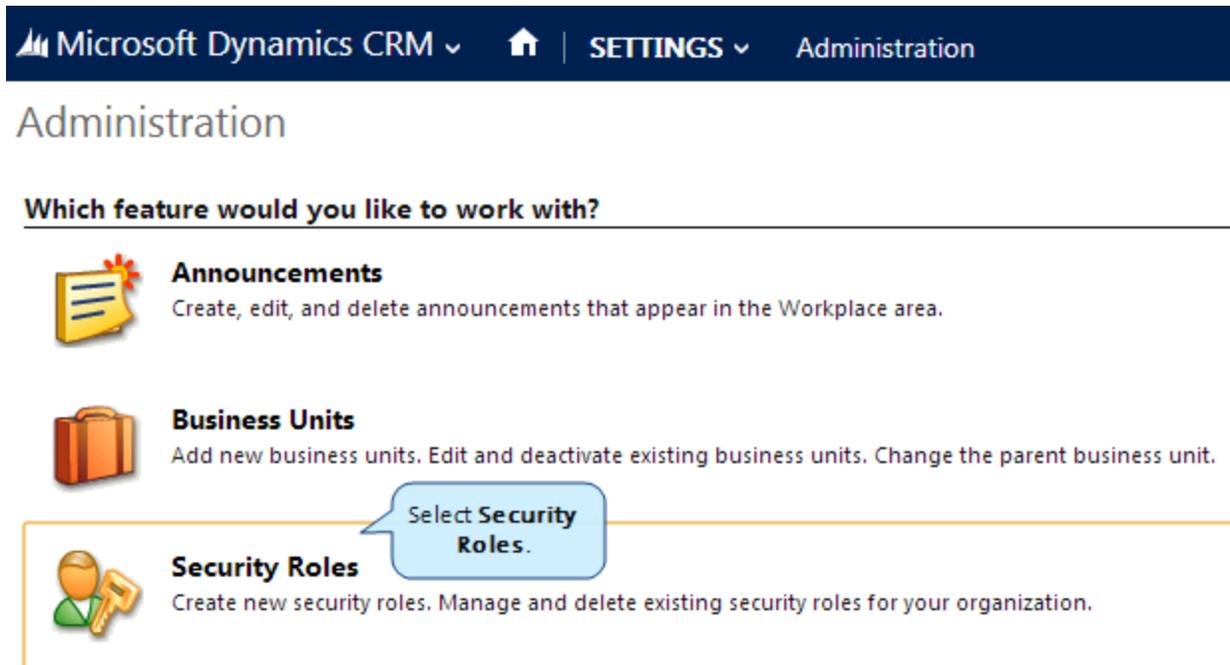


- or -

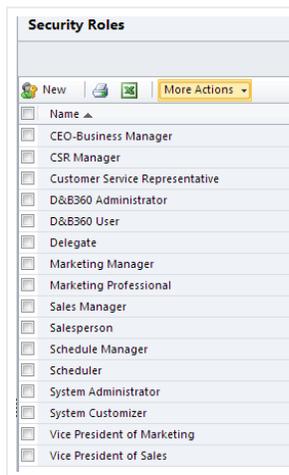
3. On the CRM 2013 window, **Settings** menu, **System** menu, select **Administration**.



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



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



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 More Actions ▾	
<input type="checkbox"/> Name ▲	Business Unit
<input type="checkbox"/> CEO-Business Manager	DnB360SalesDemo
<input type="checkbox"/> CSR Manager	DnB360SalesDemo
<input type="checkbox"/> Customer Service Representative	DnB360SalesDemo
<input type="checkbox"/> D&B360 Administrator	DnB360SalesDemo
<input type="checkbox"/> D&B360 User	DnB360SalesDemo
<input type="checkbox"/> Delegate	DnB360SalesDemo
<input type="checkbox"/> Marketing Manager	DnB360SalesDemo
<input type="checkbox"/> Marketing Professional	DnB360SalesDemo
<input type="checkbox"/> Sales Manager	DnB360SalesDemo
<input type="checkbox"/> Salesperson	DnB360SalesDemo
<input type="checkbox"/> Schedule Manager	DnB360SalesDemo
<input type="checkbox"/> Scheduler	DnB360SalesDemo
<input type="checkbox"/> System Administrator	DnB360SalesDemo
<input type="checkbox"/> System Customizer	DnB360SalesDemo
<input type="checkbox"/> Vice President of Marketing	DnB360SalesDemo
<input type="checkbox"/> Vice President of Sales	DnB360SalesDemo

Double-click a role to select it.

- 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 * <input type="text" value="D&B360 Administrator"/> Business Unit *								

- 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"/>	<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"/>								<input type="radio"/>
Export Customizations	<input type="radio"/>								<input type="radio"/>
ISV Extensions	<input type="radio"/>								<input type="radio"/>
Publish Customizations	<input type="radio"/>								
									Execute Workflow Job <input type="radio"/>
									Import Customizations <input type="radio"/>
									Modify Customization constraints <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

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

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	●	●	●	○	○	○		

Changing Administrator-User Names and Passwords

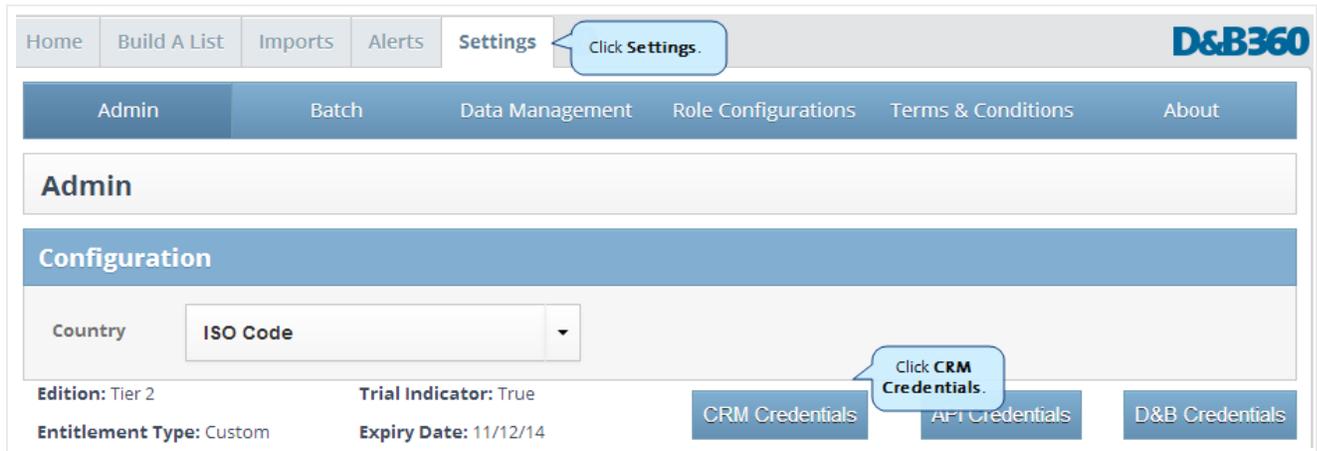
To manage the connections that D&B360 maintains for integration with the CRM, D&B stores three sets of administrator user names and their associated passwords in the database. You can update these credentials on the D&B360 user interface Settings tab.

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**.



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**.

Configure Credentials

CRM Connection Credentials

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 [D&B360 Customer Support](#).

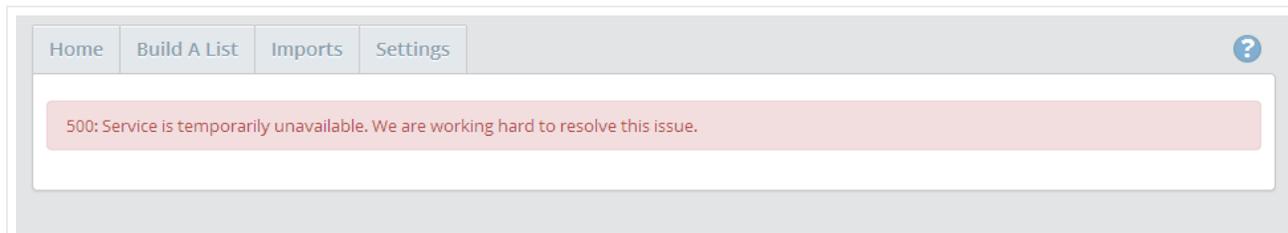
Encryption Standards

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:

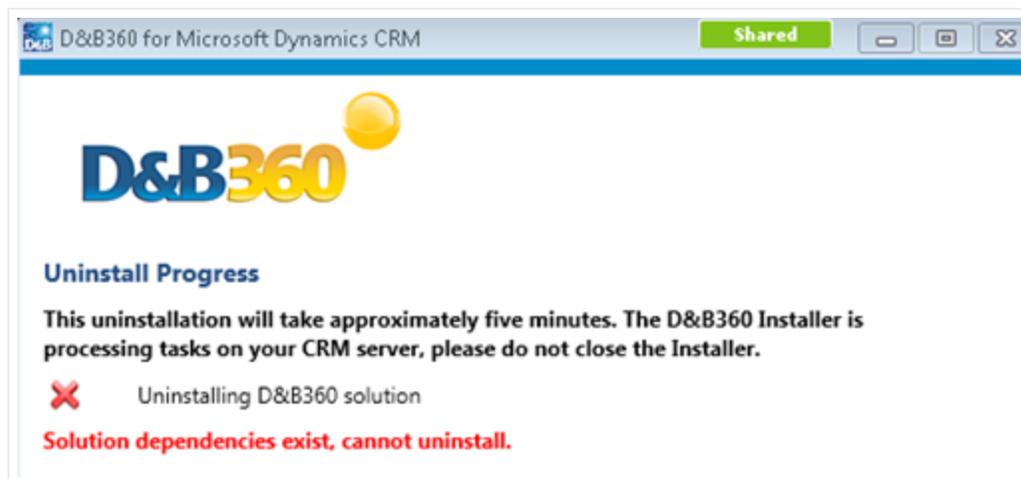


If you get this error, it is possible that the CRM username/password is incorrect. You need to reinstall using the "Register Agent" option and provide proper credentials.

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

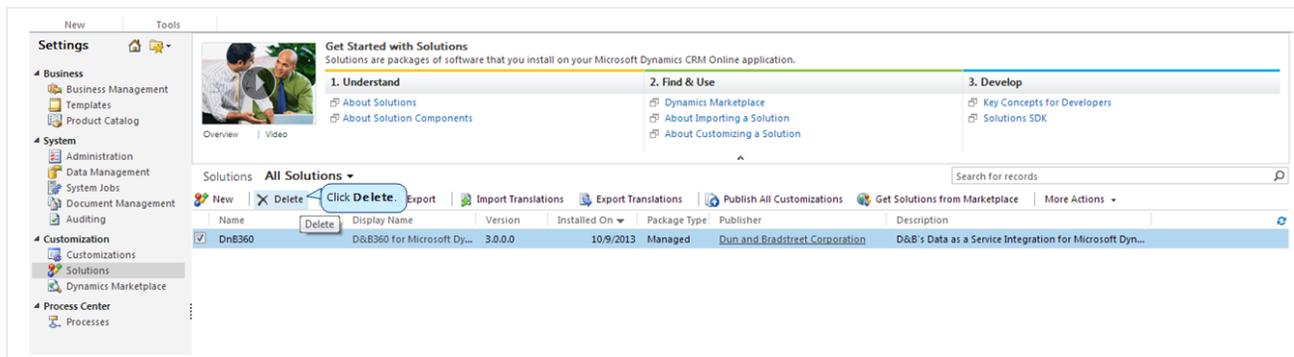
before you run an uninstall to ensure that forms and reports that use D&B fields will not be inadvertently impacted by the uninstall.

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

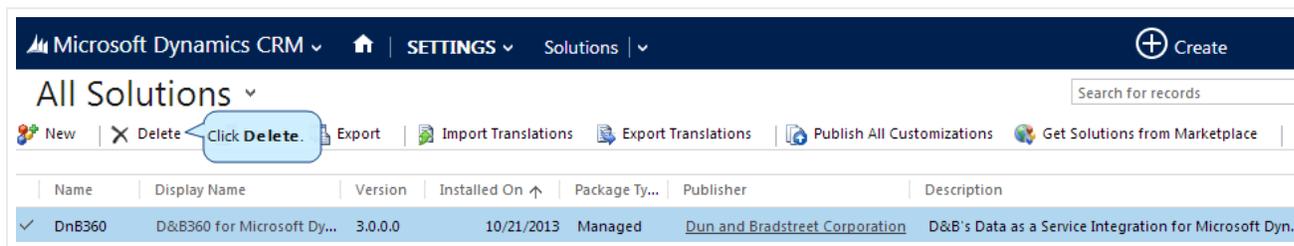
Steps to Find the Dependencies:

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**.

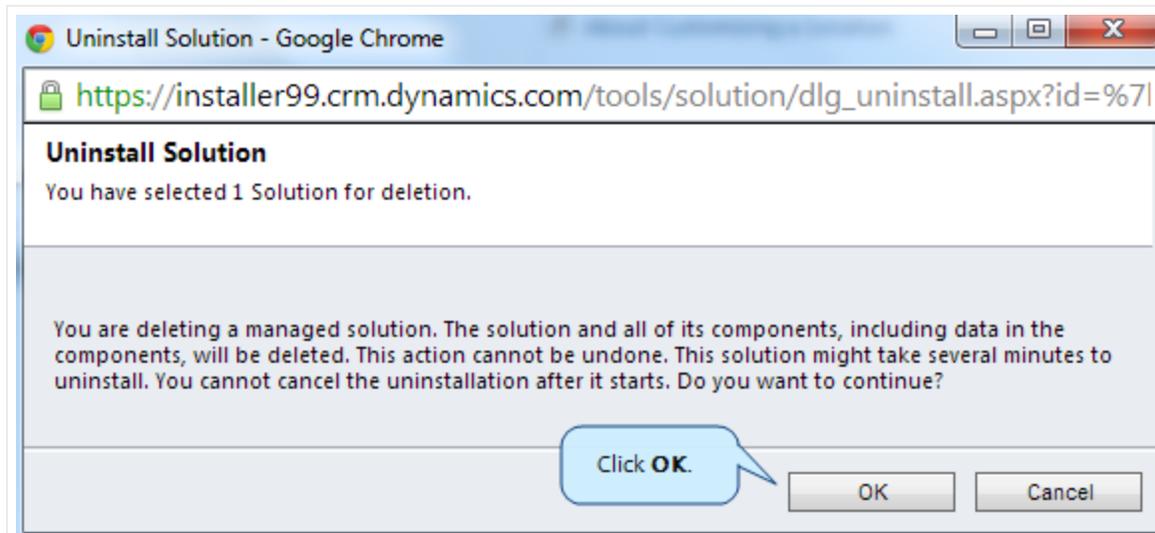
In Microsoft Dynamics CRM 2011:



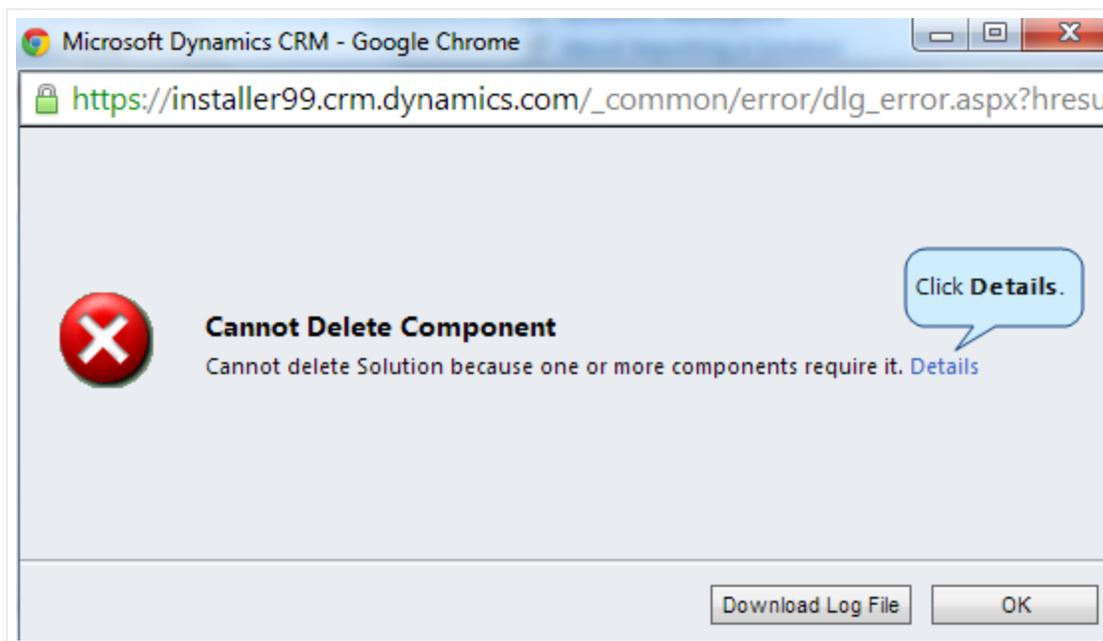
In Microsoft Dynamics CRM 2013:



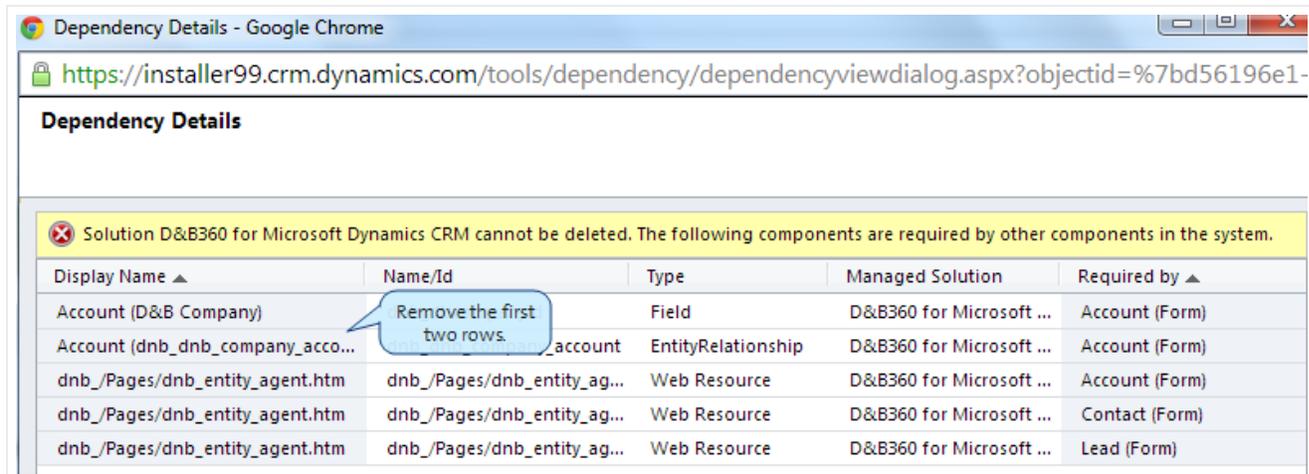
4. In the **Uninstall Solution** window, click **OK**.



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.

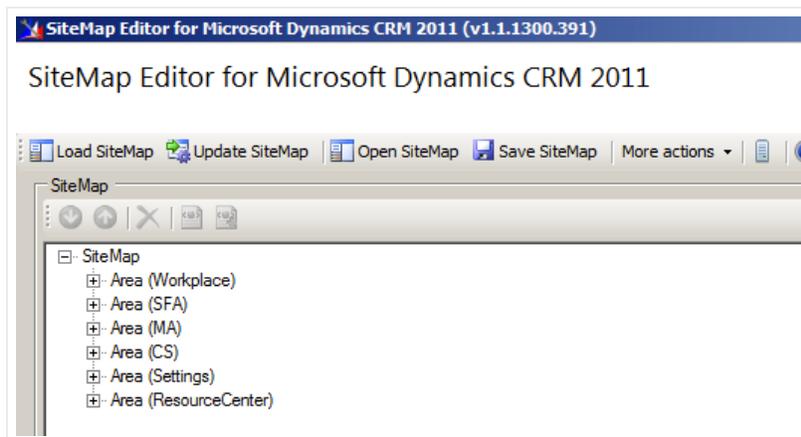


7. Click **OK**.
8. Start the reinstall process again.

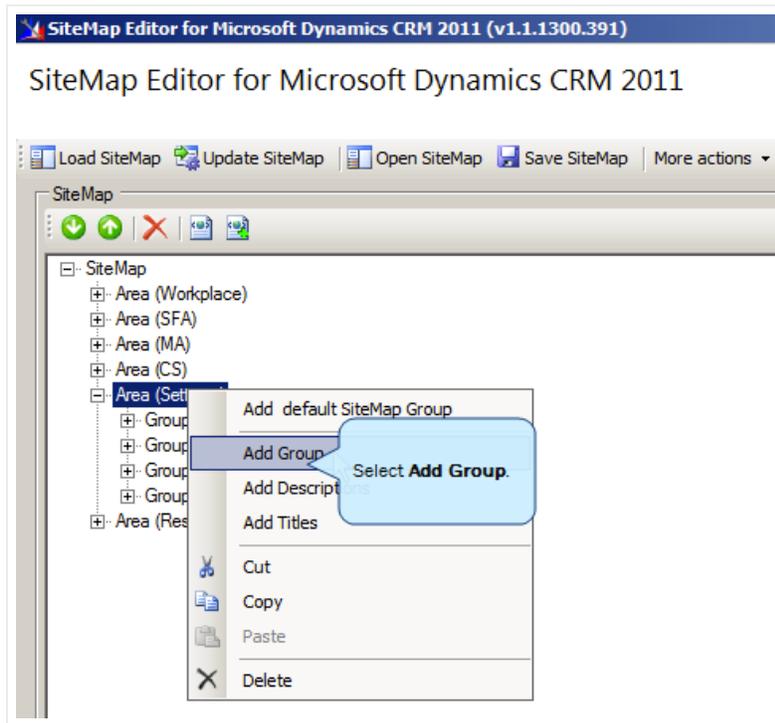
Enabling D&B360 Administration on a Customized SiteMap

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

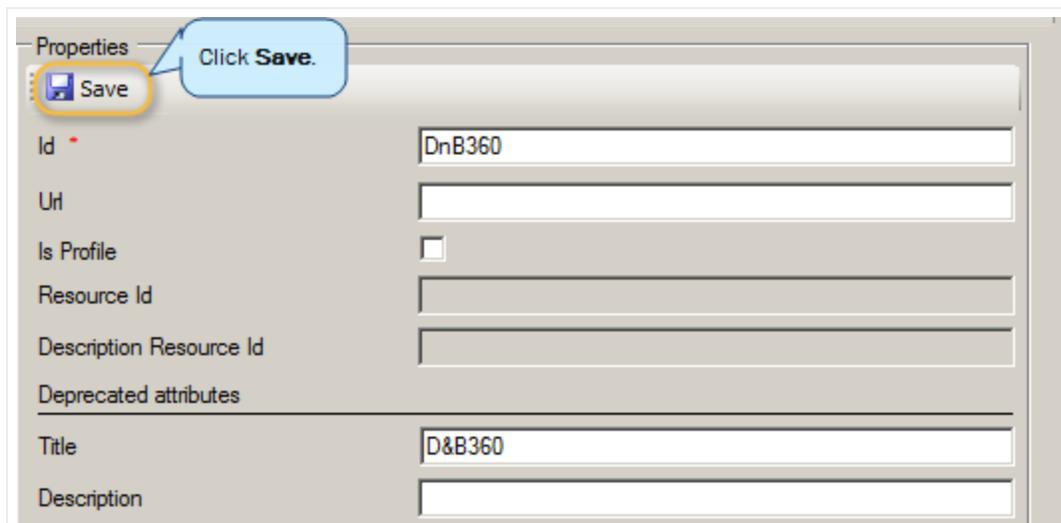
1. Open the **SiteMap Editor** window and connect to your CRM.



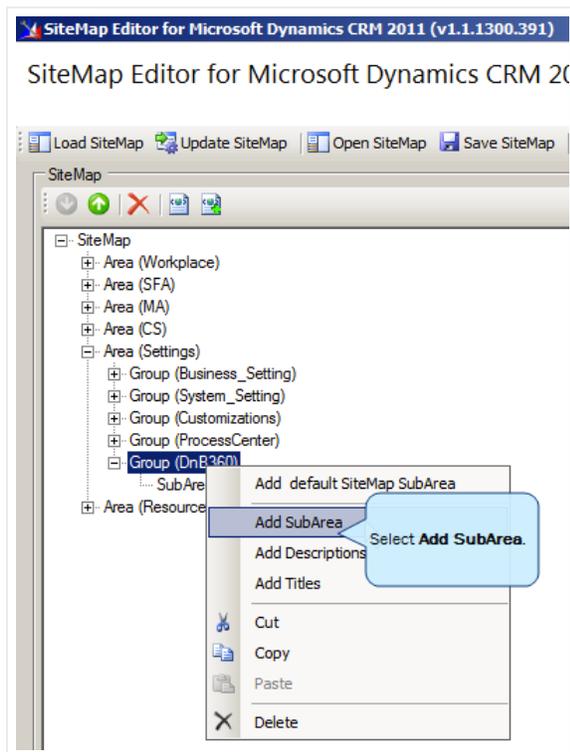
2. In the **SiteMap** window, right-click **Area (Settings)** and select **Add Group**.



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



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



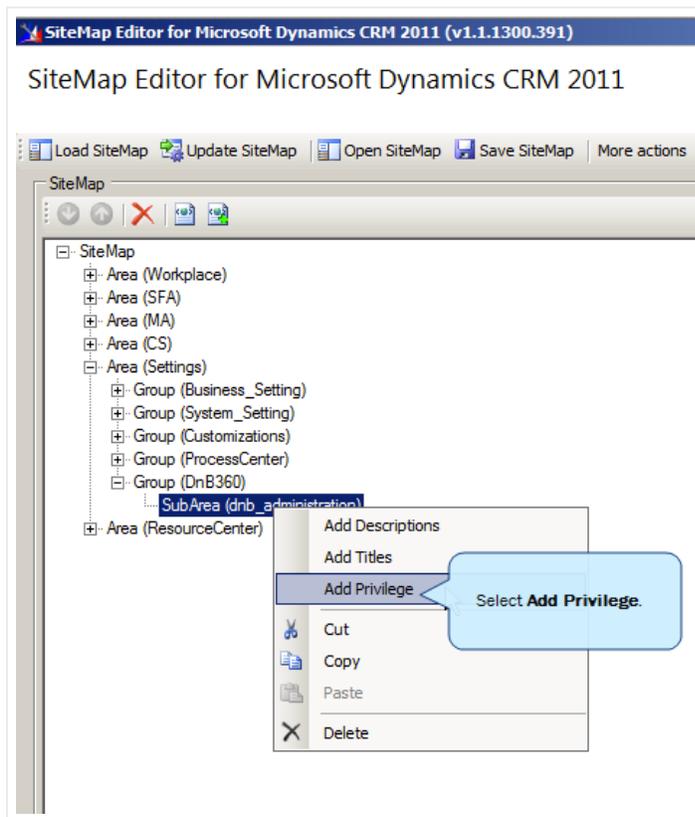
5. In the **Properties** window:
 - a. In the **Id** field, type **dnb_administration**.
 - b. In the **Entity** field, type **dnb_settings**.
 - c. In the **Url** field, enter:
\$webresource:dnb_/WebResources/DnB360.Crm.WebResources.Administration.html
 - d. In the **Title** field, type **D&B360 Administration**.

e. Click **Save**.

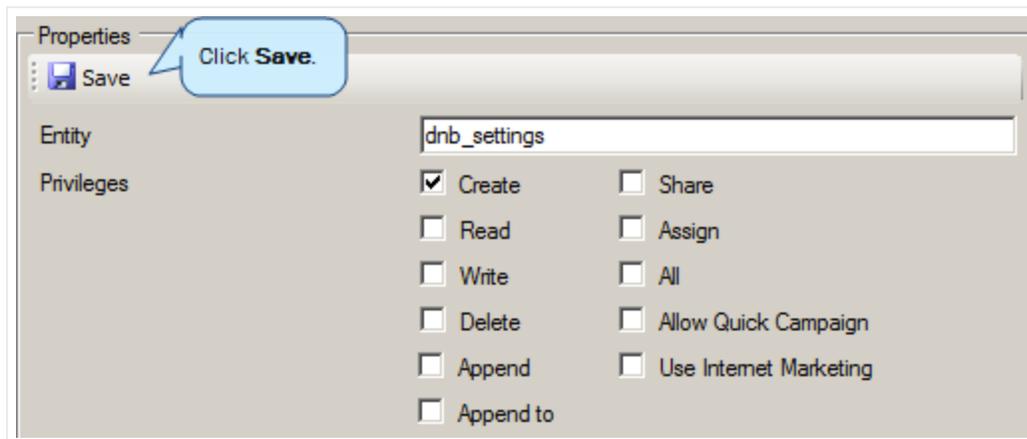
The image shows a 'Properties' dialog box for configuring a resource. A blue callout bubble with the text 'Click Save.' points to the 'Save' button in the top-left corner. The dialog contains the following fields and options:

- 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 text box]
- Get Started Panel Path Admin Outlook:** [Empty text box]
- Get Started Pane Path Admin:** [Empty text box]
- Get Started Pane Path Outlook:** [Empty text box]
- Icon:** [Empty text box] with a browse button (...)
- Outlook Shortcut Icon:** [Empty text box]
- Sku:** All OnPremise Live SPLA
- Url:** ces/DnB360.Cm.WebResources.Administration.html (with a browse button (...))
- Resource Id:** [Empty text box]
- Description Resource Id:** [Empty text box]
- Deprecated attributes:** [Empty text box]
- Title:** D&B360 Administration

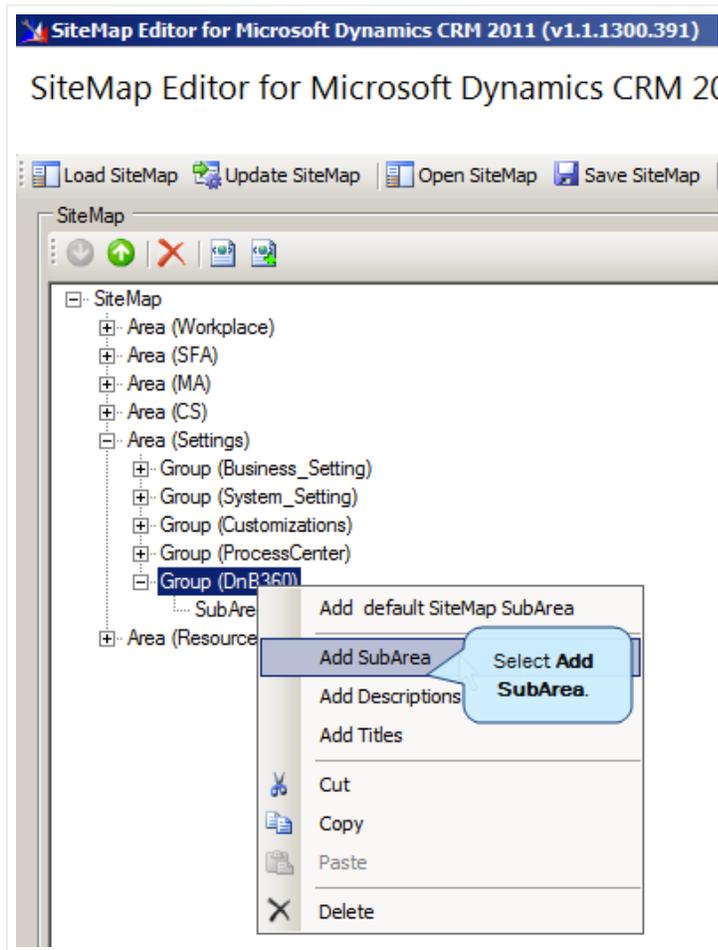
6. In the **Site Map Editor** window, right-click **SubArea (dnb_administration)** and select **Add Privilege**.



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



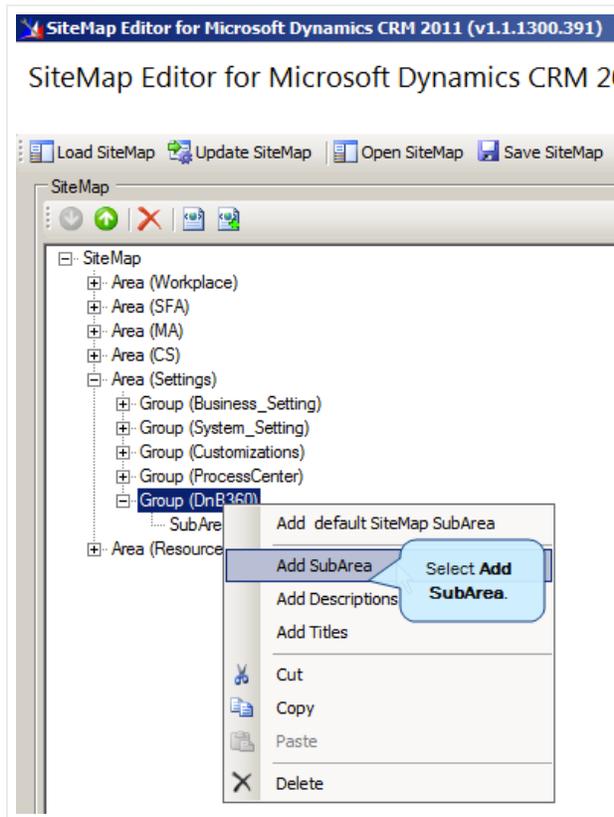
8. In the **Site Map Editor** window, right-click **Group (DnB360)**, and select **Add SubArea**.



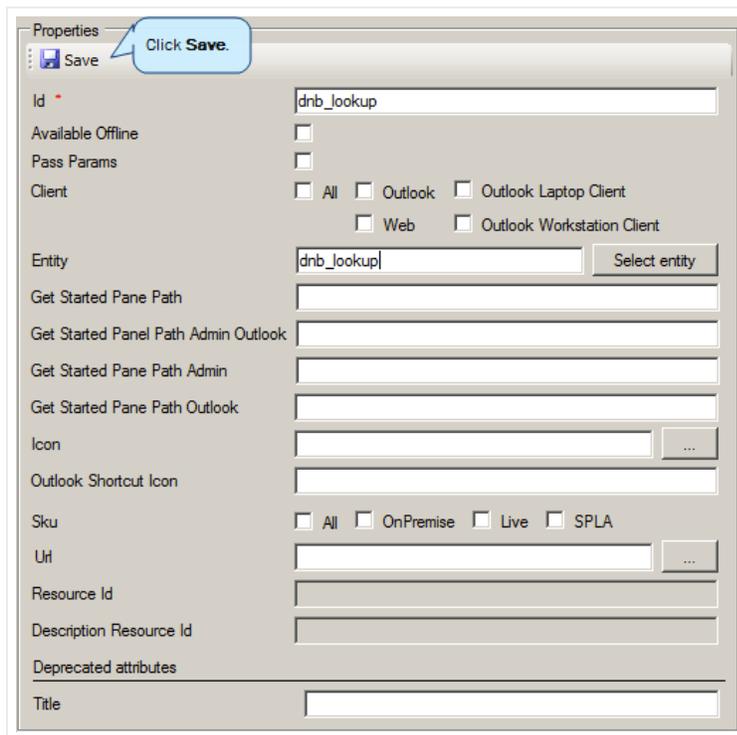
9. In the **Properties** window:
 - a. In the **Id** field, type **dnb_calloutlog**.
 - b. In the **Entity** field, type **dnb_calloutlog**.
 - c. Click **Save**.

The screenshot shows a 'Properties' window with a 'Save' button at the top left. A blue callout bubble with the text 'Click Save.' points to the 'Save' button. The 'Id' field contains the text 'dnb_calloutlog'. The 'Entity' field contains the text 'dnb_calloutlog' and a 'Select entity' button. Other fields include 'Available Offline', 'Pass Params', 'Client' (with sub-options: All, Outlook, Outlook Laptop Client, Web, Outlook Workstation Client), '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' (with sub-options: All, OnPremise, Live, SPLA), 'Uri', 'Resource Id', 'Description Resource Id', 'Deprecated attributes', and 'Title'.

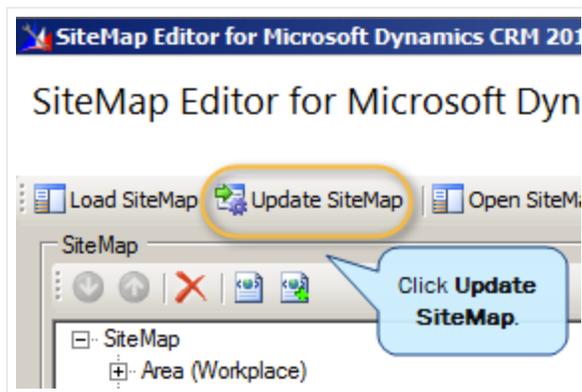
10. In the **Site Map Editor** window, right-click **Group (DnB360)** and select **Add SubArea**.



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



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

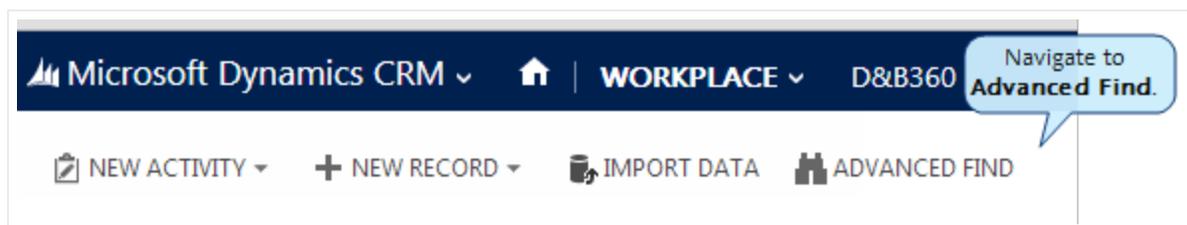
Note: System maintenance for D&B Systems occurs Saturday 11 P.M. to Sunday 9 A.M. Eastern. Any batches you submit during this time might be delayed.

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

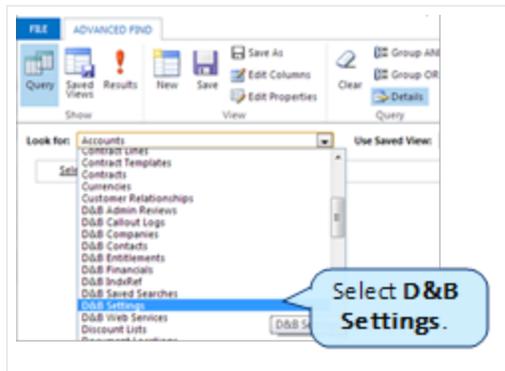
Configuring CRM Endpoints

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.

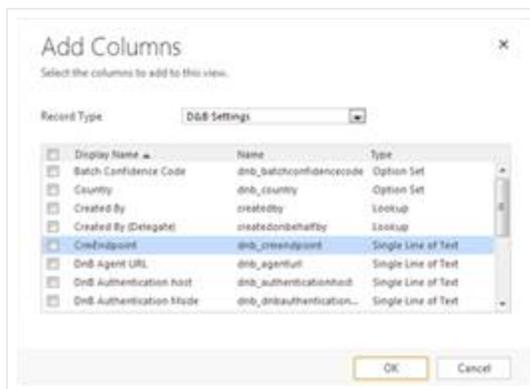
1. In the MSD CRM window, navigate to Advanced Find.



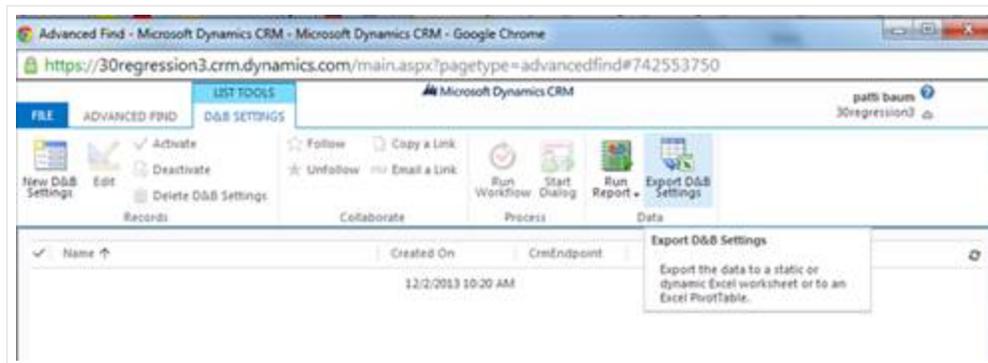
2. In the **Look for** menu, select **D&B Settings**.



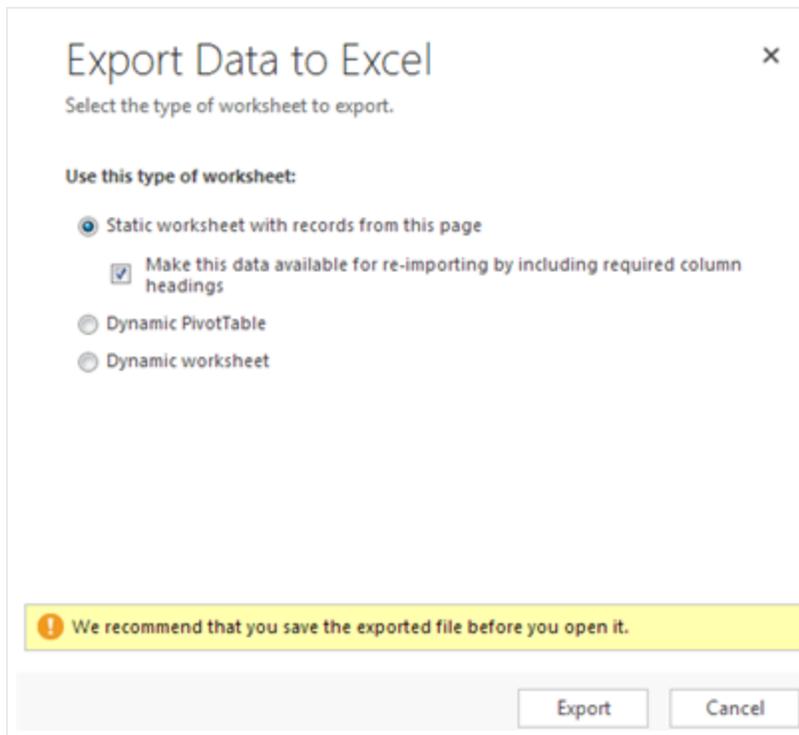
3. In the **D&B Settings** window, select **Edit Columns**, and then click **Add Columns**.
4. In the **Add Columns** window, select **CrmEndpoint**, and then click **OK** twice to close the window.



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

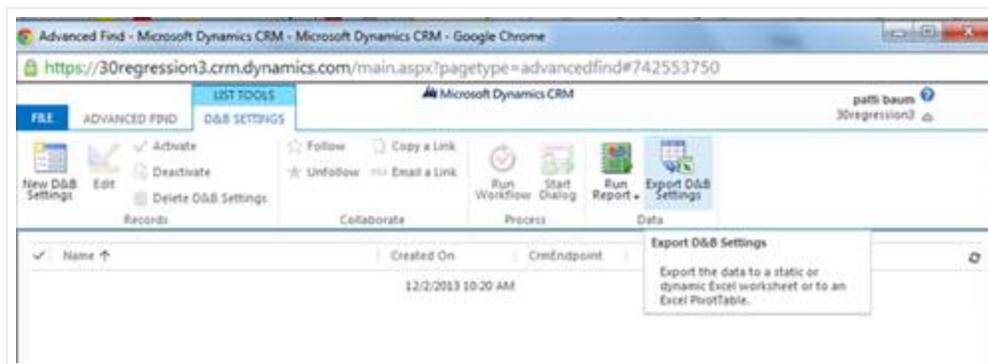


7. In the **Export Data to Excel** window, **Use this type of Worksheet** area, select **Make this data available for re-importing ...**, and then click **Export**.



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.



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