D&B360

Installation and Administration Guide

for Microsoft Dynamics CRM

Version 3.0

Contents

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 command-line interface.

Navigating in the PDF

Note: To download the free, latest version of Adobe Reader, go to this web site: http://get.adobe.com/reader/.

1. To return to the page you were on after you click a cross reference link, press **Alt + Left Arrow**.
2. To return to the first page of the document, press the **Shift + Home**.
3. To navigate in the PDF file or change the Adobe Reader settings, on the Adobe Reader menu, select **View** > **Page Navigation**, **Page Display**, and **Zoom**.

Related Documentation

For more information about D&B360 from the user perspective, refer to the D&B 360 for Microsoft Dynamics CRM User Guide. For more information about using the Microsoft Dynamics CRM, refer to the CRM documentation.

1 Introduction to D&B360

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

Product Benefits

With D&B360, you finally get the business insight you need, the D&B data quality you want, and the ease-of-use 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

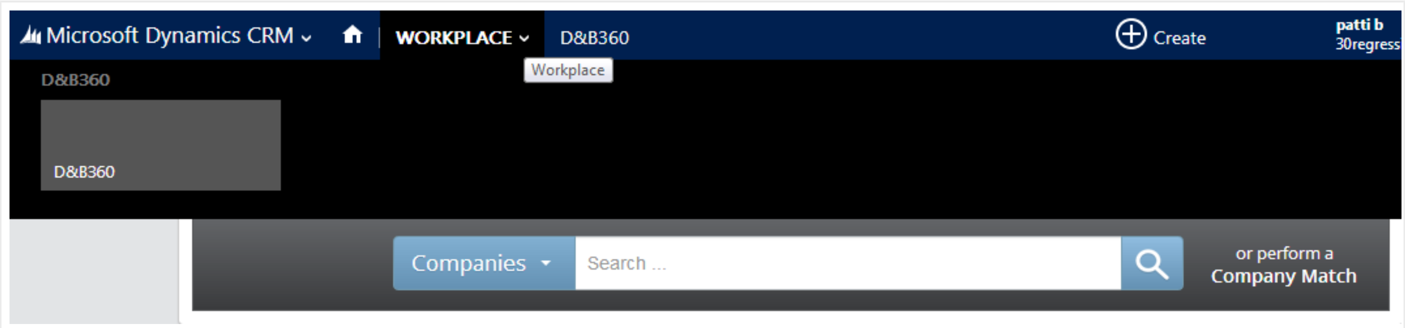
For information about running the CRM and D&B360 through Outlook, refer to the *D&B360 User Guide for Microsoft Dynamics CRM*.

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.

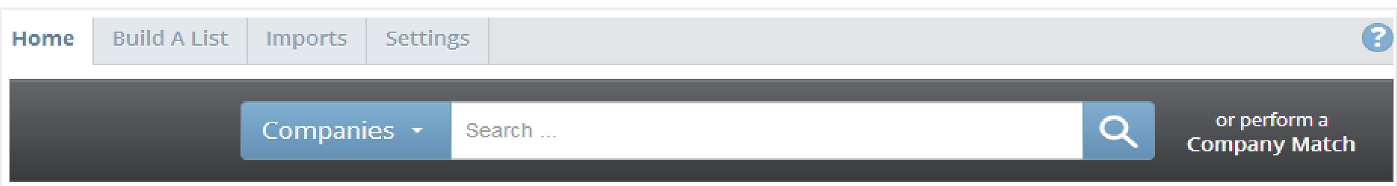


In Microsoft Dynamics CRM 2011 for Microsoft Outlook

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.



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.

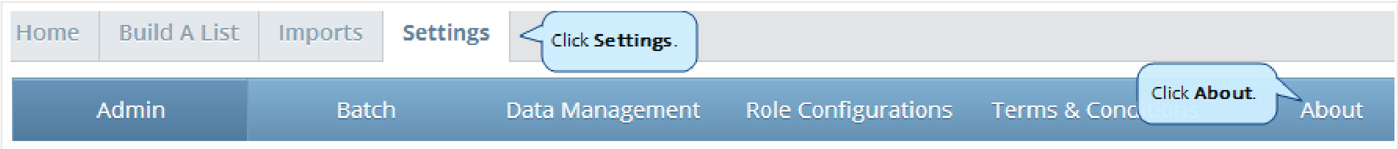
Tab	Description
Settings	Only Administrators use this tab, which includes these tabs: Admin, Batch, Data Management, Role Configurations, Terms & Conditions, and About.
Help	Click this button to open the online version of the User Guide in a separate browser window. Click the Contents tab or Index tab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

2 Getting Started

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.



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

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

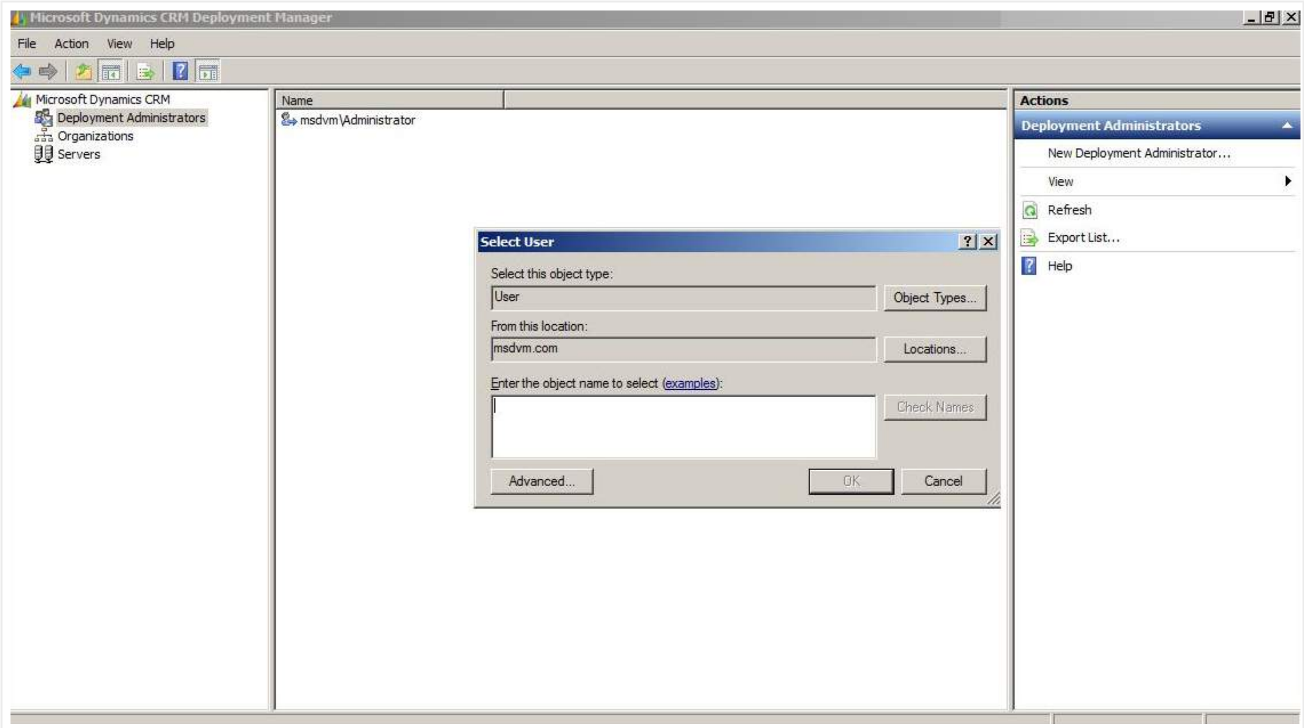
   > **Note:** During auto-registration, the Org ID will most likely be different from your previous Org ID. Org IDs are generated automatically for all registrations.

   For instructions on how to configure your batch credentials after D&B360 is installed, see "Managing Batches 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**.



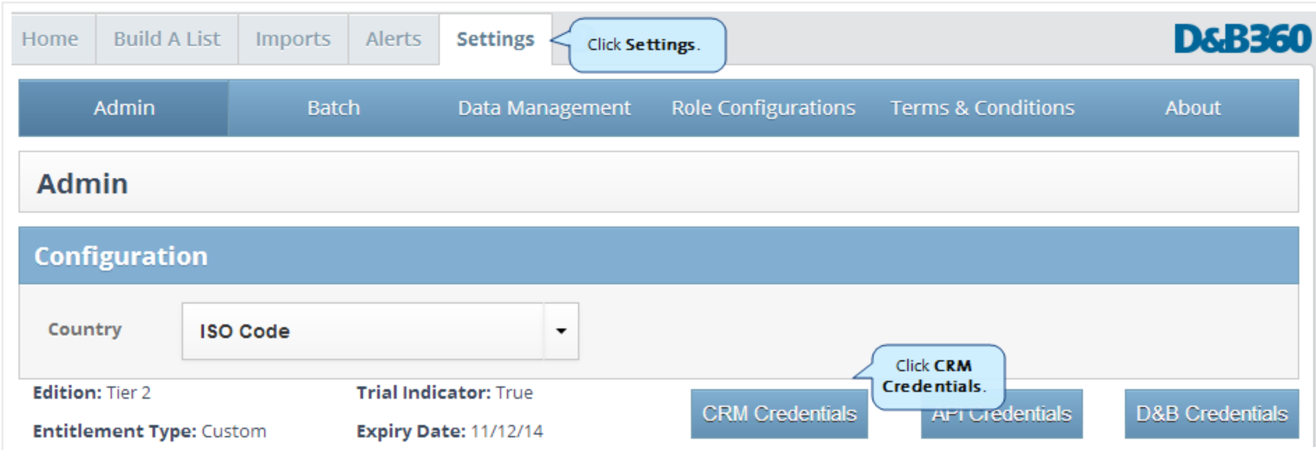
Changing Administrator-User Names and Passwords

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.

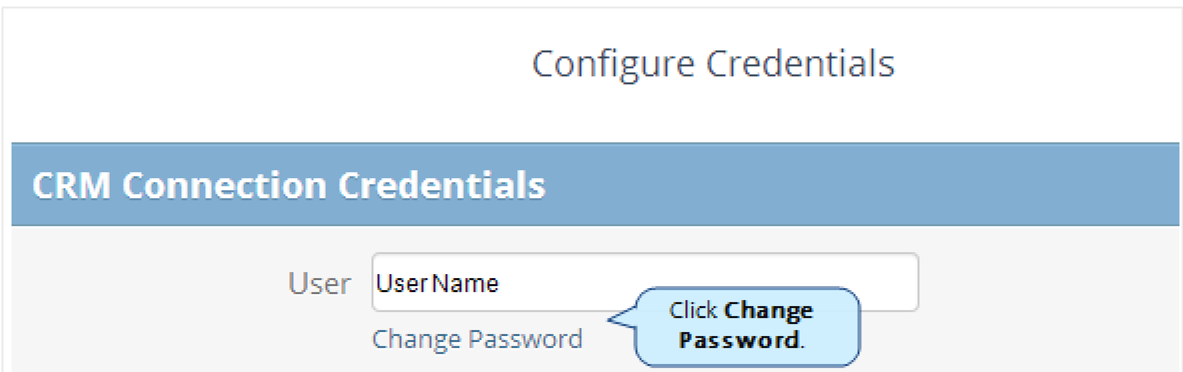
If you anticipate that any of these three sets of credentials will change, we recommend that you update them on D&B360 before you update them globally. In general, it is usually only the CRM password that will change. Before you complete these steps, make sure you know the administrator user name and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

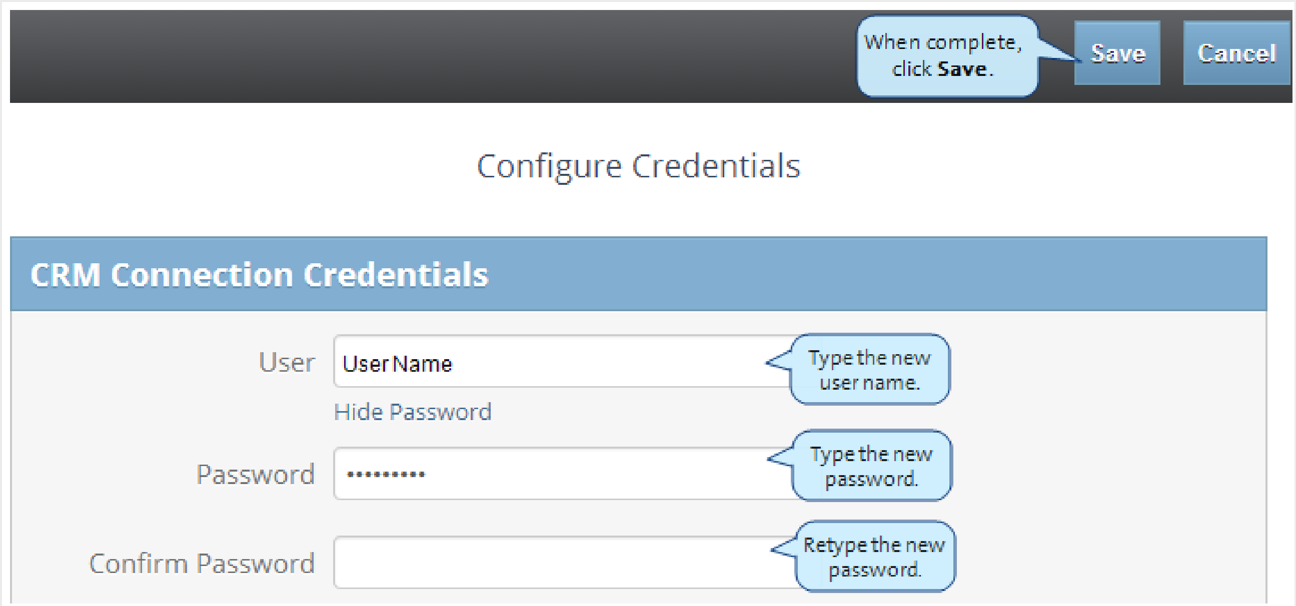
1. On the **Home** page window, click **Settings**.
2. On the **Admin** window, click **CRM Credentials**.



3. In the **Configure Credentials** window, 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**.



Note: For D&B360 to run, 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 D&B360 Customer Support.

Encryption Standards

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

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 **Note:** Computers with more than 16 GB of RAM require more disk space for paging, hibernation, and dump files.	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: Actual requirements and product functionality might vary based on your system configuration and operating system. Running Microsoft Dynamics CRM on a computer that has less than the recommended requirements might result in inadequate performance. The minimum and recommended requirements are based on 320-user load simulation tests.

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

Microsoft SQL Server for Microsoft Dynamics Server

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

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

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

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

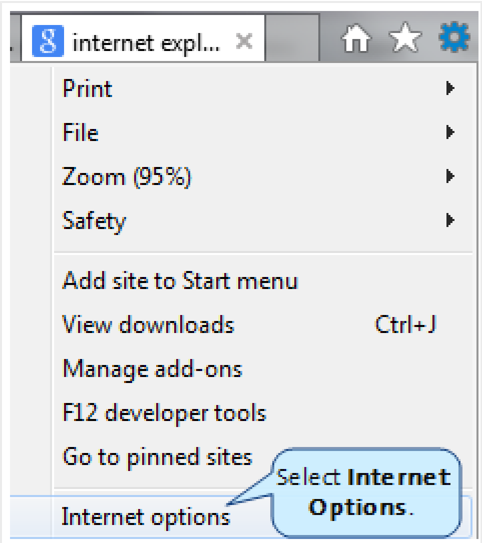
Other Requirements

Client Operating Systems	Windows 7, Windows Server 2008 R2, Windows Server 2008 Service Pack 2, Windows Vista Service Pack 2
Browser	Internet Explorer 9 and Chrome
Server Operating Systems	• 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

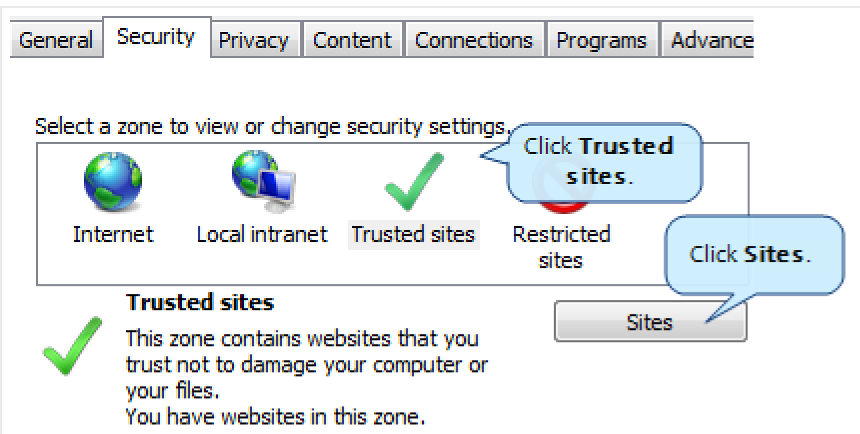
MS Dynamics Configuration	The Microsoft Dynamics CRM Deployment Manager allows administrators to set the web addresses for the: • Web Application Server • Organization Web Service • Discovery Web Service • Deployment Web Service For D&B360, these services need to be set to the same URL: • All machines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

Starting the Installer

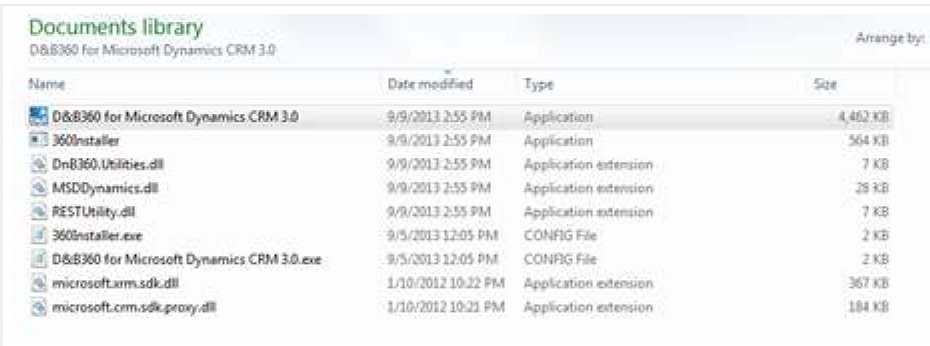
Note: We recommend that you create a dedicated CRM user to install D&B360. This user should have these CRM roles: For On Demand (Windows Live and Office 365) the user who installs D&B360 must be assigned the roles of System Administrator and Delegate. For On Premise and CRM Internet Facing Deployment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

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

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

- Installing D&B360 for the first time
- Upgrading D&B360 from the previous version
- Registering your agent
- Uninstalling the application

1. Download the installer from https://dnbinsight.dnb.com/RegisterforDNB360/mainlaunchpage.htm, and extract the file to your local directory.



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*.

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

   The installer checks CRM connectivity.

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

3. Retype your credentials, and then click **Connect** again.

4. After the installer successfully makes the connection, in the **CRM Connection Data** window, click **Next**.

Installing for the First Time or Upgrading Your Software

If you are installing D&B360 for the first time, or if you are upgrading from a previous version, complete these steps. If you are registering an agent, See "Performing the Register Agent Option" on page 3-14. If you are uninstalling your software, see "Uninstalling D&B360" on page 3-18.

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**.

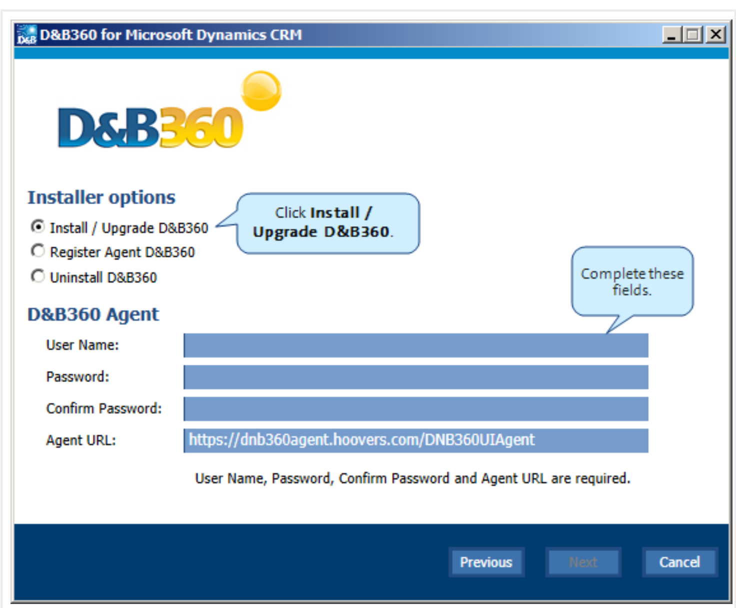
   b. In the **User Name** field, enter the user name that D&B provided to you.

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

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

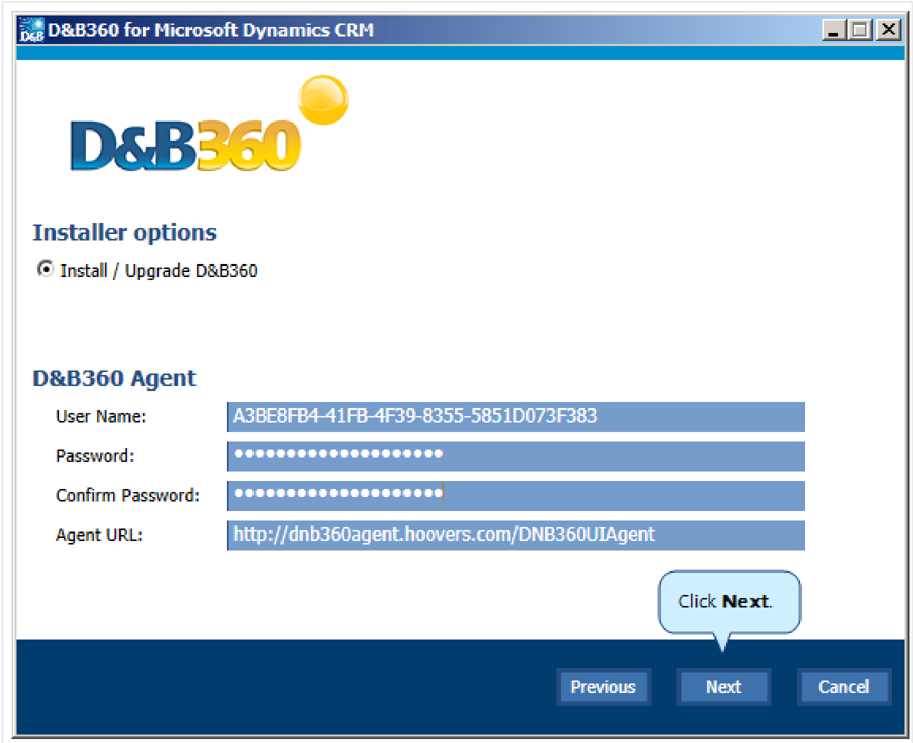
   e. In the **Agent URL** field, enter the URL path that D&B provided to you. If you are installing to a Stand Alone agent, use the URL path to the Stand Alone Server.

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

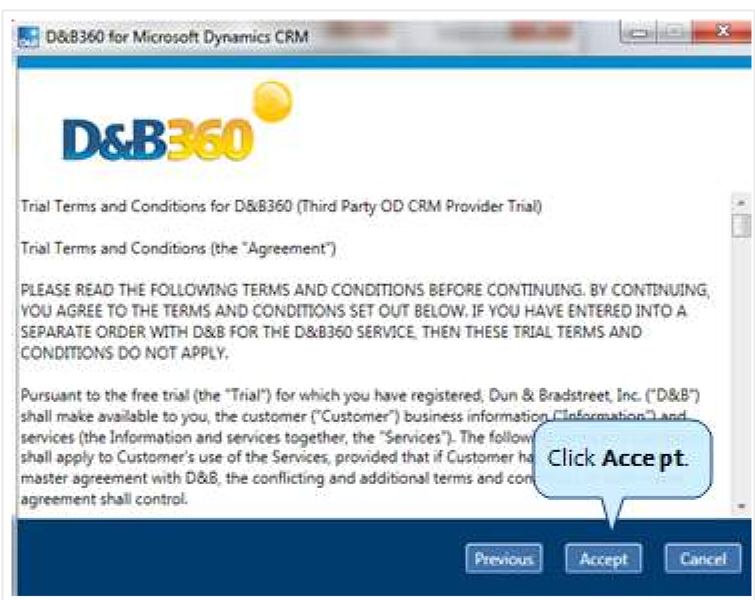


Note: To avoid problems, verify your input before you click Next. Make sure you have typed and spelled everything correctly, and that you've not added any extra spaces at the beginning or end of the input.

2. Click **Next**.

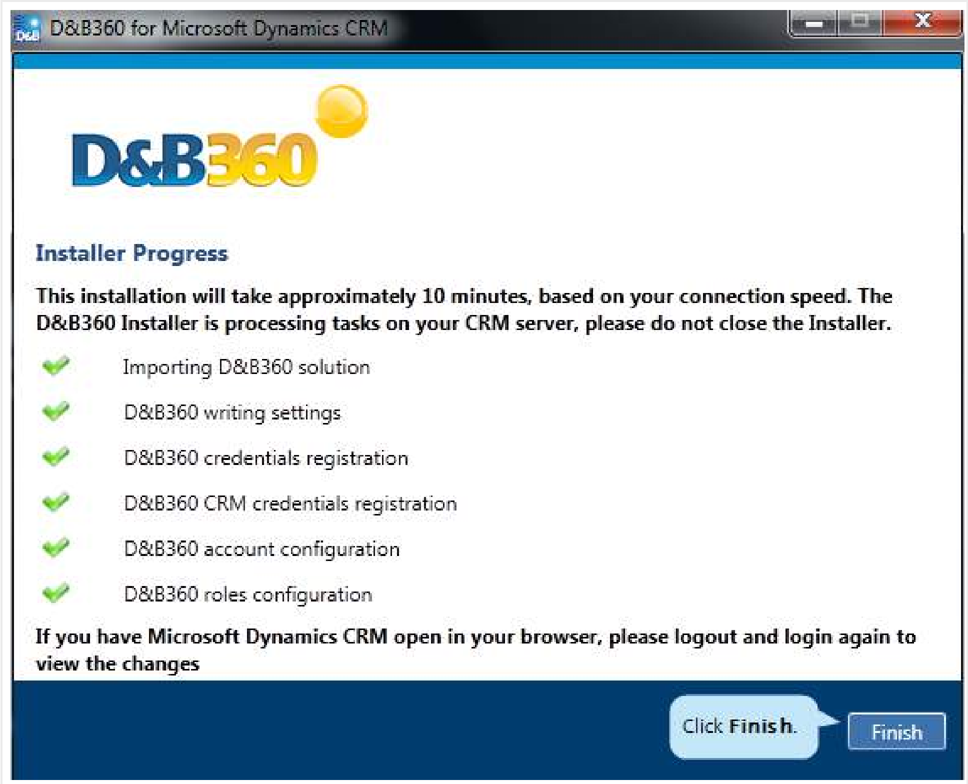


3. In the **Terms and Conditions** window, click **Accept** to agree to the Terms and Conditions.



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

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



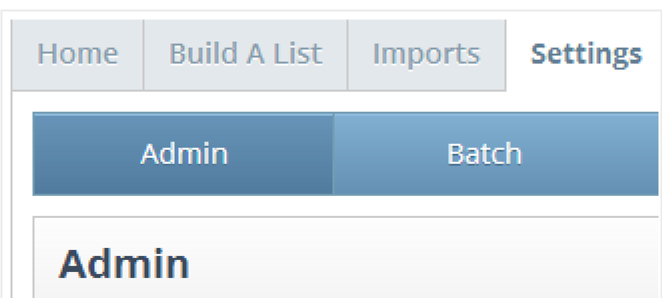
5. If the CRM is open in a browser window, for the changes to take effect, you must log out and log on again.

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

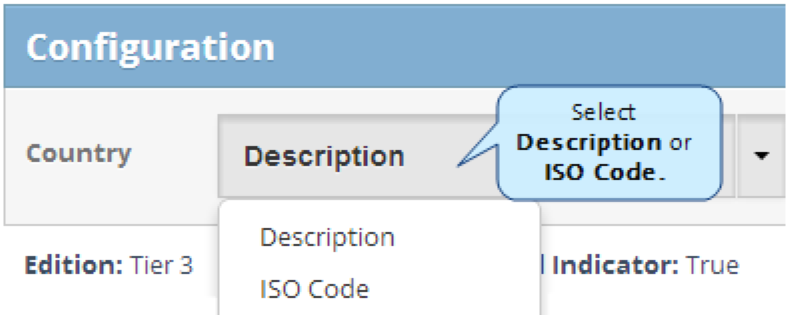
> **Note:** If you are upgrading from a previous version, see "Upgrading from a Previous Version" on page 3-12.

Setting the Country ISO Code

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



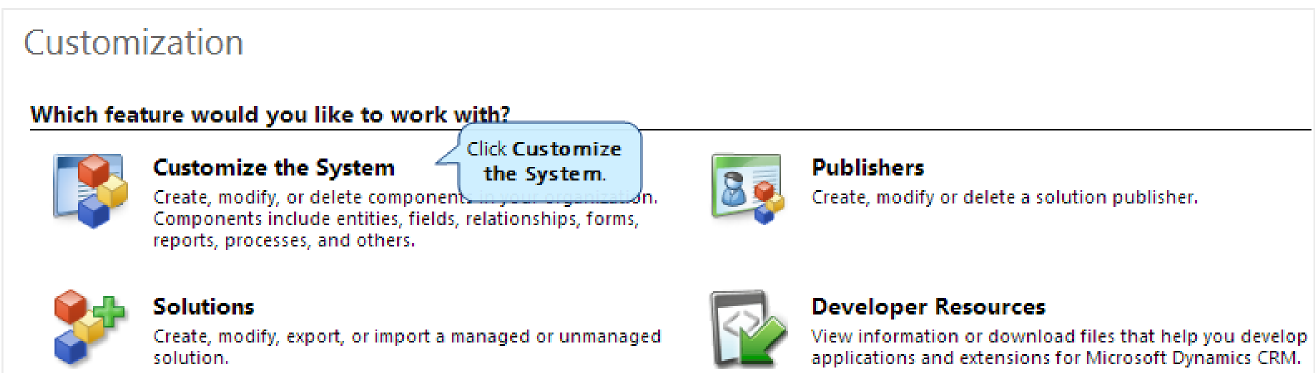
2. In the **Configuration** area, **Country** field, selected **Description** or **ISO Code**. This specifies whether countries are imported into the CRM as a full description or a 2-digit ISO code.



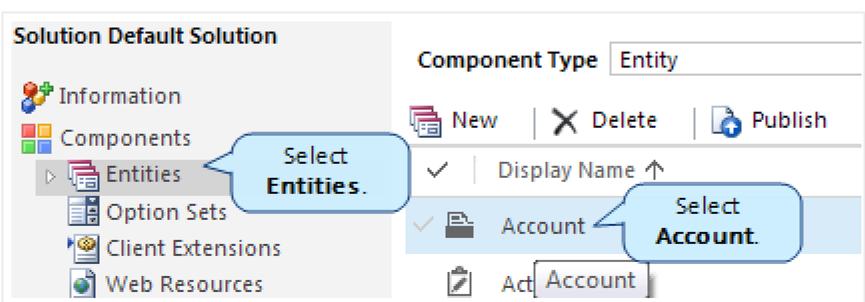
3. Click **Save**.

Customizing the Account Record to Include D&B360+

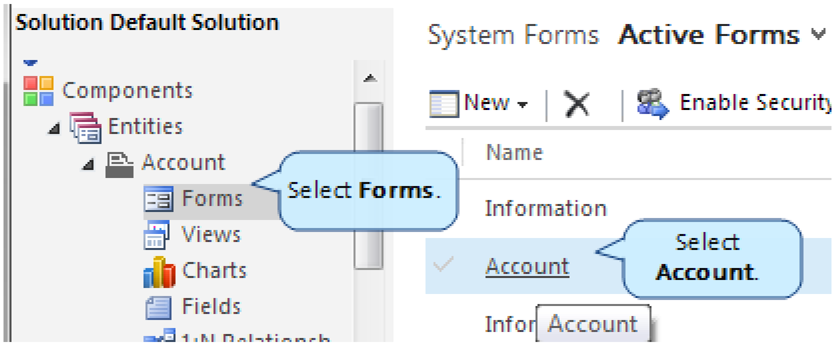
1. In the MSD CRM window main menu, select **Settings**, and then **Customizations**.
2. Click **Customize the System**.



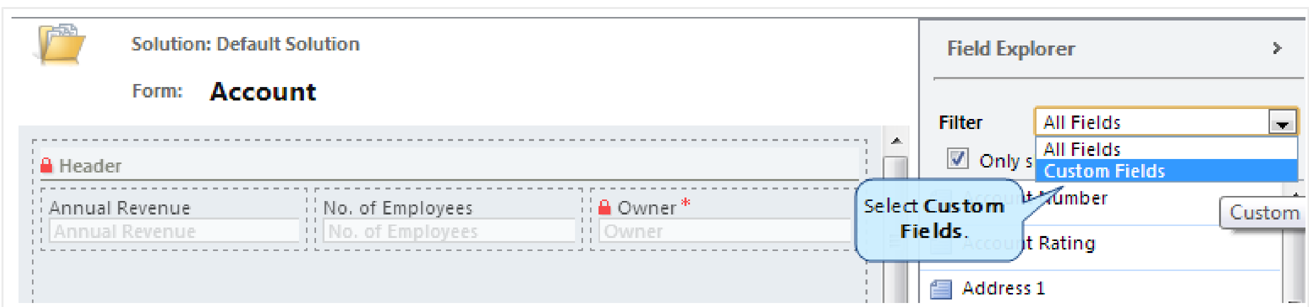
3. In the **Solution Default Solution** list, select **Entities**, and then **Account**.



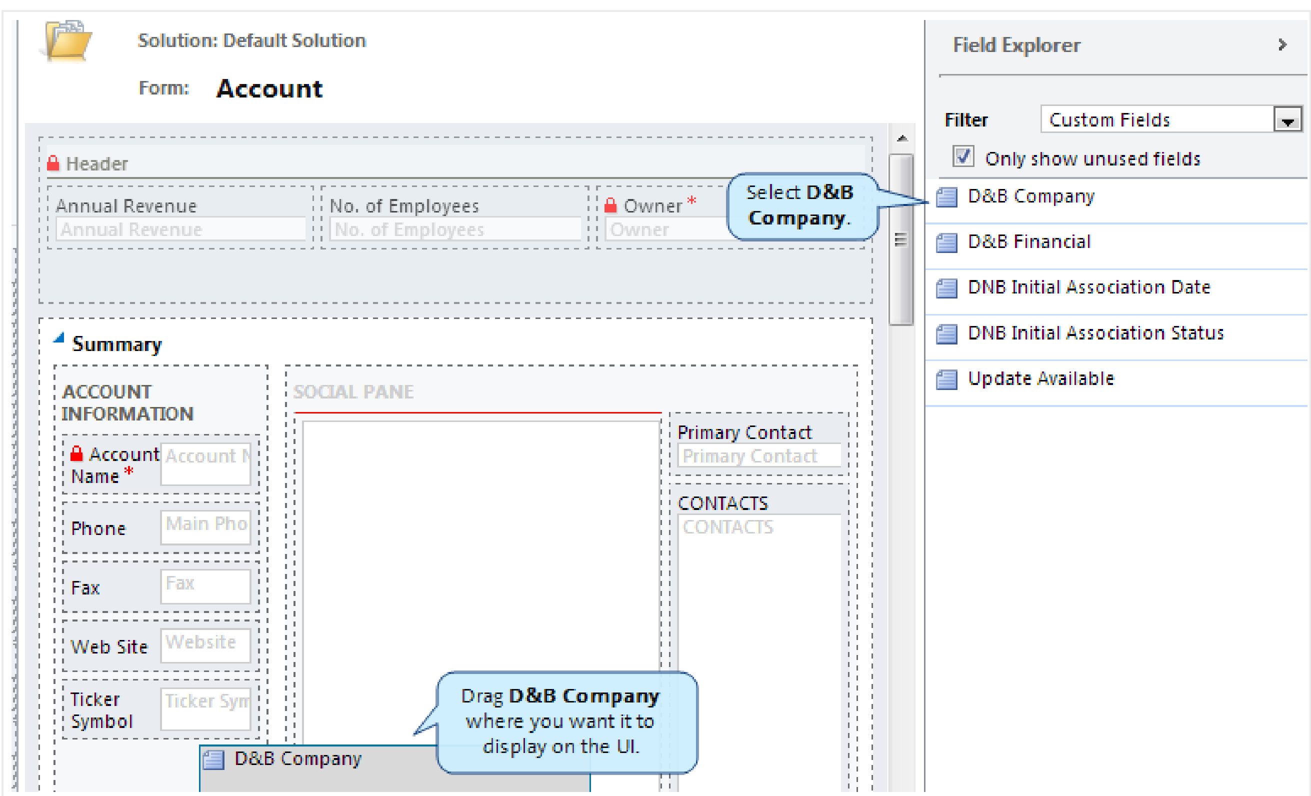
4. Select **Forms**, then **Account**.

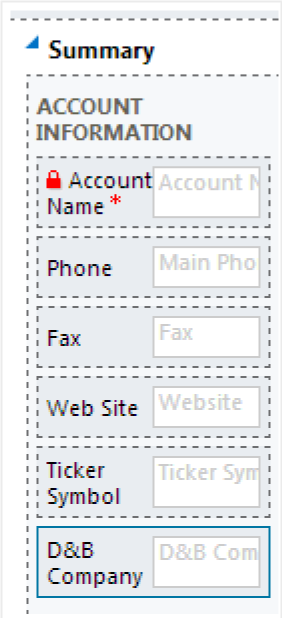


5. In the **Field Explorer** area, **Filter** field, select **Custom Fields**.



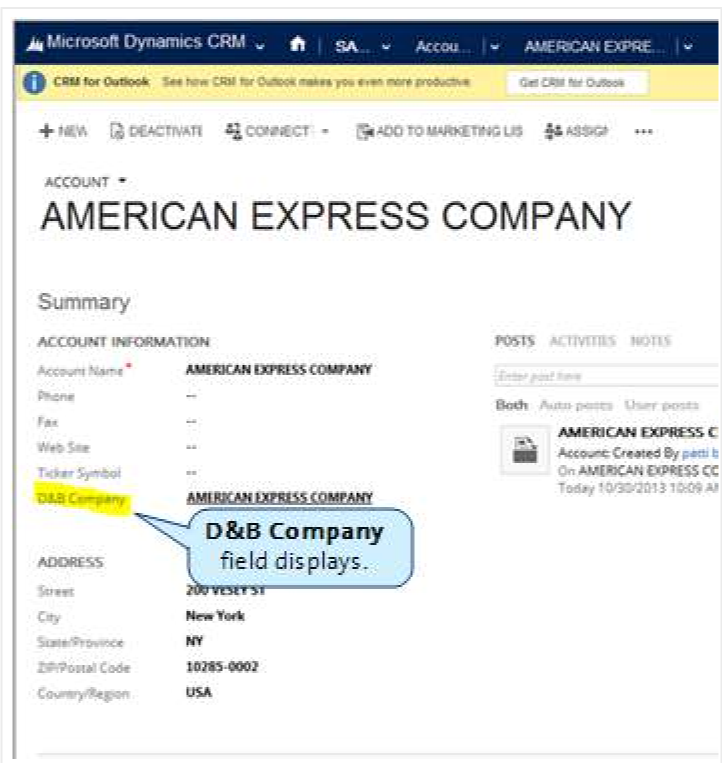
6. Use your cursor to select and drag **D&B Company** from the **Filter** list to the area on the window layout where you want this to display on the user interface.





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

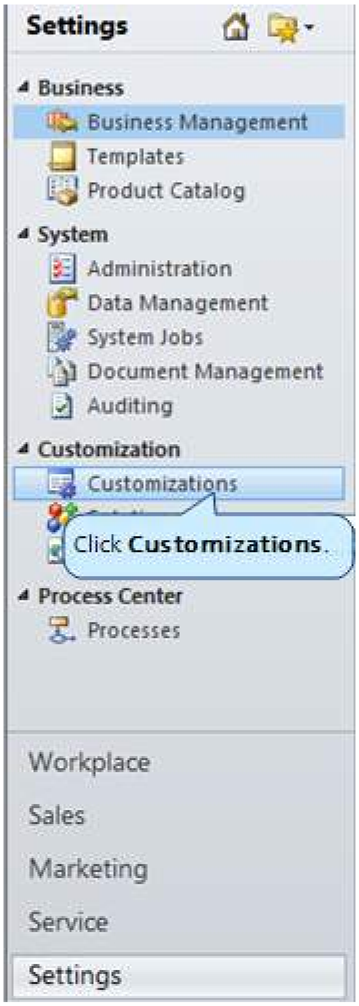
   When you select an account in the CRM window, the **D&B Company** field displays.



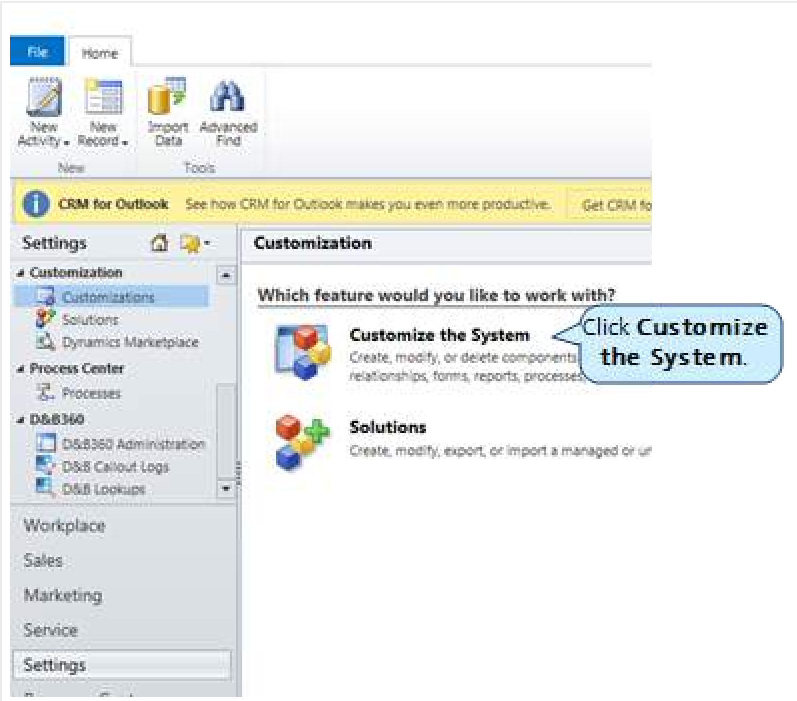
Upgrading from a Previous Version

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

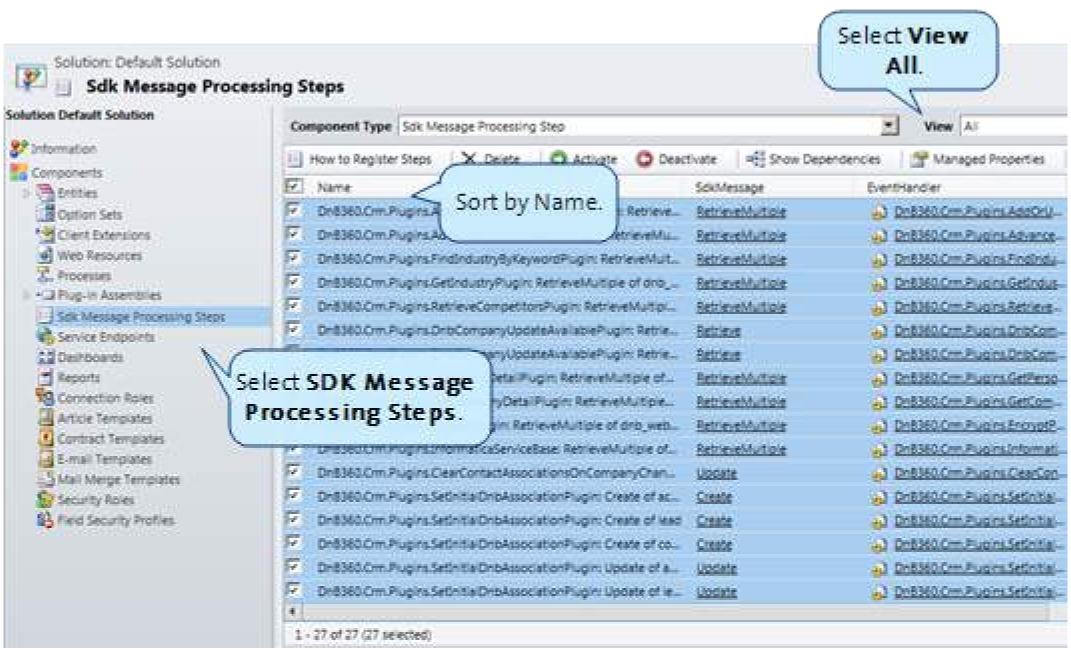
1. On your CRM browser window, click **Settings**.
2. In the **Settings** , **Customization** area, click **Customizations**.



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



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

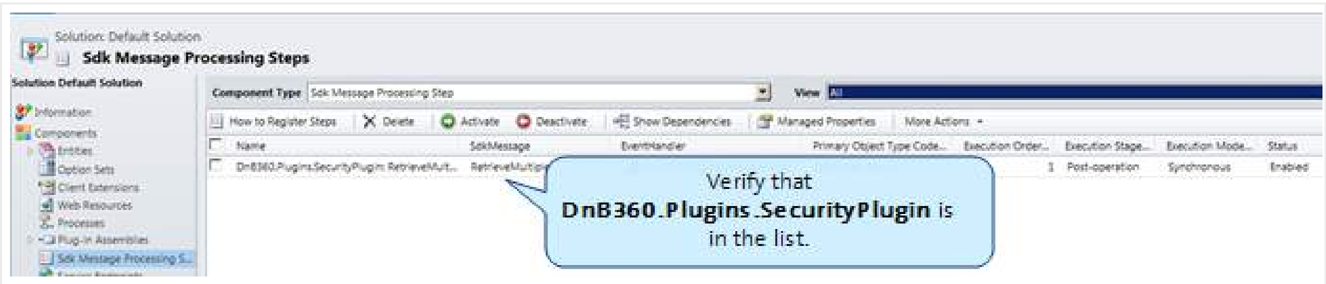


7. From the **Name** list, look for and select all steps that begin with **DnB360.CRM.Plugins** except for the DnB360.Plugins.SecurityPlugin.

(!) Important 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.



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:

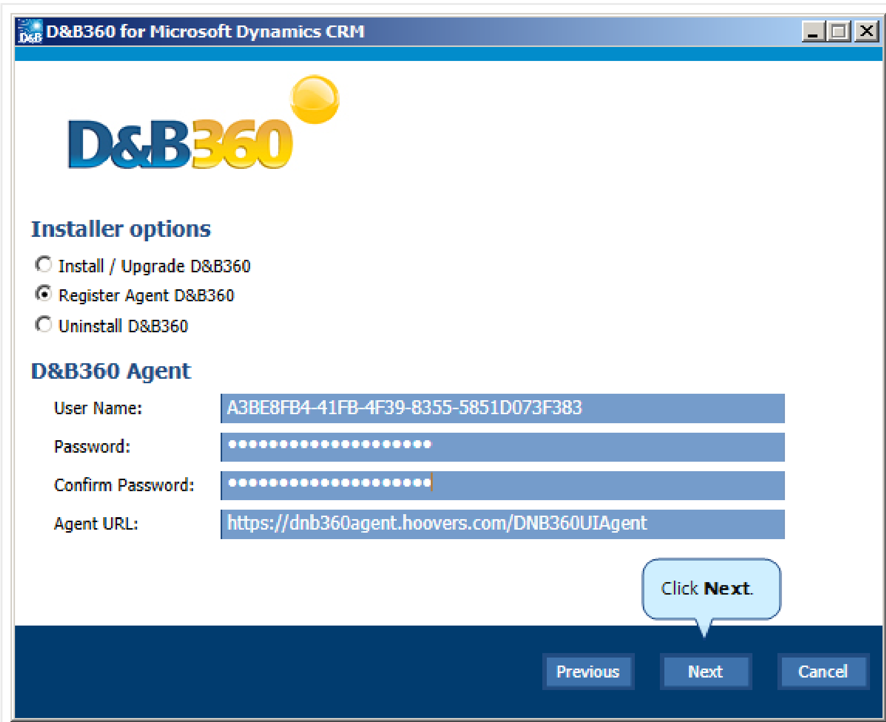
a. In the **User Name** field, type or enter the user name that D&B provided to you.

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

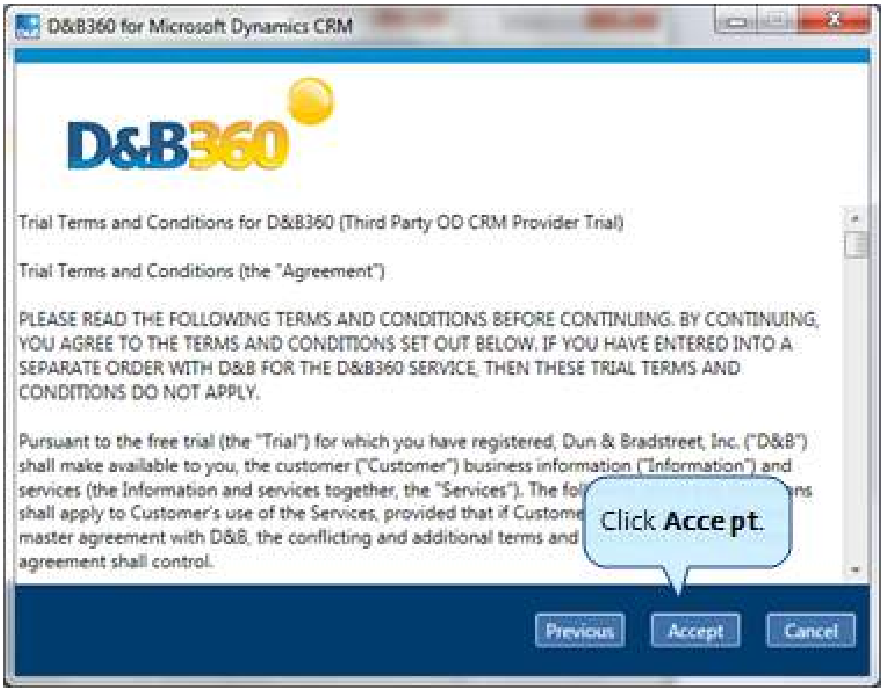
c. In the **Confirm Password** field, retype the password.

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

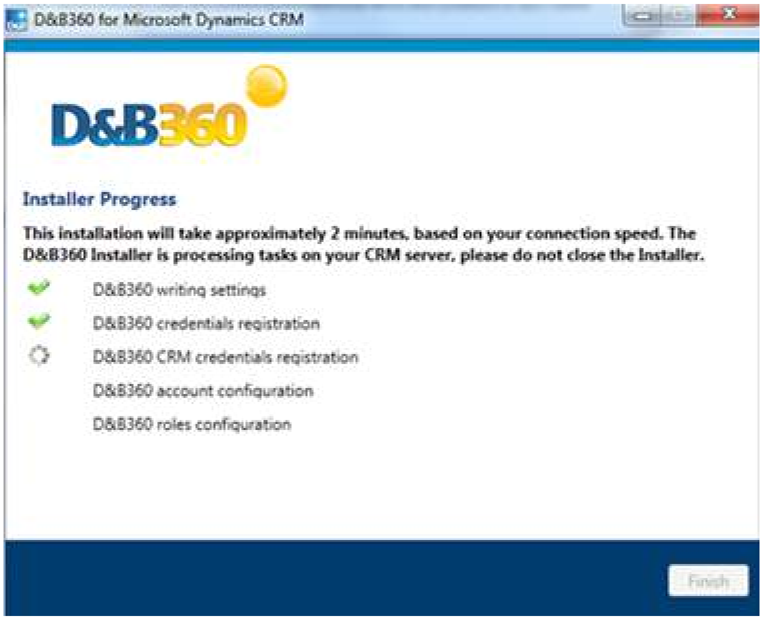
3. In the **Installer Options / D&B360 Agent** window, click **Next**.



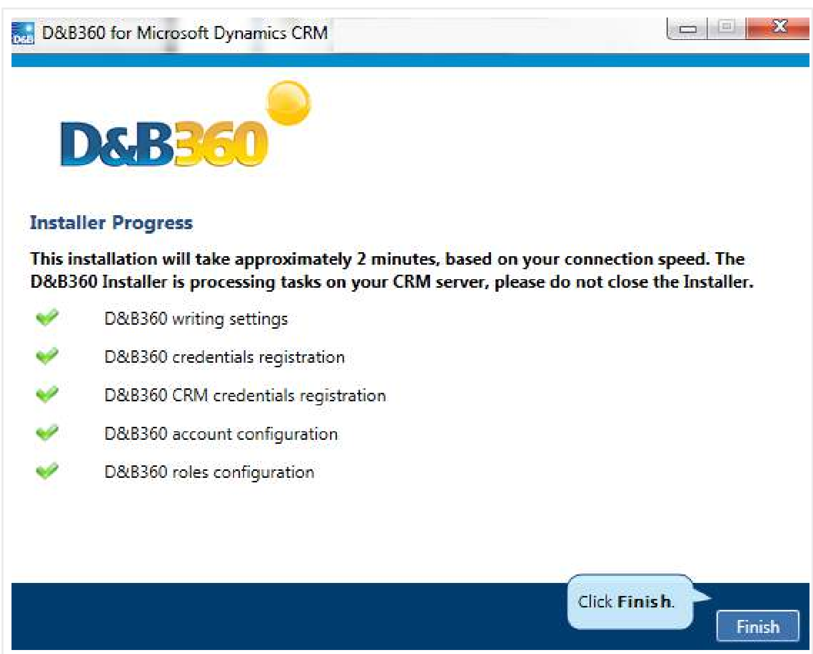
4. In the **Trial Terms and Conditions** window, click **Accept**.


D&B360 for Microsoft Dynamics CRM
D&B360
Trial Terms and Conditions for D&B360 (Third Party OD CRM Provider Trial)
Trial Terms and Conditions (the "Agreement")
PLEASE READ THE FOLLOWING TERMS AND CONDITIONS BEFORE CONTINUING. BY CONTINUING, YOU AGREE TO THE TERMS AND CONDITIONS SET OUT BELOW. IF YOU HAVE ENTERED INTO A SEPARATE ORDER WITH D&B FOR THE D&B360 SERVICE, THEN THESE TRIAL TERMS AND CONDITIONS DO NOT APPLY.
Pursuant to the free trial (the "Trial") for which you have registered, Dun & Bradstreet, Inc. ("D&B") shall make available to you, the customer ("Customer") business information ("Information") and services (the Information and services together, the "Services"). The fol
shall apply to Customer's use of the Services, provided that if Custome
master agreement with D&B, the conflicting and additional terms and
agreement shall control.
Click **Accept**.
Previous
Accept
Cancel

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



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



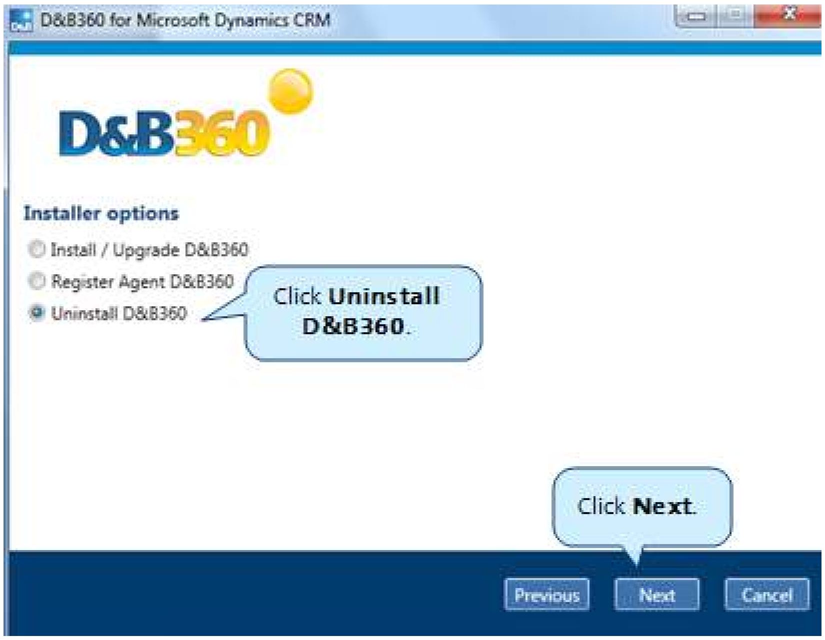
6. If the CRM is open in a browser window, for the changes to take effect, you must log out and log on again.

Uninstalling D&B360

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

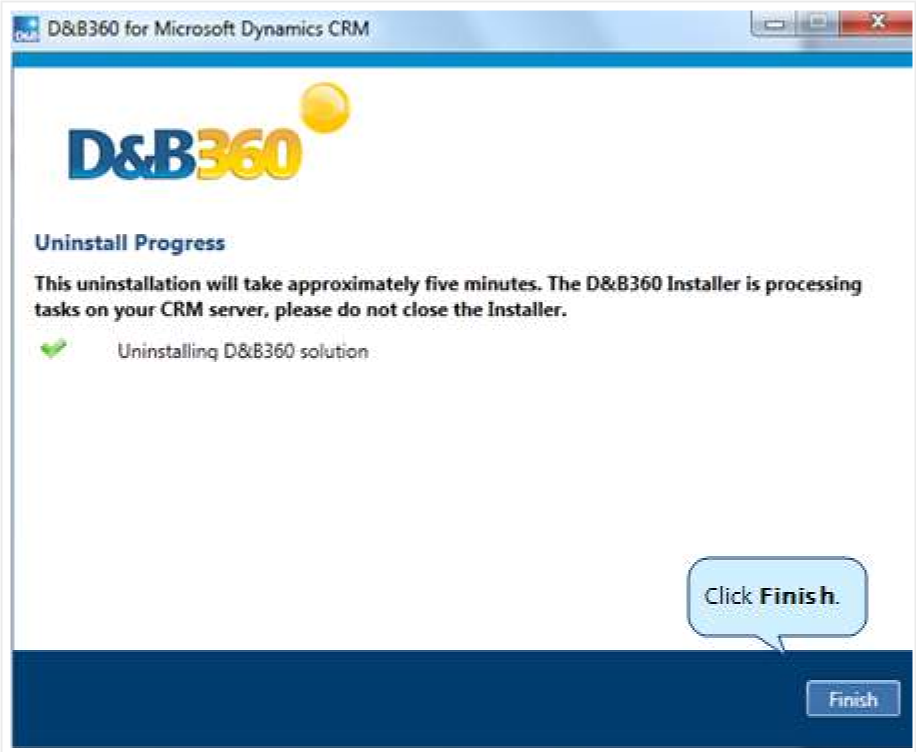
   After you click **Uninstall D&B360**, the D&B360 Agent area does not display on the window.

2. Click **Next**.



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

3. Click **Finish**.



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

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

For troubleshooting help when uninstalling D&B360, see "Resolving Installation Issues" on page 8-1.

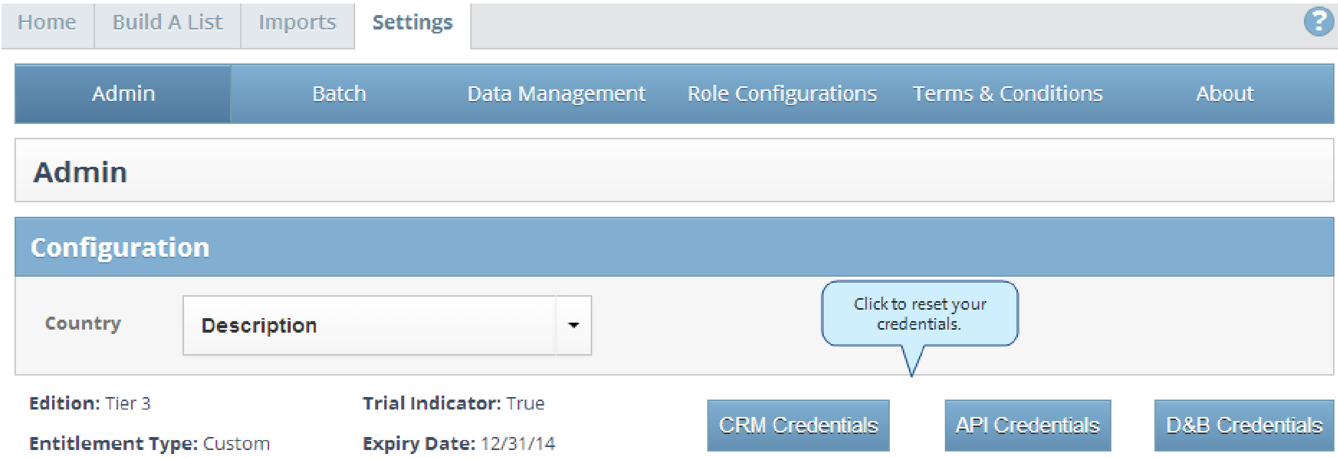
Resetting Your Credentials

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.

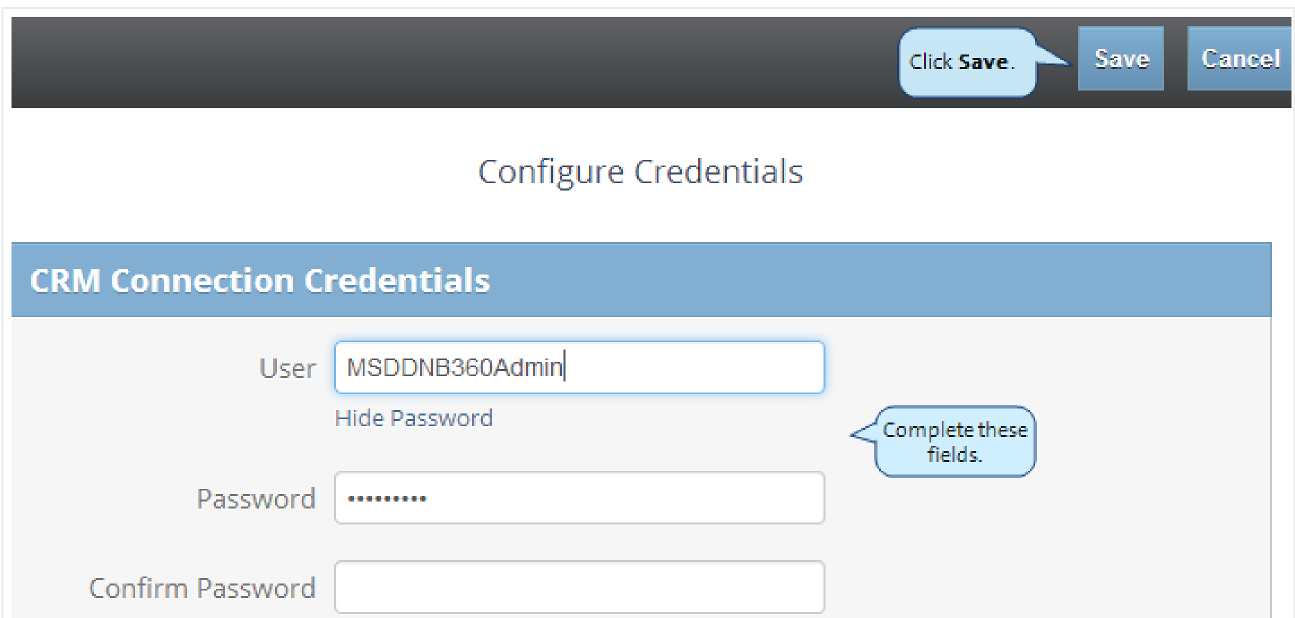
Note: For this release, resetting your D&B Credentials would be unnecessary.

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

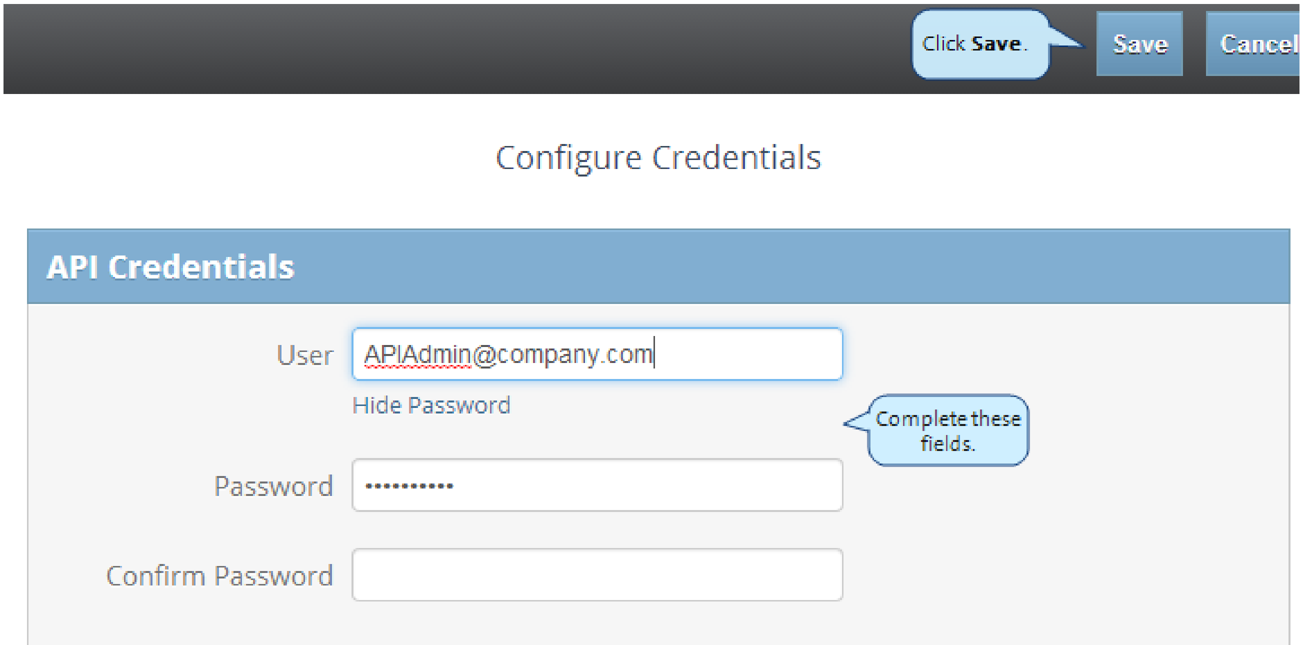
   Contact Customer Support for help with this step if you need to.



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



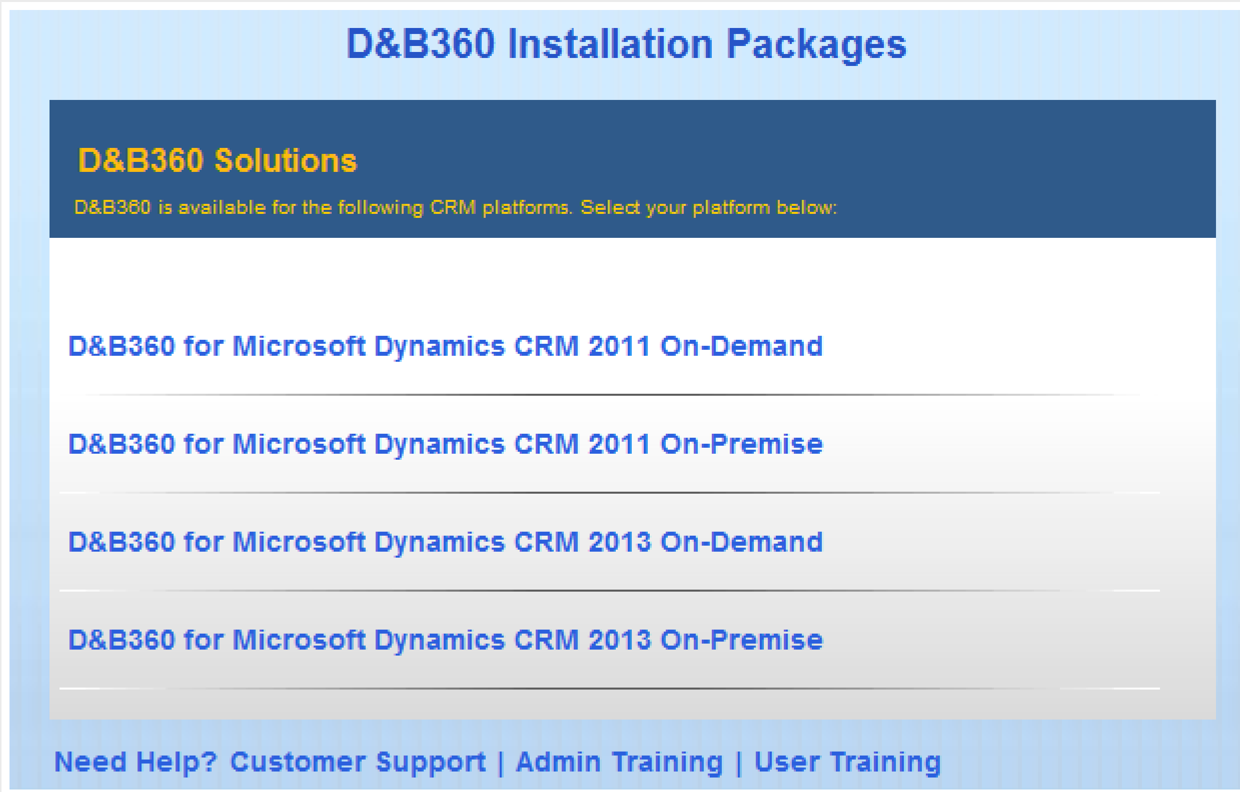
5. In the **API Credentials** window, type or enter your **User** information and click **Change Password** to reset your password.



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.

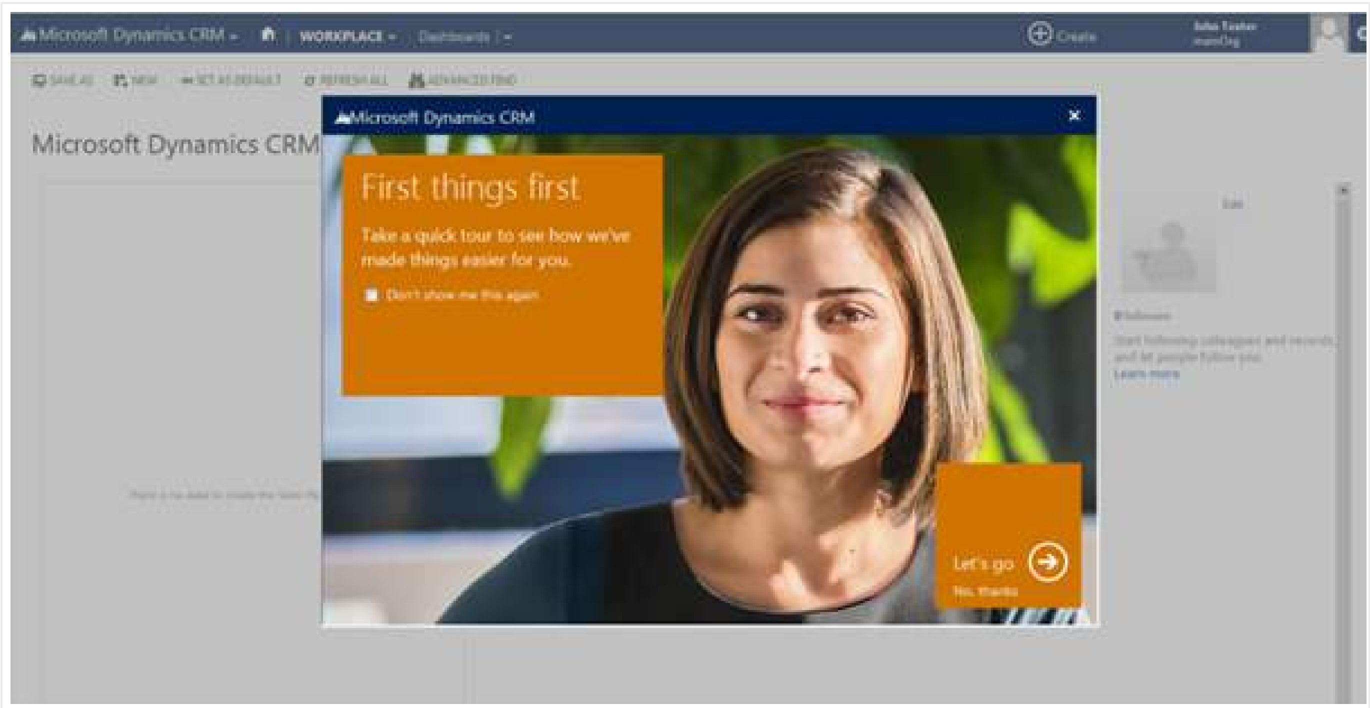
- If you are a new D&B360 customer and want to install D&B360 v3.0 to run on MSD CRM 2011, use the 2011 installer and see "Installing D&B360" on page 3-1.
- If you are an existing D&B360 2.3 customer and you want to upgrade to D&B360 v3.0 and continue to use MSD CRM 2011, use the 2011 Installer. For more information, see "Installing D&B360" on page 3-1.
- If you are a new D&B360 customer, have just installed D&B360 v3.0 to run on MSD CRM 2011, and you want to use MSD CRM 2013, after Microsoft has completed your upgrade to CRM 2013, you would use the 2013 Installer. For more information, see "Upgrading to MSD CRM 2013" on page 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 See "Installing D&B360" on page 3-1.

Upgrading to MSD CRM 2013

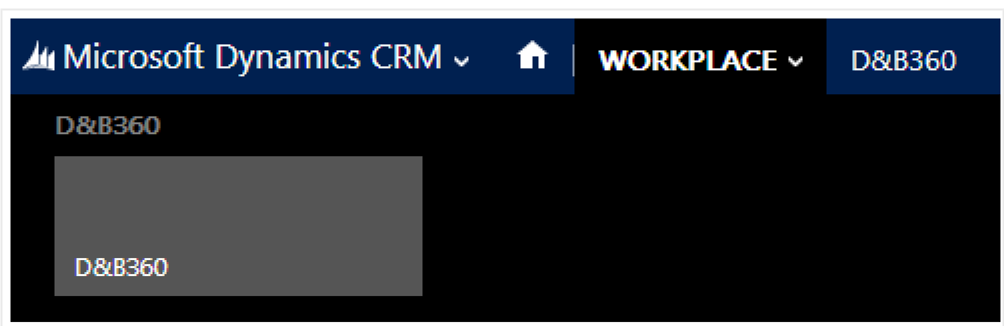
After Microsoft has completed your upgrade to CRM 2013, you can then run the D&B360 v3.0 2013 installer.

- Run the 2013 Installer using the Install Upgrade option.

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



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



4 Configuring D&B360

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.

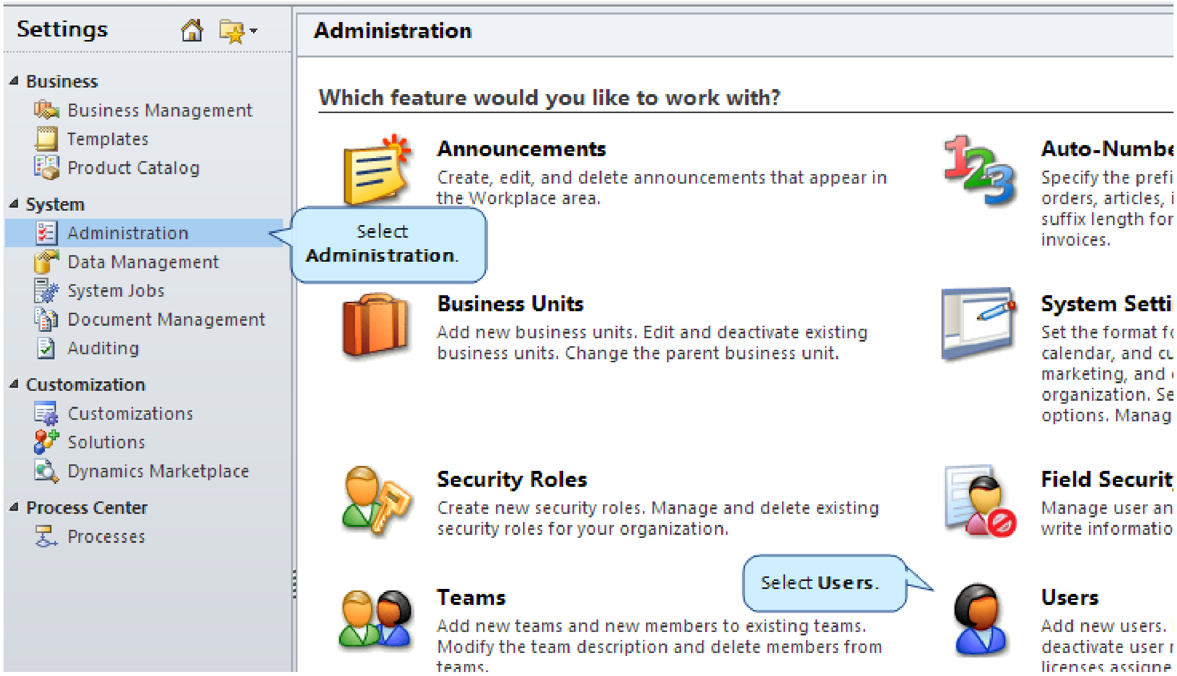
For existing users who need access to the D&B360 application to complete any required configurations, as the Microsoft Dynamics CRM administrator, you need to add the D&B360 Administrator security role to their current security role assignments.

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

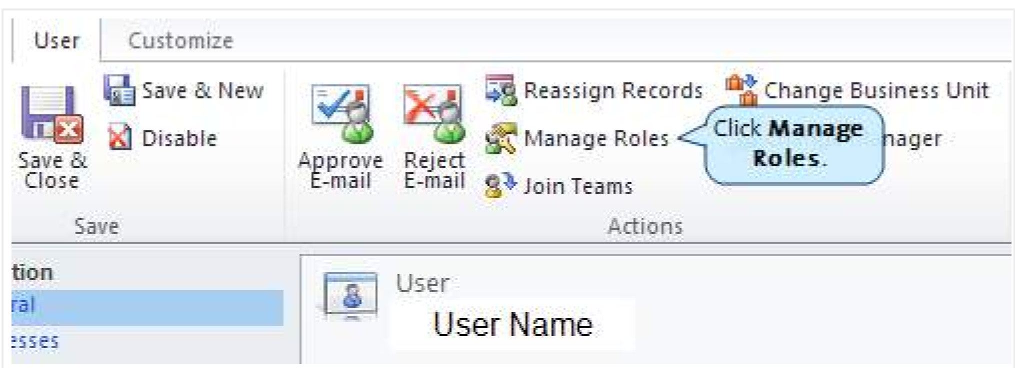
1. In the CRM window, click **Settings**.
2. In the **System** menu, select **Administration**.
3. In the **Administration** window, click **Users**.



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**.



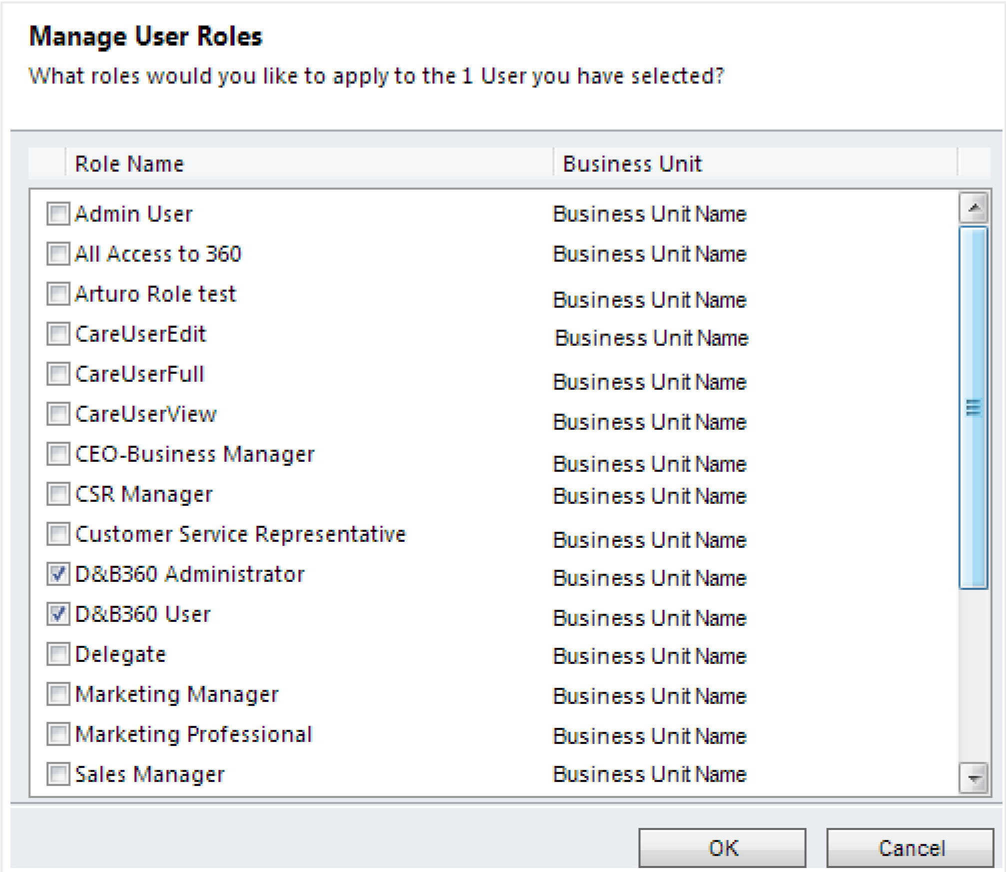
6. In the **Manage User Roles** window, **Role Name** list:

   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.

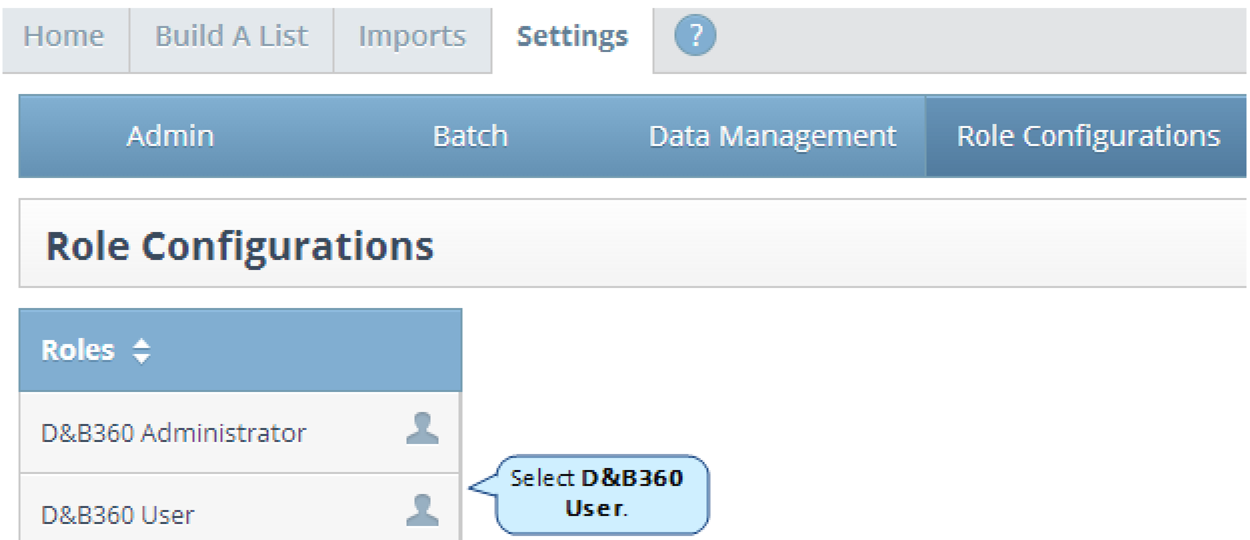
- Deselect all D&B360 Administrator settings except **Role has access to D&B360**. By leaving this setting selected, any settings you select will apply to all D&B360 administrators.
- For the other roles in the list, select any additional settings to give users access to those features.

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

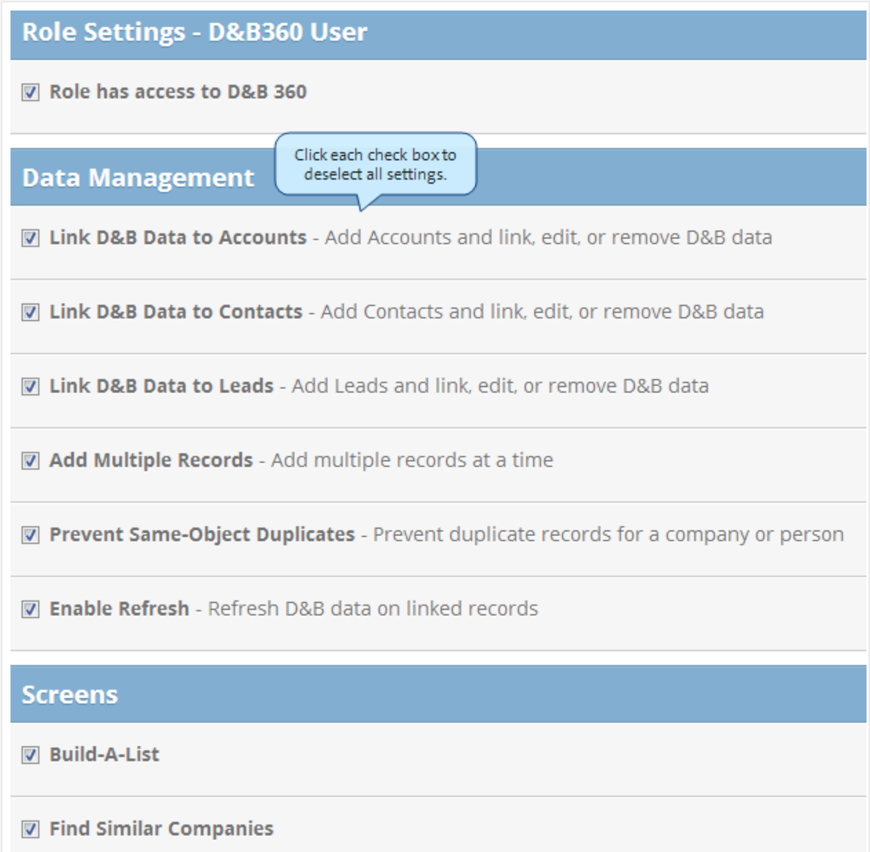
Steps for Configuring your CRM Roles with D&B360 Features

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**.



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



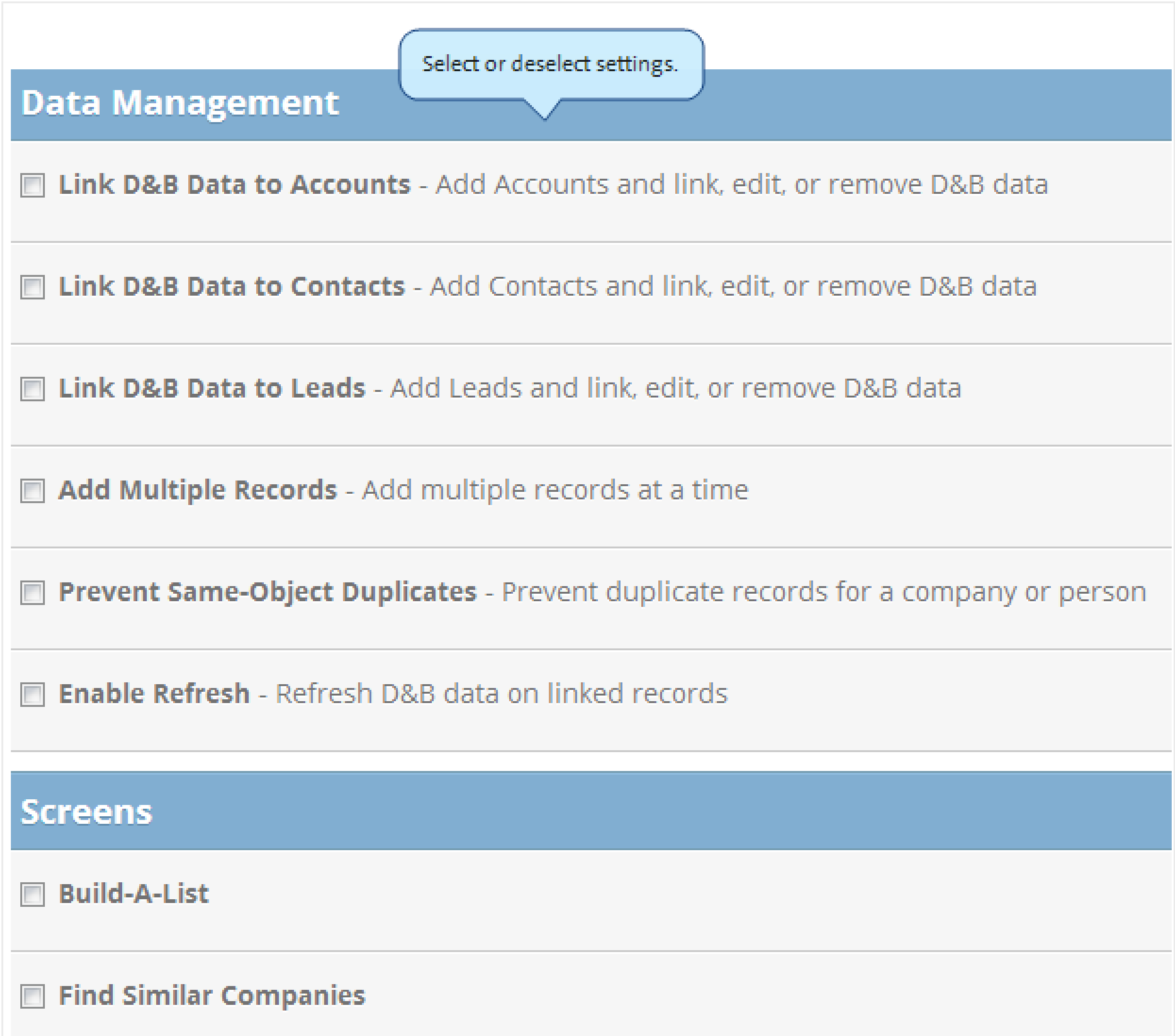
5. In the **Roles** list, select another CRM role that you have already assigned to a user, for example Sales Manager.

   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**.

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.



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 Settings – 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 Management		
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 user will be prevented from adding the person or company as a Lead or linking the person or company to a Lead.	If you deselect this setting for all of a user's roles, the user can add duplicate records of the same type.

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

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 Dynamics CRM On Demand	Requires: Configuration of Batch Job Connection

Microsoft Dynamic CRM On Premise	Requires: • Installation of Informatica Cloud Secure Agent (see "Configuring the Secure Agent for an On-Premise Installation" on page 5-14). • 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, see "Configuring the Secure Agent for an On-Premise Installation" on page 5-14.
- To install the Informatica Secure Agent, the user must be an administrator user for the CRM, a system administrator for the server where the secure agent is to be installed, and an administrator for the Domain Name Server (DNS) in the network.
- To install the Informatica Secure Agent, the user must be an administrator user and deployment manager on the server.
- Before you can set up and run batches, you must install the Informatica Secure Agent for Microsoft Dynamics. For instructions on installing the Secure Agent, see "Registering Your Informatica Cloud Account for On Demand CRMs" on page 5-4 or see "Registering Your Informatica Cloud Account for On Premise CRMs" on page 5-19.

Registering Your Informatica Cloud Account for On Demand CRMs

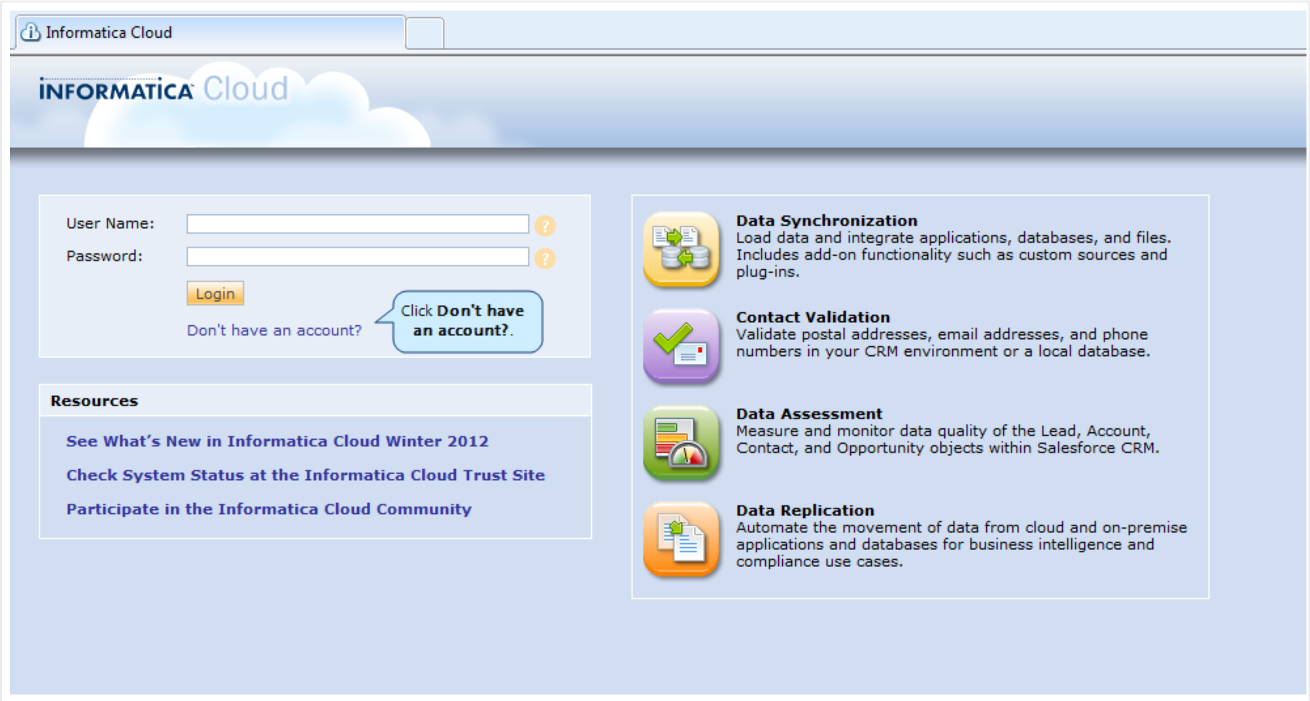
Note: To create your Informatica Cloud account, open a customer support ticket at http://dnbus.force.com/support?prod=DNB360. Before you talk to customer support, review the steps in this chapter to become familiar with the process.

Configuring Your Informatica Cloud Account for an On Demand CRM

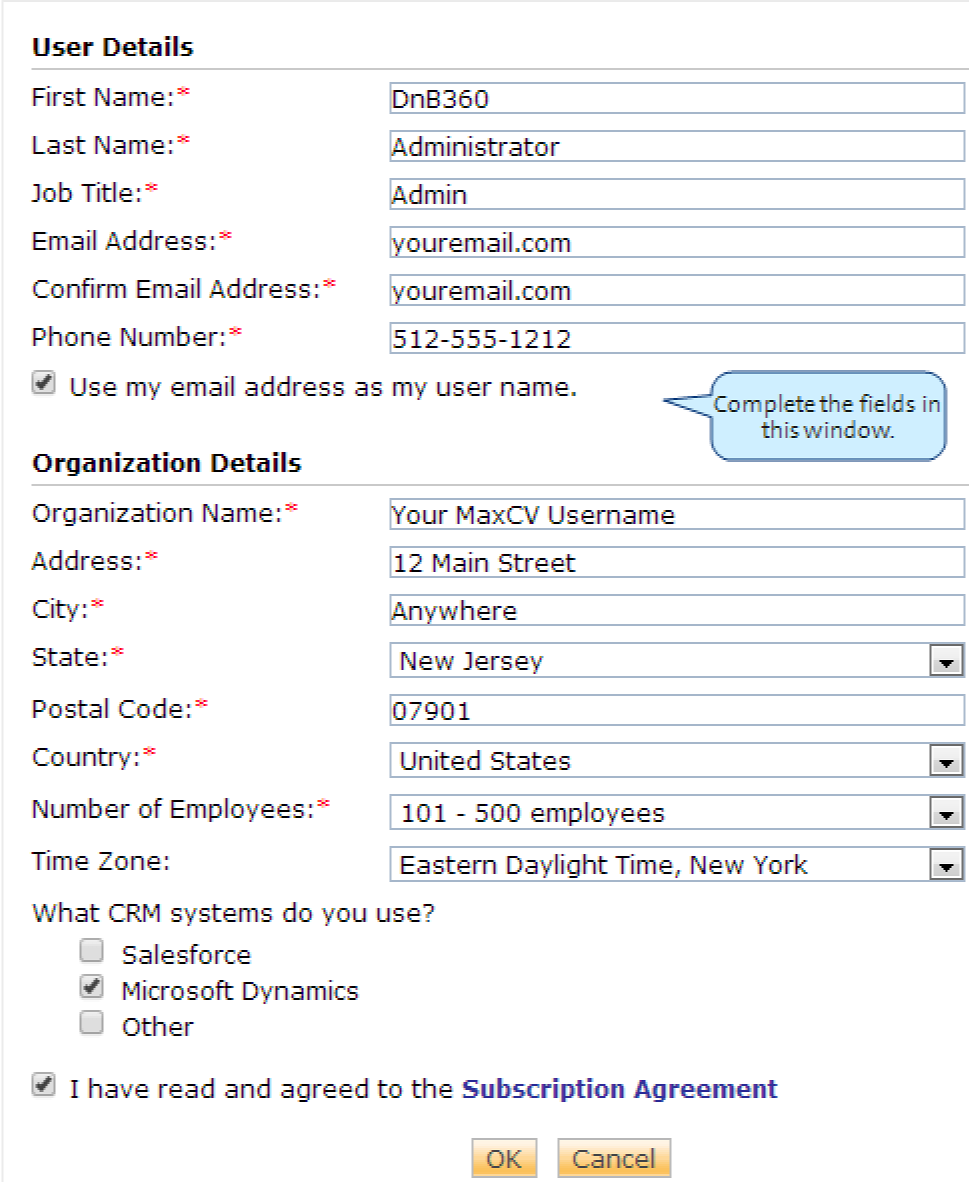
For first time users, you need to set up your Informatica Cloud account before you can run batch processing. After you set up your Informatica Cloud account, you can add one or more CRMs that use this Informatica Cloud account. For more information, see "Adding One or More CRMs to Your Informatica Cloud Account" on page A-10.

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

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

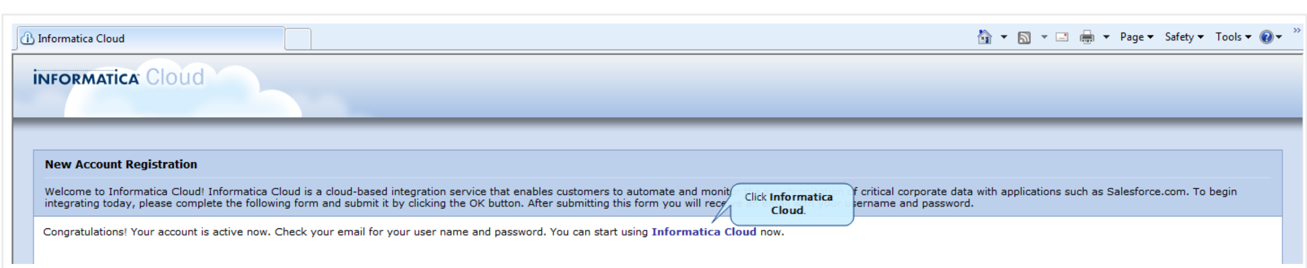


3. In the **New Account Registration** window, complete the fields as shown in the following illustration:



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.

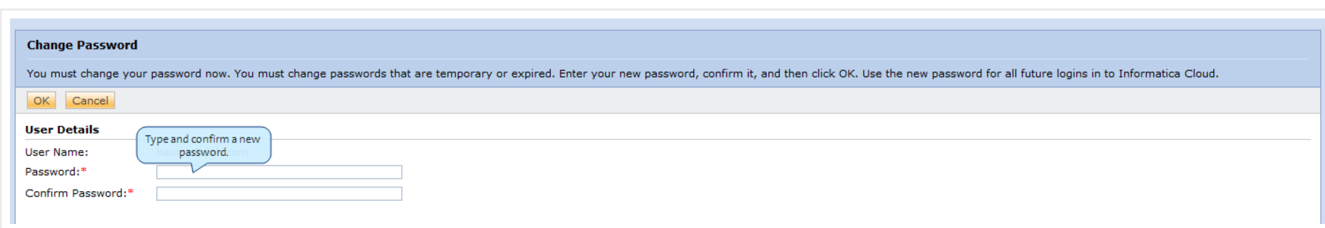
4. Click **Informatica Now** to open the Informatica Cloud login window.



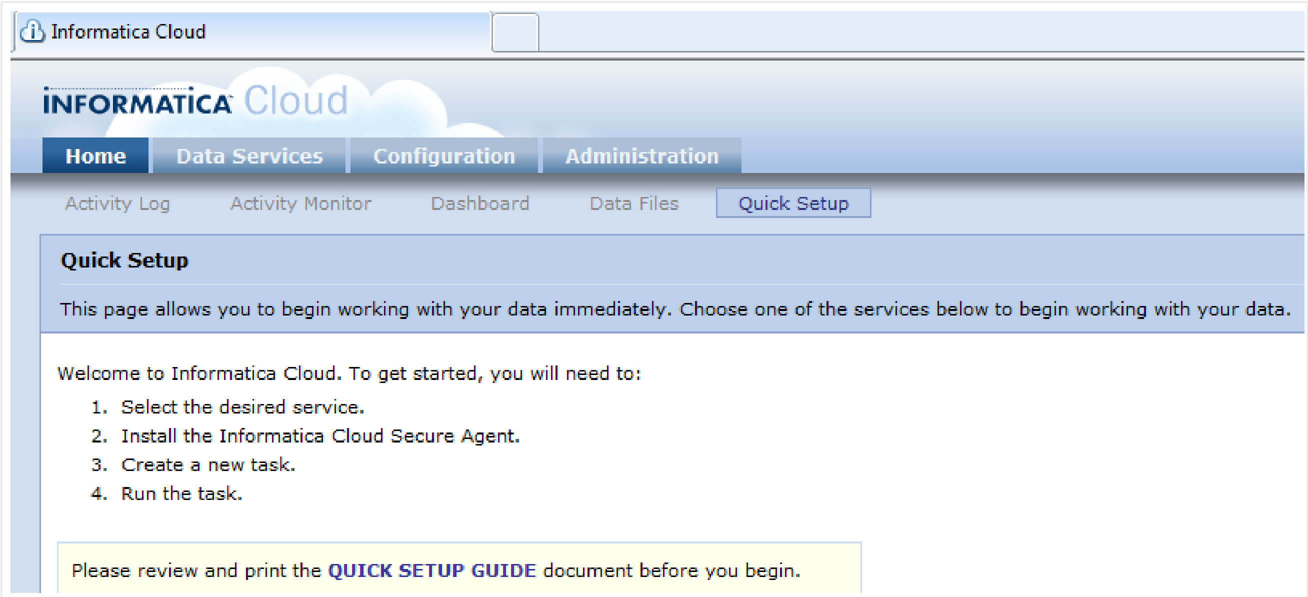
5. In the **Informatica Cloud** window, enter your user name and password, then click **Login**.

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.

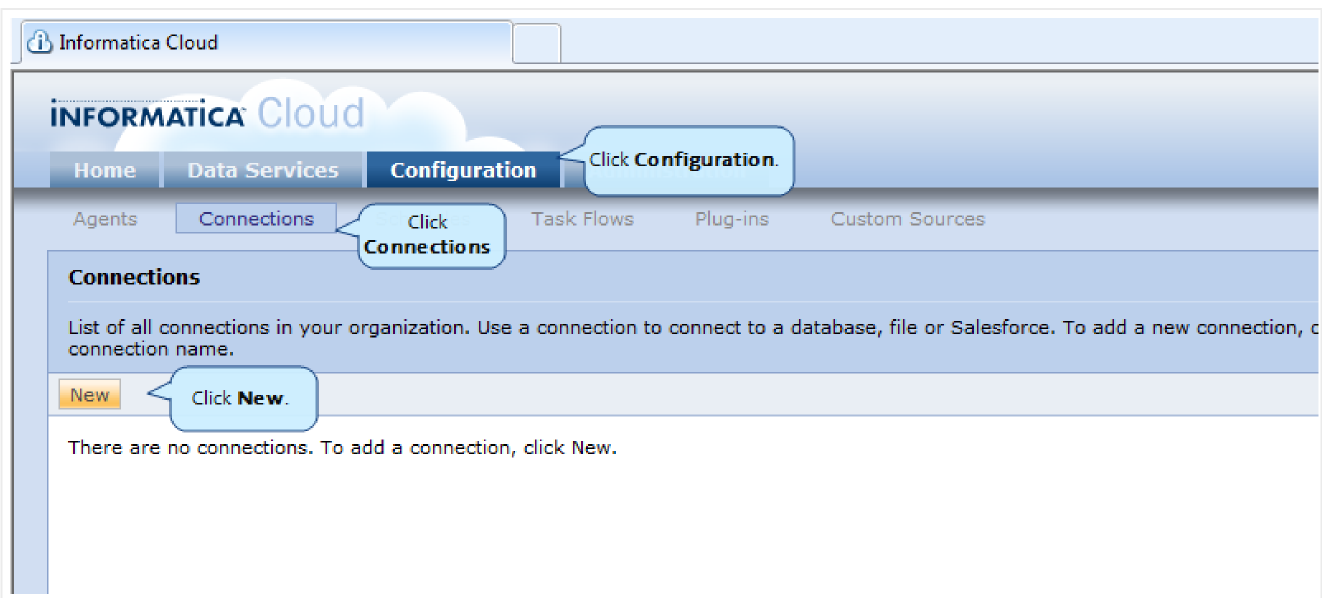


The **Informatica Cloud Quick Setup** window opens.

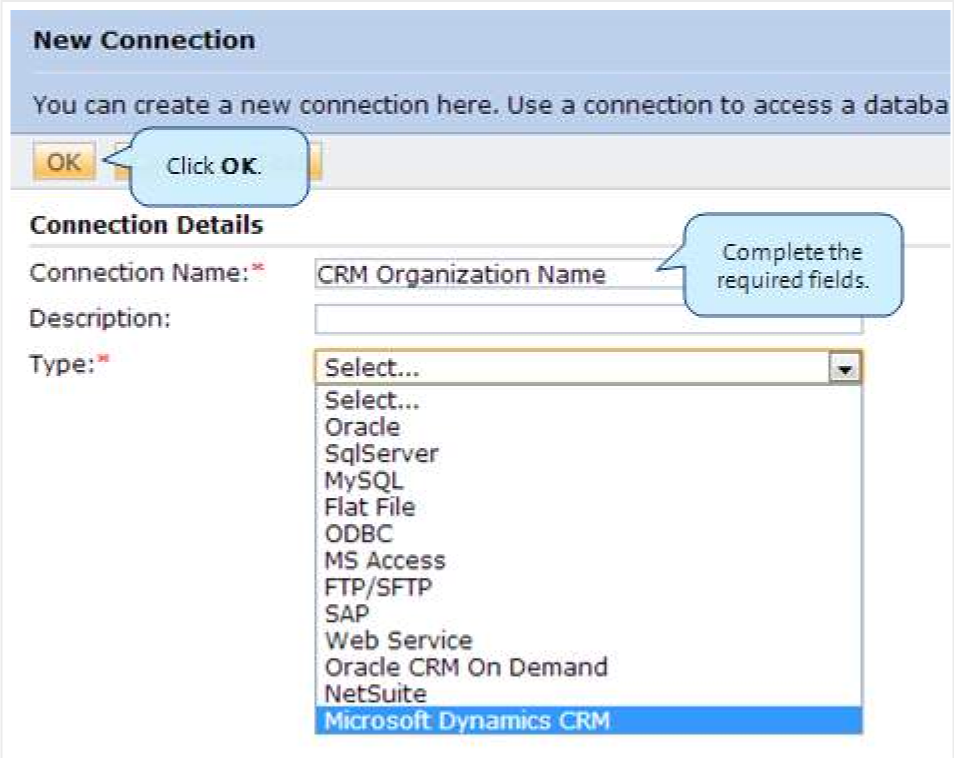


Note: For adding more than one CRM to use your Informatica Cloud account, see "Adding One or More CRMs to Your Informatica Cloud Account" on page A-10 and start with the next step.

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



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



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

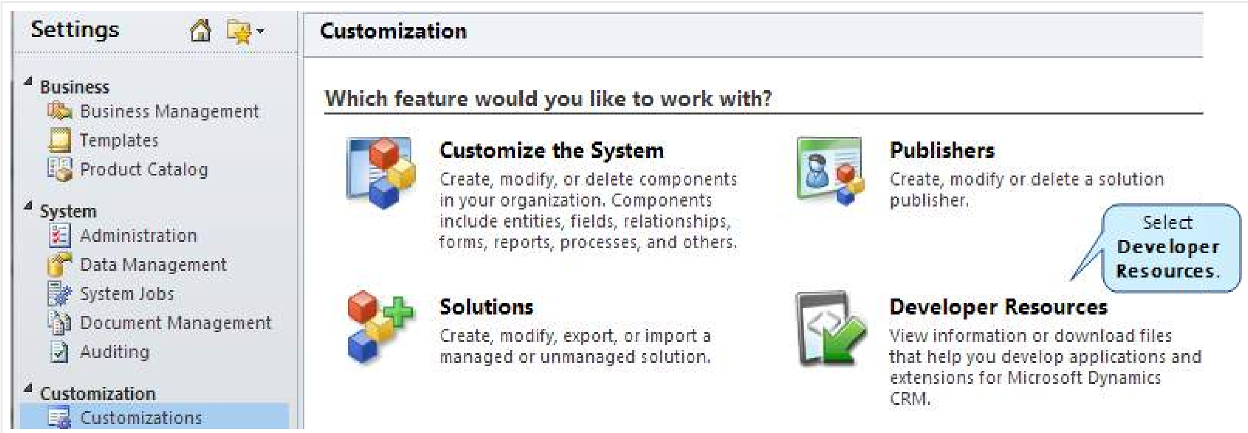
    a. On the CRM window, click **Settings**.

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

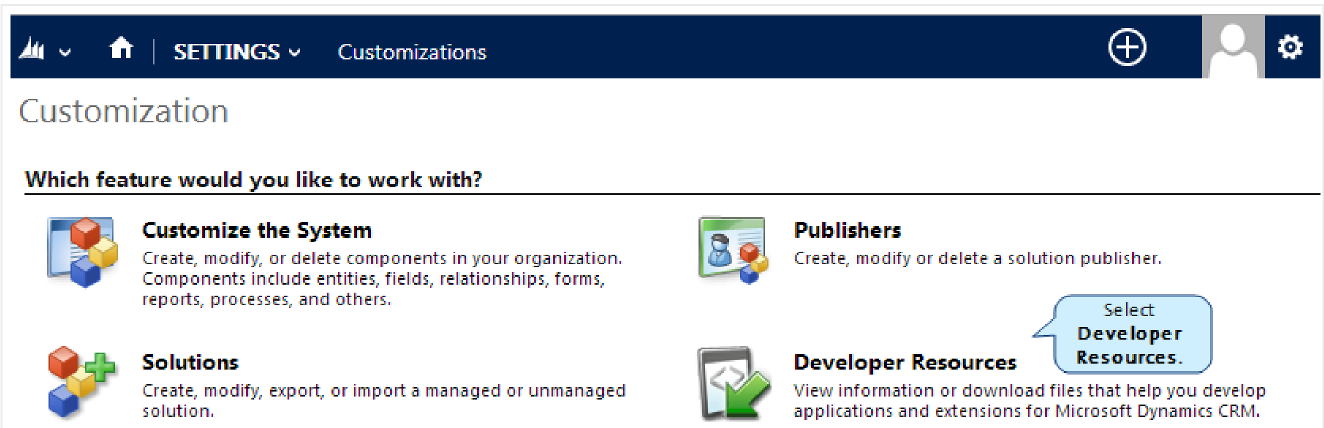
    c. In the **Customization** window, select **Developer Resources**.

> **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:



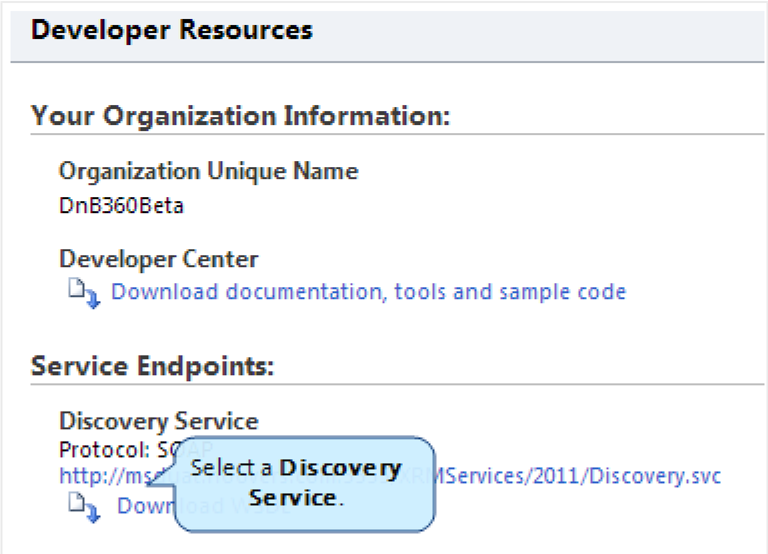
In Microsoft Dynamics CRM 2013:



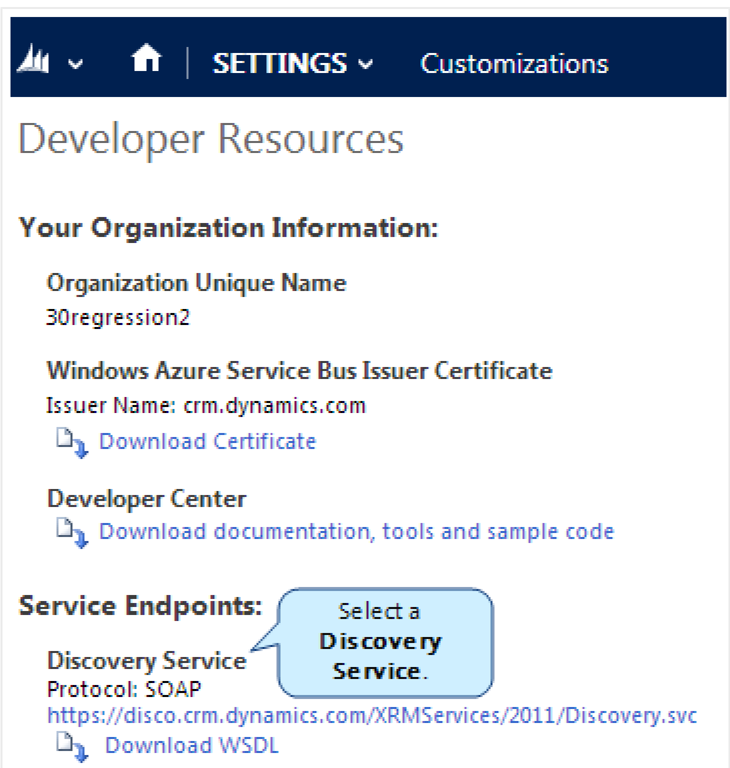
d. In the **Developer Resources** window, **Service Endpoints** area, select a **Discovery Service** URL..

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:



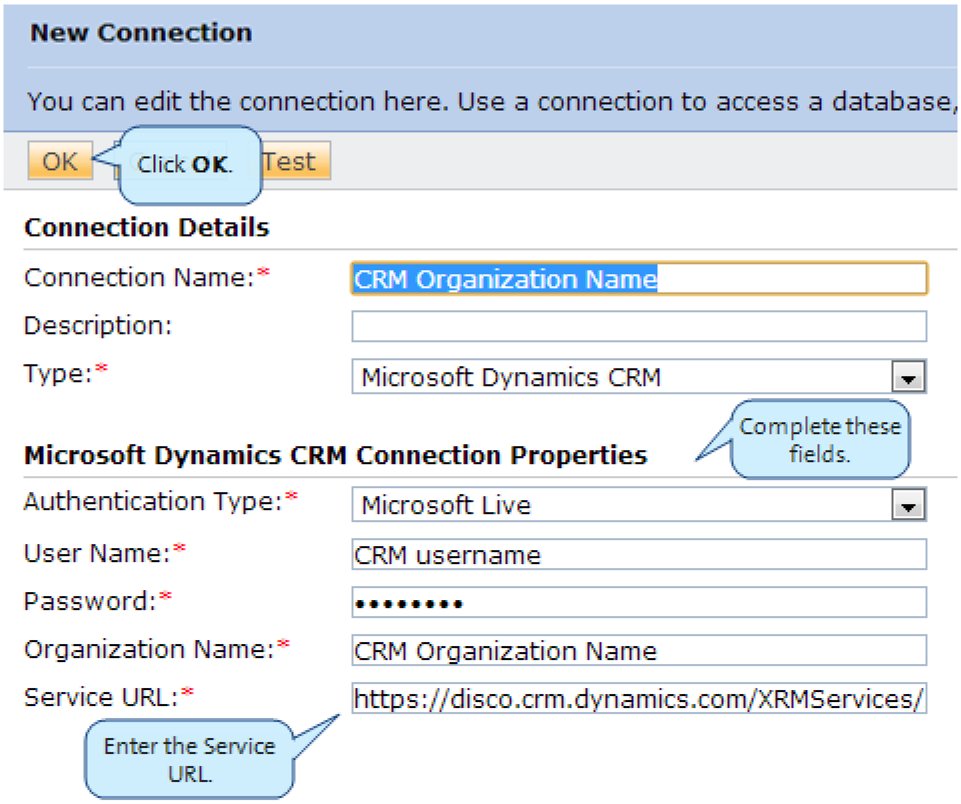
In Microsoft Dynamics CRM 2013:



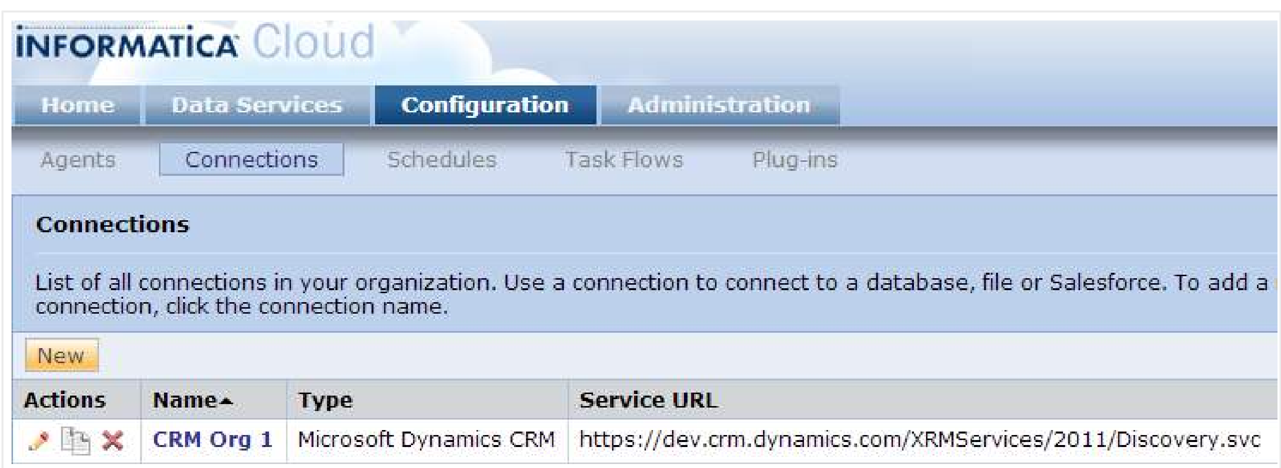
Note: In the previous illulstrations, the Organization Unique Name field displays your ORG's unique name. When you enter the Org name in the New Connection window, enter it exactly as you see it in the Organization Unique Name field.

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**.



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



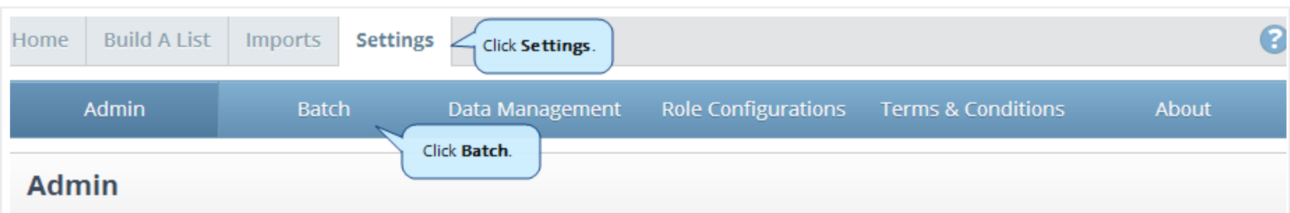
13. Make a note of your Connection name, which you will need to enter on the CRM Batch Connection window. Also note your Organization ID and put this Org number in a safe place where you can find it again for future reference to the batch process.

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

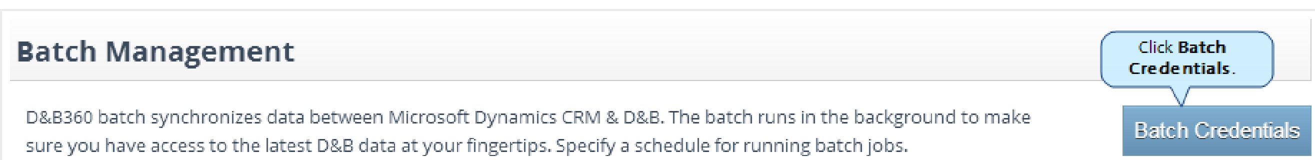
Registering Your On Demand Account for Batch Processing

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

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



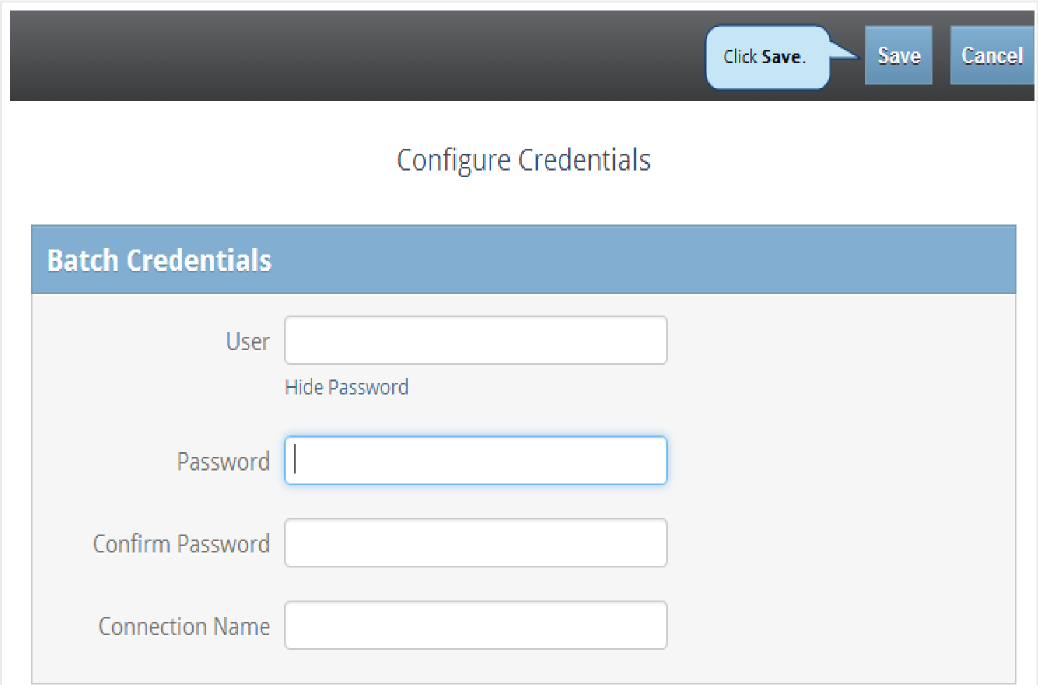
2. In the **Batch Management** area, click **Batch Credentials**.



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

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

   The batch credentials you enter in this step are from the Informatica steps, not your CRM credentials (see this step on page 5-7.)



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

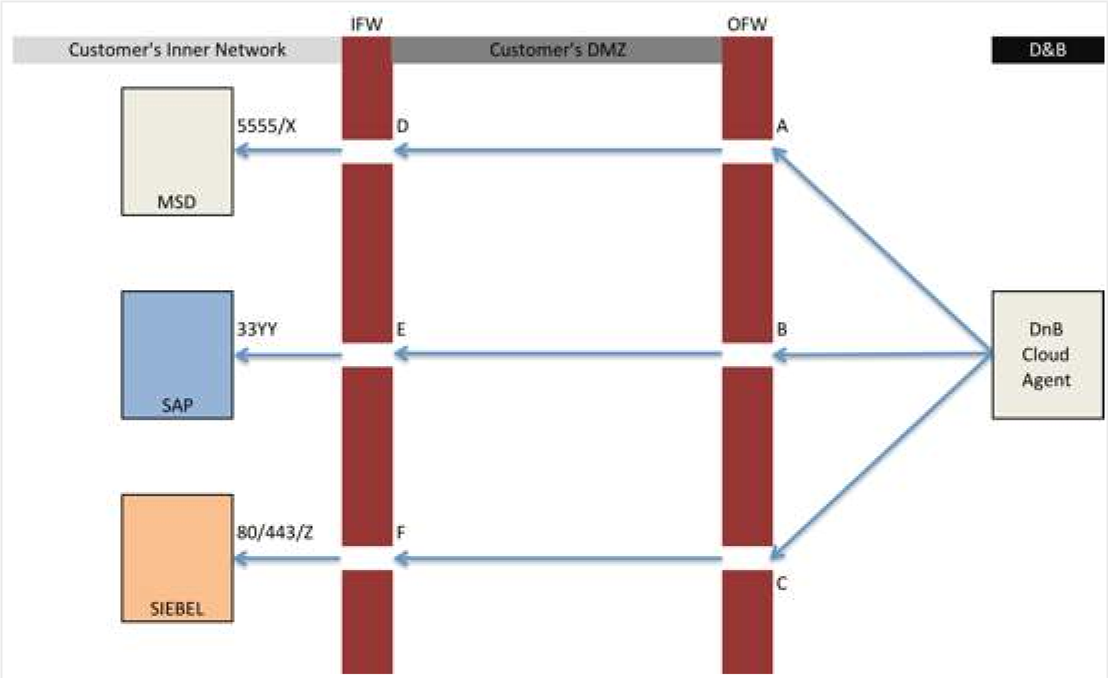
You need to go through this section if you have not yet set up batch. If you already have the account and Secure Agent set up in D&B360 v2.3, you only need to update your connections on the Informatica Cloud and enter your credentials in the CRM.

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.



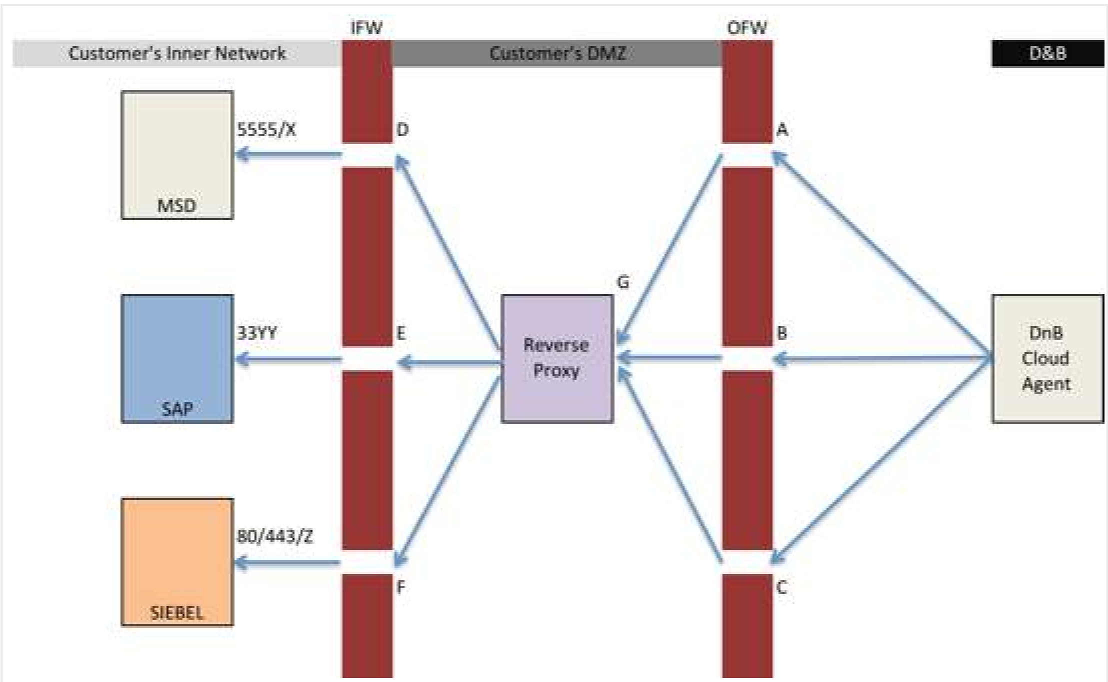
This option requires changes in the your network infrastructure to forward a specified port on the outer firewall, also known as the network edge firewall, and the inner firewall. The rules are as follows.

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

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

Option 2: Reverse Proxy

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

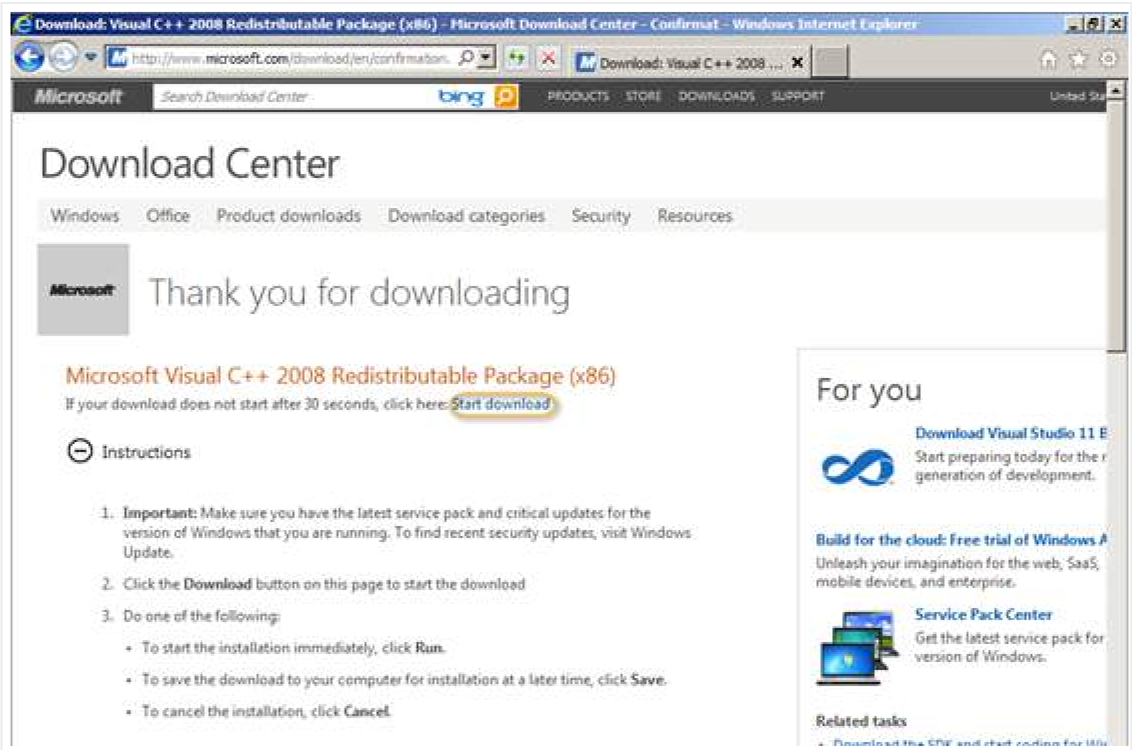


Server	Port	Foward to	Port
outerfirewall.customer.com	A	innerfirewall.customer.com	G
innerfirewall.customer.com	D	msdcrm.customer.com	5555/X
outerfirewall.customer.com	B	innerfirewall.customer.com	G
innerfirewall.customer.com	E	msdcrm.customer.com	33YY
outerfirewall.customer.com	C	innerfirewall.customer.com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

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

Installing the VC++ Redistributable Package (x86)

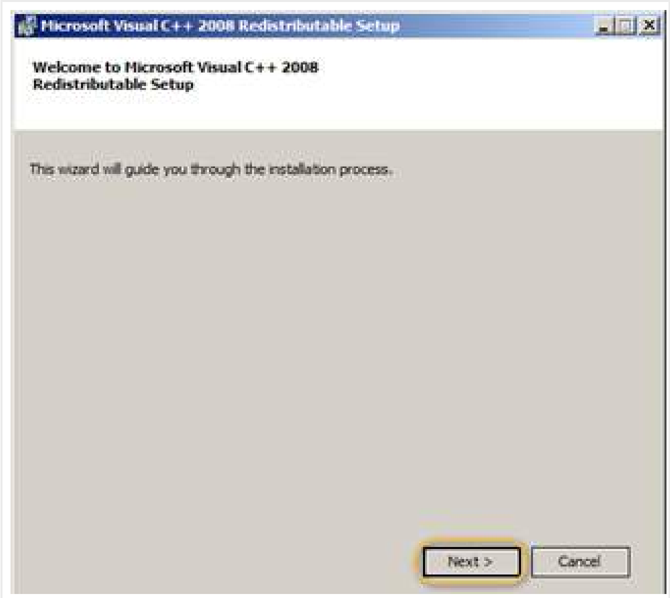
1. Open http://www.microsoft.com/download/en/confirmation.aspx?id=29.
2. Click **Start download**.



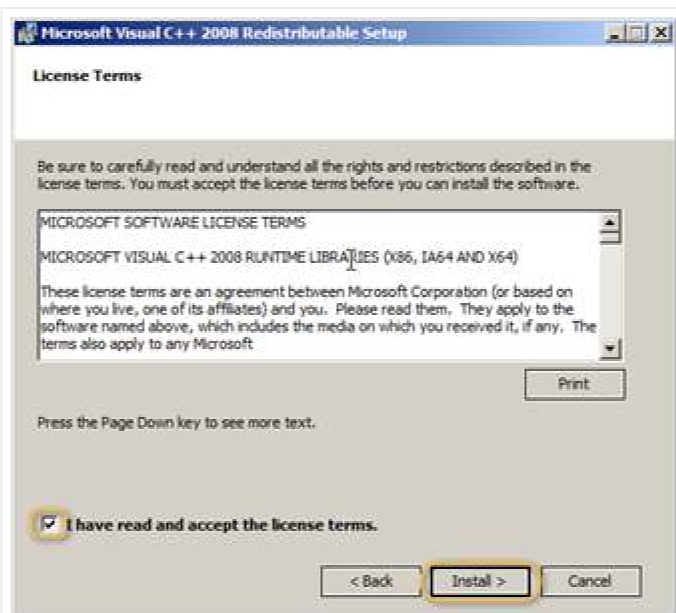
3. When you are prompted to run or save the .exe file, click **Run**.

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

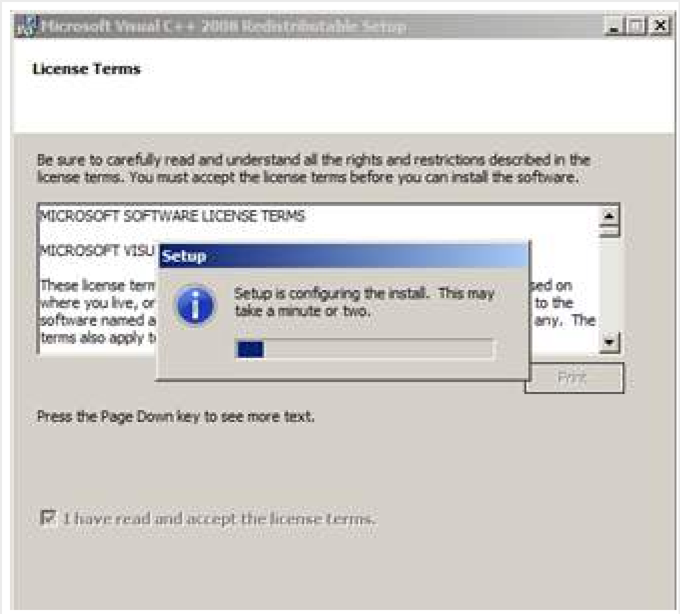
4. In the first wizard window, click **Next**.



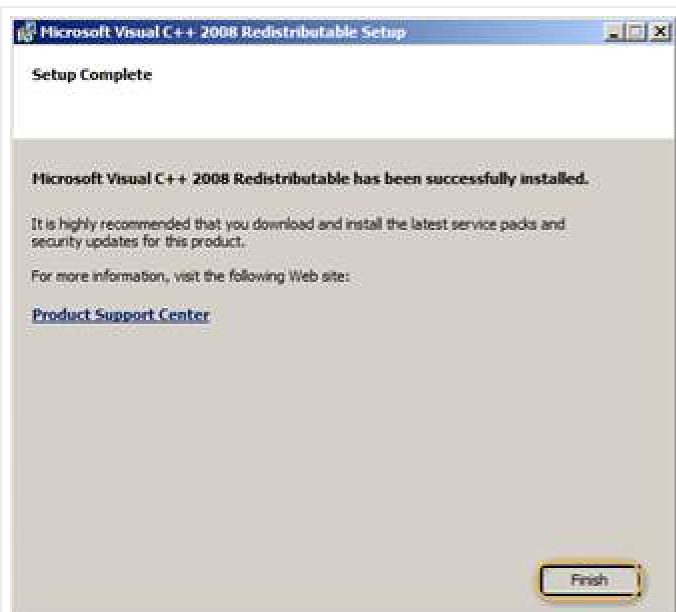
5. In the **License Terms** window, I **have read and accept the license terms** field, select the check box.
6. Click **Install**.



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



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



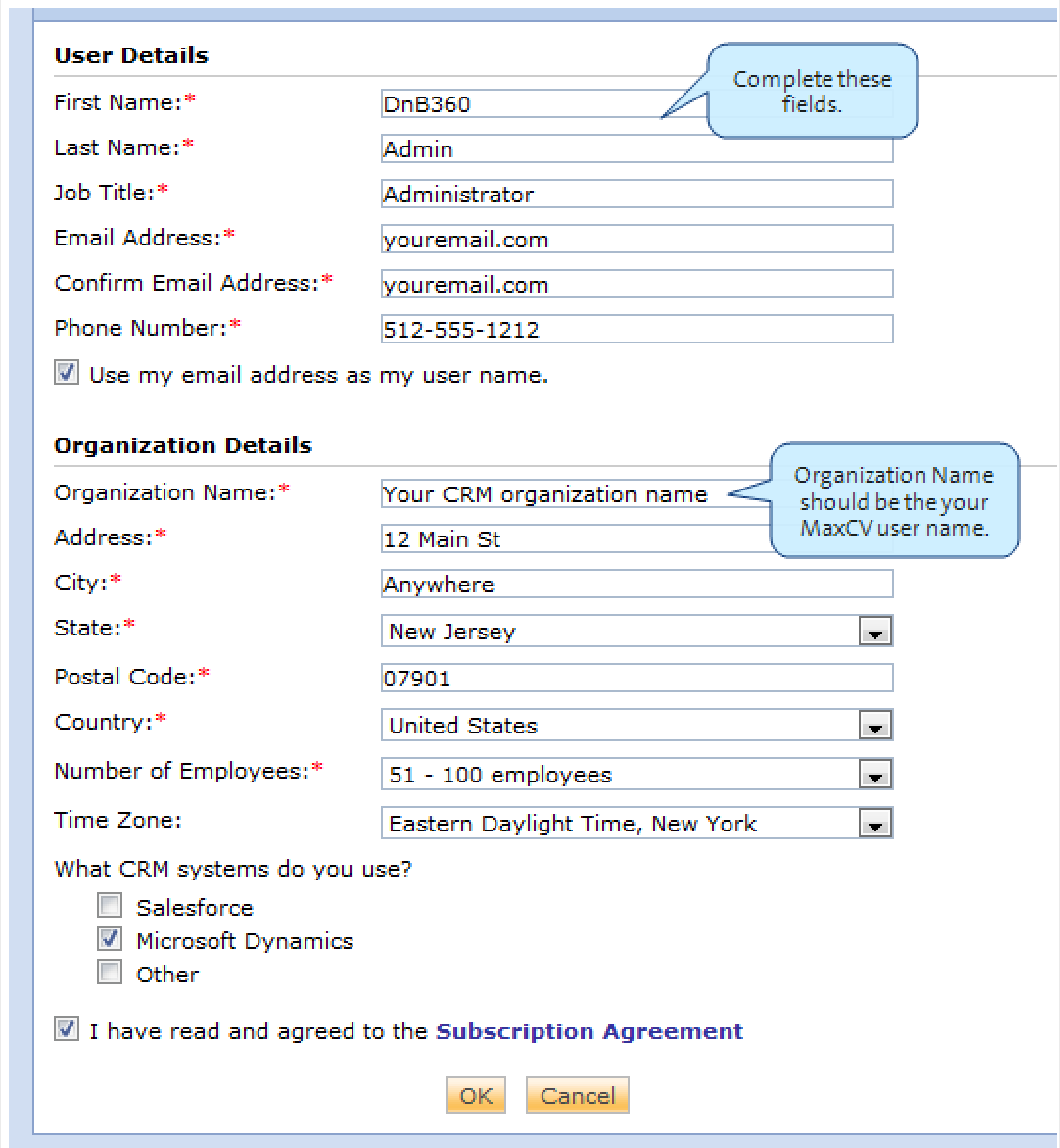
Registering Your Informatica Cloud Account for On Premise CRMs

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

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

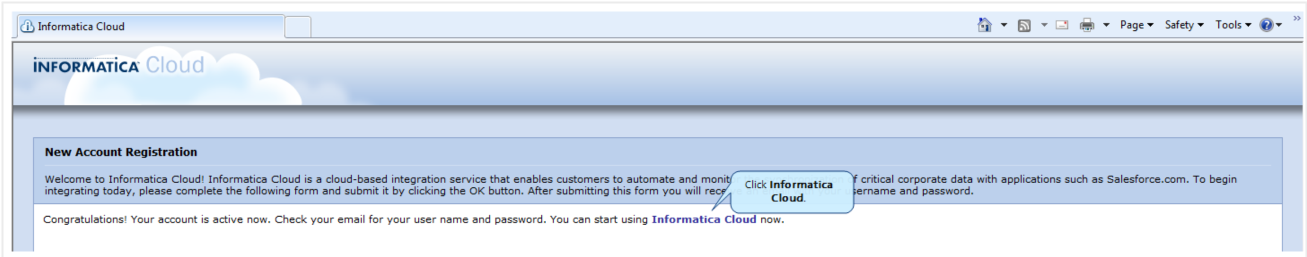
1. Access the Informatica Cloud at https://icosp2.informaticacloud.com/saas.
2. Click **Don't have an account?**.

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

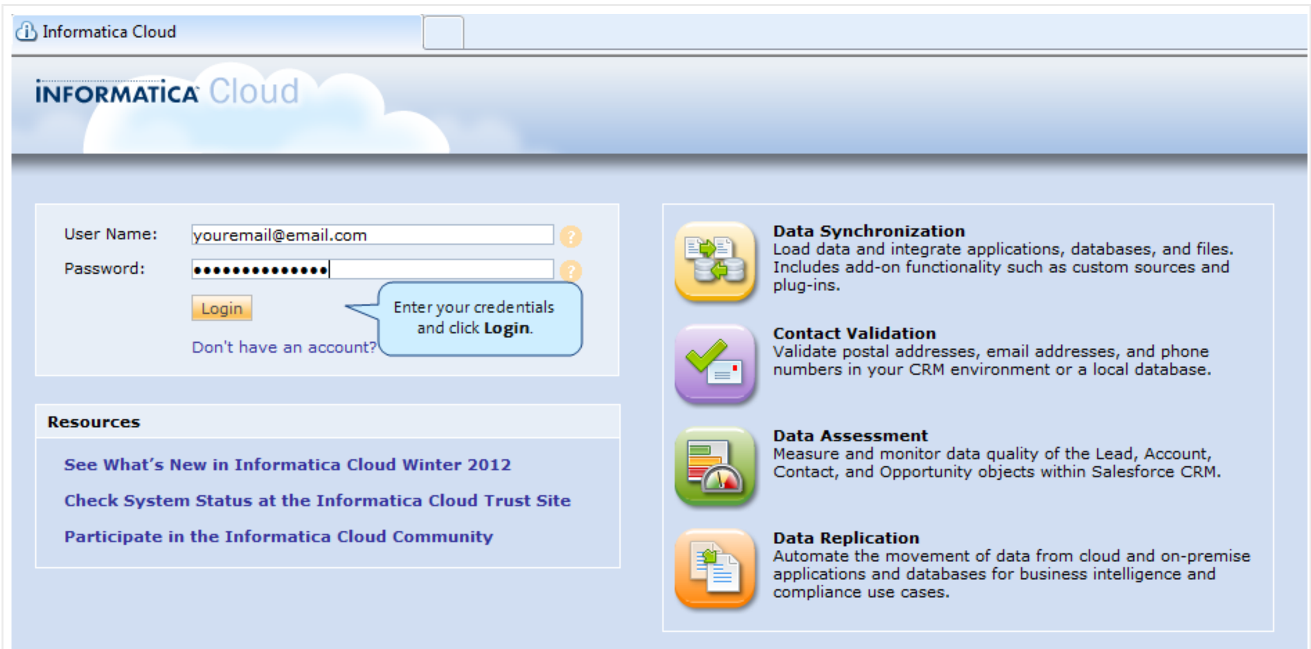


The **New Account Registration** window displays a Congratulations message. You will receive an email from osp2admin@informaticacloud.com with the account information and your temporary password.

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

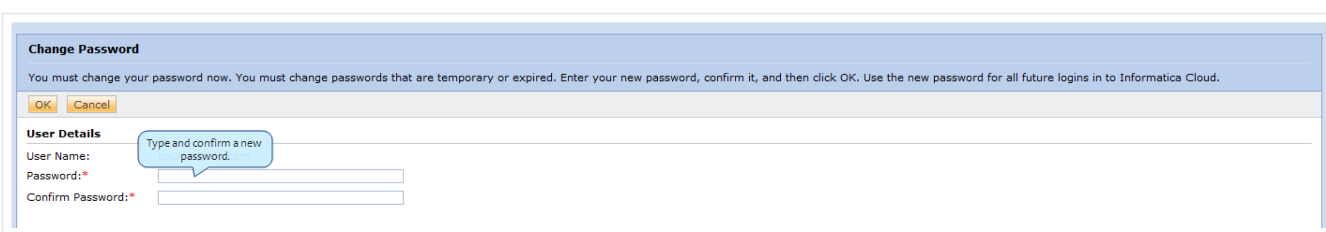


6. In the **Informatica Cloud** window, enter your user name and password, then click **Login**.

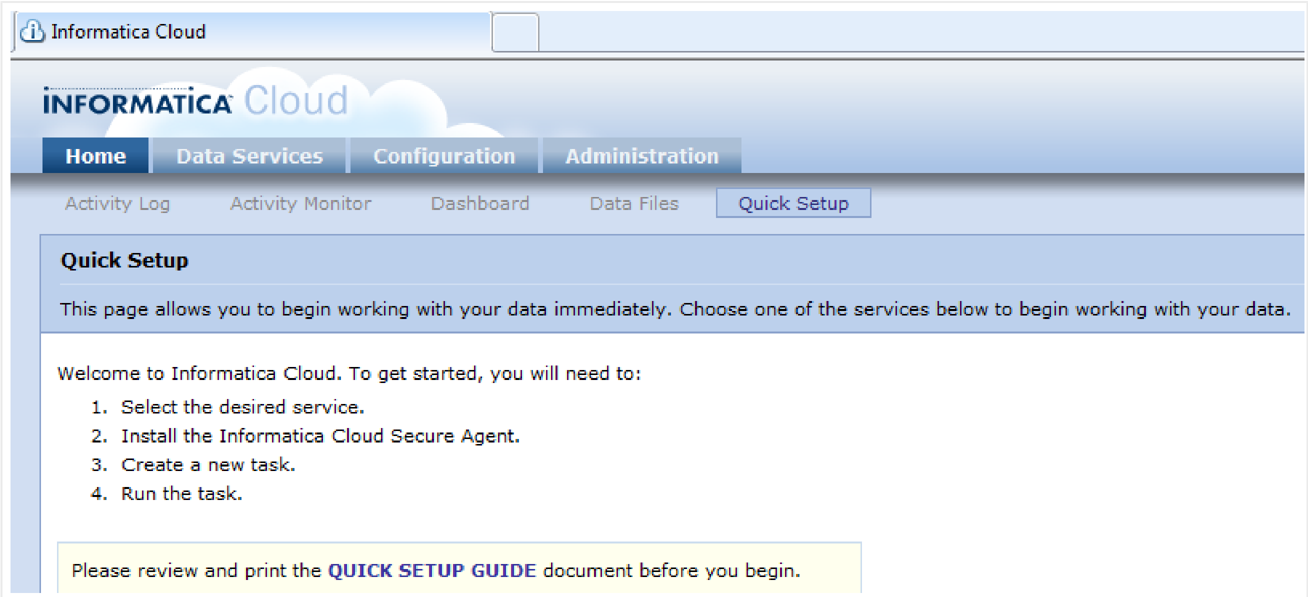


7. In the **Change Password** window, **User Details** area, complete the **User Name**, **Password**, and **Confirm Password** fields, and then click **OK**.

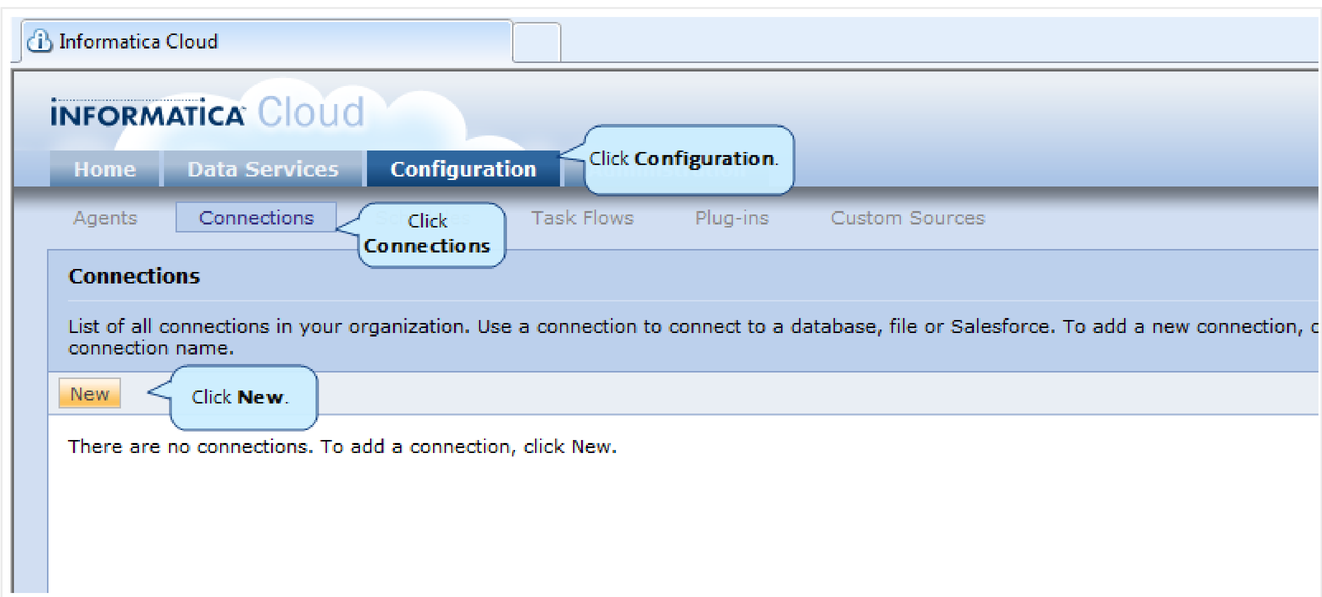
(!) Important Note: Be sure to make a note of these credentials, which you will need to connect your CRM with Informatica Cloud.



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

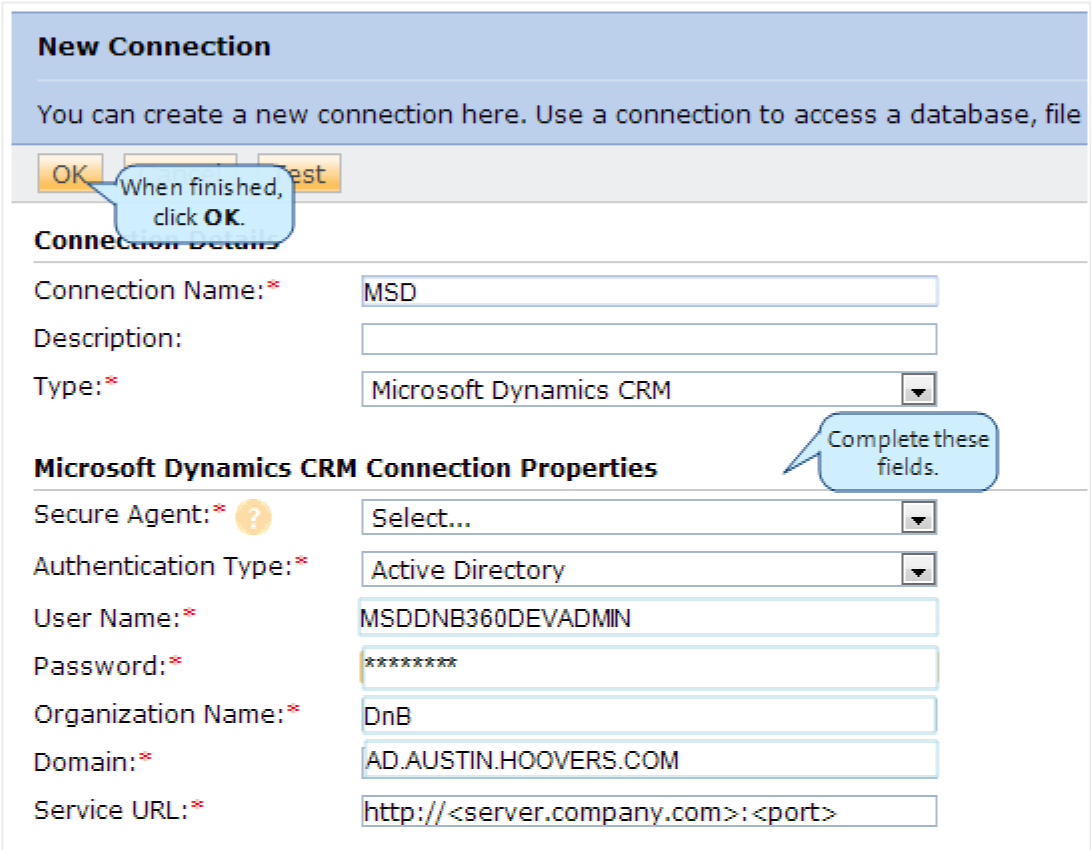


8. Click the **Configuration** tab, the **Connections** tab, and then click **New**.

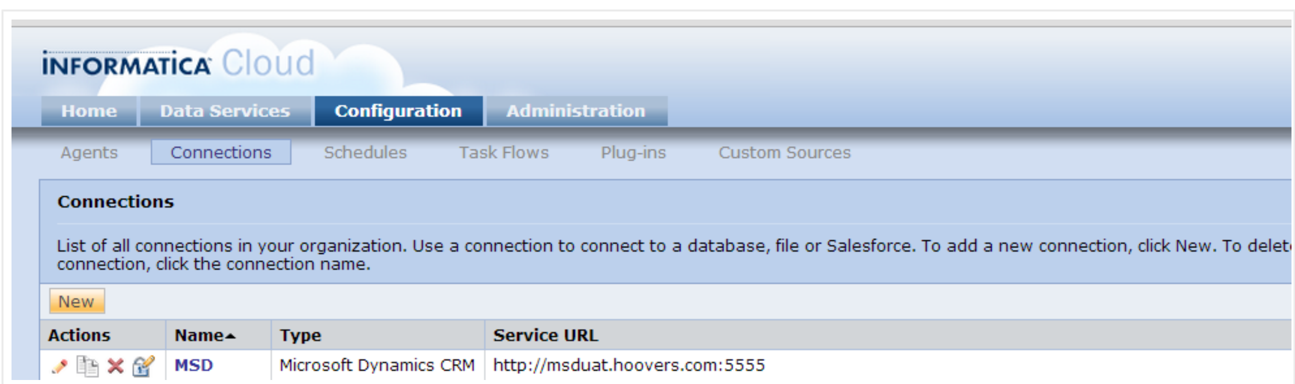


9. In the **New Connection** window, complete the required fields, and then click **OK**.
10. In **Connection Name** field, if you have named each of your connections the same name as the corresponding ORG, you can enter that here.

11. Click **OK**.



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

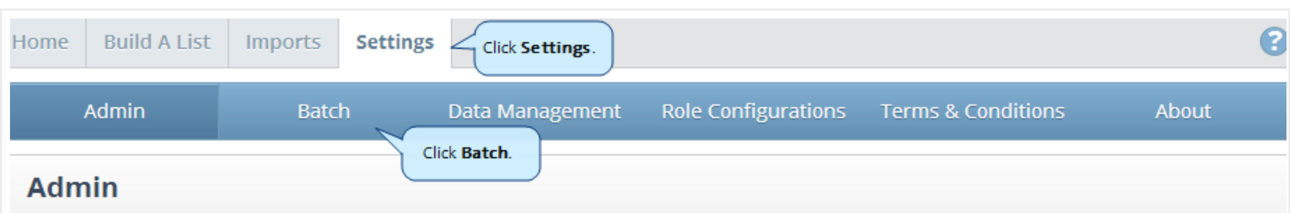


12. Make a note of your Organization ID and put this Org number in a safe place where you can find it again for future reference to the batch process.

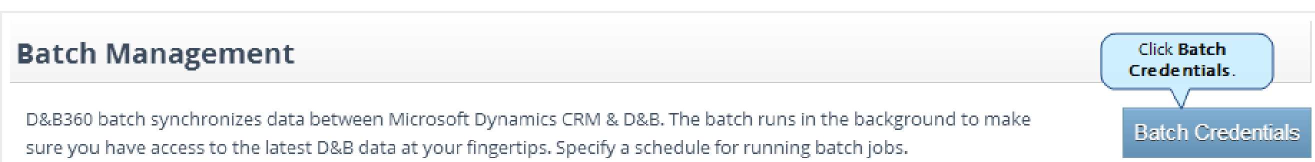
Steps for Configuring the Secure Agent for an On-Premise Installation

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

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

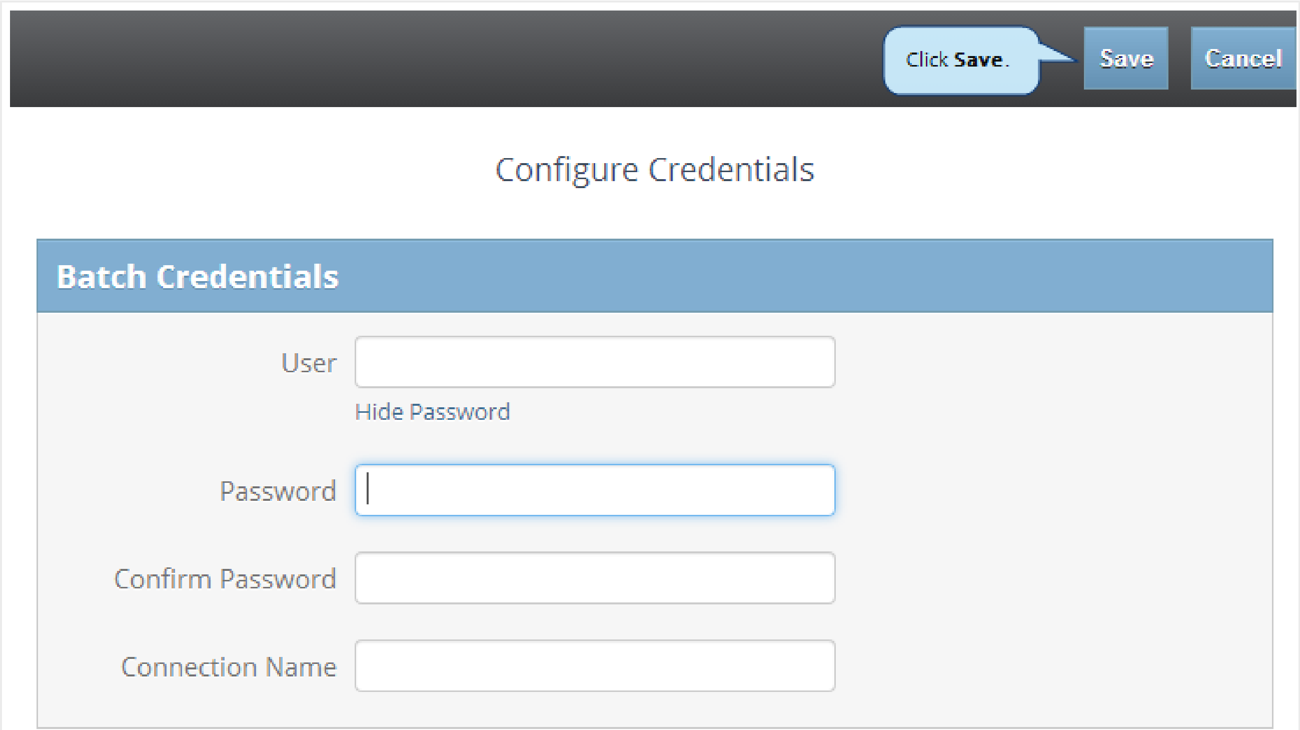


3. In the **Batch Management** area, click **Batch Credentials**.



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).



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.

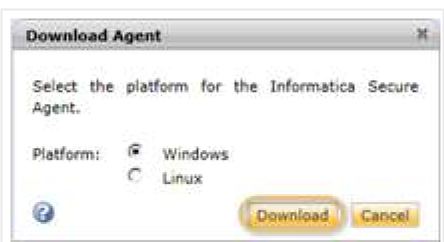
Logging in to the Informatica Cloud Secure Agent

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

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

4. Click **Download Agent**.

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



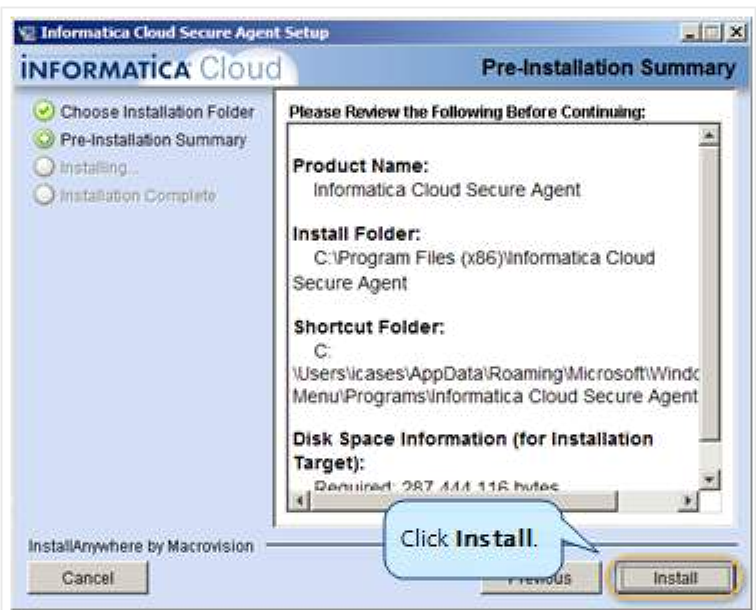
6. At the prompt to run or save the .exe file, click **Run**.

Running the Informatica Cloud Secure Agent Installation Program

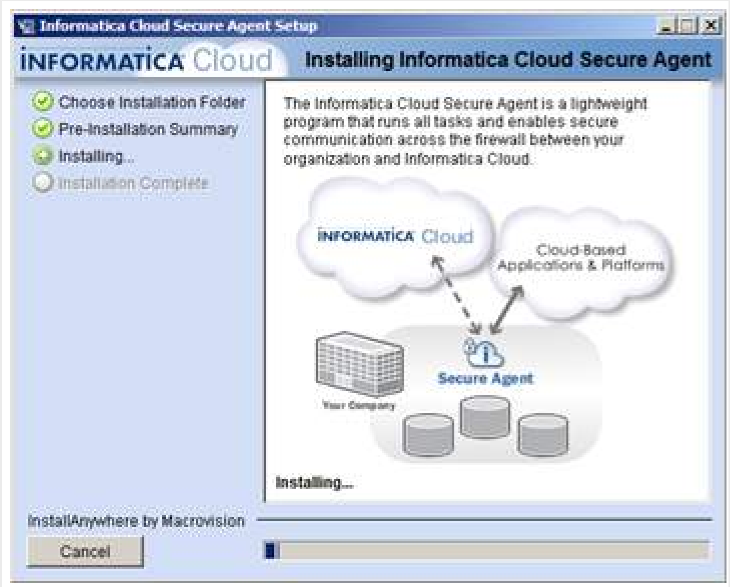
1. In the **Informatica Cloud Secure Agent Setup** window, **Choose Installation Folder** area, leave the default program directory or click **Choose** to specify a different location.

2. To install the secure agent, click **Next**.

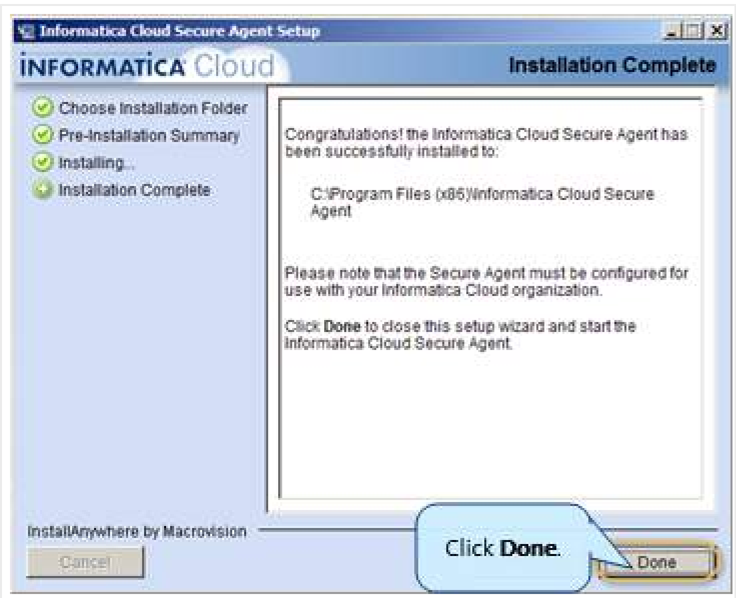
3. In the **Pre-Installation Summary** window, review the settings and if everything is correct, click **Install**.



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



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



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

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

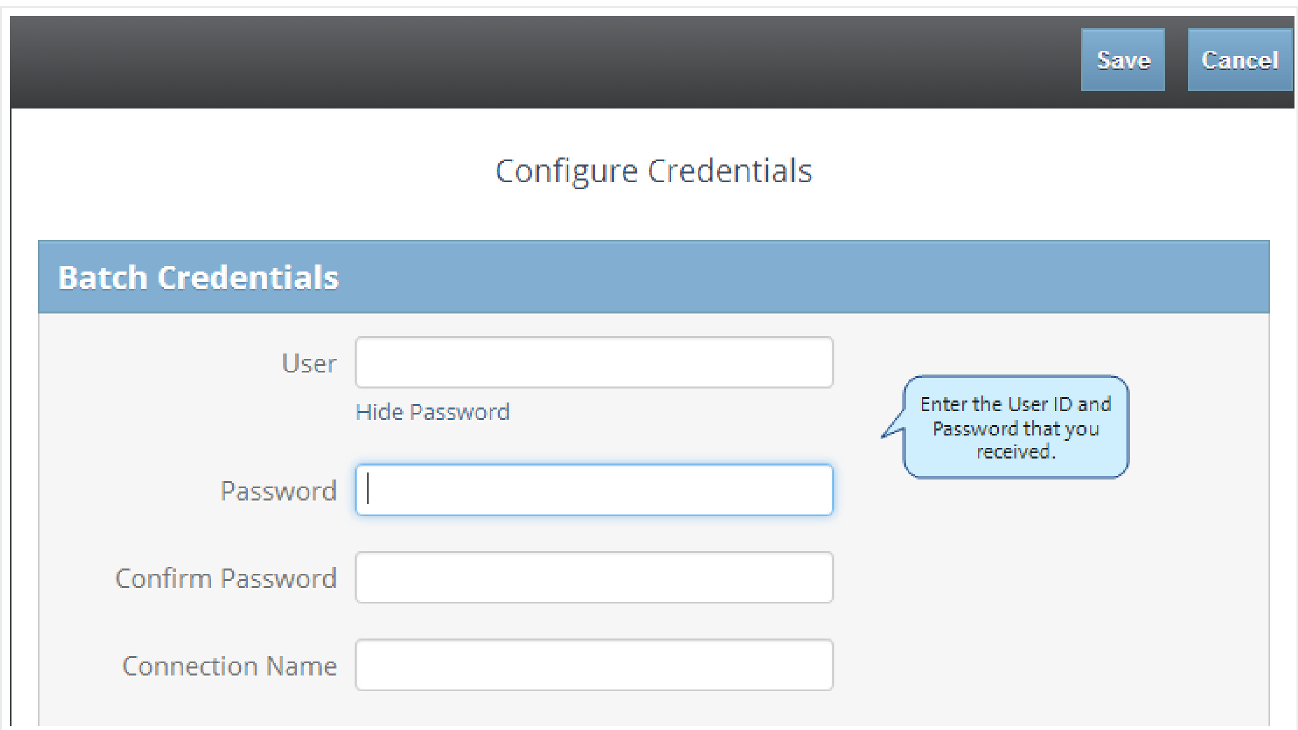
6. In the **Informatica Cloud** window, type the user name and password that you made note of earlier.

The **Configuration** window displays the log in credentials you entered previously.

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

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

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



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

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

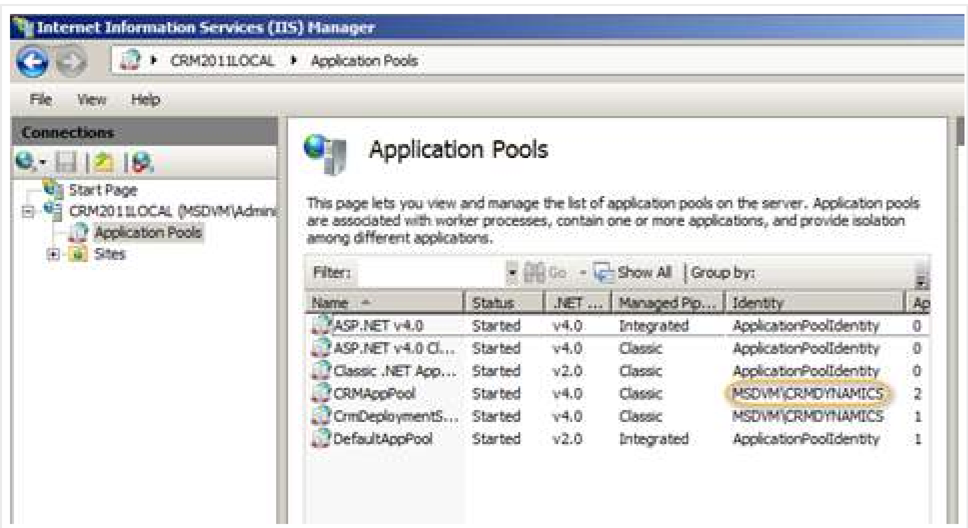
Examples in this section show 2011, but these should be the same for 2013. If you have any questions or concerns about the steps in this section, contact Customer Support.

(!) Important 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.

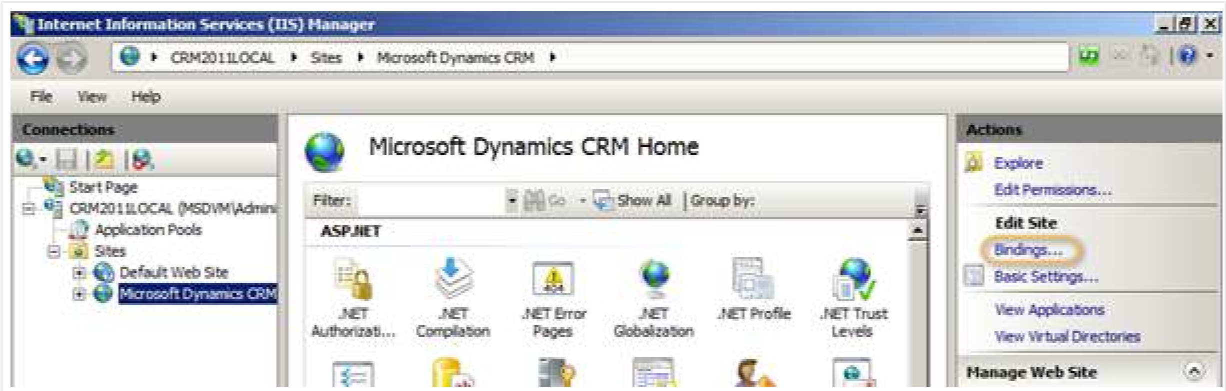
Specify the Identify for CRMAppPool

- Log in to your MSD Application server.

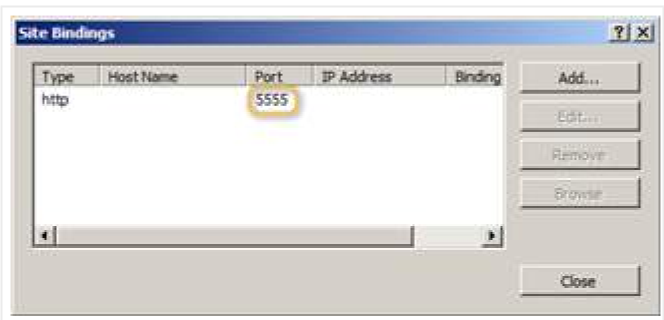


Identify the Port for Your CRM Dynamics Instance

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



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



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

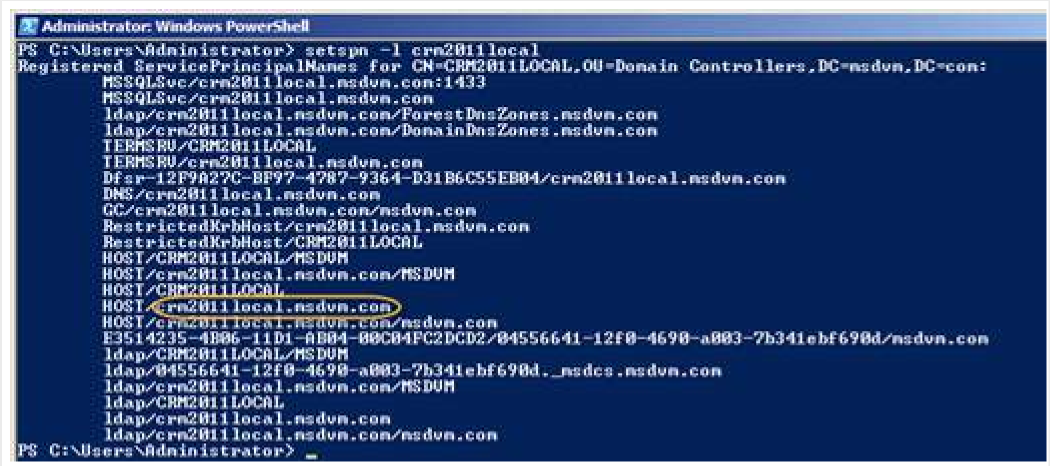
(!) Important Note: If the CRMAppPool is running as ***Network Service***, skip all of the steps in this section:

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 -l hostname` command. This should be a fully qualified domain name (FQDN).



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

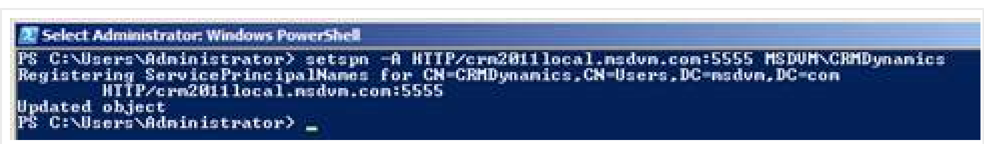
4. Enter the following command with the values obtained in the previous steps as follows:

```
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

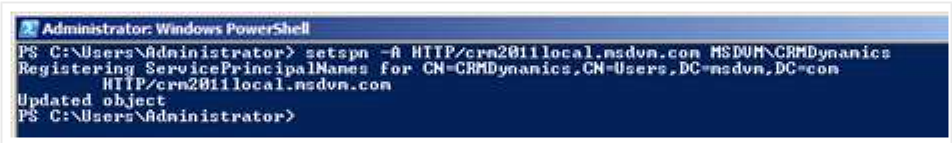
```
setspn -A HTTP/crm2011local.msdvm.com:5555 MSDVM\CRMDynamics setspn -A
HTTP/<spn> <user>
```

6. Enter the command:

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

In our example, this is

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



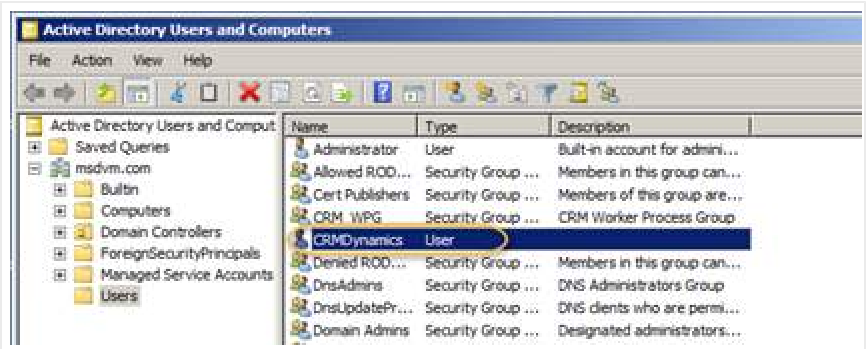
Setting Delegation

(!) Important Note: If the CRMAppPool is running as ***Network Service***, skip all of the steps in this section.

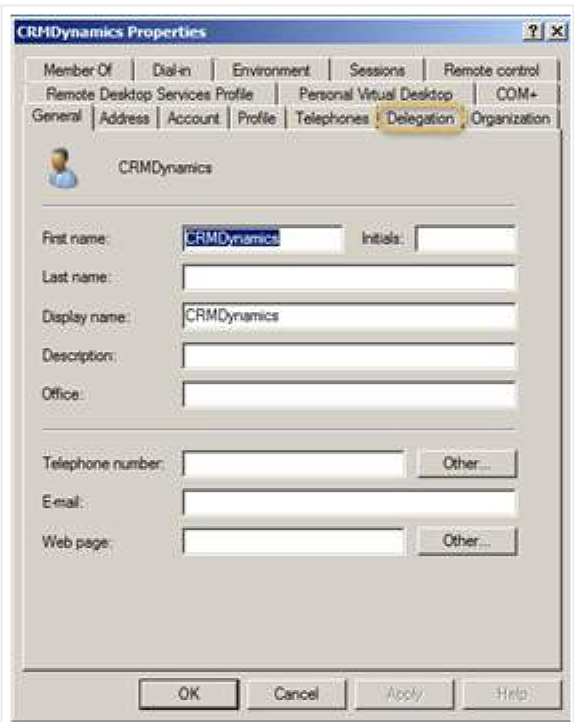
1. Log in to your Domain Controller and select **Active Directory Users and Computers**.

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

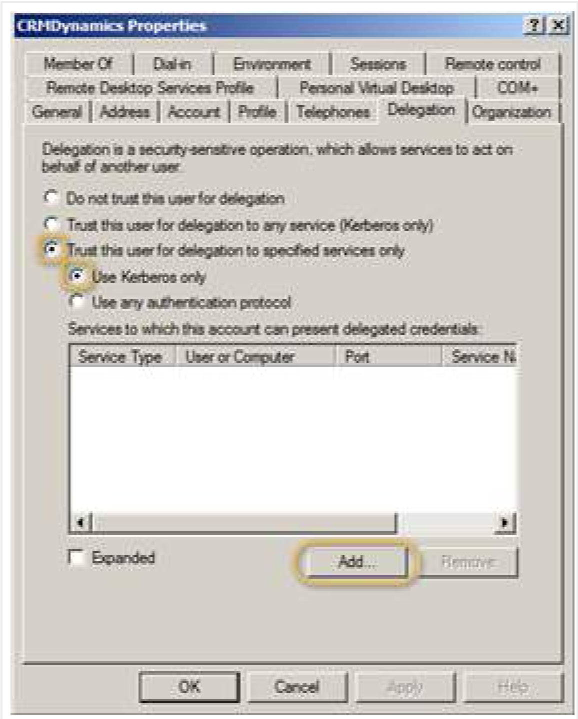
3. In the **Users** directory, locate the User identified in the Step 1 and double-click it (see this step on page 5-34).



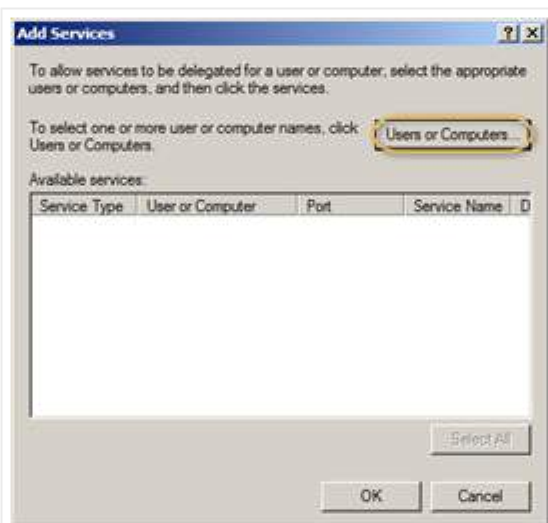
4. In the **CRMDynamics Properties** window, select the **Delegation** tab.



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

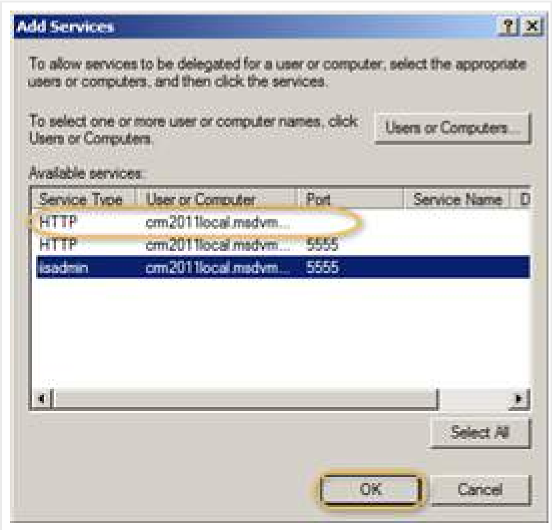


6. Click **Users or Computers**.



7. Enter the user name identified in Step 1 and then click **OK** (see this step on page 5-34).

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



Post-Installation Steps

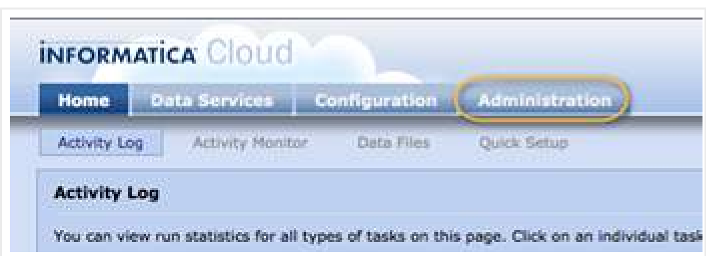
1. In the **Informatica Cloud Secure Agent Setup** window, click **Stop**.

   The Secure Agent shuts down.

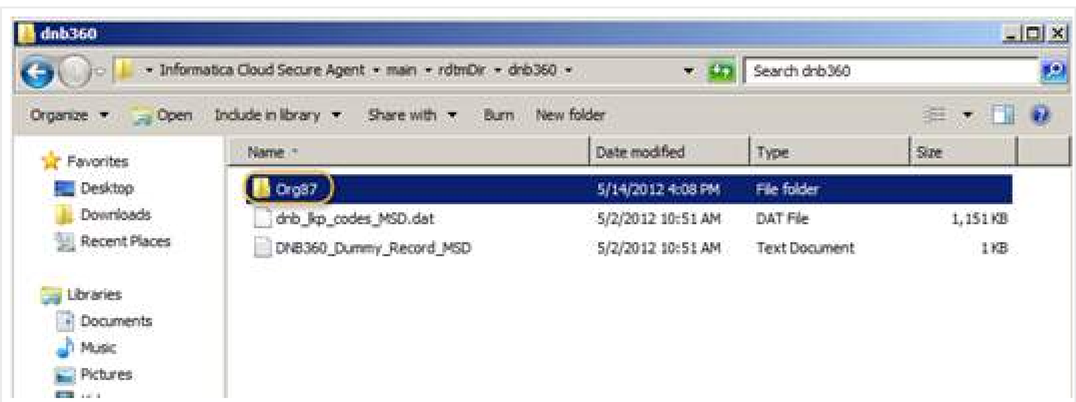
   A message displays to inform you that the Secure Agent has been stopped.

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.

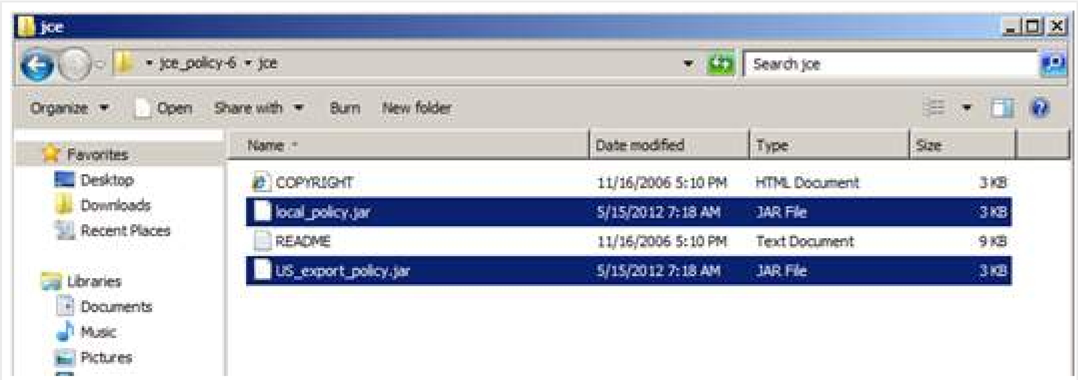
5. In the Secure Agent `..\Informatica Cloud Secure Agent\main\rdtmDir\dnb360\` directory, create a folder with the Organization ID name.



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

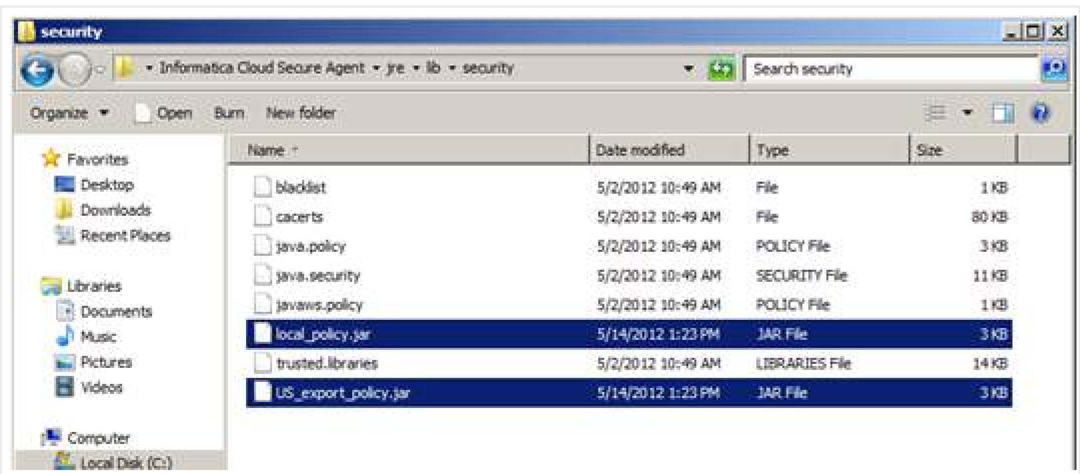
7. Unzip the zip package and copy:

   `local_policy.jar and US_export_policy.jar`



8. Paste the unzipped files in the

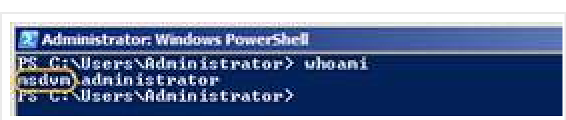
   `Program Files (x86)\Informatica Cloud Secure Agent\jre\lib\security`
   directory and overwrite the existing files.



Adjusting the Settings for Your System

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

   In our example, the domain name is MSDVM.



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

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

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

The following is an example krb5.conf file.

```
[libdefaults]

     default_realm = MSD.SAMPLE.COM

     default_tkt_enctypes = rc4-hmac

     default_tgs_enctypes = rc4-hmac

     permitted_enctypes = rc4-hmac

[realms]

     MSD.SAMPLE.COM = {}

          kdc = xxx.msd.sample.com

          default_domain = MSD.SAMPLE.COM

}

[domain_realm]

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

3. Save the file.

(!) Important 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.

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 (see "Scheduling Batch Jobs" on page 6-1).

6 Scheduling Batch Jobs

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.

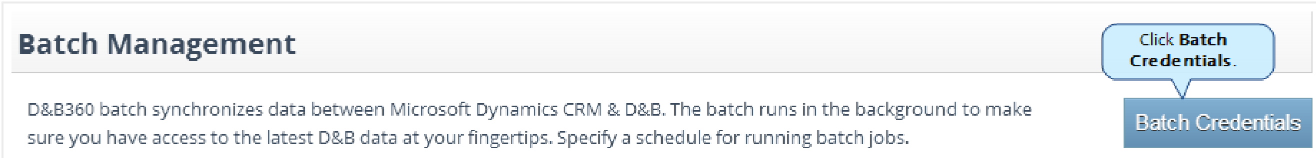
Note: When you schedule batch jobs, make sure you set them using the same time zone that the Informatica Cloud is set to. Otherwise, you will need to enter the time to match the time zone of the Cloud.

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.

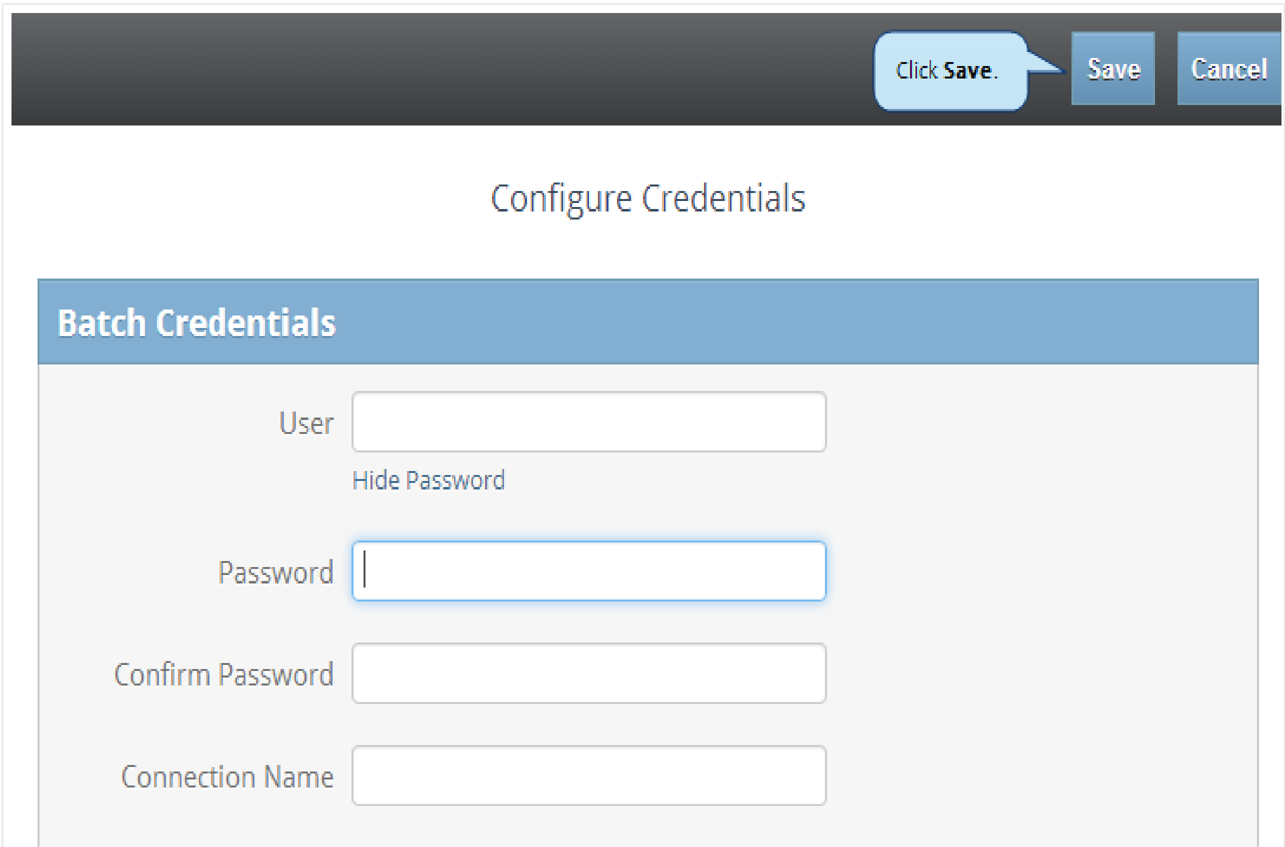
Scheduling a New Batch Job

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

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



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



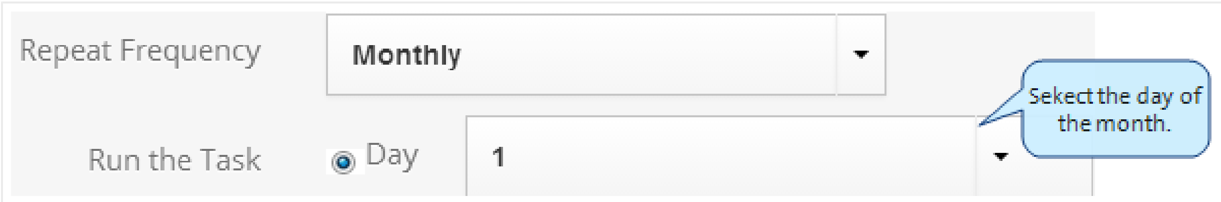
5. In the **Batch Management** window, **New Batch Activity Log** area, click **Modify Batch Schedule**.

6. In the **Modify Batch Schedule** window:

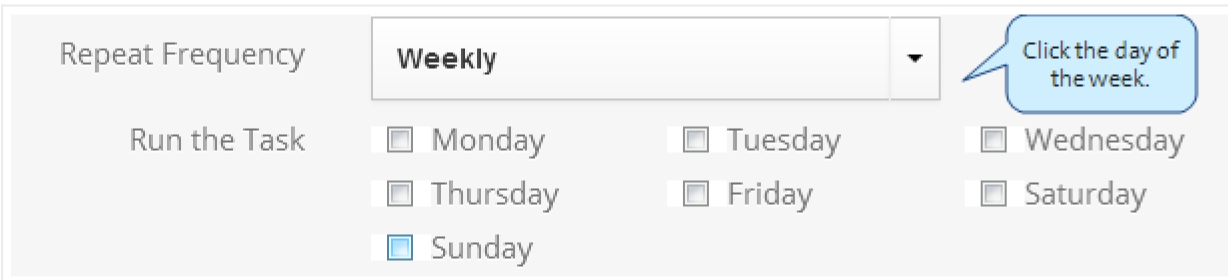
   a. In the **Start Time** field, type a start date for a new batch or use the pop-up calendar.

   b. In the **Repeat Frequency** field, select **None**, **Monthly**, or **Weekly**.

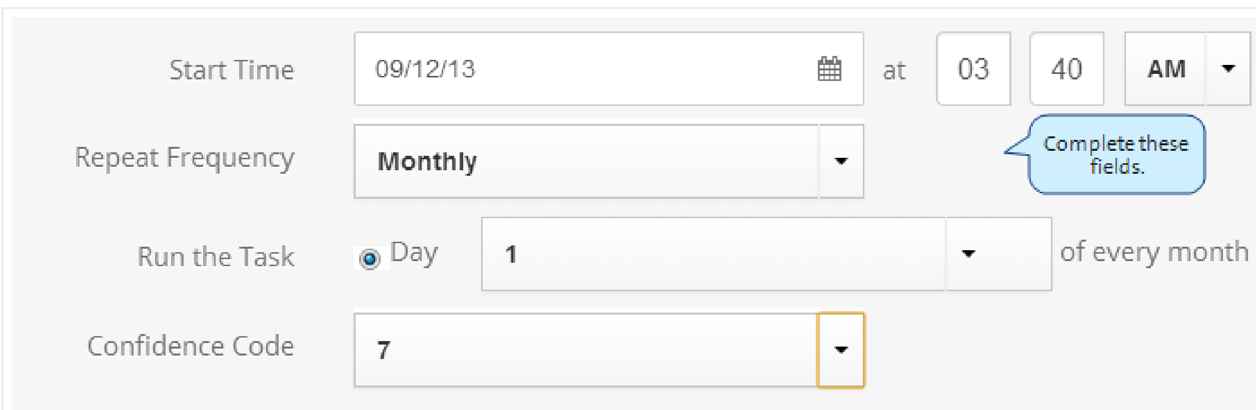
      If you select **Monthly**, in the **Run the Task** field, select which day of every month you want the batch to run.



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



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.



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.

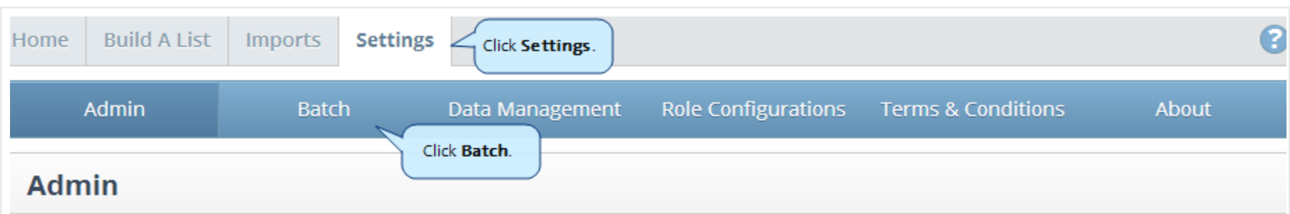
Repeat Frequency			
	None	Daily	Monthly

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 indefinitely or • Repeat until and choose the date and time.	

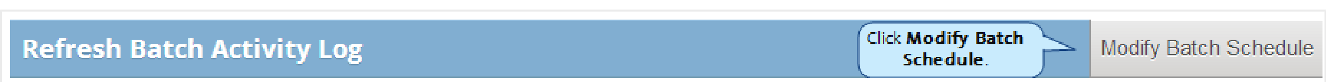
Scheduling a Refresh Batch Job

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**.



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



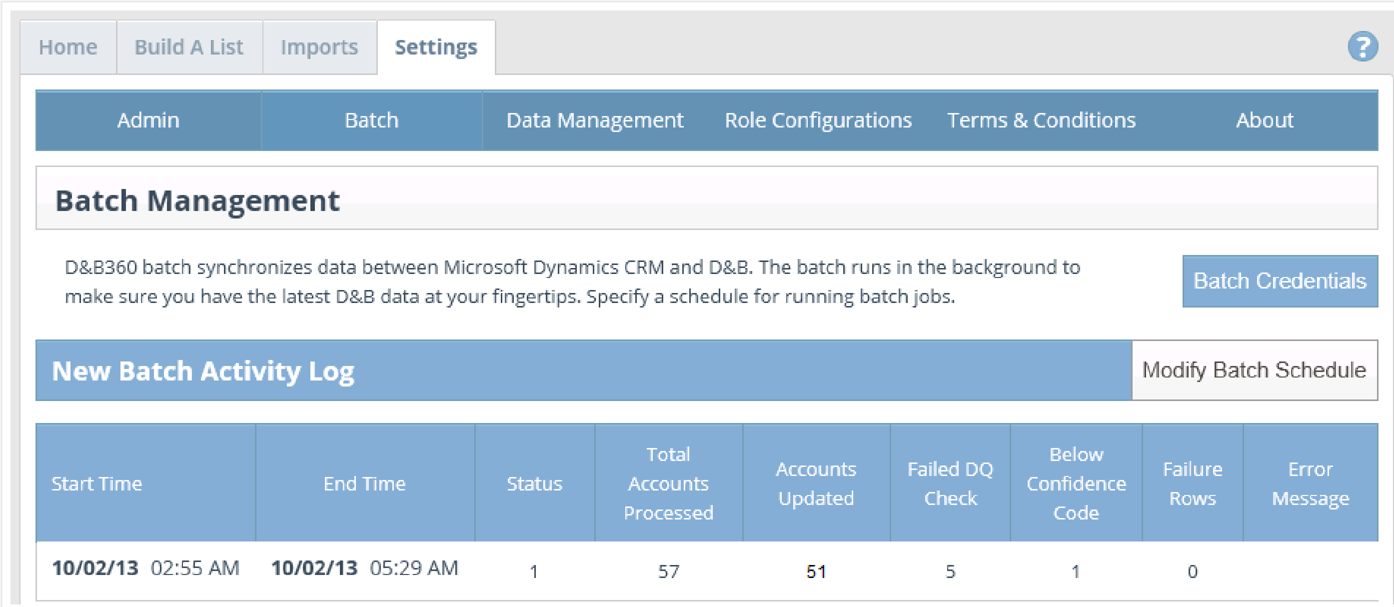
4. Follow the instructions in the previous section for setting the **Start Time**, **Repeat Frequency**, and **Repeat Options**.

> **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.

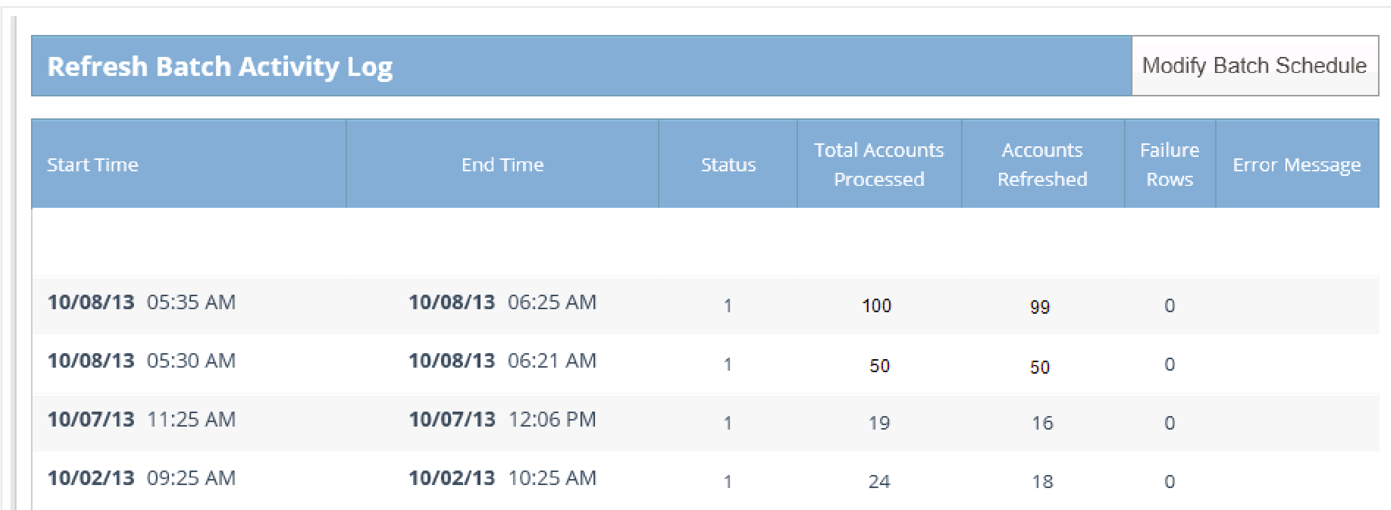
5. Click **Save**.

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.



Start Time	End Time	Status	Total Accounts Processed	Accounts Updated	Failed DQ Check	Below Confidence Code	Failure Rows	Error Message
10/02/13 02:55 AM	**10/02/13** 05:29 AM	1	57	51	5	1	0	



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	

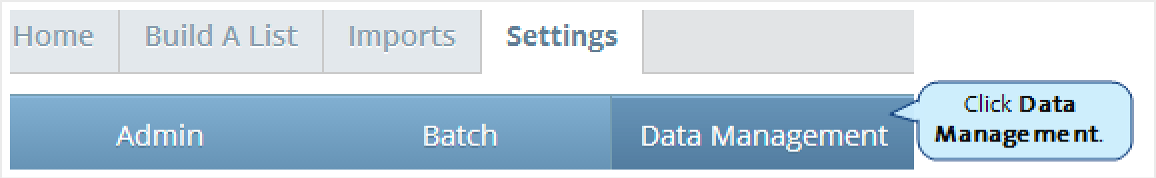
7 Reviewing Logs, Admin Review Lists, and D&B360 Reports

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.

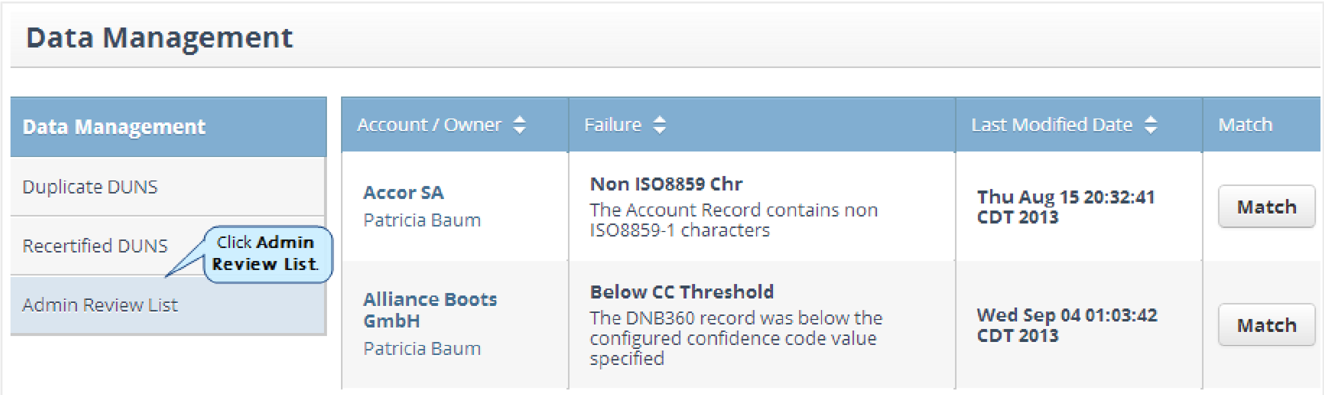
Accessing the Admin Review List

Accessing the Administrator Review List

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



2. On the **Data Management** window, click **Admin Review** List.



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

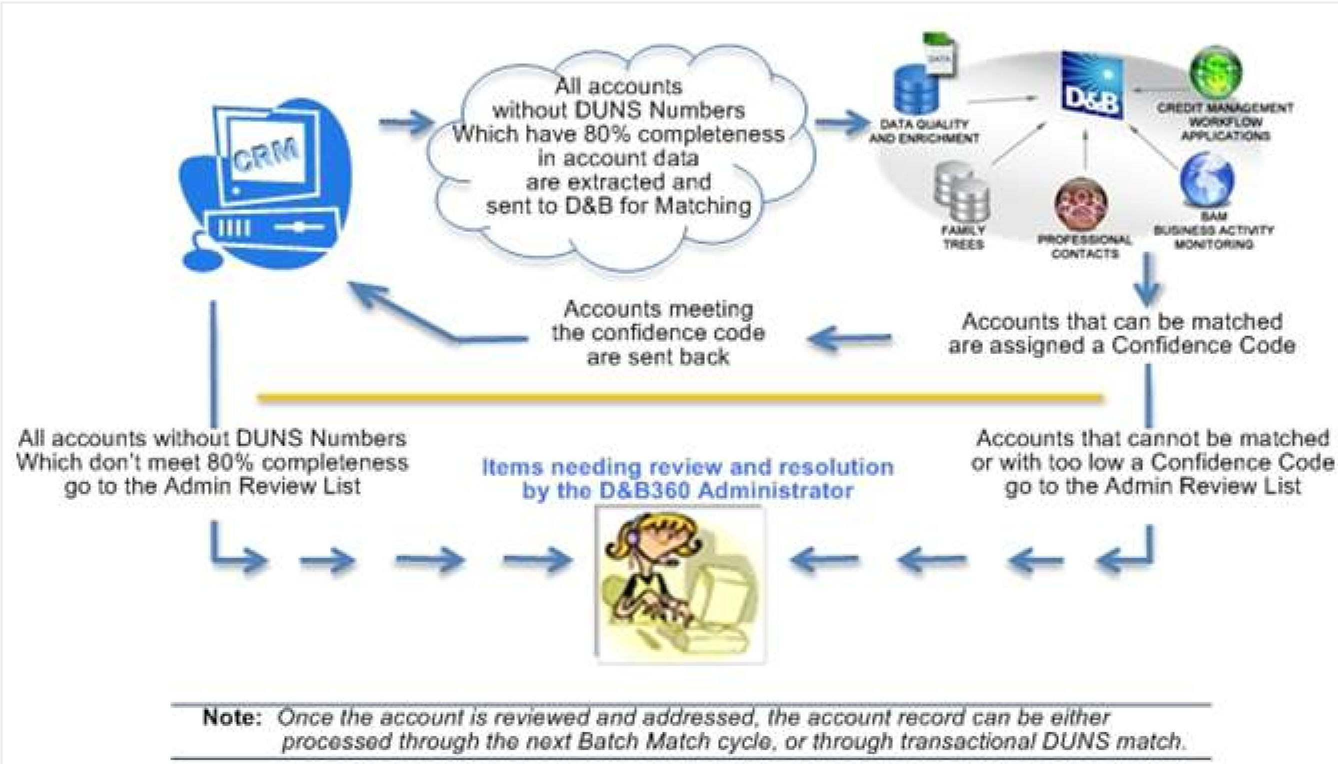
For more information, see "Viewing Batch Activity Logs" on page 6-4.

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.

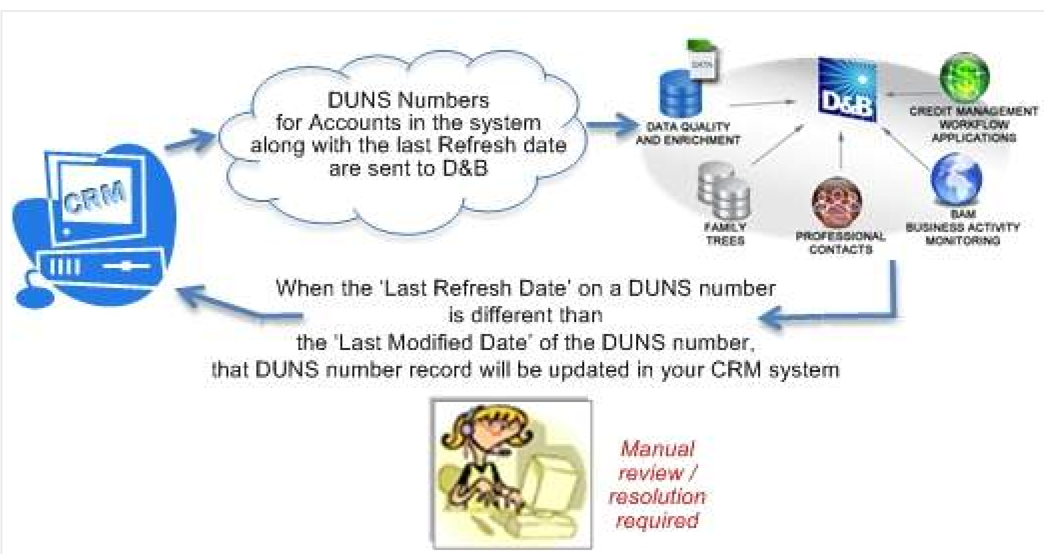
When the information is returned from D&B, most of the accounts will have been matched with D-U-N-S Numbers. Some accounts will be sent to the Admin Review List for one of the following reasons:

- 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.



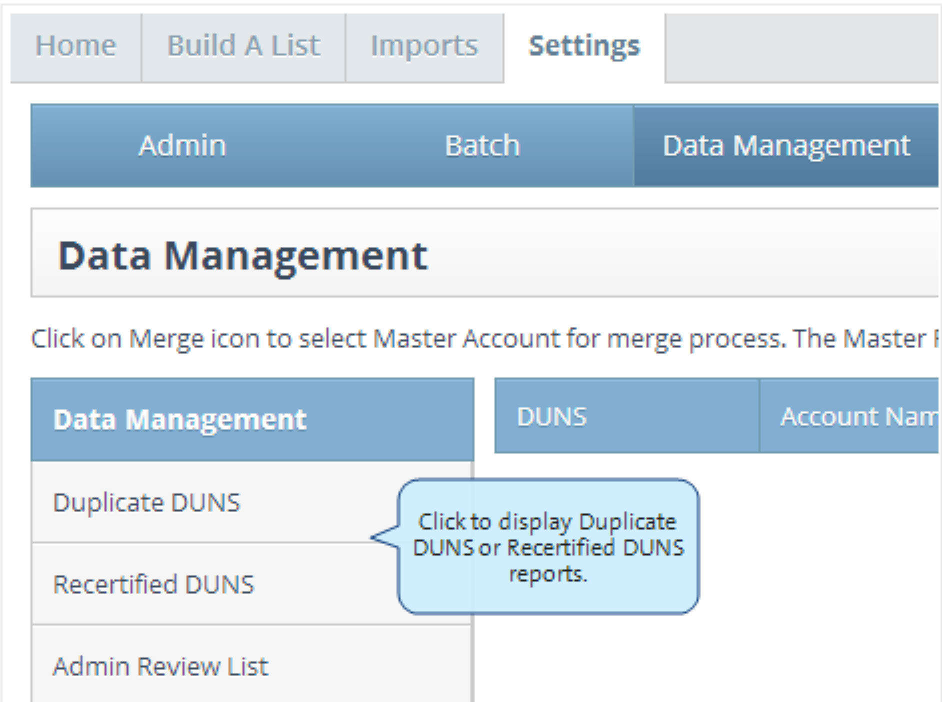
Refresh batch results can also produce items that you must manually review and resolve. For example, you need to change or accept the modified data.



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



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:

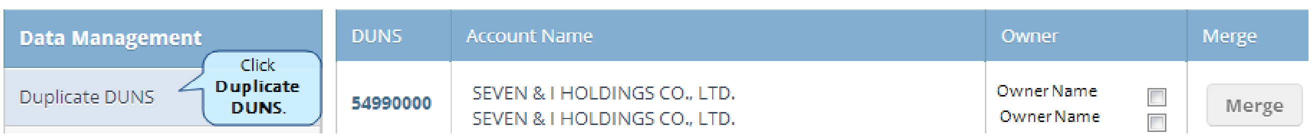
- Decide which one is the master – that is, which one should be the primary selection.
- Select an account with information you want to merge into the master.

> **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.

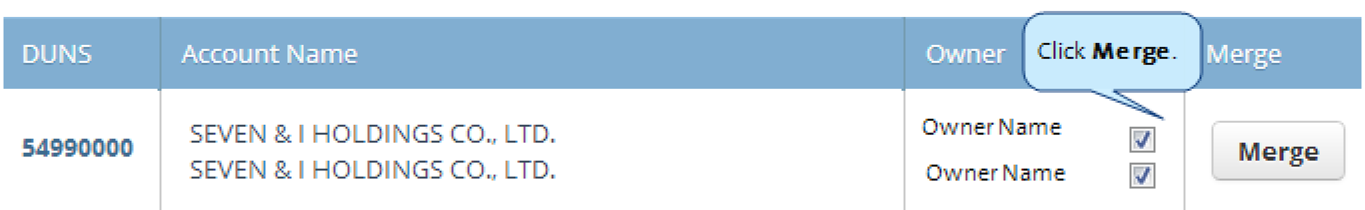
Using the Duplicate DUNS Report to Merge Duplicate Accounts

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

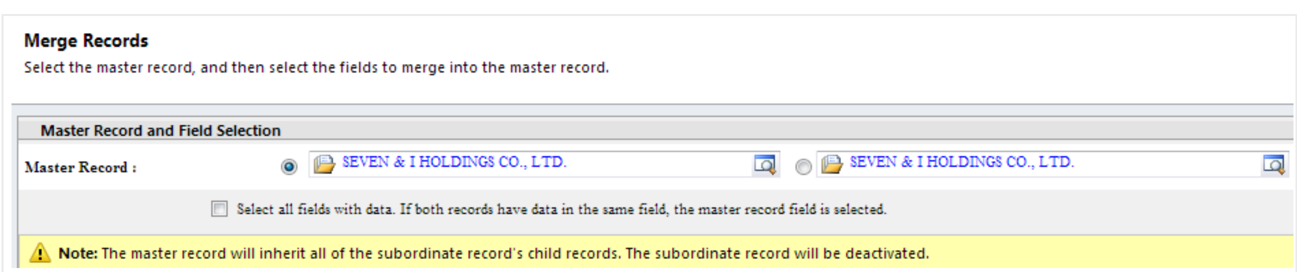
1. Click **Settings**, and then click **Data Management**.
2. In the **Data Management** window, click **Duplicate DUNS**.



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

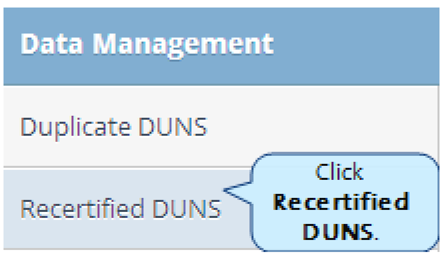


(!) Important Note: After accounts are merged, all contacts, opportunities, attachments, notes, and so forth from the subordinate account are moved to the master account record. It is recommended that you carefully evaluated the fields in the Merge Records window before merging the accounts.

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.

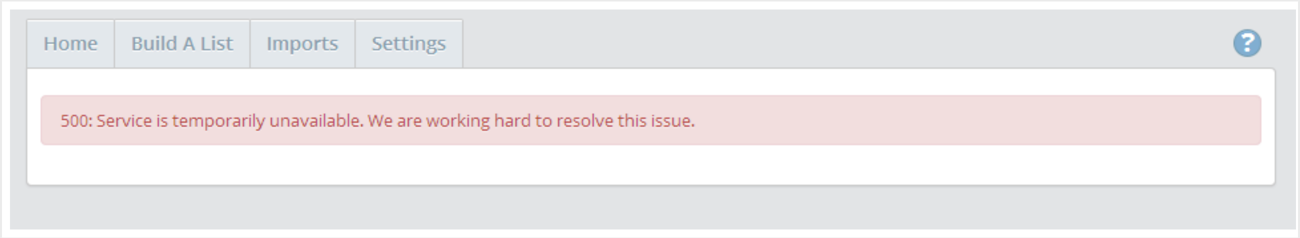


8 Troubleshooting

Resolving Installation Issues

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."

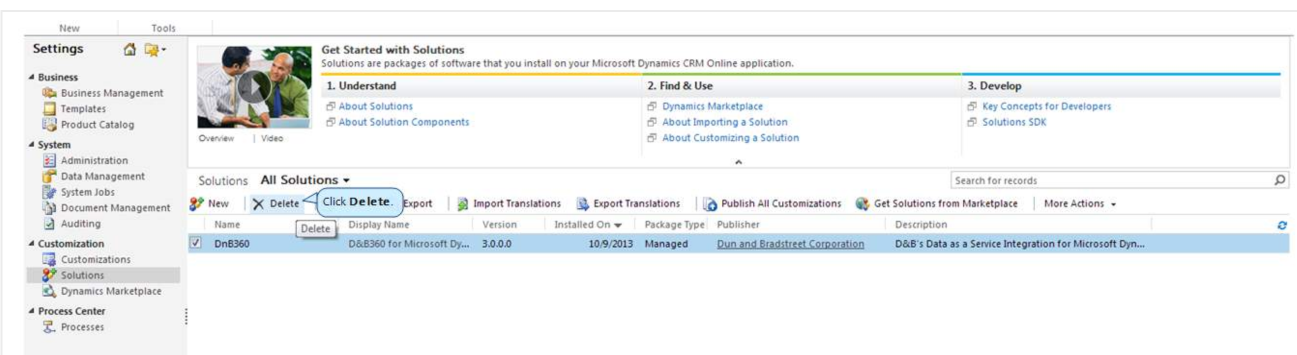
Description: If you have created or modified any forms or reports in the CRM to include D&B Data fields and you attempt to uninstall D&B360, this error message will display. The CRM detects and enforces this dependency before you run an uninstall to ensure that forms and reports that use D&B fields will 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.

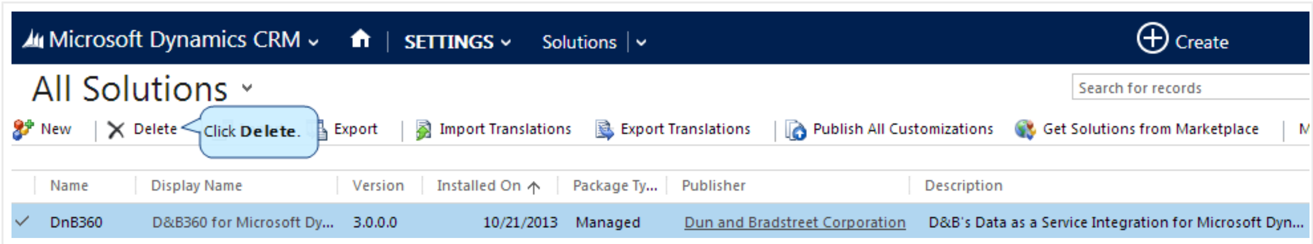
Steps to Find the Dependencies:

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**.

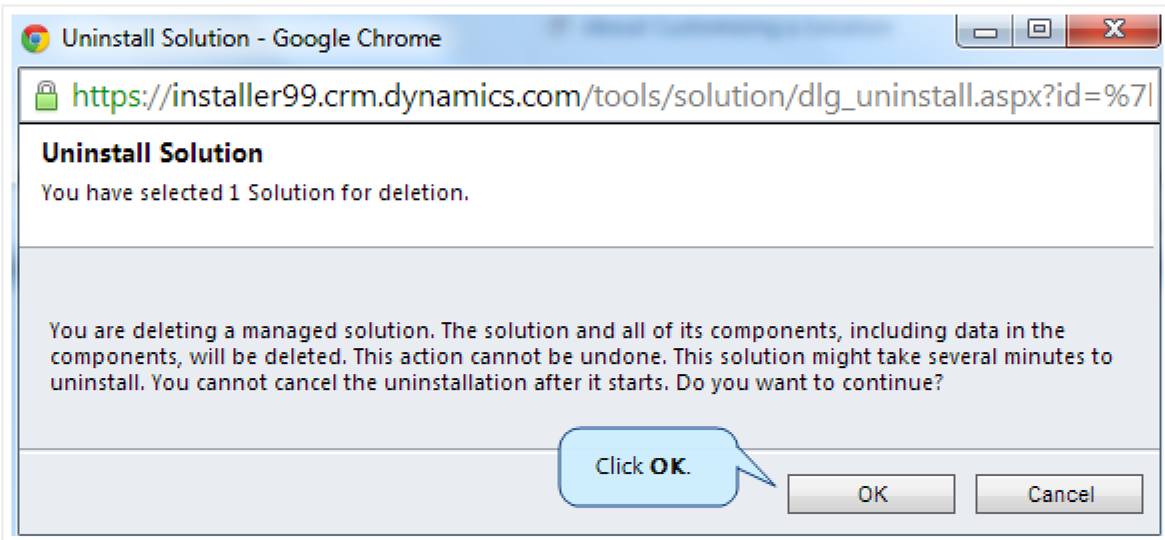
   In Microsoft Dynamics CRM 2011:



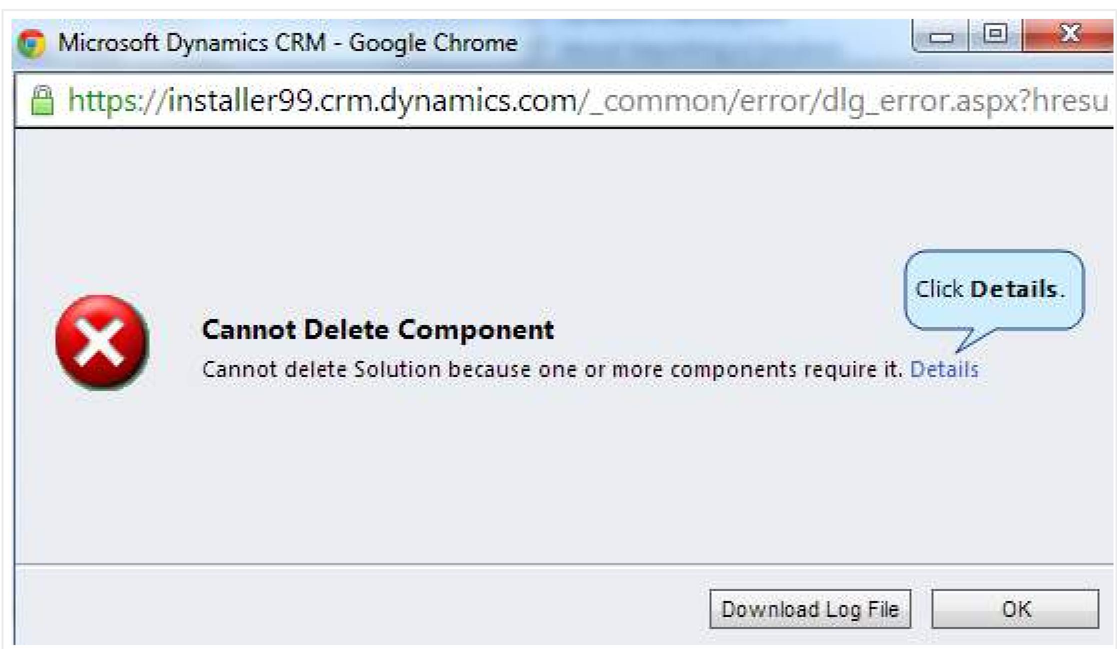
   In Microsoft Dynamics CRM 2013:



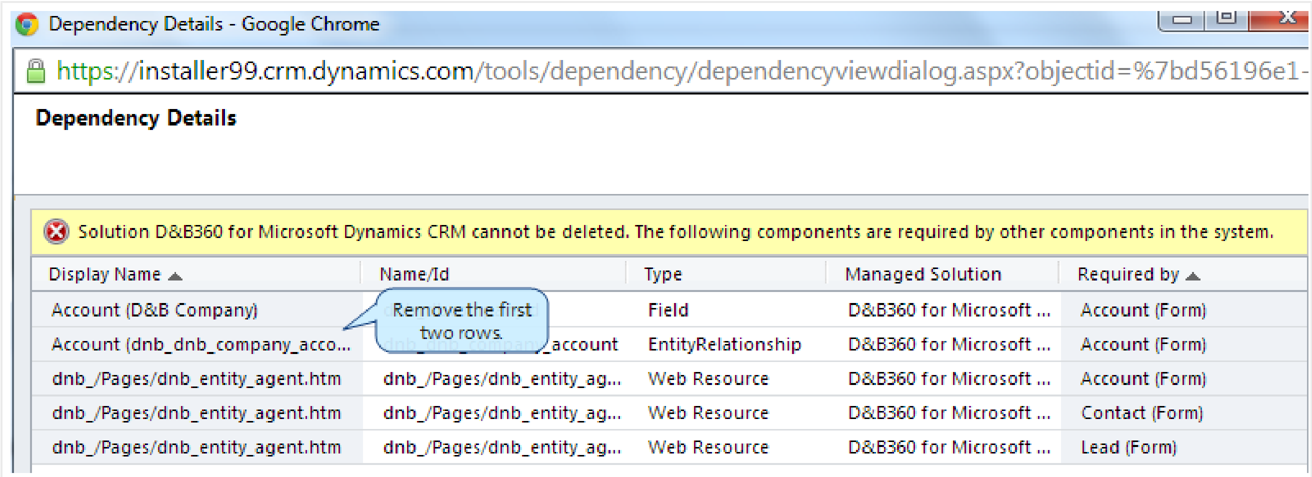
4. In the **Uninstall Solution** window, click **OK**.



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



6. In the **Dependency Details** window, follow the process for removing customizations and remove the first two rows: Account (D&B Company) and Account (dnb_dnb_company_account....).



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

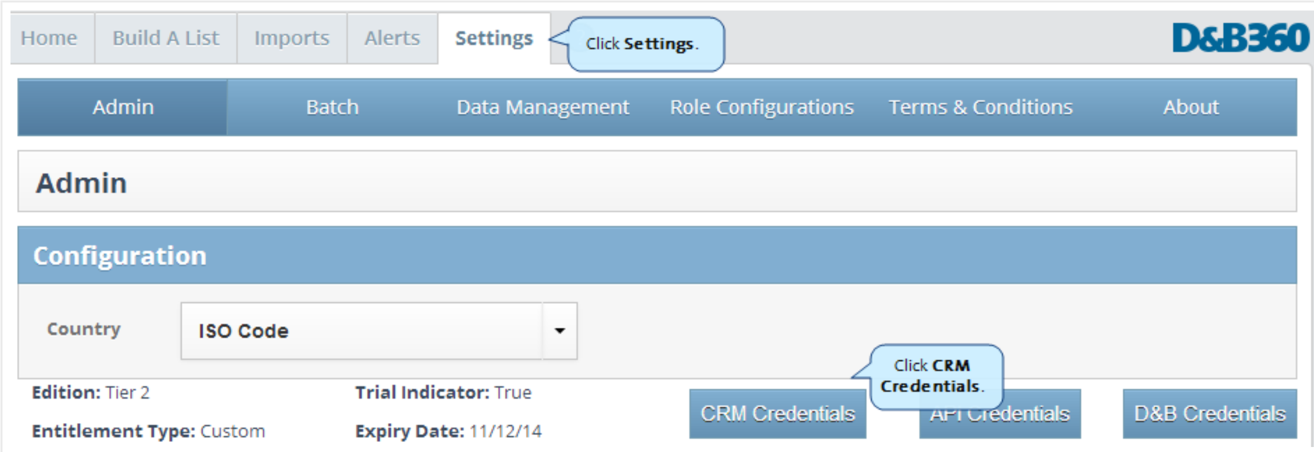
Changing Administrator-User Names and Passwords

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.

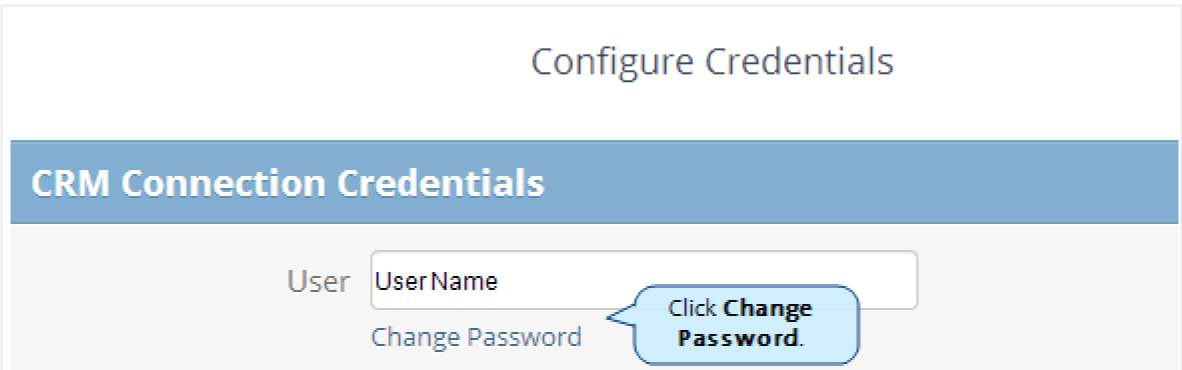
If you anticipate that any of these three sets of credentials will change, we recommend that you update them on D&B360 before you update them globally. In general, it is usually only the CRM password that will change. Before you complete these steps, make sure you know the administrator user name and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



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



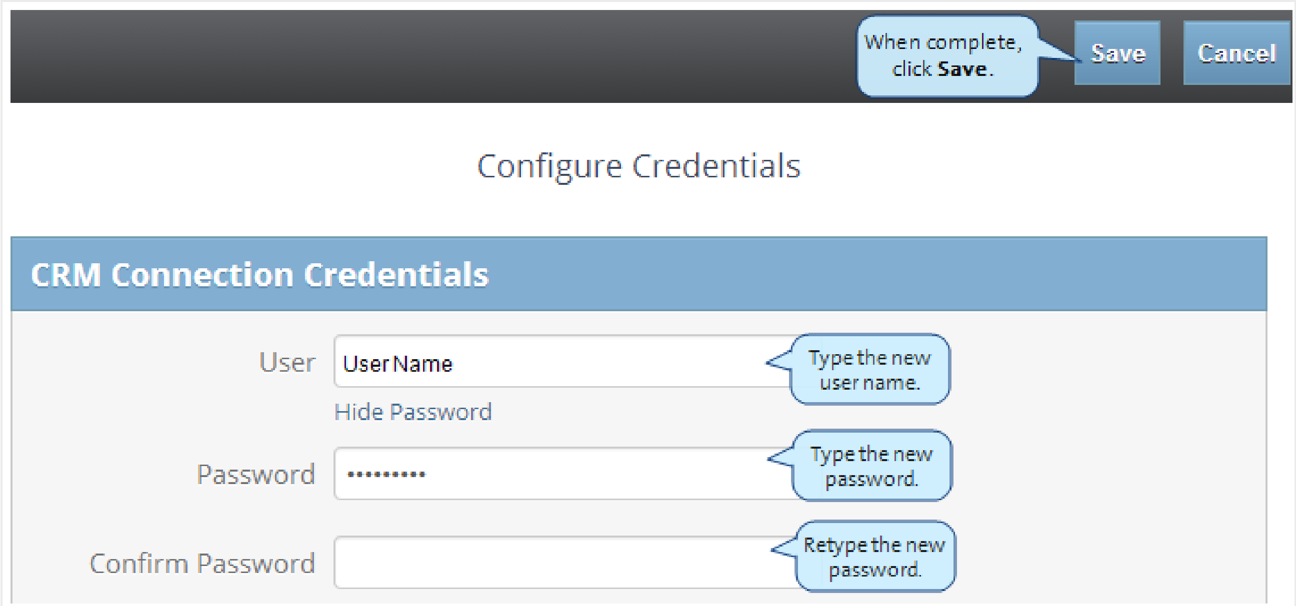
4. In the next **Configure Credentials** window that opens:

   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**.



Note: For D&B360 to run, 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 D&B360 Customer Support.

Encryption Standards

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

Contacting D&B Customer Support

Dun and Bradstreet is committed to a high level of customer satisfaction. An efficient support process is combined with a communication service level agreement to give our customers quality support.

The communication SLA (Service Level Agreement) is as follows:

Initial Response	The maximum timeframe for initial response for all inbound issues is 4 hours.
Ongoing Communication	SLA Determined with the customer. Based on mutual agreement of the severity of the issue.

The communication SLA is based on normal business hours, which are considered to be:

- 8 A.M. – 6 P.M. local time, Monday through Friday
- Excluding D&B holidays

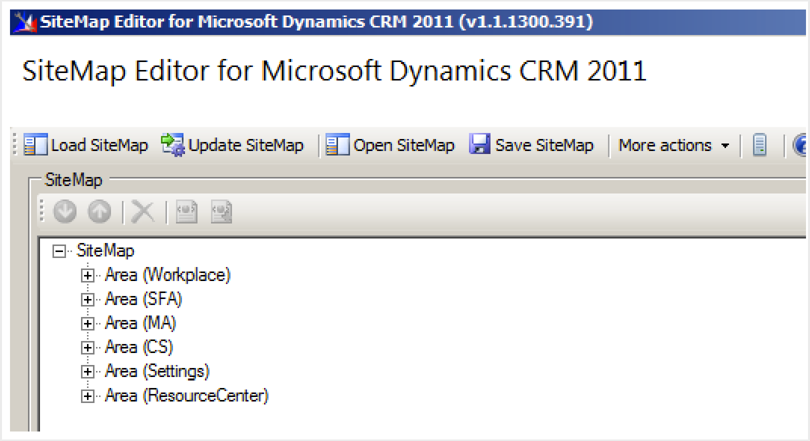
To submit a ticket, go to this URL: http://dnbus.force.com/support?prod=dnb360. You will be prompted to enter your e-mail address and then fill out a form.

A Appendix

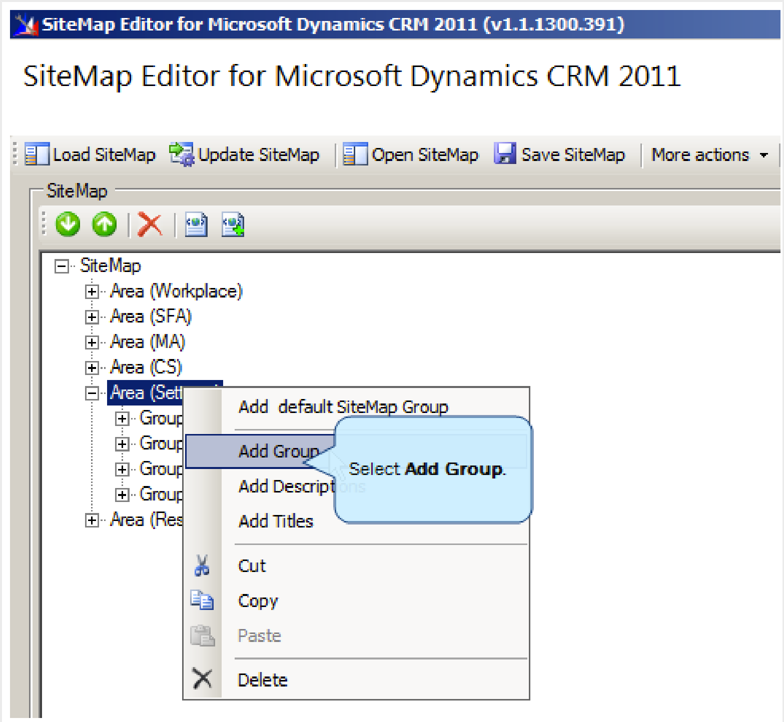
Enabling D&B360 Administration on a Customized SiteMap

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

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



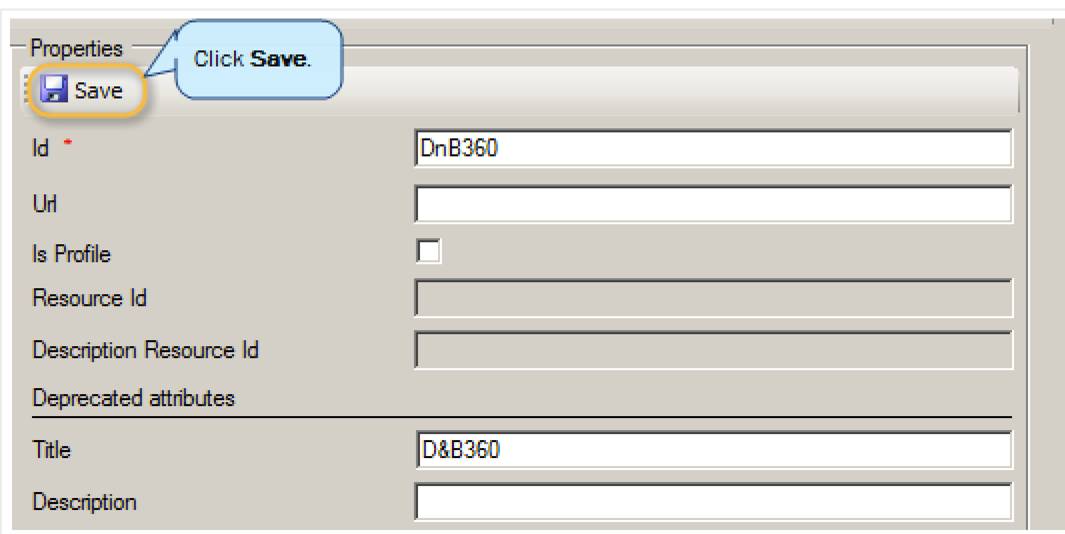
2. In the **SiteMap** window, right-click **Area (Settings)** and select **Add Group**.



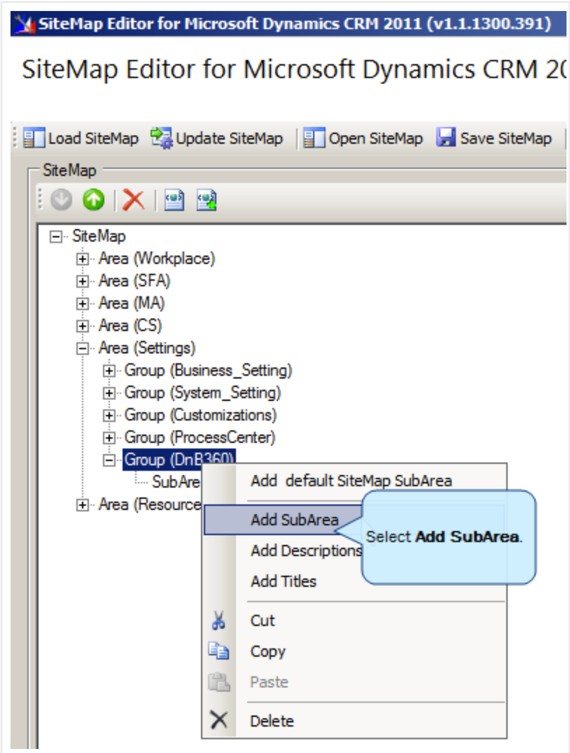
3. In the **Properties** window:

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

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



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



5. In the **Properties** window:

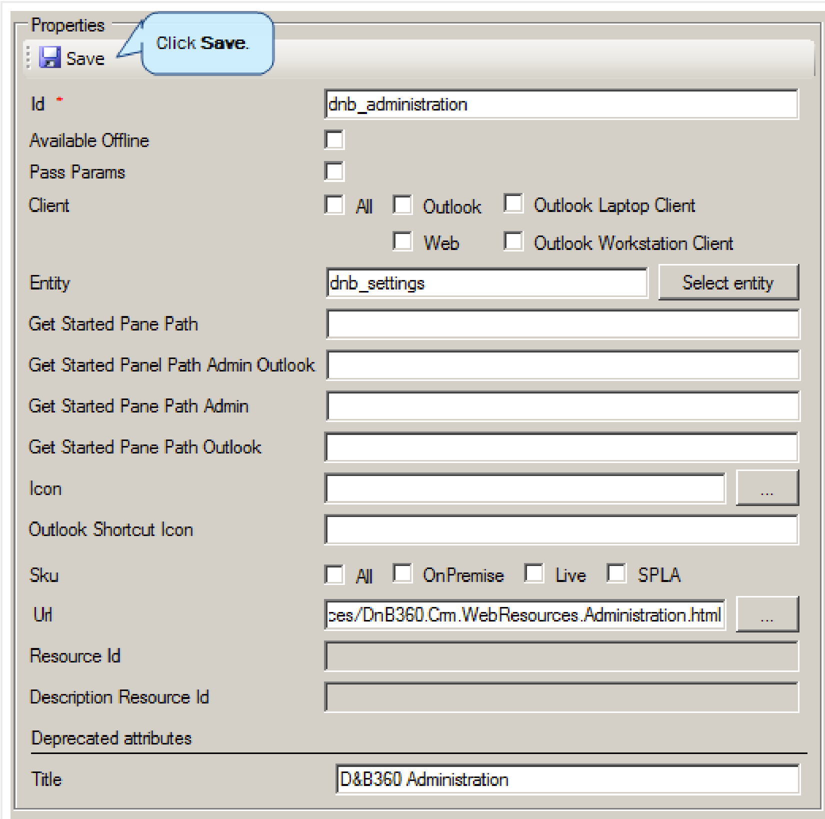
   a. In the **Id** field, type **dnb_administration**.

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

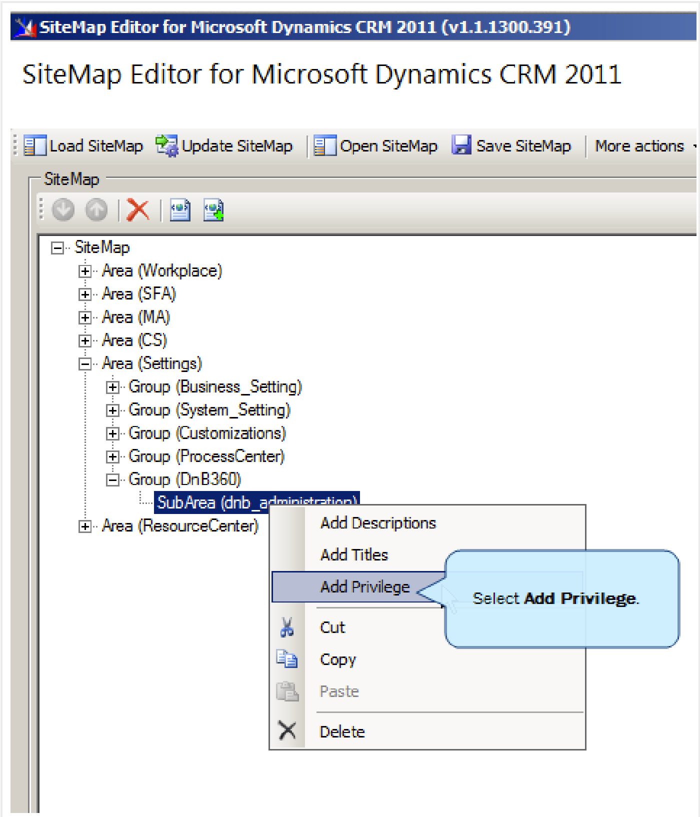
   c. In the **Url** field, enter:
   $webresource:dnb_/WebResources/DnB360.Crm.WebResources.Administration.html

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

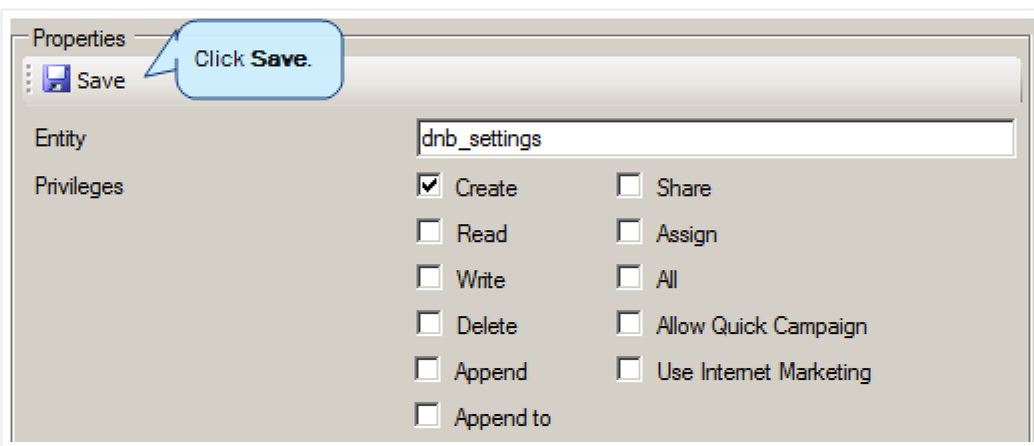
e. Click **Save**.


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

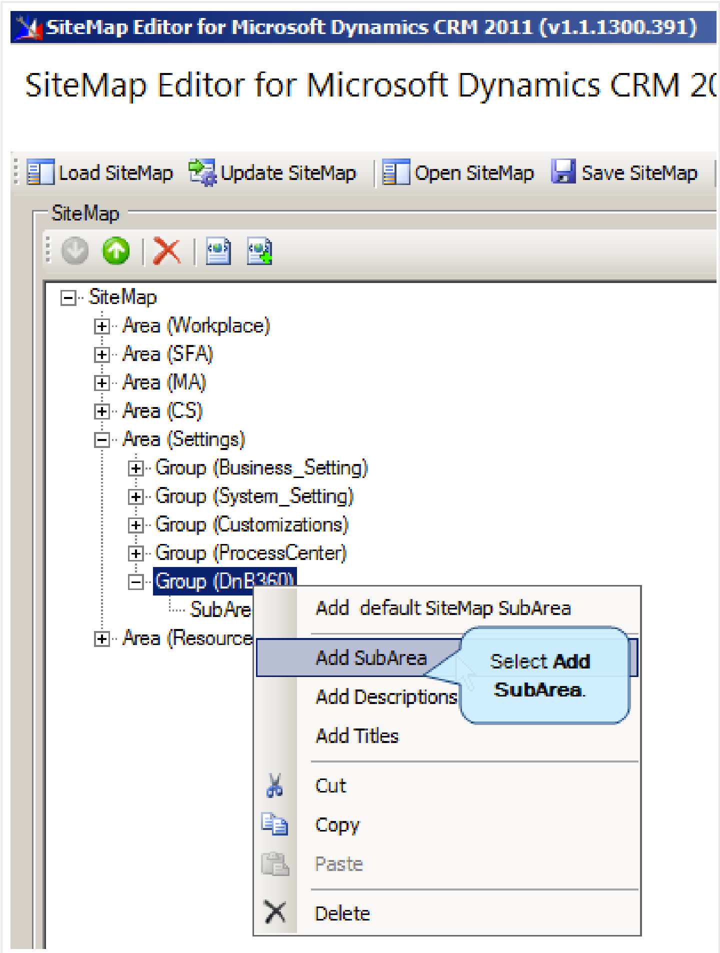
6. In the **Site Map Editor** window, right-click **SubArea (dnb_administration)** and select **Add Privilege**.



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



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



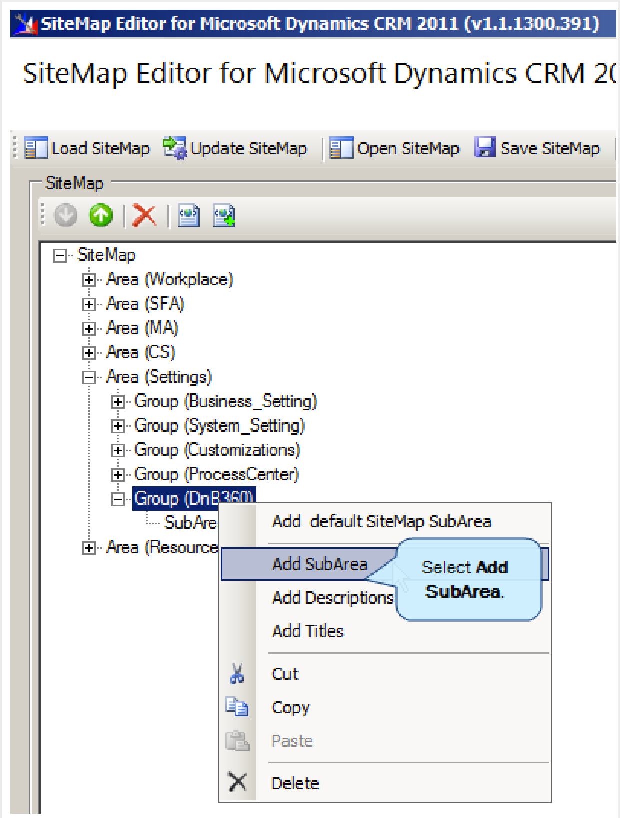
9. In the **Properties** window:

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

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

   c. Click **Save**.

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

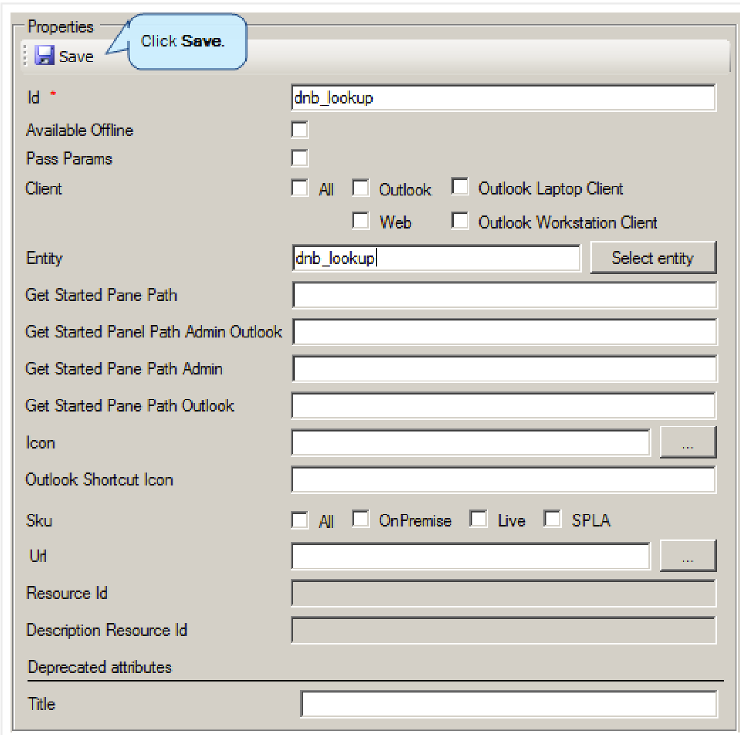


11. In the **Properties** window:

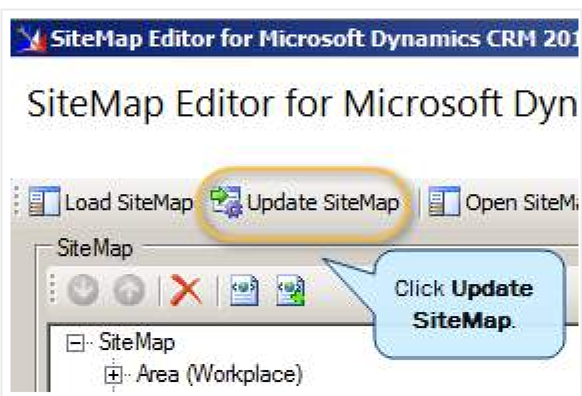
    a. In the **Id** field, type **dnb_lookup**.

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

    c. Click **Save**.



12. Click **Update SiteMap**.



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

Processing Batches — Standard Level Expectation

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

Domestic Batches – 12 hour turnaround

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

Global Batches – 24 to 48 hour turnaround

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

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

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

Adding One or More CRMs to Your Informatica Cloud Account

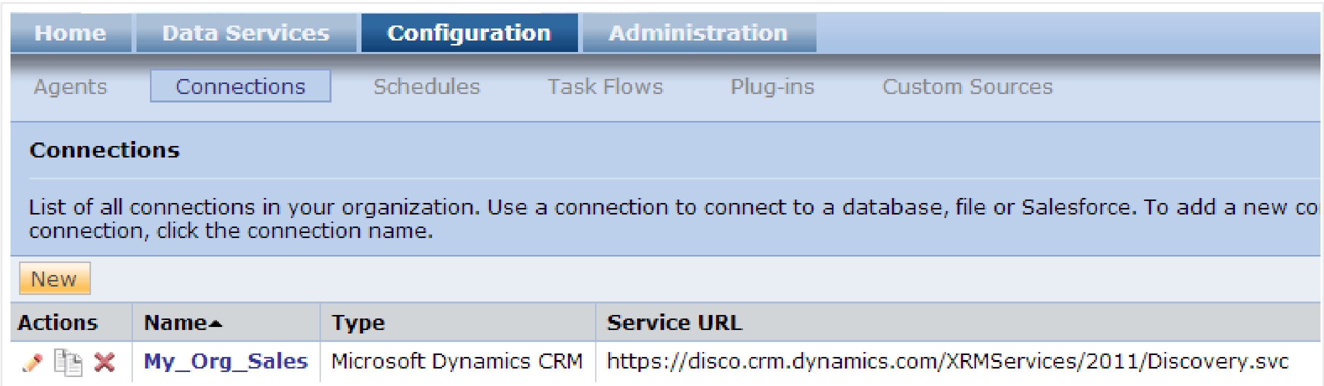
If your organization has multiple CRMs that will use the batch process, each CRM must have its own connection in your Informatica Cloud account. To do this, make sure that your Informatica Cloud account was created using your Max CV user name as the organization name. After you have created your Informatica Cloud account and connected to your first CRM, you need to create a connection on the Informatica Cloud for the any other CRMs that you want to include.

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

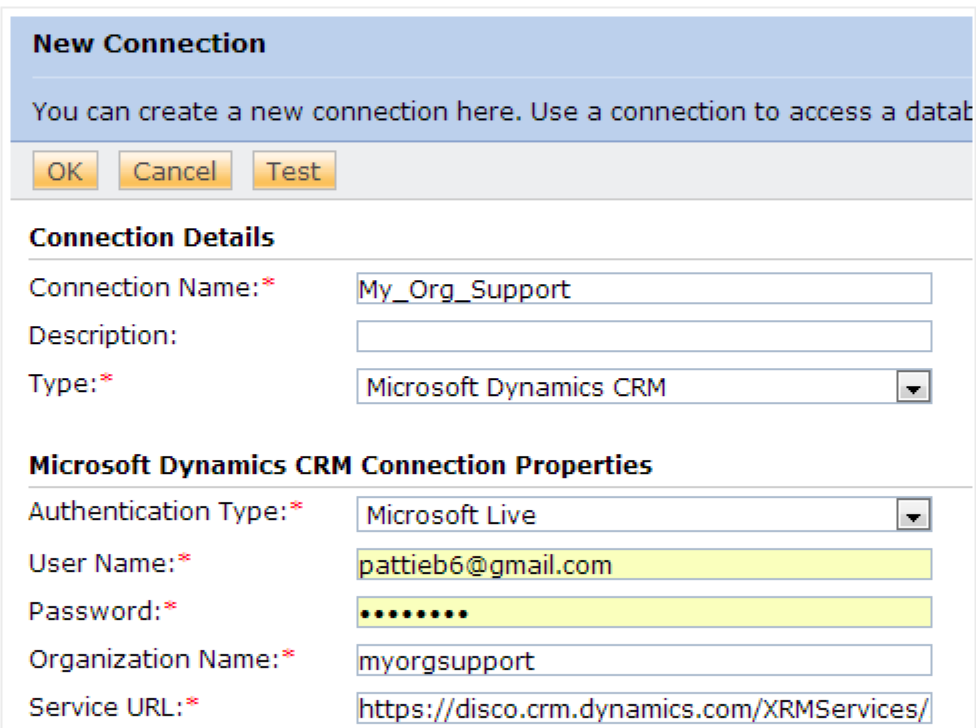
For each CRM ORG, perform the steps in *Registering Your Informatica Cloud Account for On Demand CRMs* starting with step 8. Be sure to name the CRM connection in a way that distinguishes the connections.

See the following examples:

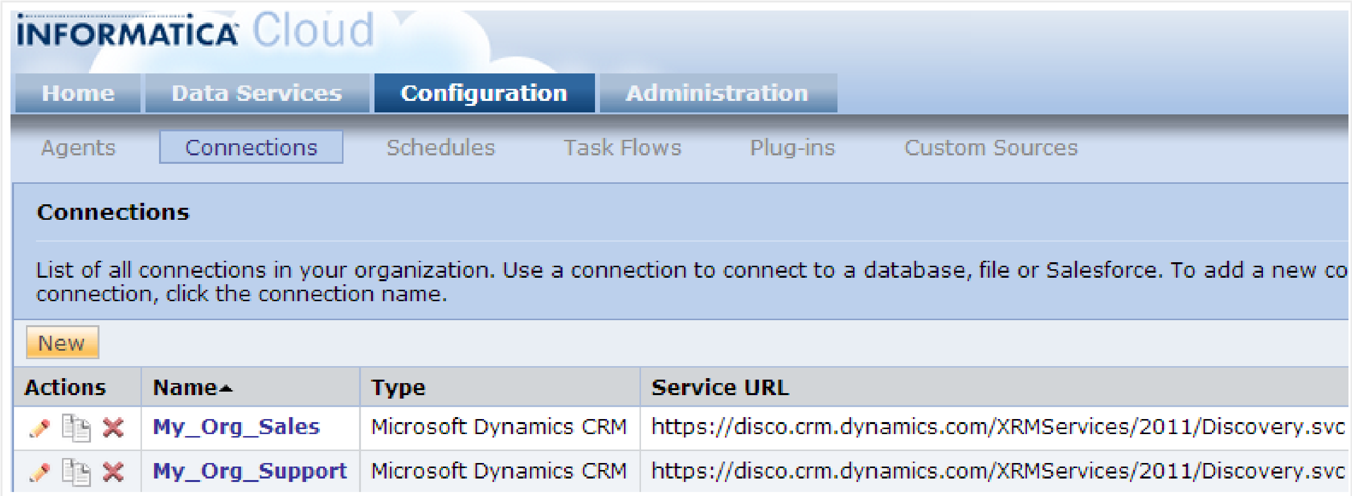
In the Connections window, the first example CRM displays in the Name column.



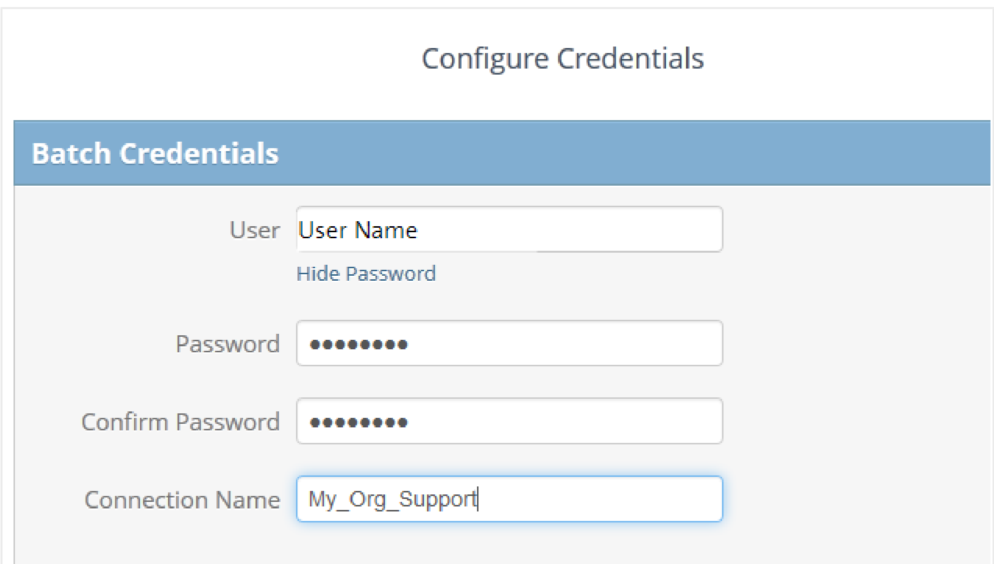
In the New Connection window, we add a second connection.



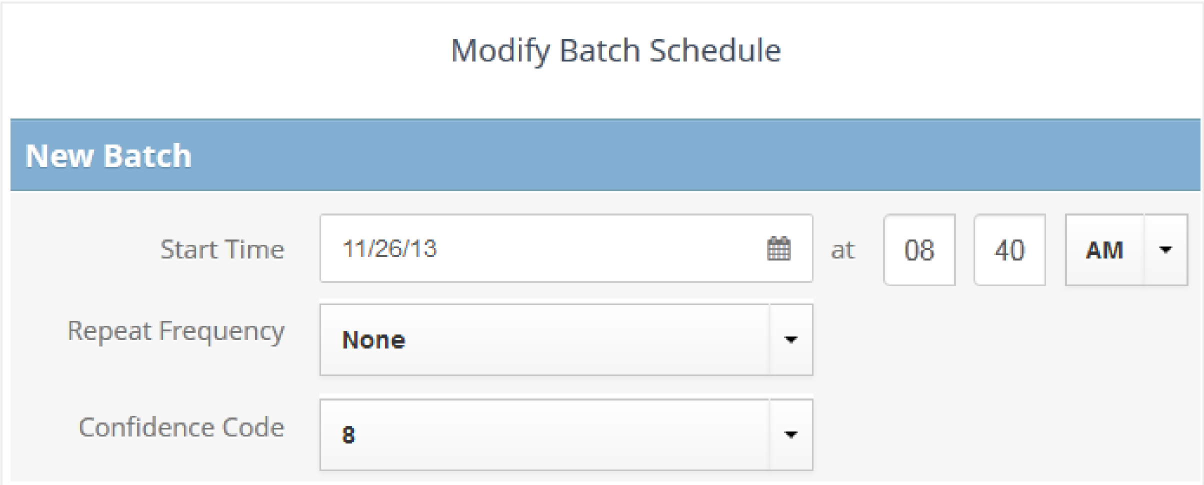
Now the Connections window displays these two organization names.



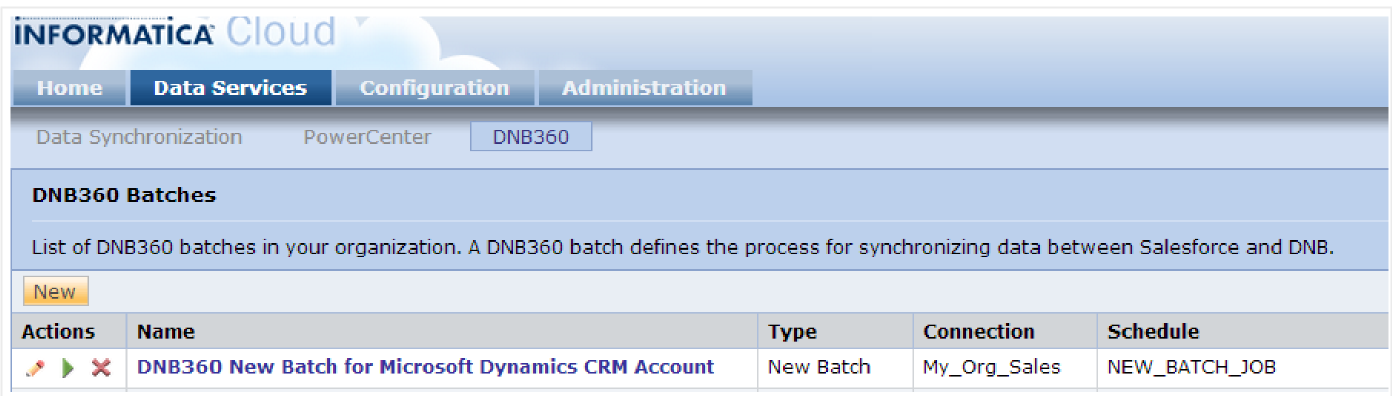
In the Configure Credentials window, Batch Credentials area, we enter the User Name and Password for our Informatica Cloud account, which we set up in [Registering Your Informatica Cloud Account for On Demand CRMs](#) starting with [step 8.](#) These instructions are in the section for an On Demand CRM,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



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



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

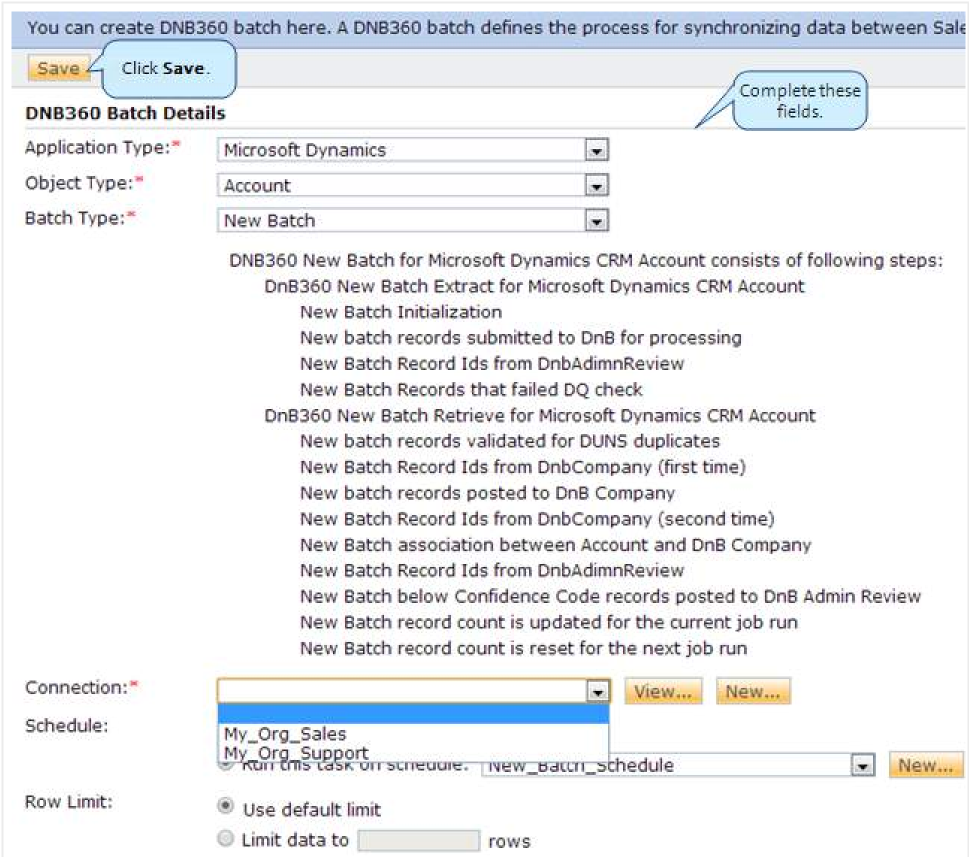


Submitting a New or Refresh Batch Job

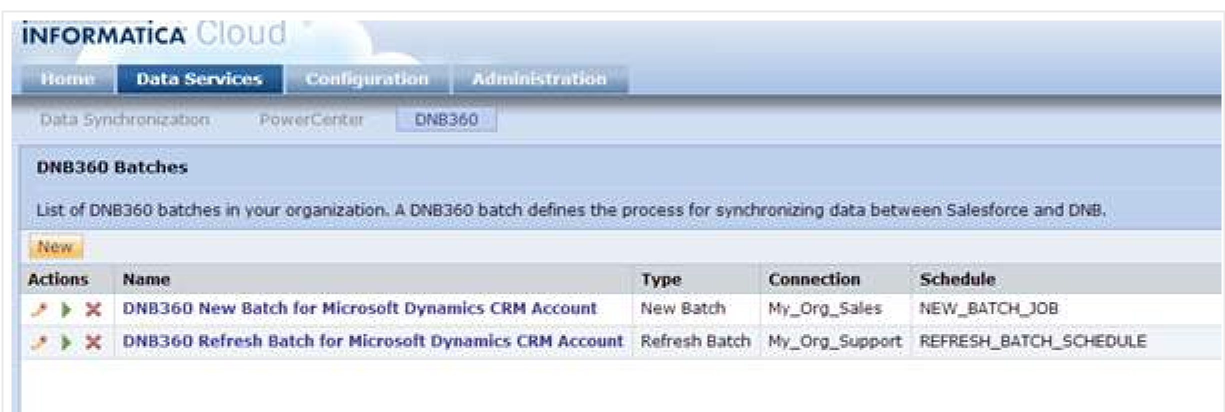
When you are ready to submit a new or refresh batch job, you must modify the connection on the Informatica Cloud. To do this, you need to edit the batch task on the Informatica Cloud to use the connection to the CRM organization where you want to run batch.

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**.



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.

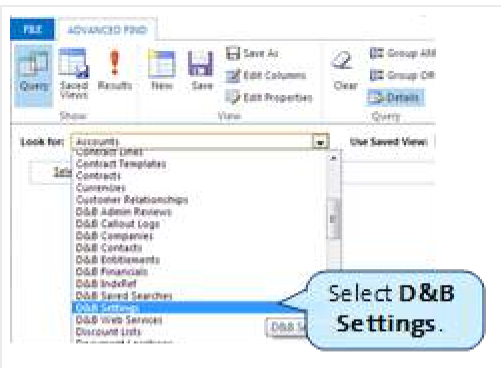


Configuring CRM Endpoints

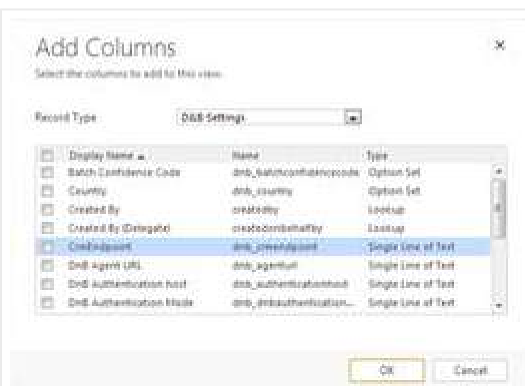
If your configuration includes a proxy service, you will need to configure a CRM endpoint to use the external URL in order to establish communication between the agent and D&B360.

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

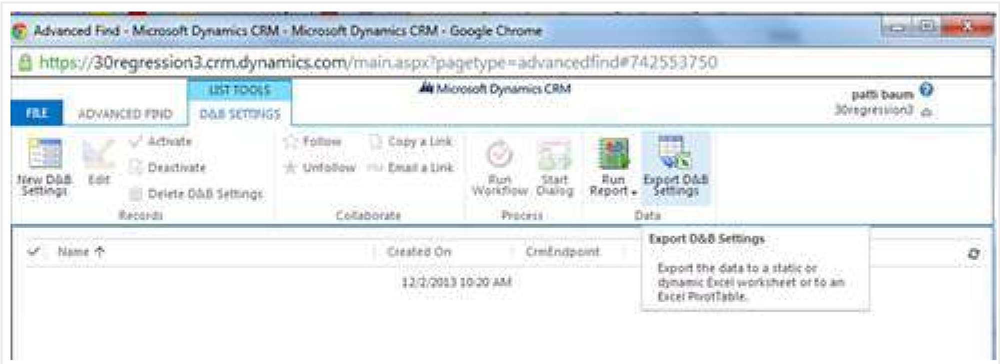
2. In the **Look for** menu, select **D&B Settings**.



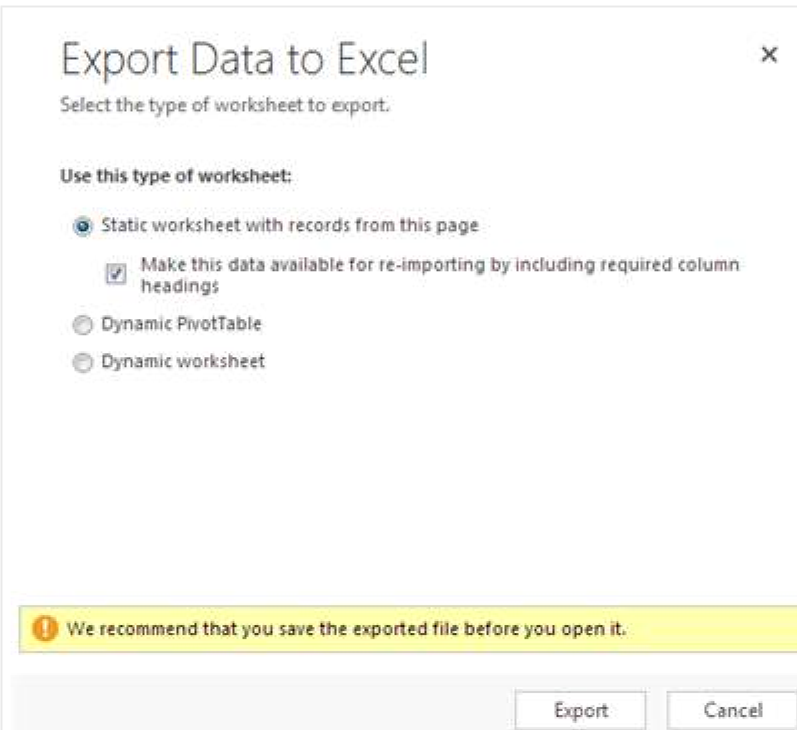
3. In the **D&B Settings** window, select **Edit Columns**, and then click **Add Columns**.
4. In the **Add Columns** window, select **CrmEndpoint**, and then click **OK** twice to close the window.



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



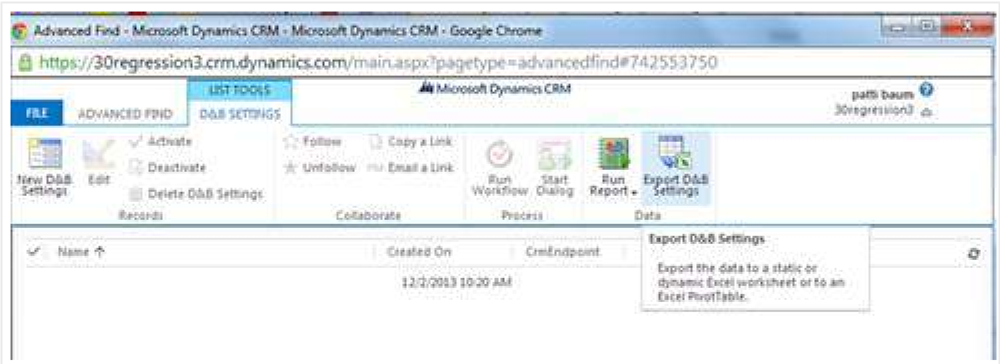
7. In the **Export Data to Excel** window, **Use this type of Worksheet** area, select **Make this data available for re-importing ...**, and then click **Export**.



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

8. When the .csv file opens in Excel, edit the file to include the URL needed for access and save the Excel file.

9. Return to the **Advanced** window and select **File**, then **Tools**, then **Import Data**.

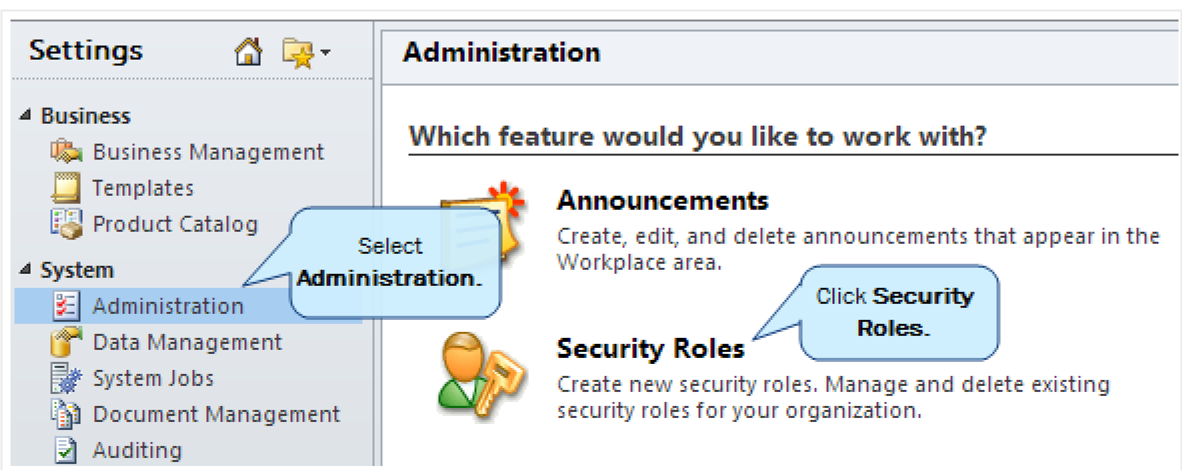


10. Search for and enter the file that you just edited, and then click **Next**.
11. Click **Finish**.
12. Wait a few minutes and then click on Results again to run the query.

When processed, input will display below the column CrmEndpoint.

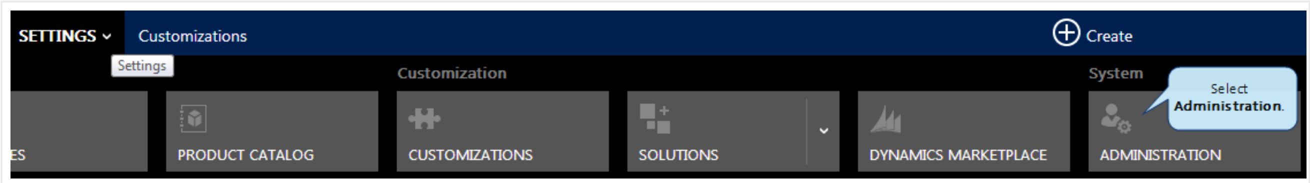
Viewing Available D&B360 Roles

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

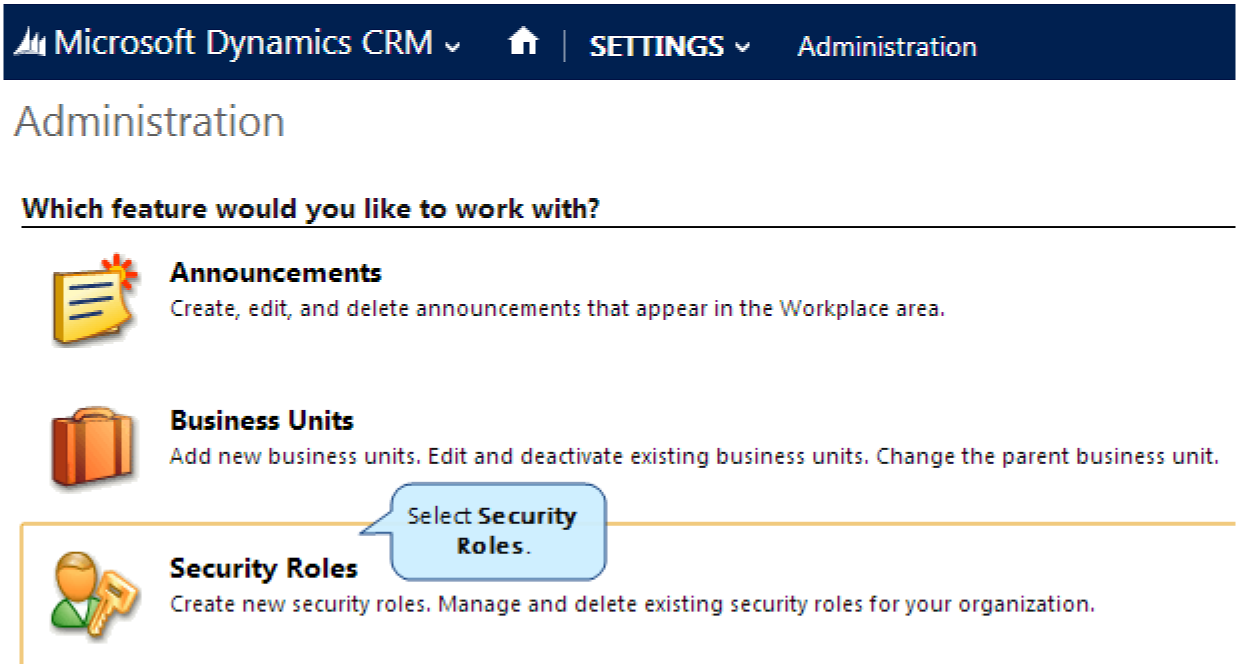


– or –

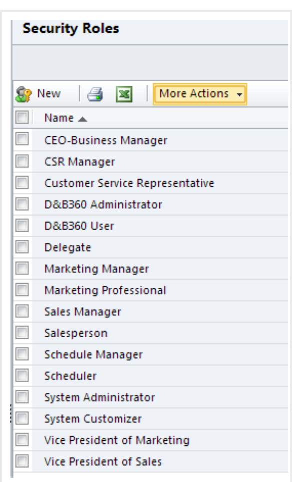
3. On the CRM 2013 window, **Settings** menu, **System** menu, select **Administration**.



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



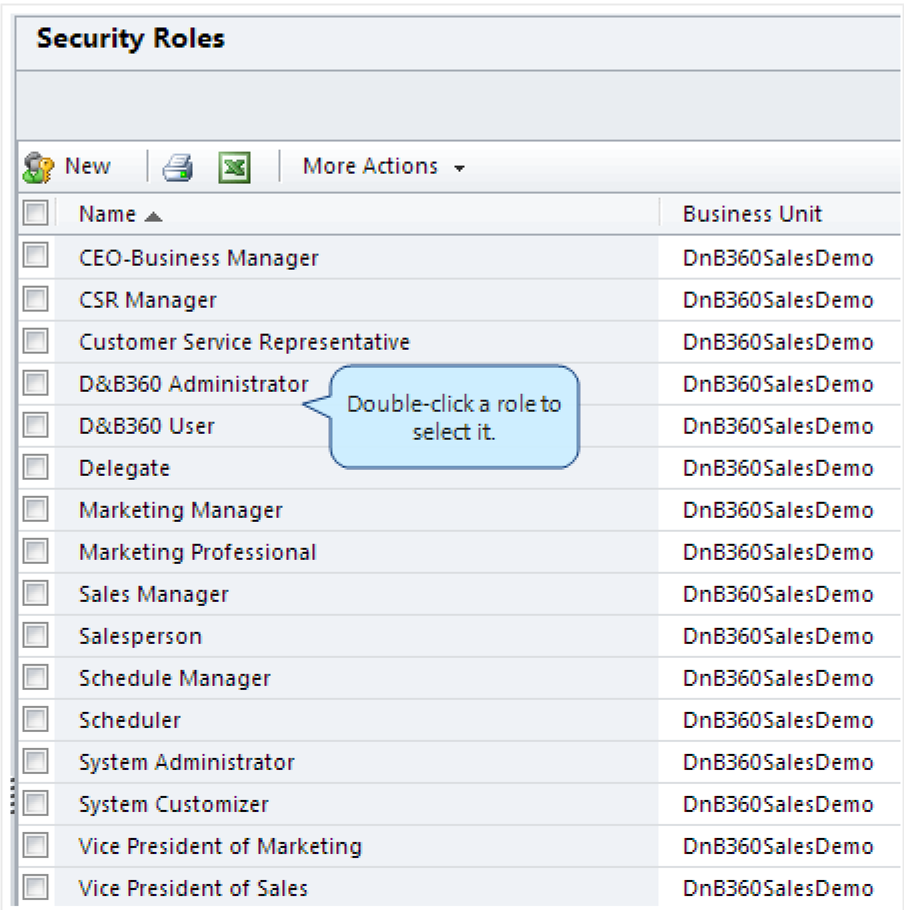
The **Security Roles** list displays the available roles.



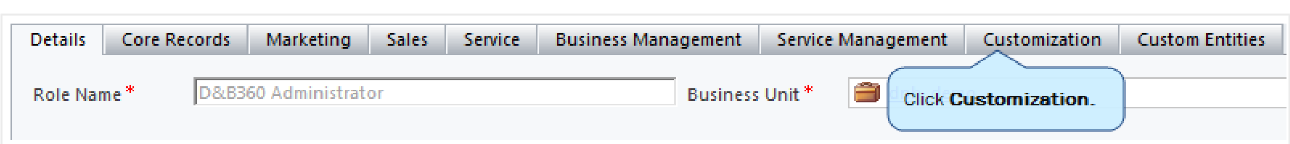
To view which tasks are permitted for the components of each role, complete the steps that follow. You can select from these tasks, which are permitted for a variety of components:

Create	Read	Write	Delete
Append	Append To	Assign	Share

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



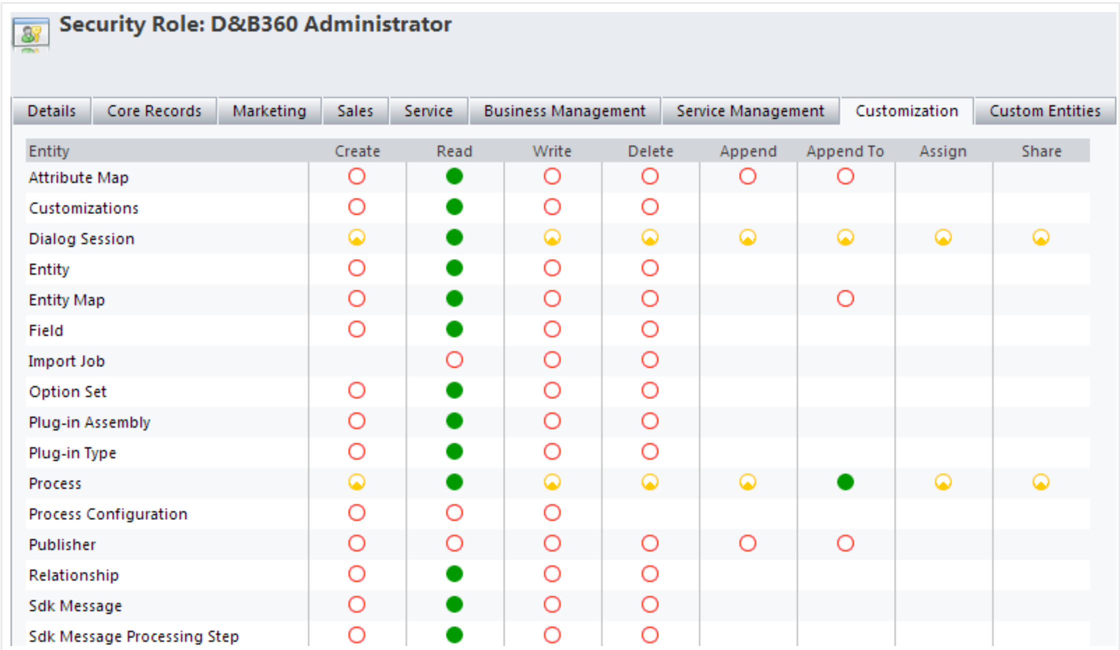
2. In the **Security Role: D&B360 Administrator** window, click **Customization** to display permissions associated with this role.



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

D&B360 Administrator Permissions

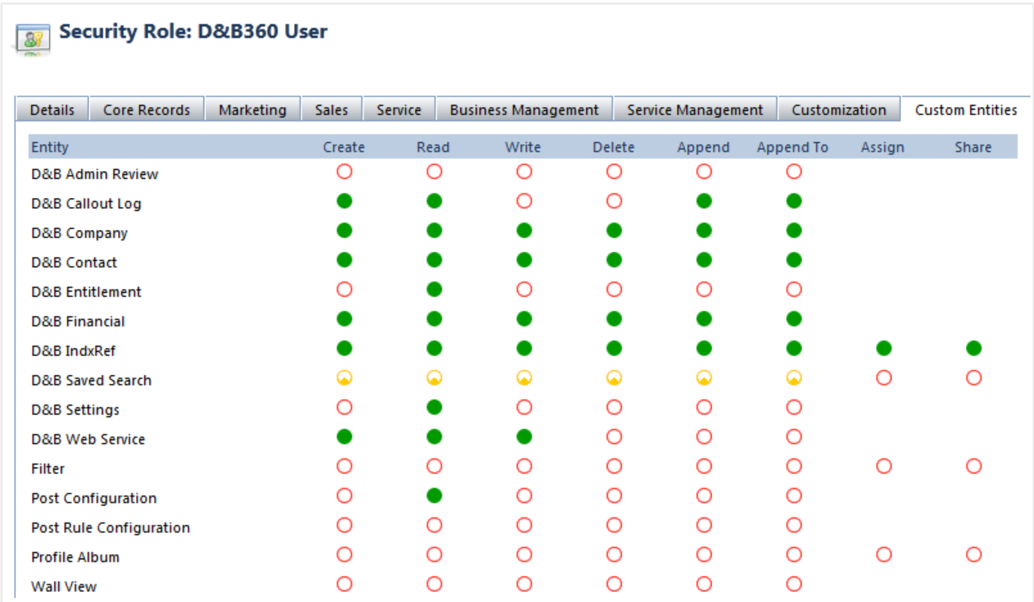
In the **Security Role: D&B360 Administrator** window, **Customization** tab, administrator permissions are indicated by green (user type) circles.



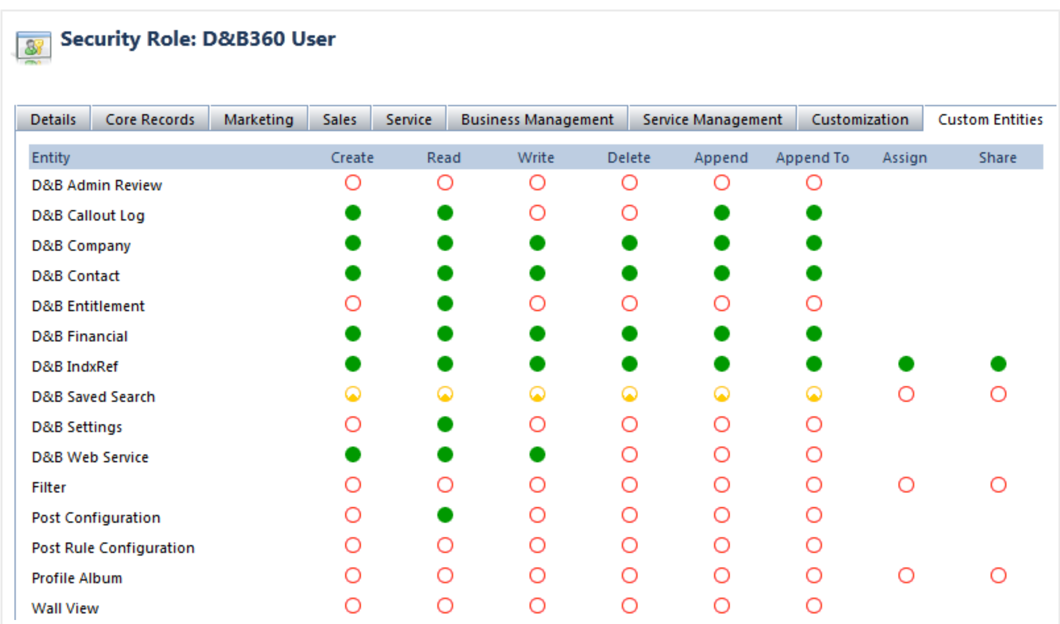
In the **Security Role: D&B Administrator** window, **Custom Entries** tab, administrator permissions are also indicated by green (user type) circles.

D&B360 User Permissions

For On-Premise CRMs:



For On-Demand CRMs:



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Dun & Bradstreet (D&B)
103 JFK Parkway
Short Hills, NJ 07078

www.dnb.com