





D&B360 Installation and Administration Guide for Microsoft Dynamics CRM

Version 3.0

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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 Note: 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 commandline 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.



1 Introduction to D&B360

Welcome to the D&B360 Administration and Installation Guide for Microsoft Dynamics CRM.

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Product Benefits

With D&B360, you finally get the business insight you need, the D&B data quality you want, and the ease-ofuse you deserve.



Now you can see all angles of your prospects and customers within your CRM:

- Know your customers better.
- Acquire new prospects.
- Sell deeper into organizations.
- Improve salesperson effectiveness.

D&B empowers you with relevant and credible information, facilitating your role as a trusted advisor to enable new sales.

See New Opportunities	Seeing your customers and prospects in a new way can uncover new information and new-sale entry points.
Accelerate Your Sales Cycle	Once you establish relevance and credibility, customers will trust you with their business.
Expand Your Customer Footprint	Build customer relationships on a foundation that is based on relevance, credibility, and trust.
Position Your Success	With D&B360, you have a powerful tool that helps you to better understand your customer's pain points and respond to their needs, and that ultimately positions you to win more business.
	The D&B360 platform features On-demand access to D&B data, automatic refresh and synchronization with the D&B database, and seamless integration of rest-of-world data.

Accessing D&B360 from the Microsoft Dynamics CRM

For information about running the CRM and D&B360 through Outlook, refer to the *D&B360 User Guide for Microsoft Dynamics CRM*.

In Microsoft Dynamics CRM 2011

- 1. Log on to the Microsoft Dynamics CRM.
- 2. From the **Microsoft Dynamics** main window, **Workplace** menu, click to expand **D&B360**, and then select **D&B360**.



In Microsoft Dynamics CRM 2013

If D&B360 is installed, it will automatically display. You can also select the CRM Workplace menu to select D&B360.

Microsoft Dynamics CR	M∽ nî	WORKPLACE ~	D&B360	🕀 Crea	ite 30regress
D&B360		W	lorkplace		
D&B360					
		Companies	Search	Q	or perform a Company Match

In Microsoft Dynamics CRM 2011 for Microsoft Outlook

To install Microsoft Dynamics CRM 2011 for Microsoft Outlook (Outlook Client), follow the instructions on the Microsoft Download Center: http://www.microsoft.com/en-us/download/details.aspx?id=27821.

D&B360 User Interface Overview

After you select **D&B360** from the CRM main window, the D&B360 Home page window opens.

Home	Build A List	Imports	Settings			8
		Compani	ies 🔹 🤅	Search	٩	or perform a Company Match

Tab	Description
Home	On this tab, D&B360 users perform most of their tasks including running company, people, and industry searches, and running a company match. For more information, refer to the D&B360 User Guide.
Build A List	On this tab, users start a new list or edit or run a saved list. For more information, refer to the D&B360 User Guide.
Imports	Administrators use this tab to view a list of all asynchronous imports. Users can view only their own imports. This tab displays the following information about import jobs: Job ID, Start Time, End Time, Status, Import Type, and Record Imported. Click a Job ID to open its Activity log, which displays the status of each record from the import. For more information, refer to the D&B360 User Guide.

Tab	Description
Settings	Only Administrators use this tab, which includes these tabs: Admin, Batch, Data Management, Role Configurations, Terms & Conditions, and About.
? Help	Click this button to open the online version of the User Guide in a separate browser window. Click the Contents tab or Index tab on the left to find specific topics. You can also use the Search feature.



2 Getting Started

About D&B360	2-1
Considerations for Administrators	2-1
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Changing Administrator-User Names and Passwords	2-3
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Specifying the Requirements for Your CRM Environment	2-6
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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.

About D&B360

To find basic information and useful links for interacting with D&B360, on the **Home** page window, click **Settings**, and then click the **About** tab. You will also find a link to the D&B training web sites here.

Home	Build A List	Imports	Settings	Click Settings.			
	Admin	Batcl	n	Data Management	Role Configurations	Terms & Cona	Click About. About

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 are 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, <u>see "Registering Your Informatica Cloud Account for On Demand CRMs" on page 5-4</u>, or <u>see "Configuring the Secure Agent for an On-Premise Installation" on page 5-14</u>.

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:
 - a. In the **User** and **Password** fields, type the user name and password that you used to log on to your Informatica Cloud account.
 - b. In the **Connection Name** field, type the connection name provided by Informatica Cloud.
- 5. Contact Informatica Support (<u>support@informatica.com</u>) 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, <u>see "Managing</u> Batches and Installing the Informatica Cloud Secure Agent" on page 5-1.

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**.

ile Action View Help					
Microsoft Dynamics CRM	Name			Actions	
Deployment Administrators	September Machinistrator			Deployment Administrators	5
Servers				New Deployment Administra	ator
				View	
				Refresh	
		Select User	? X	Export List	
		Caland this shired have		👔 Help	
		User Object type.	rt Types		
		From this location:	a typot		
		msdvm.com Loc	ations		
		Enter the object name to select (examples):	di Nomoo 1		
			skritidnico		
		Advanced	Cancel		
				1	

Changing Administrator-User Names and Passwords

To manage the connections that D&B360 maintains for integration with the CRM, D&B APIs, and Batch, 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.

(!) 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	Imports	Alerts	Settings Click Se	ttings.		D&B36
	Admin	Bato	h	Data Management	Role Configurations	Terms & Conditions	About
Adm	nin						
Confi	guration						
Coun	try ISO	Code		•			
Edition	: Tier 2		Trial Indi	cator: True	CDM Conduction	Click CRM Credentials.	
Entitle	ment Type: Cus	tom	Expiry Da	te: 11/12/14	CRM Credenuals	AFTOredentials	Dab Credendal

3. In the Configure Credentials window, click Change Password.

	Configure Credentials
CRM Connection C	redentials
User	User Name Change Password Click Change Password.

- 4. In the next **Configure Credentials** window that opens:
 - a. In the User field, type the new user name.
 - b. In the **Password** field , type the new password.
 - c. In the **Confirm Password** field, retype the new password.
 - d. Click Save.

	When complete, Save Cancel
	Configure Credentials
CRM Connection C	redentials
User	User Name Hide Password
Password	Type the new password.
Confirm Password	Retype the new password.
Note: For D&B360 to rur	n, you must update the user's credentials on the CRM.

- 5. On the CRM, click **Settings**, and in the **System Area**, click **Administration**.
- 6. On the Administration window, click Users.
- 7. 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 Customer Support</u>.

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.

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: <u>http://technet.microsoft.com/en-us/library/hh699840.aspx</u>.

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: <u>http://technet.microsoft.com/en-us/library/hh699808.aspx</u>

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	 On Premise Only: Microsoft Windows Server 2008 Standard x64 SP2 or later Microsoft Windows Server 2008 R2
Databases	 On Premise Only: Microsoft SQL Server 2008 Standard x64 SP1 or later Microsoft SQL Server 2008 R2

MS Dynamics Configuration	 The Microsoft Dynamics CRM Deployment Manager allows administrators to set the web addresses for the: Web Application Server Organization Web Service Discovery Web Service Deployment Web Service For D&B360, these services need to be set to the same URL: 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 <u>https://dnb360agent.hoovers.com</u> required. You must add this URL to your Trusted Sites. For steps on how to do this, <u>See "Adding the</u> <u>dnb360agent to Your IE Browser Trusted Sites" on page 2-9</u> .
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/.
- 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.



3 Installing D&B360

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Uninstalling D&B360	-18
Resetting Your Credentials	-19
Accessing the Installer to Upgrade D&B 360 and MSD CRM	-21
Upgrading to MSD CRM 2013	-22

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 <u>https://dnbinsight.dnb.com/RegisterforDNB360/mainlaunchpage.htm</u>, and extract the file to your local directory.

Documents Indrary 08/8350 for Microsoft Dynamics CRM 3.0			Arrange
Name	Date modified	Туре	Size
E D&B360 for Microsoft Dynamics CRM 3.0	9/9/2013 2:55 PM	Application	4,462.88
360Installer	9/9/2013 2:55 PM	Application	564 XB
🕙 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
RESTURINGUE	9/9/2013 2:55 PM	Application extension	7 KB
360installer.exe	9/5/2013 12:05 PM	CONFIG File	2 KB
B&B360 for Microsoft Dynamics CRM 3.0.exe	9/5/2013 12:05 PM	CONFIG File	2 KB
🔍 microsoft.xm.sdk.dll	1/10/2012 10:22 PM	Application edension	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.

- a. 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.
- b. 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*.
- c. In the **Server URL** field, type the URL for the server where CRM is installed, or the URL that you use to access your CRM.
 - For CRM On Premise, the server name is *http(s)://servername*.
 - For CRM On Demand, the server name is *https://organizationname.crm.dynamics.com*
 - For CRM IFD, the server name is *https://organizationname.domain.com*.
- d. 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*.

D&B360 for Mic		
D&F	360	
CRM Connect	ion Data	
Connect type:	(-
User Name:		
Password:		Complete thi
Server URL:		
Organization:		
	Connect type, User Name, Password, Server URL and Organization are required.	
		44 - A2

 After you finish completing all fields, click Connect to establish CRM connectivity. The installer checks CRM connectivity.

nect type: (Mi	posoft Dynamii			
		s CRM Utilice 305		
Name: ad	nin©30initiile	onmicrosoft.com		
word: **	····· /**	Checking CRM connectiv	ity	
er URL: htt	p#//30			
snitistion: 30	nstaller.			

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.

D&B360 for Mid	BIGO
CRM Connect	ion Data
Connect type:	Microsoft Dynamics CRM Office 365
User Name:	admin@30installer.onmicrosoft.com
Password:	•
Server URL:	https://30installer.crm.dynamics.com
Organization:	30installer
	Could not establish session with CRM. Please review your connection data and try again or contact your System Administrator. An unsecured or incorrectly secured fault was received from the other party. See the inner FaultException for the fault
	Previous Connect again. Cance

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, <u>See "Performing the Register Agent Option" on page 3-14</u>. If you are uninstalling your software, <u>see "Uninstalling D&B360" on page 3-18</u>.

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:
 - a. In the Installer options area, click to select Install / Upgrade D&B360.
 - b. In the User Name field, enter the user name that D&B provided to you.
 - c. In the Password field, enter the password that D&B provided to you.
 - d. In the **Confirm Password** field, re-enter the password.
 - e. 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 Micros	oft Dynamics CRM	
D&B	860	
Installer options Install / Upgrade D8 O Register Agent D8B	Click Install / Upgrade D&B360.	
C Uninstall D&B360		Complete these fields.
D&B360 Agent		
User Name:		
Password:		
Confirm Password:		
Agent URL:	https://dnb360agent.hoovers.com/DNB360UIAgent	
	User Name, Password, Confirm Password and Agent URL are	e 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 Micros	oft Dynamics CRM	<u> </u>
D&B	360	
Installer options	;	
Install / Upgrade D8	kB360	
D&B360 Agent		
User Name:	A3BE8FB4-41FB-4F39-8355-5851D073F383	
Password:	•••••	
Confirm Password:	•••••	
Agent URL:	http://dnb360agent.hoovers.com/DNB360UIAgent	
	Click Next.	Cancel
	FICTIOUS MEAL	Concer

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.

C	SB360
Install	ler Progress
This in: D&B36	stallation will take approximately 10 minutes, based on your connection speed. The j0 Installer is processing tasks on your CRM server, please do not close the Installer.
~	Importing D&B360 solution
4	D&B360 writing settings
~	D&B360 credentials registration
~	D&B360 CRM credentials registration
~	D&B360 account configuration
~	D&B360 roles configuration
If you I view th	have Microsoft Dynamics CRM open in your browser, please logout and login again to 1e changes

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, <u>see "Upgrading from a Previous Version" on page 3-12</u>.
```

Setting the Country ISO Code

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

Home Build A List		Imports	Settings	
	Admin	Batch		
Adm	nin			

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.

Configurat	ion	
Country	Description	Select Description or ISO Code.
Edition: Tier 3	Description ISO Code	I Indicator: True

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.



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.

	Solutio	n: Default	Solution				Field E	kplorer	>
	Form:	Αςςοι	int						
							Filter	All Fields	-
								All Fields	
Heade	er 👘						I Uni	Custom Fields	
Annual	Revenue		No. of Employees	🔒 Owner	* 5	elect	Custom	umber	Custom
Annual	l Revenue		No. of Employees	Owner		Fie	elds.	t Rating	
							🗐 Addre	ess 1	

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: Defa	alt Solution			Field	Explorer	2
Form: Acc	ount			Filter	Custom Fields	
Header			1	n 🗹 📄	nly show unused fields	
Annual Revenue	No. of Employees	🗄 🔒 Owner *	Select D&B	📥 🗐 D&E	3 Company	
Annual Revenue	No. of Employees	Owner	Company.	E 🗇 D&E	3 Financial	
					Initial Accessition Data	
					initial Association Date	
Summary					Initial Association Status	
ACCOUNT	SOCIAL PANE			🗐 Upd	ate Available	
INFORMATION		Primar	v Contact			
Account Account N		Prima	ry Contact			
Name "		CONT	ACTS			
Phone Main Pho		CONT	ACTS			
- Eav						
Fax Fax						
Web Site Website						
Ticker Ticker Sym Symbol	Drag Da	vou want it to				
(= D&	B Company displa	ay on the UI.				

Summary	1
ACCOUNT INFORMAT	ION
Account Name *	Account N
Phone	Main Pho
Fax	Fax
Web Site	Website
Ticker Symbol	Ticker Sym
D&B Company	D&B Com

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

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

CRM for Outlook	See how CRM for Outlook makes you even more pro	ductive Get CRM for Outlook
+ NEW DO DEA		COMPANY
Summary		
ACCOUNT INFORM	MATION	POSTS ACTIVITIES NOTES
Account Name*	AMERICAN EXPRESS COMPANY	Enter and favo
Phone	<u>1</u>	Both Auto parts User posts
Fax	(m) (1)	AMERICAN EXPRESS
Web Site		Account: Created By patti
Ticker Symbol		On AMERICAN EXPRESS C
DAB Company	AMERICAN EXPRESS COMPANY	construction of the second second
	D&B Company	
ADDRESS	(field displays.)	
Street	1513534005	
City	New York	
State/Province	NY	
	10285-0002	
2019 Postal Code		

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.

😤 📋 Sdk Message Pro	cessing Steps		4	
Solution Default Solution	Component Type Sdk Message	Processing Step		View Al
27 Information	How to Register Steps	Delete O Activate O De	sactivate 🛛 🖷 Show Dep	endencies 🛛 😭 Managed Properties
Components	E Name		Schillessage	EventHandler
Cation Sets	T Dresed.Cm.Pupra SO	rt by Name. Retrieve	- RetrieveMultiple	Dr8360.0m.Pupins.AddOrU
Client Extensions	T Dr8360.0m.Pupirs.Ad	AtrieveMu	- BetrieveMultiple	DoB360.Cm.Pugins.Advance-
Web Resources	Dr8360.Cm.Pugirs.Findindu	stryByKeywordPlugin: RetrieveMult	- RetrieveMultiple	Dr8360.0m.Pugins.Findinda
E. Processes	Dr8360.Cm.Plugins.Getindus	tryPlugin: RetrieveMultiple of ano_	- BetrieveMultiple	Dh8360.Cm.Plugins.Getindus-
 A Plog-in Assertance 	Dr8360.Cm.PuginsRetrieved	CompetitorsPlugin: RetrieveMultipl.	- RetrieveMultiple	DnB360.Cm.Pugins.Retrieve-
Service Endpoints	Dr8360.Cm.Pupirs.DrbCom	panyUpdateAvailablePlugin: Retrie	- Betzieve	Dh8360.Crm.Pupins.Dh9Com-
1 DeiPboards		nanyUpdateAvallablePlugin: Retrie	- Betrieve	Dob360.Cm.Pugina.DrbCom
🗂 Reports	Select SDK Message	petail#upin RetrieveMultiple of.	Betrievelduttate	Dr.5360.Cm.Pugrs.GetPerso-
Connection Roles	Bracassing Stans	yDetaiPlugin: RetrieveMultiple.	RetrieveMultiple	Dr8360.Crm.Pupins.GetCom-
Article Templates	Flocessing steps.	an RetrieveMultiple of drb web	- RetrieveMuticie	Dr.8360.Cm.Pupins.Enovot2-
Contract Templates	- Dresectore Progratmormat	ceServiceBase RetrieveMultiple of	RetrieveMultiple	DIB360.Cm.Pupins.Informati
S Mail Merce Templates	Dn8360.Cm Pugins.ClearCon	tactAssociationsOnCompanyChan.	- Upplate	Dn8360.Cm.Pupins.CearCon
Security Roles	Dn8360.Cm.Plugins.Setinitial	DribAssociationPlugin: Create of ac	- Create	Dresso Crm.Plug ns.Setinita
B Field Security Profiles	Dn8360.Cm.Plupins.Setinitiat	OnbAssociationPlugin: Create of les	o Create	Dissection Pugins Setinitial-
	P Dr8360.Cm.Piupins.Setinital	DribAssociationPlugin: Create of co	- Create	Dn8360.Cm.Fupins.Setinitial-
	Dr8360.0m.Pupirs.Setinitial	OnbAssociationPlugin: Update of a	- Update	Dr.5360.Cm.Pupins.SetInital-
		No. I American Street Str	Constants.	1. But BARD Come Brandon Futbolister

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

(!) Important Note: 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.

and postation.	Component Type Sok Message Prov	cessing Step		View D				
loe.	🔄 How to Register Steps 🛛 🗙 De	rete 🛛 🔘 Activate 🔘 Deactivate	e 🛛 🖷 Show Dependencies	Managed Properties	More Actions +			
10. H	E Name	SokMessage	Everthandler	Primary Object Typ	pe Code Execution Order	Execution Stage	Execution Mode	Status
	Dr8360.Pugins.SecurityPugin R	etrieveMult. RetrieveMultip	Mari	E ale at	1	Post-operation	Synchronous	Enabled
ion Sets nt Extensions	C Dr8340.PugintSecurityPugin R	etrieveMut RetrieveMution	Veri	fy that	<u> </u>	Post-operation	Synchronous	

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:

- a. In the **User Name** field, type or enter the user name that D&B provided to you.
- b. In the **Password** field, type or enter the password that D&B provided to you.
- c. In the **Confirm Password** field, retype the password.
- d. 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.

D&B360 for Micros	oft Dynamics CRM	
D&B	360	
Installer options	\$	
C Install / Upgrade D8	xB360	
Register Agent D&B	360	
O Uninstall D&B360		
D&B360 Agent		
User Name:	A3BE8FB4-41FB-4F39-8355-5851D073F383	
Password:	******	
Confirm Password:	*****	
Agent URL:	https://dnb360agent.hoovers.com/DNB360UIAgent	
	Click Next.	
	Previous Next	Cancel

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.

nstal	ller Progress
his in	istaliation will take approximately 2 minutes, based on your connection speed. The 60 Installer is processing tasks on your CRM server, please do not close the Installer.
~	D&8360 writing settings
÷	D&B360 credentials registration
0	D&8360 CRM credentials registration
	D&B360 account configuration

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

<mark>₀</mark> D&B:	360 for Microsoft Dynamics CRM	
	D&B360	
Instal	ler Progress	
This in D&B3	stallation will take approximately 2 minutes, based 60 Installer is processing tasks on your CRM server, p	on your connection speed. The please do not close the Installer.
1	D&B360 writing settings	
1	D&B360 credentials registration	
~	D&B360 CRM credentials registration	
4	D&B360 account configuration	
1	D&B360 roles configuration	
		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.

D&B360 for Microsoft Dynamics CRM	
DEBBECO Installer options Install / Upgrade D&B360 Register Agent D&B360 Uninstall D&B360 Click Unins tall D&B360.	
	Click Next.
	Previous Next Cancel

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 8-1.

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 Impo	orts Setting	şs			
Admin		Batch	Data Management	Role Configurations	Terms & Conditions	About
Admin						
Configurat	tion					
Country	Descriptio	on	•	Click	to reset your edentials.	
Edition: Tier 3 Entitlement Ty	ype: Custom	Trial Ind Expiry D	licator: True ate: 12/31/14	CRM Credentials	API Credentials	D&B Credentia

- 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 C	redentials		
User	MSDDNB360Admin Hide Password	Complete these fields	
Password	••••••		
Confirm Password			

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

_		Click Save.	Save	Cance
	Configure Credentials			
API Credentials				
User Password	APIAdmin@company.com Hide Password	Complete these fields.		
Confirm Password]		

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.



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 3-1.
- 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 3-<u>1</u>.
- 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 3-22.
- 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 <u>See "Installing D&B360" on page 3-1</u>.

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.

Microso	ft Dynamics CRM	∽ 	WORKPLACE ~	D&B360
D&B360				
D&B360				



4 Configuring D&B360

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Assigning Roles to Users	4-1
Assigning Roles in the CRM	4-1
Assigning D&B360 Roles	4-3

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

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.

User Customize	
Save & New Save & Disable	Approve Reject E-mail Reassign Records Change Business Unit Click Manage Roles Roles Roles.
Save	Actions
tion	User
ral	User Name
esses	User Marile

- 6. In the Manage User Roles window, Role Name list:
 - a. Select **D&B360 Administrator** only for administrators that you want to have permission to navigate to the Settings tab.
 - b. 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.

c. Click OK.



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

Assigning D&B360 Roles

Recommended Instructions

- Assign the D&B360 User role to all users who need access to D&B360. Users must be assigned the D&B360 User role to access D&B360.
- Assign the D&B360 Administrator role to any users who need permission to navigate to the Settings tab. The Settings tab is where administrators perform configuration, batch, data management, and role configuration tasks.
- Make sure that in addition to D&B360 User, you assign users to at least one other CRM role.
- First deselect all settings in the Role Settings area for the D&B360 User role except for **Role has access to D&B360**. By leaving this setting selected, any settings you select will apply to all D&B360 users.

- Deselect all D&B360 Administrator settings except **Role has access to D&B360**. By leaving this setting selected, any settings you select will apply to all D&B360 administrators.
- For the other roles in the list, select any additional settings to give users access to those features.

For more information about each role setting, see "Role Settings" on page 4-6.

Steps for Configuring your CRM Roles with D&B360 Features

Before you can configure CRM roles with D&B360 settings for the D&B360 User and D&B360 Administrator, deselect all of the role settings, except for **Role has access to D&B360**.

- 1. On the D&B360 Home page window, click Settings.
- 2. In the Settings window, click Role Configurations.
- 3. In the Role Configurations window, select D&B360 User.

Home	Build A List	Imports	Settings	?	
	Admin	Bato	:h	Data Management	Role Configurations
Role	Configura	tions			
Roles	÷				
D&B360) Administrator	2			
D&B360) User	1	Select D&B	360	

4. In the **Role Settings - D&B360 User** area, **Data Management** and **Screens** areas, click each check box to deselect all of the settings.

Role Settings - D&B360 User
☑ Role has access to D&B 360
Data Management
Link D&B Data to Accounts - Add Accounts and link, edit, or remove D&B data
Link D&B Data to Contacts - Add Contacts and link, edit, or remove D&B data
III Link D&B Data to Leads - Add Leads and link, edit, or remove D&B data
Add Multiple Records - Add multiple records at a time
Prevent Same-Object Duplicates - Prevent duplicate records for a company or person
Enable Refresh - Refresh D&B data on linked records
Screens
Build-A-List
Find Similar Companies

5. In the **Roles** list, select another CRM role that you have already assigned to a user, for example Sales Manager.

The following steps are an example of a D&B360 user who is also assigned the role of Sales Manager. Apply these steps to whichever role the user has in addition to D&B360 User:

6. In the Role Settings - Sales Manager list, select Role has access to D&B360.

Role Settings - D&B360 User	
Role has access to D&B 360	1

- 7. In the **Data Management** and **Screens** lists, leave each setting selected that you want Sales Manager role users to have permissions for.
- 8. Deselect the settings you do not want Sales Manager role users to have permissions for.

Data Management
Link D&B Data to Accounts - Add Accounts and link, edit, or remove D&B data
Link D&B Data to Contacts - Add Contacts and link, edit, or remove D&B data
Link D&B Data to Leads - Add Leads and link, edit, or remove D&B data
Add Multiple Records - Add multiple records at a time
Prevent Same-Object Duplicates - Prevent duplicate records for a company or person
Enable Refresh - Refresh D&B data on linked records
Screens
Build-A-List
Find Similar Companies

See the following table for descriptions of the user roles and settings.

Note: Only someone who is assigned the role of administrator is authorized to configure settings. After you have been assigned the role of D&B360 Administrator, you can configure the D&B360 settings.

Role Settings	If Selected	If Deselected
Role Settin	gs – D&B360 User	

Role Settings	If Selected	If Deselected
Role has access to D&B360	If you select this setting for the D&B360 Role, and the D&B360 User Role is assigned to a user, that user can access D&B360. If you select this setting for any other roles, you can configure the remaining settings for those roles. The setting that you set applies to all users who are assigned those roles.	If you deselect this setting for the D&B360 Role, the user cannot access D&B360 whether this role is assigned to a user or not. If you deselect this setting for additional roles, you cannot configure the remaining settings for those roles. Any settings that you previously configured for those roles will not be applied.
Data Mana	agement	
Link D&B Data to Accounts	If you select this setting for one or more of a user's roles, the user can add companies as Accounts, link companies to existing Accounts, refresh D&B data for Accounts if that user also has Enable Refresh permission, and unlink D&B data from Accounts.	If you deselect this setting for all of a user's roles, the user cannot add companies as Accounts, link companies to existing Accounts, refresh D&B data for Accounts, or unlink D&B data from accounts. If a user has permission to link D&B Data to Contacts but not to Accounts, the user is unable to add a Contact when doing so would result in the creation of a new Account.
Link D&B Data to Contacts	If you select this setting for one or more of a user's roles, the user can add people as Contacts, link people to existing Contacts, refresh D&B data for Contacts if user also has the Enable Refresh permission, and unlink D&B data from Contacts. If a user has permission to link D&B Data to Contacts but does not to Accounts, the user cannot add a Contact when doing so would result in the creation of a new Account.	If you deselect this setting for all of a user's roles, the user cannot add people as Contacts, link people to existing Contacts, refresh D&B data for Contacts, or unlink D&B data from Contacts.

Role Settings	If Selected	If Deselected
Link D&B Data to Leads	If you select this setting for one or more of a user's roles, the user can add companies as Leads, link companies to existing Leads, refresh D&B data for Leads if that user also has Enable Refresh permission, and unlink D&B data from Leads.	If you deselect this setting for all of a user's roles, the user does not have permission to link D&B data to Leads. The user will be prevented from adding people or companies as Leads, linking people or companies to existing Leads, refreshing D&B data for Leads, and unlinking D&B data from Leads.
Add Multiple Records	If this setting is selected for one or more of a user's roles, the user has permission to add multiple records at a time using the Add Selected button at the bottom of the results page. The user can view these records in the import queue.	If this setting is deselected for all of a user's roles, the user does not have permission to add multiple records at a time and the user is unable to view the import queue.
Prevent Same- Object Duplicates	 If you select this setting for one or more of a user's roles, the user is prevented from adding duplicate records of the same type. If a company already exists as an Account in the CRM, the user will be prevented from adding the company as an Account or linking the company to a Account. If a person already exists as a Contact in the CRM, the user will be prevented from adding the person as a Contact or linking the person to a Contact. If a person or company already exists as a Lead in the CRM, the 	If you deselect this setting for all of a user's roles, the user can add duplicate records of the same type.
	user will be prevented from adding the person or company as a Lead or linking the person or company to a Lead.	

Role Settings	If Selected	If Deselected
Enable Refresh	If you select this setting for one or more of a user's roles, the user has permission to refresh D&B data for Accounts, Leads, and Contacts by using the Check for Updates button. This setting applies only to records that the user has permission to link, through the Link D&B Data to Accounts, Link D&B Data to Contacts, and Link D&B Data to Leads settings.	If you deselect this setting for all of a user's roles, the user is unable to refresh D&B data for any records.
Screens		
Build-A- List	If you select this setting for one or more of a user's roles, the user can use Build-A-List.	If you deselect this setting for all of a user's roles, the user is prevented from using Build-A-List or Find Similar.
Find Similar Comp- anies	If you select this setting for one or more of a user's roles and the user also has permission to use Build-A-List, the user can use Find Similar.	If you deselect this setting for all of a user's roles, the user is unable to use Find Similar.



5 Managing Batches and Installing the Informatica Cloud Secure Agent

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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 5-4.

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 5-14.

Overview of Batch Processing

Two batch jobs are available through D&B360:

- New Batch Use to associate existing Microsoft Dynamics accounts with a valid D-U-N-S record. New Batch chooses accounts from Microsoft Dynamics and sends the account name and address to D&B for potential cleanse, match, and append processes. After D&B returns the batch records, the accounts in Microsoft Dynamics are associated with a valid D-U-N-S number.
- **Refresh Batch** After Microsoft Dynamics accounts are associated with a D-U-N-S number, a Refresh Batch is used once a month to refresh the D-U-N-S data stored in D&B360 Microsoft Dynamics tables.

Understanding the Key Features of D&B360 Batch Jobs

The three key features of D&B360 Batch jobs are:

- Record Eligibility
- Confidence Code Threshold Facts
- Validating D-U-N-S Numbers

Record Eligibility

Every record that is selected for New Batch processing goes through a data quality check procedure. The completeness check verifies whether at least two fields out of Billing City, Billing State, and Postal Code have a value, or if the field Phone has a value. If this criteria is not met, the records are sent to the Admin Review List. To display the Admin Review list, click the **Settings** tab, the **Data Management** tab, and then click **Admin Review List**.

Confidence Code Threshold Facts

- The range of Confidence Code is: 1 to 10
- Any number above 8 is considered to result in accurate match records.
- The setting can be adjusted by a D&B360 Administrator in the Modify Batch Schedule window.

Records from D&B that fail to meet the defined Confidence Code Threshold are moved to the Admin Review List. They are not automatically re-processed in the next batch run. As the Administrator, you must manually process these records.

Validating D-U-N-S Numbers

An event such as a merger or acquisition can result in changes to the D-U-N-S number for a record.

Note: A Recertified D-U-N-S has occurred when we send records to D&B in a Refresh Batch job, and the returned records have a new D-U-N-S Number.

In the case of a Merger or Acquisition, re-certified D-U-N-S records will be updated within the D&B360 table with the following:

- Re-cert reason code
- Re-cert description
- DATS date when the new DUNS Number was assigned

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.

	-
Microsoft Dynamic CRM On Premise	Requires:
	 Installation of Informatica Cloud Secure Agent (<u>see</u> <u>"Configuring the Secure Agent for an On-Premise</u> <u>Installation" on page 5-14</u>).
	 Installation of Batch Job Initialization Files
	 Configuration of Secure Agent
	 Configuration of Batch Job Connection

(!) Important Note: 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, <u>see "Configuring the Secure Agent for an On-Premise Installation" on page 5-14</u>.
- 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, <u>see "Registering Your Informatica Cloud</u> <u>Account for On Demand CRMs" on page 5-4</u> or <u>see "Registering Your Informatica Cloud Account for On</u> <u>Premise CRMs" on page 5-19</u>.

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, <u>see "Adding One or More CRMs to Your Informatica Cloud Account" on</u> <u>page A-10</u>.

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?.

User Name: Password: Don't have an account? Resources See What's New in Informatica Cloud Winter 2012 Check System Status at the Informatica Cloud Trust Site Data Synchronization Click Don't have an account? 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.			MATICA Cloud
Resources See What's New in Informatica Cloud Winter 2012 Check System Status at the Informatica Cloud Trust Site Data Assessment Measure and monitor data quality of the Lead, Account, Contact, and Opportunity objects within Salesforce CRM.	ons, databases, and files. h as custom sources and addresses, and phone nt or a local database.	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.	Name: Prord: Click Don't have an account?
	r of the Lead, Account, within Salesforce CRM.	Data Assessment Measure and monitor data quality of the Lead, Account, Contact, and Opportunity objects within Salesforce CRM.	ces What's New in Informatica Cloud Winter 2012 k System Status at the Informatica Cloud Trust Site
Participate in the Informatica Cloud Community Data Replication Automate the movement of data from cloud and on-premise applications and databases for business intelligence and compliance use cases. Data Replication	from cloud and on-premise isiness intelligence and	Data Replication Automate the movement of data from cloud and on-premi applications and databases for business intelligence and compliance use cases.	cipate in the Informatica Cloud Community

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

First Name:*	DnB360
Last Name:*	Administrator
Job Title:*	Admin
Email Address:*	vouremail.com
Confirm Email Address:*	youremail.com
Phone Number:*	512-555-1212
🕑 Use my email address as	s my user name. Complete the fields in this window.
Organization Details	
Organization Name:*	Your MaxCV Username
Address:*	12 Main Street
City:*	Anywhere
State:*	New Jersey
Postal Code:*	07901
Country:*	United States
Number of Employees:*	101 - 500 employees 💌
Time Zone:	Eastern Daylight Time, New York
What CRM systems do you Salesforce Microsoft Dynamics Other	use?
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.

4. Click Informatica Now to open the Informatica Cloud login window.

Informatica Cloud	🐴 👻 🗟 👻 🖶 👻 Page 🕶 Safety 🕶 Tools 🕶 🔞 👻
INFORMATICA Cloud	
New Account Registration	
Welcome to Informatica Cloud Informatica Cloud is a cloud-based integration service that enables customers to automate and monif integrating today, please complete the following form and submit it by clicking the OK button. After submitting this form you will recr Cloud.	ta with applications such as Salesforce.com. To begin d.
Congratulations! Your account is active now. Check your email for your user name and password. You can start using Informatica Cloud now.	

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

Informatica Cloud	
INFORMATICA Cloud	
User Name: youremail@email.com ? Password: ? Login Enter your credentials and click Login. Don't have an account?	Data Synchronization Load data and integrate applications, databases, and files. Includes add-on functionality such as custom sources and plug-ins. Other Context Validation Validate postal addresses, email addresses, and phone numbers in your CRM environment or a local database.
Resources See What's New in Informatica Cloud Winter 2012 Check System Status at the Informatica Cloud Trust Site	Data Assessment Measure and monitor data quality of the Lead, Account, Contact, and Opportunity objects within Salesforce CRM.
Participate in the Informatica Cloud Community	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.
OK. Cancel
User Details Type and confirm a new password. User Name: password.* Password:*

The Informatica Cloud Quick Setup window opens.

Home C	Data Services C	onfiguration	Administration		
Activity Log	Activity Monitor	Dashboard	Data Files	Quick Setup	
Quick Setup)				
This page allo	ws you to begin worki	ng with your data	immediately. Choo	se one of the services	below to begin working with you
This page allo	ows you to begin worki	ng with your data	immediately. Choo	se one of the services	below to begin working with you
This page allo Velcome to Ir	ws you to begin workin nformatica Cloud. To g	ng with your data et started, you wi	immediately. Choo Il need to:	se one of the services	below to begin working with you
This page allo Velcome to Ir 1. Select (nformatica Cloud. To go the desired service.	ng with your data et started, you wi	immediately. Choo Il need to:	se one of the services	below to begin working with you
This page allo Velcome to Ir 1. Select t 2. Install t 3. Create	ows you to begin worki nformatica Cloud. To g the desired service. the Informatica Cloud a new task.	ng with your data et started, you wi Secure Agent.	immediately. Choo Il need to:	se one of the services	below to begin working with you

Note: For adding more than one CRM to use your Informatica Cloud account, <u>see "Adding One or More CRMs to Your Informatica Cloud Account" on page A-10</u> and start with the next step.

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

6	1) Informatica Cloud
	INFORMATICA Cloud
	Home Data Services Configuration Agents Connections Click Connections Connections
	List of all connections in your organization. Use a connection to connect to a database, file or Salesforce. To add a new connection, or connection name.
	There are no connections. To add a connection, click New.

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

OK Click OK.		
Connection Details	5	Complete the
Connection Name:* Description:	CRM Organization Name	required field:
Туре:*	Select Select Oracle SqlServer MySQL Flat File ODBC MS Access FTP/SFTP SAP Web Service Oracle CRM On Demand NetSuite	

- 10. In the **New Connection** window, enter the CRM information to connect the Informatica Cloud account to the CRM:
 - a. On the CRM window, click **Settings**.
 - b. In the Customization menu, Customizations.
 - c. 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:

Settings 🚮 🏹 -	Customization	
Business Business Management	Which feature would you like to work with?	
Templates	Customize the System Create, modify, or delete components	Publishers Create, modify or delete a solution
System	in your organization. Components include entities, fields, relationships, forms, reports, processes, and others.	publisher. Select Developer
System Jobs	🖗 👍 Solutions 🥅	Developer Resources
Auditing	Create, modify, export, or import a managed or unmanaged solution.	View information or download files that help you develop applications and extensions for Microsoft Dynamics
Customization		CRM.

In Microsoft Dynamics CRM 2013:



d. 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:



In Microsoft Dynamics CRM 2013:

¼ 🗸 🏦 SETTINGS 🗸 Customizations
Developer Resources
Your Organization Information:
Organization Unique Name 30regression2
Windows Azure Service Bus Issuer Certificate Issuer Name: crm.dynamics.com
Developer Center $\square_{ar{b}}$ Download documentation, tools and sample code
Service Endpoints: Select a
Discovery Protocol: SOAP https://disco.crm.dynamics.com/XRMServices/2011/Discovery.svc Discovery Service. Discovery Service. Discovery Service. Discovery Service.

Note: In the previous illulstrations, 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 connecti	on here. Use a connection to access a database,
OK Click OK. Test	
Connection Details	
Connection Name:*	CRM Organization Name
Description:	
Type:*	Microsoft Dynamics CRM
Microsoft Dynamics CRM	Complete these fields.
Authentication Type:*	Microsoft Live
User Name:*	CRM username
Password:*	•••••
Organization Name:*	CRM Organization Name
Service URL:*	https://disco.crm.dynamics.com/XRMServices/
Enter the Service URL.	

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

INFORMATICA Cloud						
Home	Data Ser	vices Configuration	Administration			
Agents	Connecti	ons Schedules	Task Flows Plug-ins			
List of all connection	connections i n, click the co	n your organization. Use a nnection name.	connection to connect to a database, file or Salesforce. To add			
Actions	Name -	Туре	Service URL			
> 🖪 🗙	CRM Org 1	Microsoft Dynamics CRM	https://dev.crm.dynamics.com/XRMServices/2011/Discovery.sv			

13. 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.

Home	Data Services	Configuration	Administration	
Organizatio	on Connectors	Users AL	idit Log	
You can vie	w your organizatior	n profile. It displays o	rganization properties and de	etails, default email not

To add other CRMs to your Informatica Cloud Account, <u>see "Adding One or More CRMs to Your Informatica</u> <u>Cloud Account" on page A-10</u>

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.

Home	Build A List	Imports	Settings	Click Settings.			8
Admin		Batch		Data Management	Role Configurations	Terms & Conditions	About
Ad	min		Cli	ick 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 5-7.)

		Click Save.	Save	Cancel
	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 the 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	А	innerfirewall.customer.com	D
innerfirewall.customer.com	D	msdcrm.customer.com	5555/X
outerfirewall.customer.com	В	innerfirewall.customer.com	E
innerfirewall.customer.com	E	msdcrm.customer.com	33YY
outerfirewall.customer.com	С	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	А	innerfirewall.customer.com	G
innerfirewall.customer.com	D	msdcrm.customer.com	5555/X
outerfirewall.customer.com	В	innerfirewall.customer.com	G
innerfirewall.customer.com	E	msdcrm.customer.com	33YY
outerfirewall.customer.com	С	innerfirewall.customer.com	G
innerfirewall.customer.com	F	msdcrm.customer.com	80/443/2

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.

Be sure to carefully read and understand all the rights and restri license terms. You must accept the license terms before you can	ctions described in the install the software.
MICROSOFT SOFTWARE LICENSE TERMS	-
MICROSOFT VISUAL C++ 2008 RUNTIME LIBRATUSS (X86, 1A6-	4 AND X64)
These license terms are an agreement between Microsoft Corpo where you live, one of its affiliates) and you. Please read them software named above, which includes the media on which you terms also apply to any Microsoft	ration (or based on . They apply to the received it, if any. The
	Print
Press the Page Down key to see more text.	
Press the Page Down key to see more text.	

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?.

User Name: Password: Login Don't have an account? Click Don't have an account?	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.
esources See What's New in Informatica Cloud Winter 2012 Check System Status at the Informatica Cloud Trust Site	Data Assessment Measure and monitor data quality of the Lead, Account, Contact, and Opportunity objects within Salesforce CRM.
Participate in the Informatica Cloud Community	Data Replication Automate the movement of data from cloud and on-premise applications and databases for business intelligence and compliance use cases.

- 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.

User Details	
First Name:*	DnB360 fields.
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	s my user name.
Organization Details	
Organization Name:*	Your CRM organization name Organization Name should be the your
Address:*	12 Main St MaxCV user name.
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 Salesforce Microsoft Dynamics Other	use?
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.

1) Informatica Cloud	😭 👻 🖾 👻 🖃 🖤 Page 👻 Safety 👻 Tools
INFORMATICA Cloud	
New Account Registration	
New Account Registration Welcome to Informatica Cloud! Informatica Cloud is a cloud-based integration service that enables customers to a integrating Icday, please complete the following form and submit it by clicking the OK button. After submitting this	utomate and monity Click Informatica f critical corporate data with applications such as Salesforce.com. To begin form you will refy Cloud ername and password.

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

Informatica Cloud	
INFORMATICA Cloud	
User Name: youremail@email.com ? Password: ? Login Enter your credentials and click Login. Don't have an account?	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.
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 Assessment Measure and monitor data quality of the Lead, Account, Contact, and Opportunity objects within Salesforce CRM. Image: 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 Note: 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.
OK Cancel
User Details
User Name: Operation of the password Com
Password:"
Confirm Password:*

The Informatica Cloud Quick Setup window opens.

Informatica Clou	Jd
INFORMATI	ica Cloud
Home Da	ata Services Configuration Administration
Activity Log	Activity Monitor Dashboard Data Files Quick Setup
Quick Setup	
This page allov	ws you to begin working with your data immediately. Choose one of the services below to begin working with your data
Welcome to Inf 1. Select th 2. Install th 3. Create a 4. Run the	formatica Cloud. To get started, you will need to: he desired service. he Informatica Cloud Secure Agent. a new task. : task.
Please review	v and print the QUICK SETUP GUIDE document before you begin.

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

6	i) Informatica C	Cloud					
		ATICA CIOU	id				
	Home	Data Services	s Configurati	ion Click Co	nfiguration.		
	Agents	Connections	Click	Task Flows	Plug-ins	Custom Sources	
	Connectio	ns					
	List of all co connection	onnections in you name.	r organization. Use	a connection to	connect to a d	atabase, file or Salesf	orce. To add a new connection, o
	New <	Click New.					
	There are r	no connections. T	o add a connection	, 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.

You can create a new	connection here. Use a connection to access a
Connection Details	
Connection Name:* Description:	MSD Complete the required fields.
Type:*	Select Select Oracle SqlServer MySQL Flat File ODBC MS Access FTP/SFTP SAP Web Service Oracle CRM On Demand NetSuite

11. Click **OK**.

New Connection	
You can create a new c	onnection here. Use a connection to access a database, file
OK When finished, est	
click OK.	
Connection Name:*	MSD
Description:	
Type:*	Microsoft Dynamics CRM
Microsoft Dynamics CR	M 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></port></server.company.com>

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.

	rica [,] Clo	ud		
Home	Data Service	S Configuration	Administration	
Agents	Connections	Schedules Ta	sk Flows Plug-ins	Custom Sources
Connection	5			
List of all con connection, c	nections in yo lick the conne	our organization. Use a co ction name.	onnection to connect to	a database, file or Salesforce. To add a new connection, click New. To dele
New				
Actions	Name 	Туре	Service URL	
🥕 lin 🗙 😭	MSD	Microsoft Dynamics CRM	http://msduat.hoover	s.com:5555

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.

Home Da	ta Services	Configuration	Administration	
Organization	Connectors	Users Au	dit Log	
my organizati	on			
You can view vo	ur organization	profile. It displays or	ganization properties and det	ails default email notifi
You can view yo	ur organizatior	ı profile. It displays or	ganization properties and det	ails, default email notifi

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**.

Home	Build A List	Imports	Settings	Click Settings.			8
	Admin	Batc	h	Data Management	Role Configurations	Terms & Conditions	About
Adm	nin		Cli	ick Batch.			

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



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

Note: The batch credentials you are your Informatica user name and password and your Connection Name (see this step on page 5-25).

		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 Note: 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: <u>https://icosp2.informaticacloud.com/saas</u>.
- 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**.

Do you want to run or save agent_install.exe (122 MB) from icoss1.informaticacloud.com?	Run	Save	Cancel	×

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**.

NFORMATICA CIOUC	Ghoose Installation Fold
Choose Installation Folder Pre-Installation Summary Installing. Installation Complete	This setup wizard will install the Informatica Cloud Secure Agent on your computer. For best results, install the Secure Agent on a computer that is always running and always connected to your organization's network. You do not have to connect to Informatica Cloud from the computer where the Secure Agent is installed.
	Where Would You Like to Install?
	C: Program Files (x86) Unformatica Cloud Secure Agent
	Restore Default Folder Choose
	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**.

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t, enter your Inform	aatica Cloud login infor	mation below.	
			>
	Click Pe	aistar	Register
		gister.	
	t, enter your Inform	click Re	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.

tart Shuts down the Secure Agent If it is running, then starts it up again. Shuts down the Secure Agent. There or edit your proxy server information.	Shuts down the Secure Agent if it is running, then starts Shuts down the Secure Agent. Enter or edit your proxy server information.	arts it up agair
Shuts down the Secure Agent.	Shuts down the Secure Agent. Enter or edit your proxy server information.	
Num Enter or edit your proxy server information.	Enter or edit your proxy server information.	
A CONTRACTOR OF A CONTRACTOR O	2G-	

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.

	Data Serv	rices Con	figuration	Adm	inistration	1		
Agents	Connectio	ns Sched	jule:					
Agents								
List of a databas	ll Informatica S e or file located	ecure Agents in on your netwo	n your organ irk. The pag	ization. A automat	n Informatica tically refresh	Secure Agent is a l les every 5 seconds	lightweight, self-upgrading ·	program that runs on a machin
List of a databas	ll Informatica S e or file located ad Agent	ecure Agents ir on your netwo	n your organ irk. The pag	ization. A automat	n Informatica tically refresh	s Secure Agent is a l les every 5 seconds	lightweight, self-upgrading	g program that runs on a machin
List of a databas Downlow	II Informatica S e or file located ad Agentur Name	ecure Agents ir on your netwo Host Name	Platform	ization. A automal Status	n Informatica tically refresh Version	Secure Agent is a les every 5 seconds Upgrade Status	lightweight, self-upgrading Last Upgrade Check	g program that runs on a machin Last Status Change

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.

_		Save Cance
	Configure Credentials	
Batch Credentials		
User	Hide Password	Enter the User ID and Password that you
Password		leterved.
Confirm Password		
Connection Name		

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 Note: 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.

Maternet Information Services (II)	5) Manager						X
G S (RM2011LOCAL	Sites Mor	osoft Dynamics	CRM +				10 · 10 ·
File View Help							
Connections	C Mie			DM Home			Actions
Start Page	Filter:	rosoit Dy	· mo · (Show Al G	oup by:		Explore Edit Permissions
Application Pools	ASP.NET	۵		0		R	Edit Site Bindings
	.NET Authorizati	.NET Compilation	NET Error Pages	JNET Globalization	.NET Profile	.NET Trust Levels	View Applications View Virtual Directories

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

ype	Host Name	Port	IP Address	Binding	Add
ttp		5555			Edition
					Remove
				2	Brayse
d					Br <i>quise</i>

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

(!) Important Note: 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.



3. To identify the SPN for your environment, enter the setspn -1 hostname command. This should be a fully qualified domain name (FQDN).

🕱 Administrator: Windows PowerShell
PS C:\Users\Administrator\ setsum -1 crm2011]ocal
Registered ServicePrincipalNames for CN=CRM2011LOCAL_OU=Donain Controllers.DC=nsdyn.DC=con;
MSSQLSvc/crn2011local.nsdvn.con:1433
MSSQLSvc/crn2011local.nsdvn.con
ldap/crn2011local.nsdvn.con/ForestDnsZones.nsdvn.con
ldap/crn2011local.nsdvn.con/DonainDnsZones.nsdvn.con
TERHS RV/CRM2011LOCAL
TERMSRU/crn2011local.nsdvn.com
Dfsr-12F9A27C-BF97-4787-9364-D31B6C55EB04/crn2011local.msdum.com
DNS/crn2811local.nsdvn.com
GC/crn2011local.nsdvn.con/nsdvn.con
RestrictedKrbHost/crn2011local.msdvm.com
RestrictedKrbHost/GRI2011LOCAL
HOST/CRH2011LOCAL/HSDUH
HOSI/crn2011local.nsdvn.con/MSDUM
HOST/CHH2HILLOCAL
HOST Crn2011 local.nsdvn.com
HUSI/CHRZ011IGCAI.HSUUR.COM/HSUUR.COM
E3514235-4806-11D1-HB04-80C04FG2DGD2/84556641-12f8-4690-a803-7D341ebf6900/asdva.coa
Idap/CKT2011LUCNL/RSDON
LIGAL FURSTOOR AND A THE AND A
Iday/cm201110ca1.nsdvn.con/nsbon
Idea four Set I ac a Les dun son fandum son
De Callanna da in constanta da constant
1 3 VI VS6F3 WUMMASCFACUP7

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



5. Enter the command:

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

In our example, this is

```
setspn -A HTTP/crm2011local.msdvm.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 Note: 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 msdvm.com/Users.



3. In the **Users** directory, locate the User identified in the Step 1 and double-click it (see this step on page <u>5-34</u>).

File Action View Help	3 2 2 3	18807	r 2 %
Active Directory Users and Comput	Name	Type	Description
Saved Queries msdvm.com Bill Bultn Computers J Domain Controllers J Domain Controllers	Administrator	User	Built-in account for admini
	Allowed ROD	Security Group	Members in this group can
	Cert Publishers	Security Group	Members of this group are
	CRM WPG	Security Group	CRIM Worker Process Group
PoregnSecurityPrinciples Managed Service Accounts Users	Denied ROD	Security Group	Members in this group can
	DisAdmins	Security Group	DNS Administrators Group
	DisUpdatePr	Security Group	DNS clients who are permi
	Domain Admins	Security Group	Designated administrators

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

2010-00 M C /		-	
First name:	Service and	intials:	
Last name:			
Display name:	CRMDynamics		-
Description:			
Office	[
Telephone number:	1	-0	Other
E-mail:			
			2000 1

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 5-34).



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.

Home Data Services	Configuration	Administration
Organization Connectors	Users Aud	t Log
My Organization		
You can view your organization	profile. It displays org	anization properties and details, default email r
Edit		
Edit. Organization Properties		
Edit Organization Properties Organization ID:	Org87	
Edit Organization Properties Organization ID: Dev Org:	Org87 False	
Edit Organization Properties Organization ID: Dev Org: Publishing Org:	Org87 False False	
Edit Organization Properties Organization ID: Dev Org: Publishing Org: Schedule Offset:	Org87 False False +15s	

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

🎍 dnb360					
🌀 🕕 • Informa	tica Cloud Secure Agent • main • rdtmDir • drb3	160 • 🔹 💭	Search dnb360		2
Organize 🔹 🍃 Open	Include in library • Share with • Burn 1	New folder)ii • 🛄	
🔆 Favorites	Name *	Date modified	Туре	Size	
E Desktop	Crg87	5/14/2012 4:08 PM	File folder		
🔒 Downloads	dnb_jkp_codes_MSD.dat	5/2/2012 10:51 AM	DAT File	1,151 KB	
📃 Recent Places	DNB360_Dummy_Record_MSD	5/2/2012 10:51 AM	Text Document	1 KB	
Calibraries					
Documents					
J Music					
Pictures					
ETT AND A	1				

6. Download the Java Security Policy Files from this URL: <u>http://www.oracle.com/technetwork/java/javase/downloads/jce-6-download-429243.html</u>. 7. Unzip the zip package and copy:

local_policy.jar and US_export_policy.jar

∋)∘ ↓ • jce_pok	cy-6 • jce	- 😐	Search joe		_
Drganize 💌 📄 Open	Share with Burn New folder			# • 🖬	
Pavorites	Name +	Date modified	Туре	Size	
E Desktop	COPYRIGHT	11/16/2006 5:10 PM	HTML Document	31/8	
J Downloads	local_policy.jar	\$/15/2012 7:18 AM	JAR File	3 KB	
2 Recent Places	README	11/16/2006 5:10 PM	Text Document	9 1/3	
Tibraries	US_export_policy.jar	5/15/2012 7:18 AM	JAR File	3 1/3	
Documents	3				
J Music					
Pictures					

8. Paste the unzipped files in the

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

Jo 🕨 • Informa	atca Cloud Secure Agent • Jre • lib • security	* 🔛	Search security	
ganize 🔹 📄 Open	Burn New folder) = • 🖬
Favorites	Name 1	Date modified	Туре	Size
E Desktop	blackist	5/2/2012 10:49 AM	File	1 KB
J. Downloads	accerts	5/2/2012 10:49 AM	File	80 KB
E Recent Places	java.policy	5/2/2012 10:49 AM	POLICY File	3 KB
- I By arias	i sava.security	5/2/2012 10:49 AM	SECURITY File	11 KB
Documents	javaws.policy	5/2/2012 10:49 AM	POLICY File	1 KB
A Music	local_policy.jar	5/14/2012 1:23 PM	JAR File	3 KB
Fictures	trusted.libraries	5/2/2012 10:49 AM	LIBRARIES File	14 KB
Videos	US_export_policy.jar	5/14/2012 1:23 PM	JAR.File	3 KB

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 Note: 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.
 - a. Use CMD and navigate to <agentdir>/jre/bin/
 - b. 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.

s starting up	
ts down the Secure Agent if it is running, then starts it up again.	
ts down the Secure Agent,	
er er edit your proxy server information.	
	ts down the Secure Agent if it is running, then starts it up again. Is down the Secure Agent.

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



After you have completed these steps, you are ready to schedule new and refresh batch jobs (<u>see "Scheduling</u> Batch Jobs" on page 6-1).



6 Scheduling Batch Jobs

Scheduling New and Refresh Batch Jobs	6-1
Scheduling a New Batch Job	6-1
Scheduling a Refresh Batch Job	6-4
Viewing Batch Activity Logs	6-4

Scheduling New and Refresh Batch Jobs

After the first run of New Batch job completes successfully, you can run both New and Refresh jobs in any order or in parallel.

Note: When you schedule batch jobs, make sure you set them using the same time zone that the Informatica Cloud is set to. Otherwise, you will need to enter the time to match the time zone of the Cloud.

Note: For both New Batch Jobs and Refresh Batch Jobs, the start date and time field is mandatory. To cancel a job that you have scheduled to run at a future date and time, enter a past date and time. If your job has already started, you cannot cancel it.

Scheduling a New Batch Job

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

Home	Build A List	Imports	Settings	Click Settings.			3
	Admin	Batc	h	Data Management	Role Configurations	Terms & Conditions	About
Adn	nin		CI	ick Batch.			

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

Batch Management	Click 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.	Batch Credentia

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

		Click Save.	Save	Cancel
	Configure Credentials			
Batch Credentials				
User	Hide Password			
Password				
Confirm Password				
Connection Name				

5. In the Batch Management window, New Batch Activity Log area, click Modify Batch Schedule.

New Batch Activity Log	Click Modify Batch	5	Modify Batch Schedule
New Batch Activity Log	Schedule.		Moully Batch Schedule

- 6. In the **Modify Batch Schedule** window:
 - a. In the **Start Time** field, type a start date for a new batch or use the pop-up calendar.
 - b. In the **Repeat Frequency** field, select **None**, **Monthly**, or **Weekly**.

If you select **Monthly**, in the **Run the Task** field, select which day of every month you want the batch to run.

Repeat Frequency	Monthly	-		Sekect the day of
Run the Task	Day	1		the month.

If you select **Weekly**, in the **Run the Task** field, click which day of the week you want the batch to run.

Repeat Frequency	Weekly		•	Click the day of the week.
Run the Task	Monday	Tuesday		Wednesday
	🔲 Thursday	🔲 Friday		🔲 Saturday
	🔲 Sunday			

c. In the **Confidence Code** field, select from **1** to **10** to set the minimum acceptable confidence code for the batch. The default is 8.

Start Time	09/12/13	Ĥ	at	03	40 AM -	
Repeat Frequency	Monthly	,	•		4	Complete these fields.
Run the Task	Day	1			•	of every month
Confidence Code	7		•			

7. Click Save.

Note: The **Start Time** field, which includes the calendar date and time of day, is mandatory.To cancel a job that you've scheduled to run at a future date and time, enter a past date and time. If your job has already started, you cannot cancel it.

	Repeat Freque	ncy
None	Daily	Monthly

Repeat Frequency								
Run the Task	Select Start Time and Date	Select Every day or Every weekday	 Select Day of the month, or Select the first, second, third, fourth, or last day of every month 					
Repeat Options	N/A	Select Repeat indefineRepeat until and choose	nitely or pose the date and time.					

Scheduling a Refresh Batch Job

Before you can schedule a Refresh Batch Job, which repeats a previous batch job, you must have run a New Batch job at least once (see "Scheduling a New Batch Job" on page 6-1).

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

Home	Build A List	Imports	Settings	Click Settings.			3
	Admin	Batcl	h	Data Management	Role Configurations	Terms & Conditions	About
Adn	nin		Cli	ck Batch.			

3. In the D&B360 Batch Administration window, click Refresh Batch Schedule.

Refresh Batch Activity Log	Click Modify Batch Schedule.	>	Modify Batch Schedule
----------------------------	---------------------------------	---	-----------------------

4. Follow the instructions in the previous section for setting the **Start Time**, **Repeat Frequency**, and **Repeat Options**.

Note: The **Start Time** field, which includes the calendar date and time of day, is mandatory.To cancel a job that you've scheduled to run at a future date and time, enter a past date and time. If your job has already started, you cannot cancel it.

5. Click Save.

Viewing Batch Activity Logs

After a scheduled job has completed, you can view the log for New and Refresh Batch jobs in the Batch Management window, as shown in the following illustrations.

lome	Build A List	Imports S	ettings							
	Admin	Batch		Data Mar	nagement R	tole Configuratio	ons Terms	& Conditions	ļ	About
Bato	ch Manage	ement								
D&B360 batch synchronizes data between Microsoft Dynamics CRM and D&B. The batch runs in the background to make sure you have the latest D&B data at your fingertips. Specify a schedule for running batch jobs.										
D&B3 make	360 batch synchr e sure you have t	onizes data betw he latest D&B dat	veen Micr ta at your	osoft Dynam r fingertips. S	ics CRM and D& pecify a schedu	.B. The batch runs le for running bat	in the backgr ch jobs.	round to	Batch	n Credentia
D&B3 make	360 batch synchr e sure you have t r Batch Actir	onizes data betw he latest D&B dat vity Log	veen Micr ta at your	osoft Dynam r fingertips. S	ics CRM and D&	.B. The batch runs le for running bat	; in the backgr ch jobs.	round to	Batch Modify Bat	n Credentia tch Schedul
D&B3 make New Start Ti	360 batch synchr a sure you have t Batch Activ ime	onizes data betw he latest D&B dat vity Log End Time	reen Micr ta at your	osoft Dynam r fingertips. S Status	ics CRM and D& pecify a schedu Total Accounts Processed	.B. The batch runs le for running bat Accounts Updated	s in the backgr ch jobs. Failed DQ Check	Below Confidence Code	Batch Modify Bat Failure Rows	n Credentia tch Schedul Error Message

Refresh Batch Activity	Refresh Batch Activity Log								
Start Time	End Time	Status	Total Accounts Processed	Accounts Refreshed	Failure Rows	Error Message			
10/08/13 05:35 AM	10/08/13 06:25 AM	1	100	99	0				
10/08/13 05:30 AM	10/08/13 06:21 AM	1	50	50	0				
10/07/13 11:25 AM	10/07/13 12:06 PM	1	19	16	0				
10/02/13 09:25 AM	10/02/13 10:25 AM	1	24	18	0				



7 Reviewing Logs, Admin Review Lists, and D&B360 Reports

After you have scheduled batches, you need to monitor the batch processes and be alert for incomplete results. You also need to review the results from batch jobs.

7-2
7-2
7-4
7-4
7-5
7-6

Accessing the Admin Review List

Accessing the Administrator Review List

1. On the D&B360 Home page window, click Settings, and then click Data Management.

Home	Build A List	Imports	Settings		
	Admin	Batc	h	Data Management	Click Data Manage ment.

2. On the **Data Management** window, click **Admin Review** List.
| Data Management | | | | | | | | |
|---|---|--|---------------------------------|-------|--|--|--|--|
| Data Management | Account / Owner ≑ | Failure ≑ | Last Modified Date ≑ | Match | | | | |
| Duplicate DUNS Recertified DUNS Click Admin | Accor SA
Patricia Baum | Non ISO8859 Chr
The Account Record contains non
ISO8859-1 characters | Thu Aug 15 20:32:41
CDT 2013 | Match | | | | |
| Admin Review List | Alliance Boots
GmbH
Patricia Baum | Below CC Threshold
The DNB360 record was below the
configured confidence code value
specified | Wed Sep 04 01:03:42
CDT 2013 | Match | | | | |

Using the Admin Review List

Two failure types are reported after batch processing:

Failure Type	Means that
Data Quality	the Data Quality of the Account Record failed to meet the minimum requirements set for D&B360 Batch processing.
Below CC Threshold	The D&B record matched to your input record was below the customer-assigned confidence code

Note: Records that fall below the defined Confidence Code Threshold are moved to the Admin Review List. They are not automatically re-processed in the next batch run. You must manually process these records.

Viewing and Processing Failed Batched Records

For more information, see "Viewing Batch Activity Logs" on page 6-4.

Accounts without a D-U-N-S Numbers are batched and sent to D&B for matching with D&B's D-U-N-S data. Some accounts cannot be sent because they don't meet 80% completeness. These accounts are listed in the Admin Review List for review and resolution.

When the information is returned from D&B, most of the accounts will have been matched with D-U-N-S Numbers. Some accounts will be sent to the Admin Review List for one of the following reasons:

- They were unable to be matched.
- They were matched, but the confidence code is below the default.

Whenever accounts are on the Admin Review List, you must review the information and correct it so that these accounts can be successfully processed.



Refresh batch results can also produce items that you must manually review and resolve. For example, you need to change or accept the modified data.



Viewing D&B360 Data Management Reports

The two D&B360 reports that are valuable in the review and resolution of some common situations include:

- Duplicate DUNS Report
- Recertification Report

Home	Build A List	Imports	Settings		
	Admin	Bat	ch	Data N	lanagement
Data	a Managen	nent			
Click on N	Aerge icon to sele	ect Master Ac	count for me	erge proce	ess. The Master F
Data M	lanagement		DUNS		Account Nam
Duplica	te DUNS	Click to	display Dupli	cate	
Recertif	fied DUNS		reports.		
Admin	Review List				

Duplicate DUNS Report

If more than one account with the same D-U-N-S Number exists, it is listed on the Duplicate DUNS report.

Note: The Duplicate DUNS reports feature performs optimally only if DUNS numbers are appended to all records by using Transaction Match, Batch Match, or the DUNS Import Tool.

To resolve duplicates, you need to review the information in each of the duplicates and then:

- Decide which one is the master that is, which one should be the primary selection.
- Select an account with information you want to merge into the master.

Note: If you have three or more accounts with the same D-U-N-S Number, you can merge the information from more than one account into the master. However, you must do the merge operations one at a time because the merge function merges information from two sources at a time.

Using the Duplicate DUNS Report to Merge Duplicate Accounts

You can merge a maximum of two duplicate accounts at a time.

- 1. Click Settings, and then click Data Management.
- 2. In the Data Management window, click Duplicate DUNS.

Data Management	DUNS	Account Name	Owner	Merge
Duplicate DUNS Duplicate DUNS.	54990000	SEVEN & I HOLDINGS CO., LTD. SEVEN & I HOLDINGS CO., LTD.	Owner Name	Merge

3. In the Merge column, select the two account records you want to merge and click Merge.

DUNS	Account Name	Owner	Click Merge.	Merge
54990000	SEVEN & I HOLDINGS CO., LTD. SEVEN & I HOLDINGS CO., LTD.	Owner Na Owner Na	ame 🔽	Merge

- 4. In the Merge Records window, select the data you want to retain after the merge is complete.
- 5. Select which of the accounts will be the Master record. You can select which fields on which records you want to take precedence.
- 6. Click OK.

Merge Records Select the master record, a	ind then select the fields to merge into the master record.		
Master Record and Field	d Selection		
Master Record :	SEVEN & I HOLDINGS CO., LTD.	💿 🌔 🍋 SEVEN & I HOLDINGS CO., LTD.	Q
	Select all fields with data. If both records have data in the same field,	the master record field is selected.	
A Note: The master reco	ord will inherit all of the subordinate record's child records. The su	bordinate record will be deactivated.	

(!) Important Note: After accounts are merged, all contacts, opportunities, attachments, notes, and so forth from the subordinate account are moved to the master account record. It is recommended that you carefully evaluated the fields in the Merge Records window before merging the accounts.

Recertified DUNS Report

Information about a company might change periodically, for example, if the D&B records in the Microsoft Dynamics CRM are updated during a Refresh (DUNS Recertification) Batch job. This triggers a change in the D-U-N-S Number. Use the recertified DUNS Report to identify these issues so that you understand. If necessary, you can modify your account information.

- 1. Click Settings, and then click Data Management.
- 2. In the Data Management window, click Recertified DUNS to view those reports.





8 Troubleshooting

Resolving Installation Issues	8-1
Resolving Issues when Uninstalling D&B360	8-1
Changing Administrator-User Names and Passwords	8-4
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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. For more information,
- 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:

Settings 🖓 🙀 -		Get Started with Solutions Solutions are packages of software that you install on your Micros	oft Dynamics CRM Online application.	
4 Business		1. Understand	2. Find & Use	3. Develop
Templates Product Catalog System Administration	Overview Video	ති About Solutions ති About Solution Components	ති Dynamics Marketplace ති About Importing a Solution ති About Customizing a Solution	ප Key Concepts for Developers එ Solutions SDK
🚰 Data Management 💱 System Jobs 🛐 Document Management	Solutions All Soluti % New X Delete	ions - Click Delete. Export 👰 Import Translations 🛚 🕵 Export	Translations 🛛 👔 Publish All Customizations 🛛 🎯 Get Solutions fro	Search for records \$
Auditing	Name	lete Display Name Version Installed On -	Package Type Publisher Description	
Customization Customizations Customizations Customics Dynamics Marketplace	☑ Dn8360	D&B360 for Microsoft Dy 3.0.0.0 10/9/20	13 Managed <u>Dun and Bradstreet Corporation</u> D&B's Data	as a Service Integration for Microsoft Dyn
4 Process Center				

In Microsoft Dynamics CRM 2013:



4. In the Uninstall Solution window, click OK.

📀 Uninstall Solution - Google Chrome
https://installer99.crm.dynamics.com/tools/solution/dlg_uninstall.aspx?id=%7
Uninstall Solution You have selected 1 Solution for deletion.
You are deleting a managed solution. The solution and all of its components, including data in the components, will be deleted. This action cannot be undone. This solution might take several minutes to uninstall. You cannot cancel the uninstallation after it starts. Do you want to continue?

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

nups:/	Installer99.crm.dynamics.com/_comm	on/error/dig_error.aspx:nn
8	Cannot Delete Component Cannot delete Solution because one or more co	Click 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...).

Dependency Details - Google Chrom	1e							
https://installer99.crm.dynamics.com/tools/dependency/dependencyviewdialog.aspx?objectid=%7bd56196e3								
Dependency Details								
🐼 Solution D&B360 for Microsoft Dy	namics CRM cannot be deleted.	The following compon	ents are required by other co	omponents in the system.				
Display Name								
propring manne an	Name/Id	Туре	Managed Solution	Required by 🔺				
Account (D&B Company)	Name/Id Remove the first	Type Field	Managed Solution D&B360 for Microsoft	Required by 🔺 Account (Form)				
Account (D&B Company) Account (dnb_dnb_company_acco	Name/Id Remove the first two rows account	Type Field EntityRelationship	Managed Solution D&B360 for Microsoft D&B360 for Microsoft	Required by 🔺 Account (Form) Account (Form)				
Account (D&B Company) Account (dnb_dnb_company_acco dnb_/Pages/dnb_entity_agent.htm	Name/Id Remove the first two rows. account dnb_/Pages/dnb_entity_ag	Type Field EntityRelationship Web Resource	Managed Solution D&B360 for Microsoft D&B360 for Microsoft D&B360 for Microsoft	Required by 🔺 Account (Form) Account (Form) Account (Form)				
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 rowsaccount dnb_/Pages/dnb_entity_ag dnb_/Pages/dnb_entity_ag	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	Required by Account (Form) Account (Form) Account (Form) Contact (Form)				

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

Changing Administrator-User Names and Passwords

To manage the connections that D&B360 maintains for integration with the CRM, D&B APIs, and Batch, 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.

(!) 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	Imports	Alerts	Settings Click Se	ttings.		D&B36
	Admin	Bato	h	Data Management	Role Configurations	Terms & Conditions	About
Adm	nin						
Confi	iguration						
Coun	try ISO	Code		-			
Edition	: Tier 2		Trial Indi	cator: True		Click CRM Credentials.	
Entitle	ment Type: Cus	tom	Expiry Da	ite: 11/12/14	CRM Credentials	API Credentials	D&B Credential

3. In the Configure Credentials window, click Change Password.

Configure Credentials			
CRM Connection Credentials			
User	User Name Change Password Click Change Password.		

- 4. In the next **Configure Credentials** window that opens:
 - a. In the User field, type the new user name.
 - b. In the **Password** field , type the new password.
 - c. In the **Confirm Password** field, retype the new password.
 - d. Click Save.

	When complete, Save Cancel
	Configure Credentials
CRM Connection C	redentials
User	User Name Type the new user name.
Password	Type the new password.
Confirm Password	Retype the new password.
Note: For D&B360 to rur	n, you must update the user's credentials on the CRM.

5. On the CRM, click **Settings**, and in the **System Area**, click **Administration**.

- 6. On the **Administration** window, click **Users**.
- 7. 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 Customer Support</u>.

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.

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	SLA Determined with the customer.
Communication	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: <u>http://dnbus.force.com/support?prod=dnb360</u>. You will be prompted to enter your e-mail address and then fill out a form.



A Appendix

Enabling D&B360 Administration on a Customized SiteMap	A-1
Processing Batches — Standard Level Expectation	.A-10
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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 M	icrosoft Dynamics CRM 2011 (v1.1	.1300.391)
SiteMap Editor	for Microsoft Dynamic	s CRM 2011
🔄 🔢 Load SiteMap 🛛 😪 Upd	date SiteMap 🛛 📳 Open SiteMap 🛛 层 S	Save SiteMap More actions 👻
- SiteMap		
	(a)	
SiteMap Area (Workplac Area (SFA) Area (SFA) Area (CS) Area (CS) Area (CS) Area (CS) Group Group Group Group Group Group Area (Res	Add default SiteMap Group Add Group Add Descript Add Titles Cut Copy Paste Delete	
×	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
Uil	
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 Click Save.		
ld *	dnb_administration	
Available Offline		
Pass Params		
Client	All 🔲 Outlook 🗖 Outlook Laptop	Client
	🗌 Web 🔲 Outlook Workst	ation 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		
lcon		
Outlook Shortcut Icon		
Sku	🗖 All 🗖 OnPremise 🗖 Live 🗖 Sf	PLA
Uil	ces/DnB360.Cm.WebResources.Administra	ation.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 acti	ons •		
SiteMap			
⊡ SiteMap			
Area (Workplace)			
E Area (SFA)			
Area (Settings)			
⊡ Group (Business_Setting)			
Hur Group (System_Setting)			
Group (ProcessCenter) E			
⊟ Group (DnB360)			
SubArea (dnb_administration)			
Add Titles	_		
Add Divideor			
Add Privilege Select Add Privilege.			
🔏 Cut	J		
Сору			
Paste			
× Delete			

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

Properties Save 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	
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:
 - 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
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.

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.

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 <u>Registering Your Informatica Cloud Account for On Demand CRMs</u> starting with <u>step 8</u>. 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 Service	s Configuration	Administration		
Agents	Connections	Schedules Task	Flows Plug-ins	Custom Sources	
Connect	Connections				
List of all connectio	List of all connections in your organization. Use a connection to connect to a database, file or Salesforce. To add a new co connection, click the connection name.				
New					
Actions	Name	Туре	Service URL		
🧈 🗈 🗙	My_Org_Sales	Microsoft Dynamics CRM	https://disco.crm.dy	namics.com/XRMServices/2011/Discovery.svc	

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

New Connection	
You can create a new co	onnection here. Use a connection to access a datab
OK Cancel Test	
Connection Details	
Connection Name:*	My_Org_Support
Description:	
Type:*	Microsoft Dynamics CRM
Microsoft Dynamics CRI	M 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.

	NFORMATICA Cloud										
Home	Data Services	Configuration	Administration								
Agents	Connections	Schedules Task F	lows Plug-ins	Custom Sources							
Connect	Connections										
List of all connectio	List of all connections in your organization. Use a connection to connect to a database, file or Salesforce. To add a new c connection, click the connection name.										
New	New										
Actions	Name 🔺	Туре	Service URL								
🧈 🖹 🗙	My_Org_Sales	Microsoft Dynamics CRM	https://disco.crm.dy	ynamics.com/XRMServices/2011/Discovery.svc							
🧈 🖹 🗙	My_Org_Support	Microsoft Dynamics CRM	https://disco.crm.dy	ynamics.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 <u>Registering Your Informatica Cloud Account for On Demand</u> <u>CRMs</u> starting with <u>step 8</u>. 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 Sched	ule					
New Batch							
Start Time	11/26/13	Ê	at	08	40	АМ	•
Repeat Frequency	None	•					
Confidence Code	8	•]				

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

	ATICA Cloud									
Home	Data Services	Configuration	Administration							
Data Syn	chronization Pov	werCenter DNB	360							
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			Туре	Connection	Schedule				
🧈 🕨 🗙	DNB360 New Batch	for Microsoft Dyna	mics 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.

Save Click Save	÷ (6		
DNB360 Batch Deta	ils			1	fields.	nese	
Application Type:*	Microsoft Dynamics						
Object Type:*	Account						
Batch Type:*	New Batch						
	DnB360 New B New Batch New Batch New Batch DnB360 New B New Batch New Batch	atch Extract f Initialization records subn Record Ids fr Records that atch Retrieve records valid Record Ids fr records post Record Ids fr association b Record Ids fr below Confid record count record count	nitted to DnB f om DnbAdimn failed DQ che for Microsoft I lated for DUNS om DnbCompa ed to DnB Com om DnbCompa between Accou- to DnbAdimn Jence Code re is updated fo is reset for th	ynamics C for proces: Review ck Dynamics G duplicate any (first t npany any (secor unt and Dr Review cords pos r the curre ie next job	CRM Account sing CRM Account s ime) nd time) nB Company ted to DnB Ad ent job run o run	imin Rev	riew
Connection:*				View	New		
Schedule:	My_Org_Sales My_Org_Support Kun this task orrs	schedale. The	ew_Baccn_sch	edule			New
Row Limit:	Use default limit						
	O Limit data to	ro	WS				

6. 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.

Home	Data Services Configurat	ion Administration			
Data Syr	chronization PowerCentur	DNB360			
DNB360	Batches				
List of DN	B360 batches in your organization.	A DNB360 batch defines the p	process for synch	nronizing data betw	een Salesforce and DNB.
List of DN	IB360 batches in your organization. J	A DNB360 batch defines the p	process for synch	nronizing data betw	een Salesforce and DNB.
List of DN New Actions	IB360 batches in your organization. A	A DNB360 batch defines the p	process for sync Type	connection	een Salesforce and DNB.
List of DN New Actions	IB360 batches in your organization. J Name DNB360 New Batch for Microsoft	A DNB360 batch defines the p Dynamics CRM Account	Type New Batch	Connection My_Org_Sales	een Salesforce and DNB. Schedule NEW_BATCH_JOB

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.

Microsoft Dyna	mics CRM 🗸 🚽	n	WORKPLACE	~ D	&B360	Navigat Advance o	te to d Find.
🖄 NEW ACTIVITY 👻	➡ NEW RECORD ▼	Ĩ	MPORT DATA	ADV	VANCED F	IND	

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.

ALX ADVANCED FRID Data Settings Alt Microsoft Dynamics CBM pattle baum borrgression3 ALX ADVANCED FRID Data Settings Capy a Link ± Unfoliow Capy a Link ± U	essential and a second the	naspx:pagetype=advan	cedfind#742553750	
Image: State I	PHD DAS SETTINGS	Microsoft Dynamics CRI	M patti 30regre	baum 😧
	Activate Collabor Deactivate ± Unfollow in Delete OAB Settings and Collabor	Copy a Link Email a Link Email a Link Workflow Date Tate Process	t Reon Data	
✓ Name ↑ Created On Creditions Export D&8 Settings Export D&8 Settings Export the data to a static or		Created On Create	dpoint Export D&8 Settings Export the data to a static or	

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.

ΕX	p	ort Data	to Excel		3
Selec	t th	e type of workshee	et to export.		
Use t	his	type of worksheet:			
0	Stat	ic worksheet with i	records from this pa	ige	
	7	Make this data av headings	ailable for re-import	ting by including require	d column
01	Dyn	amic PivotTable			
01	Dyn	amic worksheet			
Wen	eco	mmend that you sa	ave the exported file	e before you open it.	

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.

https	://30regressio	n3.crm.dynan	nics.com/main.aspx?pag	getype=advance	dfind#7	42553750		
R.E	ADVANCED FIND	LIST FOOLS DAIS SETTINGS	M i Mo	rosoft Dynamics CRM	_		patti baum 6 30regression3 d	2
tw Dåå	Edt V Activat	e vate Ob.B Settings	Collaborate	Bun Stat Workflow Dalog	Report -	Export Odd Settings		
/ Nat	me 🛧		Created On	CrmEndp	pint.	Export D&8 Settings	1992 - E	
			12/2/2013	10.20 AM		dynamic Excel workshe facel PootTable.	et or to an	

- 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.

SETTINGS ~	Customizations		Œ) Create
ES	PRODUCT CATALOG	* SOLUTIONS	M DYNAMICS MARKETPLACE	System Select Administration.

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

Microsoft Dynamics CRM ~	🗙 Settings -	Administration
Administration		

Which feature would you like to work with?



Announcements

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

_	-6	-	2	-
				Ľ
				L
				L
				L
				L
		_	_	-

Business Units

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



Select 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						
88	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.

Security Roles								
🎯 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 Managemen		Management	Customization	Custom Entities
Role Na	me *	D&B3	50 Administrat	or		Busines	; 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.

Details Core Records	Marketing	Sales	Service	Business Mana	gement	Service Manage	ement Cust	omization	Custom Enti
Entity		Create	Read	Write	Delet	e Append	Append To	Assign	Share
Attribute Map		0	•	0	0	0	0		
Customizations		0	•	0	0				
Dialog Session		\bigcirc	•				$\overline{\mathbf{Q}}$		
Entity		0	•	0	0				
Entity Map		0	•	0	0		0		
Field		0	•	0	0				
Import Job			0	0	0				
Option Set		0	•	0	0				
Plug-in Assembly		0	•	0	0				
Plug-in Type		0	•	0	0				
Process		\odot	•				•		
Process Configuration		0	0	0					
Publisher		0	0	0	0	0	0		
Relationship		0	•	0	0				
Sdk Message		0	•	0	0				
Sdk Message Processing S	tep	0	•	0	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	Busi	ness Manage	ment	Serv	ice Manageme	ent Custon	nization	Custom Entities
Entity			Create	Rea	d	Write	Dele	ete	Append	Append To	Assign	Share
D&B Adr	min Review		۲			٠			•	•		
D&B Call	lout Log		٠			0			•	•		
D&B Cor	mpany		•	•		•	•		•	•		
D&B Cor	ntact		۲			•			•	•		
D&B Ent	itlement		•	•		•	•		•	•		
D&B Fina	ancial		•	•		•		•	•	•		
D&B Ind	xRef		•	•		•	•		•	•	•	•
D&B Sav	ed Search		\sim	6)	\sim	6)	$\overline{\mathbf{Q}}$	•	0	0
D&B Set	tings		•	•	•	•			•	•		
D&B We	b Service		٠		•	•	C)	0	0		

D&B360 User Permissions

For On-Premise CRMs:

Details Core Records Marketin	g Sales S	Service B	usiness Manage	ment Serv	ice Managem	ent Custom	ization	Custom Entiti
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
D&B Admin Review	0	0	0	0	0	0		
D&B Callout Log	•	٠	0	0	٠	•		
D&B Company	•	•	•	٠	•	٠		
0&B Contact	•	•	•	٠	•	•		
D&B Entitlement	0	•	0	0	0	0		
D&B Financial	•	•	•	٠	•	•		
D&B IndxRef	•	•	•	•	•	•	•	•
D&B Saved Search	\bigcirc	\bigcirc	\bigcirc	\odot	\odot	\odot	0	0
D&B Settings	0	٠	0	0	0	0		
D&B Web Service	•	٠	٠	0	0	0		
Filter	0	0	0	0	0	0	0	0
Post Configuration	0	٠	0	0	0	0		
Post Rule Configuration	0	0	0	0	0	0		
Profile Album	0	0	0	0	0	0	0	0
Wall View	0	0	0	0	0	0		

For On-Demand CRMs:

sec.	urity Role: I	D&B360 U	ser							
Details	Core Records	Marketing	Sales	Service	Business Mana	gement	Service Manage	ement Cus	tomization	Custom Entities
Entity			Create	Rea	d Write	Dele	te Append	i Append	To Assign	Share
D&B Adr	min Review		0	0	0	0	0	0		
D&B Cal	lout Log		•	•	0	0	•	•		
D&B Cor	mpany		٠	•	•	•	•	•		
D&B Cor	ntact		•	•	•	•	•	٠		
D&B Ent	itlement		0	•	0	0	0	0		
D&B Fin	ancial		•	٠	•	•	•	٠		
D&B Ind	xRef		•	•	•	•	•	•	•	•
D&B Sav	ed Search		\bigcirc	6	$\overline{\mathbf{Q}}$	6	\sim	\bigcirc	0	0
D&B Set	tings		0	•	0	0	0	0		
D&B We	b Service		•	•	•	0	0	0		
Filter			0	0	0	0	0	0	0	0
Post Con	figuration		0	•	0	0	0	0		
Post Rule	e Configuration		0	0	0	0	0	0		
Profile A	lbum		0	0	0	0	0	0	0	0
Wall View	w		0	0	0	0	0	0		



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