

D&B Optimizer for Salesforce

Installation, Configuration, and User Guide

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I. Introduction

A. Product Overview

The D&B Optimizer for Salesforce is a native Salesforce.com application that ensures the data powering your Salesforce environment is clean, complete, and actionable. The application helps you automatically update and enrich the Lead and Account data, optimize the productivity of your operations teams, and increase the success of your sales and marketing programs powered by the Dun & Bradstreet Data Cloud. With D&B Optimizer, you can:

- Resolve the Identity of Your Business Entities: Match Account and Lead records to the Data Cloud of 300+ million records from 30,000 sources in 190 countries, updated 5 million times a day.
- Enrich Account & Lead Data: Direct access to over 80+ fields of core business data and insights from Dun & Bradstreet (D&B), including firmographic intelligence and hierarchical relationships.
- Ensure Continuous Data Hygiene: As updates occur in the Data Cloud, they are made available in your Salesforce instance automatically every 15 days, or anytime on-demand.
- Visualize and Analyze Your Data: View match results to understand data health, identify duplicates, companies that have gone out of business, and review segments by industry, revenue and location.

B. Benefits for User Groups

The application helps the following users get access to clean, complete, and actionable data in Salesforce to improve business performance and guide faster and more confident decision making:

Salesforce Administrators

The Optimizer for Salesforce application helps the Salesforce Administrator in several ways, including:

- Manage the quality and completeness of data feeds into Salesforce.com instance
- Ensure the accuracy of Salesforce.com dashboards and reports shared across the organization
- Build workflow and validation rules to keep Account and Lead data up-to-date
- Increase time-to-value of Salesforce by ensuring higher reliance and utilization of the CRM with better data

Sales Professionals

The Optimizer for Salesforce application helps Sales Professionals in several ways, including:

- Eliminate redundant data entry tasks into Lead and Account records
- Provide the most up-to-date information on Leads and Accounts to guide better decision making
- Flag out-of-business Accounts to help prioritize sales activities
- Establish corporate linkages to uncover cross-sell and up-sell opportunities

Sales Operations Professionals

The Optimizer for Salesforce application helps Sales Operations Professionals in several ways, including:

- Producing highly accurate Account and Lead profile reports to inform sales and marketing constituents
- Identify territory segments based on location, industry, and other data attributes
- Eliminate manual workflows for sellers to maintain Account data quality

II. Installation

A. Before you Begin

I. Supported Versions

Enterprise, Unlimited: Yes
Professional: Conditional (requires API access)
Essential (aka Group): No

2. Custom Logic

Out of the box, Optimizer for Salesforce seeks to maintain the integrity of your original Account and Lead (company) data. If opted in, Optimizer also helps match and enrich contacts on your Lead and Contact objects. There are a number of ways you can use D&B data to enrich, supplement or replace your data when desired. This guide will explain how native Salesforce practices can be combined with features of the application to accomplish various tasks.

3. Sandbox vs. Production

Many clients go through an installation process in sandbox environments before moving to their live Salesforce orgs. This is a strongly recommended best practice. A sandbox environment is the best place to test the application and any degree of customizations. A fully configured sandbox can help protect your live data while allowing you to explore:

1. Confidence codes for matching
2. Data Integration Field Mappings
3. Data Integration Update Mappings
4. Bulk Matching Results
5. Workflow Rules, Triggers & Validations

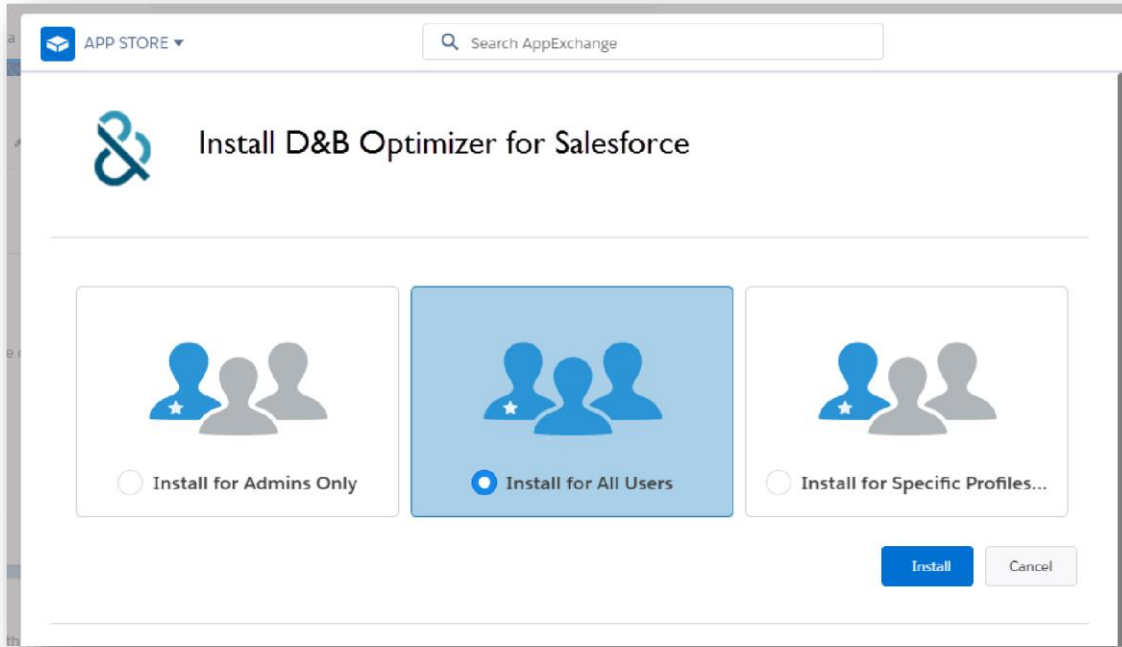
4. Activating Matching Capability

The matching capability of Optimizer for Salesforce is controlled by Data Integration Rules. These rules will appear after installation but cannot be turned on until they are activated by the D&B support team. Please be aware that we'll need to activate rules for EACH sandbox and production org you'd like to use. Reach out to your support contact for assistance with activation. Contact-related Data Integration Rules are a separate, opt in service. The Optimizer package automatically includes these rules, however if you attempt to activate them without subscribing to the contact optimization service, matches will not be successful. Please see Enabling Contact Matching for more information.

B. Installing the Application

To install the D&B Optimizer for Salesforce application, use the URL in the welcome letter sent by the D&B team. Please note that there are distinct links for production environments (login.salesforce.com) and sandbox environments (test.salesforce.com).

Next, enter your login credentials for the Salesforce organization where you'd like to install the application. After entering your credentials, you will be asked to identify the users for which you want to install the application. **Please select 'Install for All Users.'** User permissions and access restriction can be applied after installation.



Notify your D&B Onboarding Specialist when D&B Optimizer for Salesforce has been successfully installed, and you have selected a confidence code for the Data Integration Rules. You will receive an activation email within one business day, confirming activation of your service. You can then activate your Data Integration Rules and start using D&B Optimizer for Salesforce.

You cannot move onto Configuration until you receive your activation confirmation.

NOTE: Optimizer will take up to 4KB per matched record. The storage rate taken up by Optimizer will vary based on the number of matched records and the number of duplicate matched records. To reduce the amount of usage taken up by Optimizer, see [Exclude Records from Matching](#) for how you can manage the number of matched records processed.

C. Apex Job – Family Tree Management

After the above installation step, this Apex batch job runs regardless of the license status and handles the background processing for the Family Tree Management dashboard. It's invoked hourly and processes only matched Accounts.

Click here to go to the new batch jobs page

Apex Jobs

Monitor the status of all Apex jobs, and optionally, abort jobs that are in progress.

View: All [Create New View](#)

<Previous Page | Next Page>

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Action	Submitted Date	Job Type	Status	Status Detail	Total Batches	Batches Processed	Failures	Submitted By	Completion Date	Apex Class	Apex Method	Apex Job ID
	6/25/2019 11:00 AM	Batch Apex	Completed		0	0	0	D&B Optimizer	6/25/2019 11:00 AM	DNR_LinkageOpportunity_Batch		707200006vFiliu
	6/25/2019 10:01 AM	Batch Apex	Completed		0	0	0	D&B Optimizer	6/25/2019 10:01 AM	DNR_LinkageOpportunity_Batch		707200006vFOSc
	6/25/2019 9:00 AM	Batch Apex	Completed		0	0	0	D&B Optimizer	6/25/2019 9:00 AM	DNR_LinkageOpportunity_Batch		707200006vF0gC

D. Custom Fields

The installation process includes creating custom fields on the Account and Lead objects to facilitate the match and refresh process, plus Dashboard functionality (Accounts only).

Custom Account fields include:

- **D&B DUNS Number:** upon successful match, Optimizer populates this field and references it for future refreshes.
 - **NOTE:** By default, 'D&B DUNS Number' is NOT indexed. We recommend putting in a request with Salesforce to index this field if your org has more than 200,000 records or if you have flows or apex where a query or lookup is being performed by the "D&B DUNS Number" field.
- **AccountToDnb:** upon a successful match, Optimizer populates this field that links the Account record to a specific D-U-N-S Number for display of the correct custom object with D&B data.

Custom Lead (company) fields include:

- **D&B DUNS Number:** upon successful match, Optimizer populates this field and references it for future refreshes.
 - **NOTE:** By default, 'D&B DUNS Number' is NOT indexed. We recommend putting in a request with Salesforce to index this field if your org has more than 200,000 records or if you have flows or apex where a query or lookup is being performed by the "D&B DUNS Number" field.
- **LeadToDnb:** upon a successful match, Optimizer populates this field that links the Lead record to a specific D-U-N-S Number for display of the correct custom object with D&B data.

Custom Lead (contact) fields include:

- **LeadContactToDnb:** upon a successful match, Optimizer populates this field that links the Lead record to a specific D&B Contact ID for display of the correct custom object with D&B data.

Custom Contact fields include:

- **ContactToDnb:** upon a successful match, Optimizer populates this field that links the Lead record to a specific D&B Contact ID for display of the correct custom object with D&B data.

Note: 'LeadContactToDnb' and 'ContactToDnb' will only populate if you have opted into and enabled contact matching.

III. Configuration

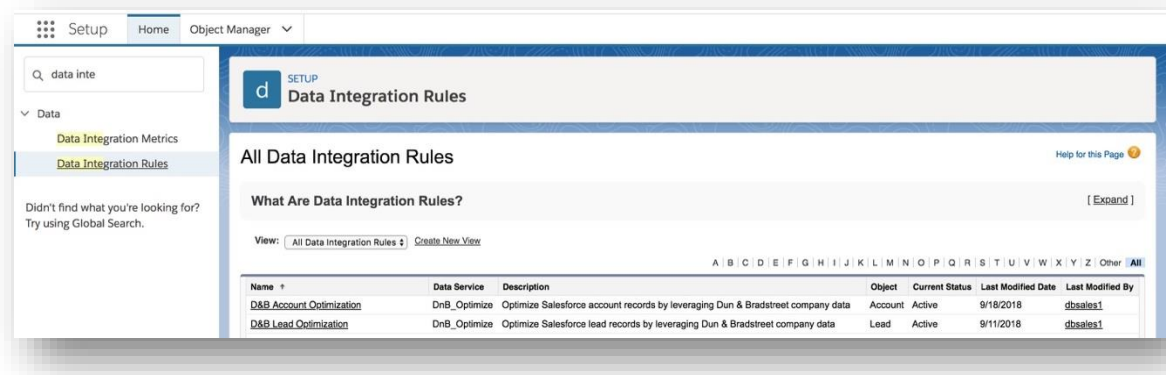
A. Mandatory

I. Configuring Matching Fields

Before your Salesforce Accounts can be enriched with D&B data, you will need to identify which Account fields to consider when attempting a match. If you have any doubts about your configuration, please test in a sandbox prior to moving to production. Lightning Data utilizes the following Account attributes for matching: Account Name, Address, City, State, Country, Phone, Web Address, and D-U-N-S Number. Pair each matching field to the field on your Account object that contains the most relevant data or leave them as the defaults.

Note: The minimum matching requirements include mapping business name and country values. All other fields are optional but will result in higher confidence matches. Details on fields available for matching and enriching are in the ‘D&B Optimizer for Salesforce Field Guide’ on the [AppExchange](#).

Go to ‘Setup’ and quick search ‘Data Integration Rules.’



Under ‘Administer’ (Classic) or ‘Data’ (Lightning), click on ‘Data Integration Rules.’ Click on the ‘D&B Account Optimization’ rule.

Click ‘Edit Field Mapping’ and map the match fields to the standard Account fields you would like to use in matching.

Account Data Integration Rule

D&B Account Optimization

« [Back to List: Data Integration Rules](#)

Rule Details Edit Rule Settings Edit Field Mapping Deactivate

Name	D&B Account Optimization
Description	Optimize Salesforce account records by leveraging Dun & Bradstreet company data
Object	Account
Data Service	DnB_Optimize
Update all records (recommended)	<input checked="" type="checkbox"/>
Bypass triggers	<input type="checkbox"/>
Bypass workflow rules	<input type="checkbox"/>
Leave last-modified information unchanged	<input type="checkbox"/>
Current Status	Active
Created By	Abhishek Shakure, 5/22/2018 11:53 AM
Modified By	Abhishek Shakure, 5/25/2018 4:36 AM

→ [D&B ACCOUNT OPTIMIZATION](#) > FIELD MAPPING

Data Integration Rule Field Mapping

MATCH **UPDATE**

Select fields in Salesforce to match with fields on the data service. Make sure to pair each data service field with a field in Salesforce.

Data Service Fields	Account Fields
Business Name Or Web Address	Account Name
Combined Address Fields	Street
D-U-N-S Number	D&B DUNS Number
Primary Address City	City
Primary Address Country/Region Code	Country
Primary Address Postal Code	Zip/Postal Code
Primary Address State Province Abbrev	State/Province
Telephone Number	Account Phone
Web Address	Website

Cancel Save

a) *If you already have D-U-N-S® Numbers*

Should you already have D-U-N-S® Numbers on your Accounts, it is easy to maintain this link in Optimizer for Salesforce and benefit from fresh data. To match existing records using D-U-N-S Numbers:

Verify that the 'D-U-N-S Number' field in the left column is mapped to your Account field that currently holds D-U-N-S Numbers.

DATA SERVICE FIELDS	ACCOUNT FIELDS
Business Name	Account Name
Combined Address Fields	Billing Street
D-U-N-S Number	D&B DUNS Number
Primary Address City	Billing City

Whichever field is used for 'D-U-N-S Number' matching should also be substituted in on the 'Update' section for the rule.

DATA SERVICE FIELDS	ACCOUNT FIELDS
D-U-N-S Number	D&B DUNS Number

Add Field Cancel Save

b) *If you don't already have D-U-N-S Numbers*

D&B Optimizer for Salesforce will automatically add a field called 'D&B DUNS Number' to hold D-U-N-S Numbers that are returned during matches.

c) *Addressing Leads*

The same process should be followed to allow Leads to be enriched with D&B data.

Under 'Administer' (Classic) or 'Data' (Lightning), click on 'Data Integration Rules.'

Click on the 'D&B Lead Optimization' rule.

Click 'Edit Field Mapping' and map the match fields to the standard Lead fields you would like to use in matching.

Remember to accommodate any existing D-U-N-S Number field or take advantage of the automatically created 'D&B DUNS Number' field.

Lead Data Integration Rule
D&B Lead Optimization
[« Back to List: Data Integration Rules](#)

Rule Details [Edit Rule Settings](#) [Edit Field Mapping](#) [Activate](#)

Name	D&B Lead Optimization
Description	Optimize Salesforce lead records by leveraging Dun & Bradstreet company data
Object	Lead
Data Service	DnB_Optimize
Update all records (recommended)	<input checked="" type="checkbox"/>
Bypass triggers	<input type="checkbox"/>
Bypass workflow rules	<input type="checkbox"/>
Leave last-modified information unchanged	<input type="checkbox"/>
Current Status	Inactive
Created By	Abhishek Shakure, 5/22/2018 11:53 AM
Modified By	Abhishek Shakure, 5/22/2018 11:53 AM

... > D&B ACCOUNT OPTIMIZATION > FIELD MAPPING
Data Integration Rule Field Mapping

MATCH UPDATE

Select fields in Salesforce to match with fields on the data service. Make sure to pair each data service field with a field in Salesforce.

Data Service Fields	Account Fields
Business Name Or Web Address	Account Name
Combined Address Fields	Street
D-U-N-S Number	D&B DUNS Number
Primary Address City	City
Primary Address Country/Region Code	Country
Primary Address Postal Code	Zip/Postal Code
Primary Address State Province Abbrev	State/Province
Telephone Number	Account Phone
Web Address	Website

[Cancel](#) [Save](#)

2. Activating the Data Integration Rules

The last mandatory step in the Configuration process is activating the mass enrichment of your Accounts and Leads. However, please consider the Optional configuration items below before completing this step. Additionally, if you are taking advantage of D&B's one-time cleanse process to obtain or refresh D-U-N-S Numbers, please ensure that process is complete and the results are uploaded into Salesforce before completing this step. Please refer to the User Guide in Section IV for more information on how to interpret your match results that are returned by your assigned Delivery Consultant. You may use the [Data Loader](#) tool to load the account information returned by D&B back into Salesforce.

When activated, the previously configured Data Integration Rules run against their respective record types. In successful matches, Accounts and Leads are linked to a corresponding Dun & Bradstreet Company record. Following the initial enrichment, Optimizer will automatically match newly added records, immediately update any manually edited records, and refresh data throughout the organization every fifteen days.

This step is only available after your license for the org in which you are installing is activated by D&B. If you did not do this at the end of Installing the Application please reach out to your Onboarding Specialist or contact D&B Support at <https://support.dnb.com>

To enable enrichment on your Salesforce instance:
Click on 'Setup' and type 'Data Integration Rules.'

Under 'Administer' (Classic) or 'Data' (Lightning), click on 'Data Integration Rules.'

Click on the rule named 'D&B Account Optimization.'

Click on the 'Activate' button. (Your License must be activated by the D&B support staff in order to see the 'Activate' button.)

Check the box for 'Update all records after this rule is activated or saved.'

Select 'Save.'

Follow the same process for the Data Integration Rule named 'D&B Lead Optimization,' as desired.

Notes:

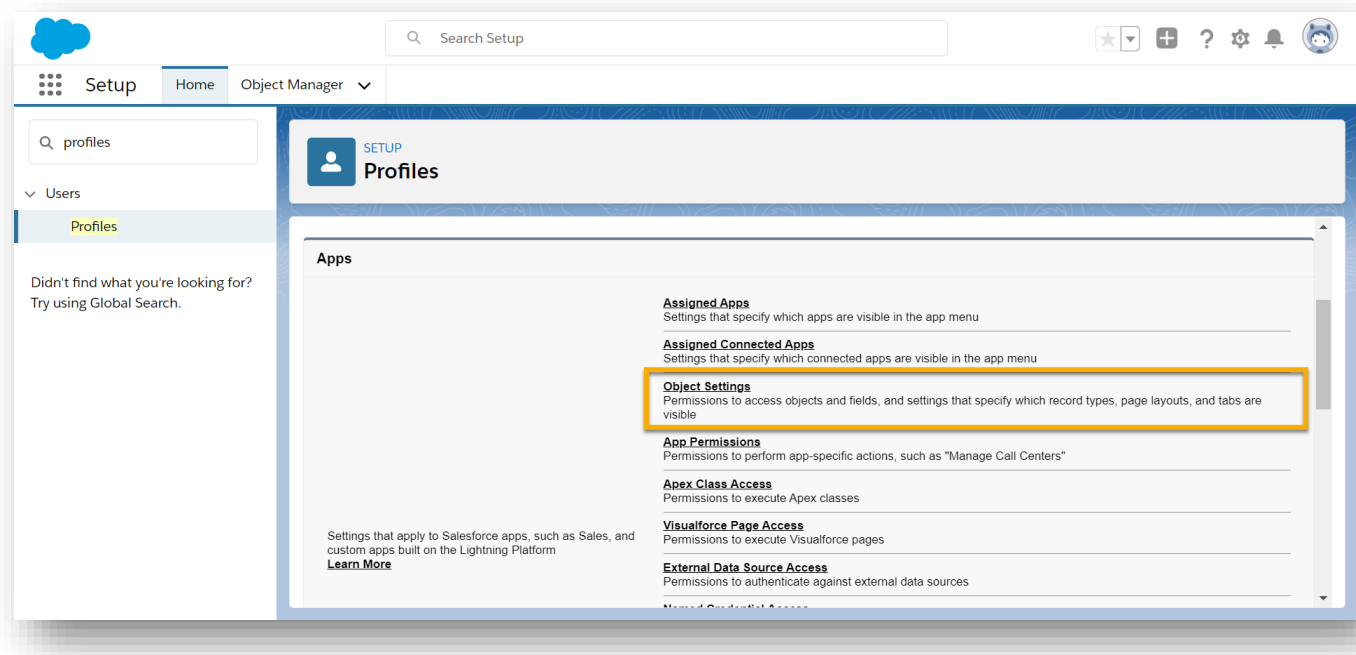
1. The Data Integration Rules process records at an average rate of 1-2M per day. Many factors affect this throughput, so use this as a guideline rather than a guarantee. Please wait for the first batch job to complete to see fully-matched and enriched Account/Lead records and fully-populated Data Stewardship and Account Segmentation Dashboards.
2. Contact-related Data Integration Rules are a separate, opt in service. The Optimizer package automatically includes these rules, however if you attempt to activate them without subscribing to the contact optimization service, matches will not be successful. Please see Enabling Contact Matching for more information.

3. Hide the Optimizer Admin Panel

The Optimizer Admin tab allows users with admin level access to control the Search Before Create feature. When first installing, this panel will be visible to all users until it is hidden.

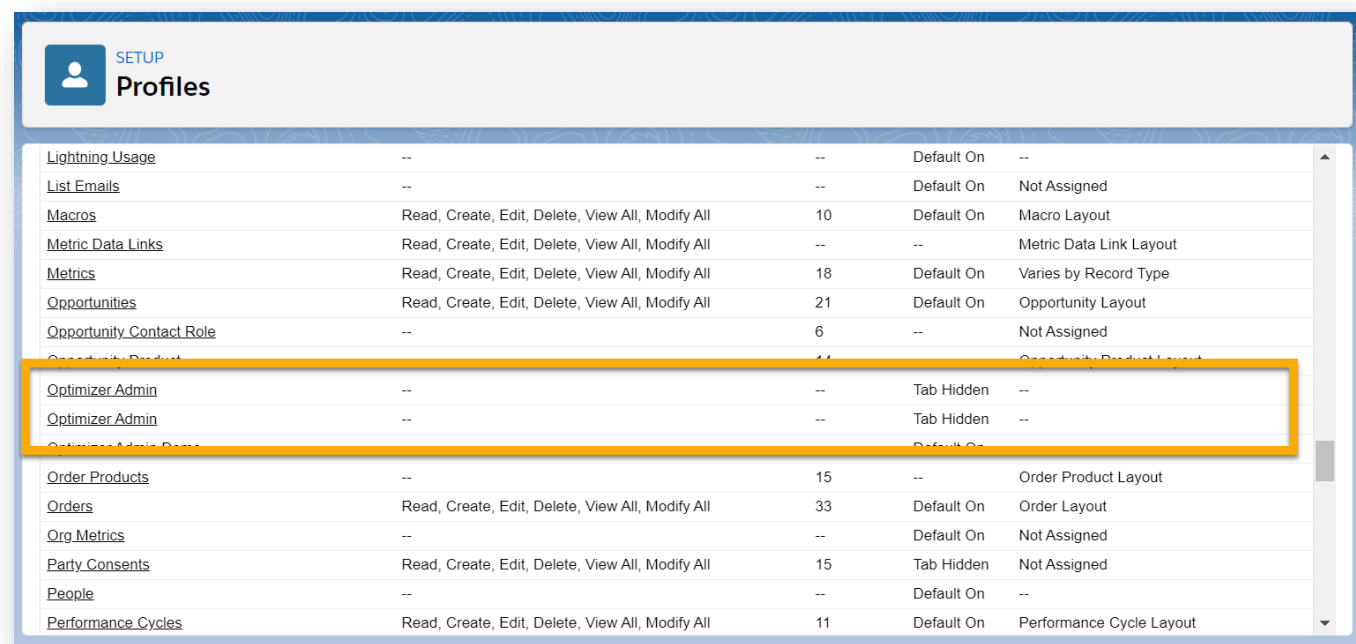
Go to Setup>Profiles and select the profile you wish to hide the Admin Panel from

Select "Object Settings"

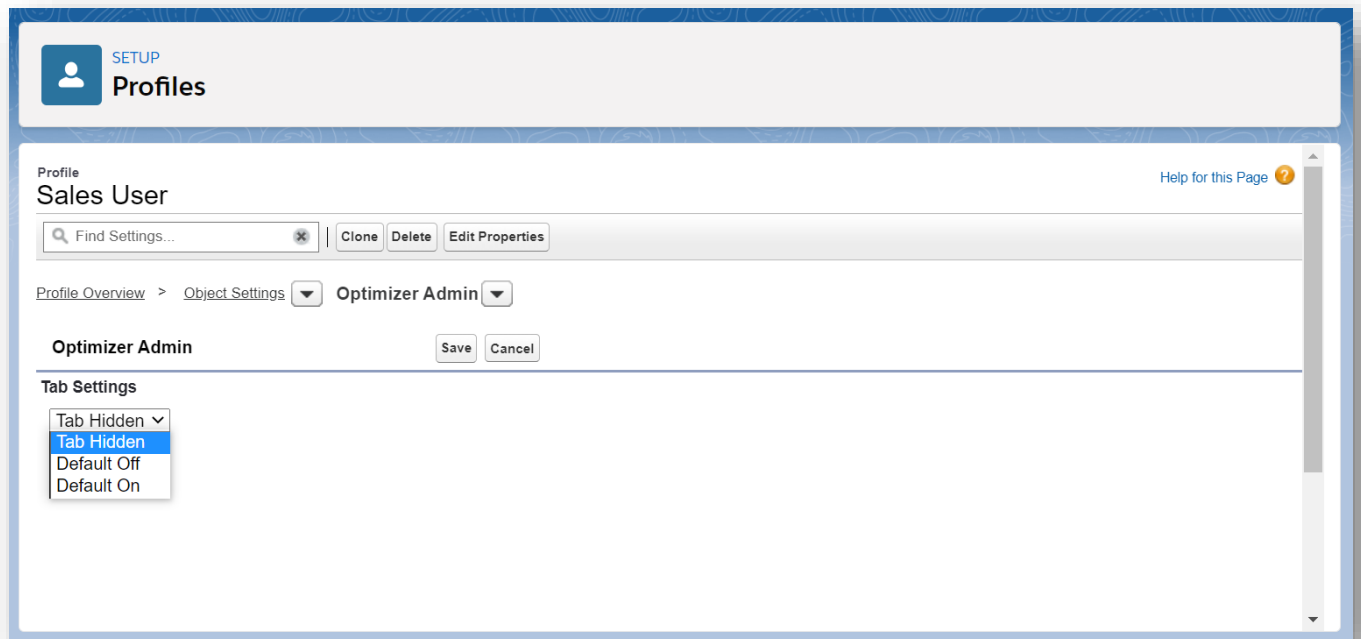


Select “Optimizer Admin”. There will be two listed, one for Lightning and one for Classic, and both should be hidden.

NOTE: You will need to hide each of these tabs individually



Turn to “Tab Hidden”, click “Save”



B. Optional

I. Enable Search Before Create

a) *Setting up the Lightning Aura Component*

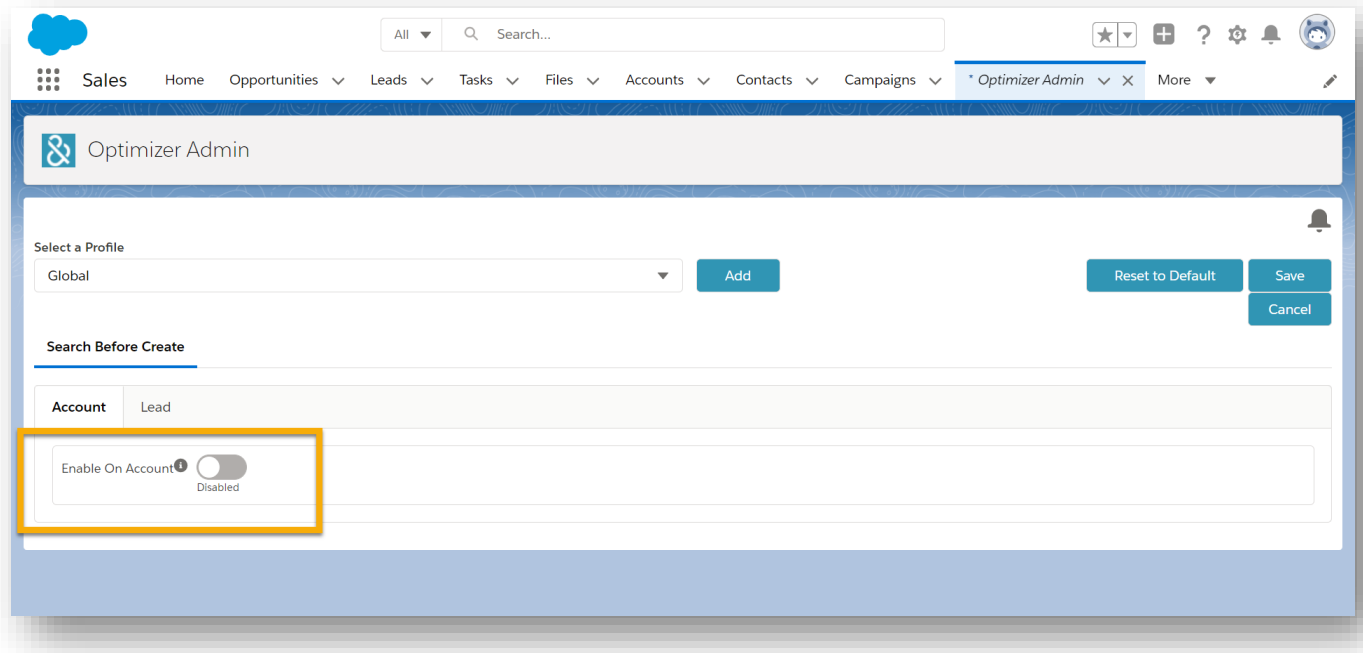
Search Before Create functionality offers two primary advantages to your Salesforce instance when creating new Accounts or Leads:

- Enable duplicate detection by reading the D-U-N-S Numbers in the D&B custom object
- Pre-fill your records with D&B data to support an Optimizer match

There are two places where Search Before Create will need to be turned on or off. See below for enablement steps:

I. Optimizer Admin Panel

By default, the Search Before Create feature is set to “disabled” in the Optimizer Admin panel. To turn this feature on, find the “Optimizer Admin” tab through the app launcher (lighting) or by adding a tab (classic)



By default, you are editing the “global” profile, which refers to the default settings for all profiles in your org.

To enable Search Before Create, change this slider to “Enabled”.

NOTE: This will turn on the Search Before Create Experience for all user profiles. To understand how to restrict access and customize your Search Before Create layout, see next section, [Customize Search Before Create](#).

2. Lightning Aura Component

After activating through the admin panel, go to ‘Setup’ and search for the desired object.

To enable on the Account object, search for ‘Account’ (classic). In Lightning, search for ‘Object Manager’, then select ‘Account’

To enable on the Lead object, search for ‘Lead’ (classic). In Lightning, search for ‘Object Manager’, then select ‘Lead’

Follow the below steps after the desired object has been selected

Choose ‘Buttons, Links, and Actions’

Scroll down to the ‘New’ label and select ‘Edit’

Buttons, Links, and Actions				
20 Items, Sorted by Label				
Google Maps	GoogleMaps	Detail Page Link	URL	▼
Google News	GoogleNews	Detail Page Link	URL	▼
Google Search	GoogleSearch	Detail Page Link	URL	▼
Hoovers Profile	HooversProfile	Detail Page Link	URL	▼
List	List		Standard page	▼
New	New		SBCComponent (Lightning component)	✓ ▼
View	View		Standard page	▼
View Account Hierarchy	AccountHierarchy		Standard page	▼
Yahoo Maps	YahooMaps	Detail Page Link	URL	▼

Select where Search Before Create should override the standard Salesforce Account or Lead creation process. It's best practice to enable for Classic and Lightning views. Search Before Create is not currently supported in the mobile experience.

For classic, select 'Visualforce page' and choose 'Search_Before_Create_VF [DnBPackageSF__Search_Before_Create_VF]'

To ensure Search Before Create is applied to the Lightning view, select 'Lightning component' and choose 'DnBPackageSF :SBCComponent'

Click 'Save'

Override Properties

Save Cancel

Label

New

Name

New

Default

Standard page

Salesforce Classic Override

☐ No override (use default) ⓘ
 ☒ Visualforce page Search_Before_Create_VF [DnBPackageSF__Search_Before_Create_VF] ▼

Lightning Experience Override

☒ Lightning component DnBPackageSF:SBCComponent ▼
 ☐ Use the Salesforce Classic override

Mobile Override

☐ Lightning component --None-- ▼
 ☒ Use the Salesforce Classic override

Comment

Save Cancel

Search Before Create will be displayed anywhere your users select "New Account". For step-by-step guidance

on proper use, see [section H](#) in the user guide.

NOTE: In order for Search Before Create to identify duplicates, the D&B Account Optimization (Accounts) or D&B Lead Optimization (Leads) rules must be activated. Duplicates are determined by reading matched records in the D&B Custom Object. Be sure to activate the D&B Account Optimization/D&B Lead Optimization rules before exposing Search Before Create to your users.

2. Customize Search Before Create

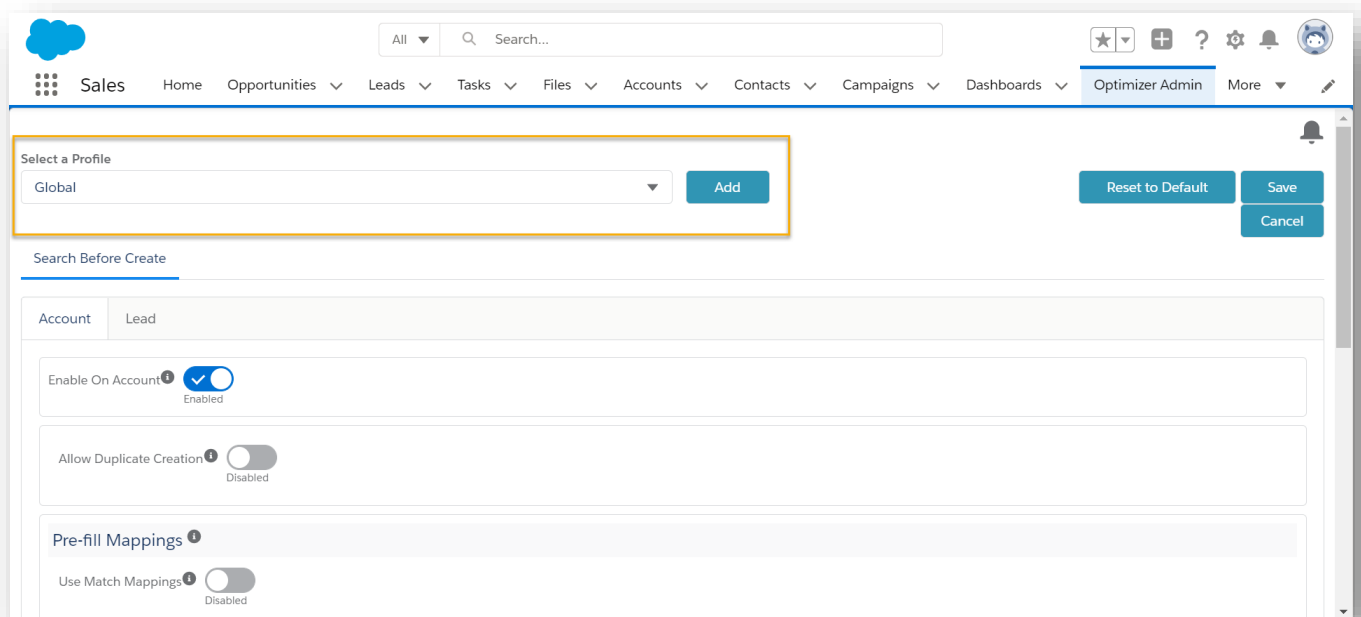
After implementing the Lightning Aura component, you can customize Search Before Create for your users in our Optimizer Admin Panel. This panel allows you to control the following in your org:

- Restrict Access to Search Before Create by profile
- Allow or prevent the ability to create duplicates in Search Before Create
- Customize your Search Before Create pre-fill mappings

NOTE: This section explains how to use the Admin Panel to customize Search Before Create. If you are a first time user, it is recommended that you visit [section H](#) to familiarize yourself with the Search Before Create feature before configuring the admin panel.

a) *Setting up the global profile*

Your org's "Global" profile is the default setting for all users. Access for all profiles will mirror these settings unless additional profile settings are added.



The screenshot shows the 'Optimizer Admin' interface. At the top, there's a navigation bar with 'Sales' and 'Home' highlighted. Below the navigation bar, a dropdown menu labeled 'Select a Profile' is open, showing 'Global' as the selected profile. To the right of the dropdown are buttons for 'Add', 'Reset to Default', 'Save', and 'Cancel'. Below the profile selection, the 'Search Before Create' section is visible. It has two tabs: 'Account' and 'Lead'. Under the 'Account' tab, there are three settings: 'Enable On Account' (checked, 'Enabled'), 'Allow Duplicate Creation' (unchecked, 'Disabled'), and 'Pre-fill Mappings' (unchecked, 'Disabled').

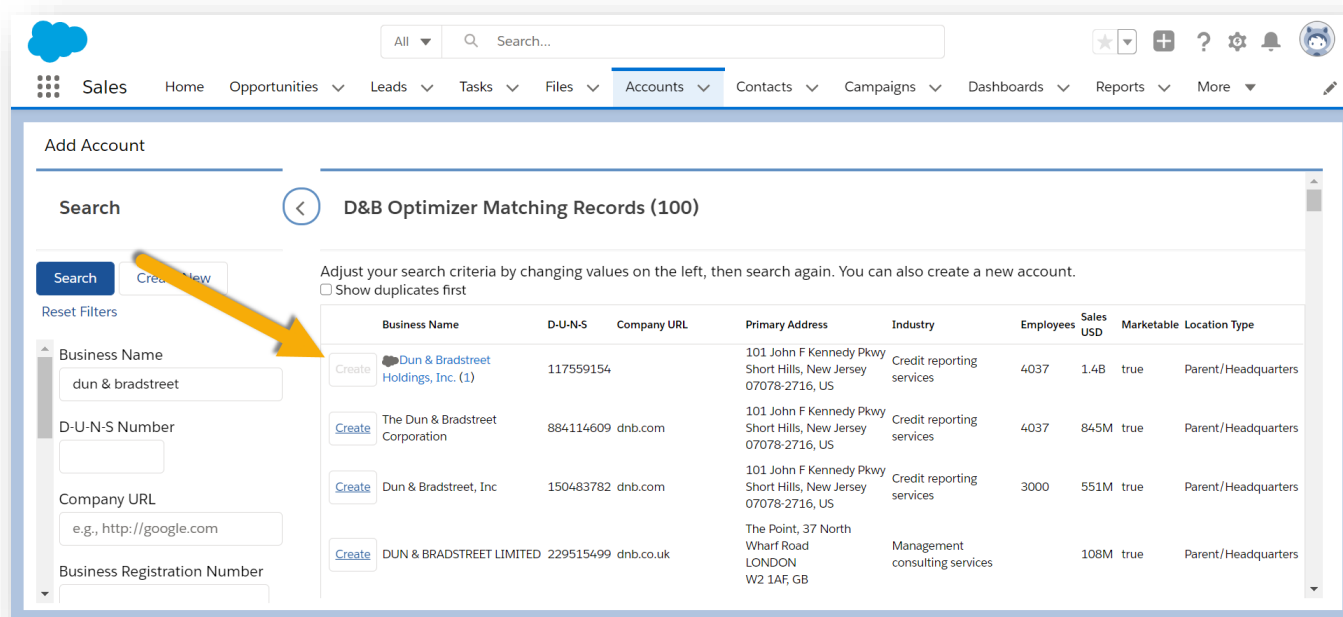
Setting 1: Enable on Account (or Lead)

When 'Enabled', the Search Before Create experience is 'on' for global profile. When editing the Global profile, this turns Search Before Create 'on' or 'off' for all users in your org.

Setting 2: Allow Duplicate Creation

This setting controls your user's ability to create records Search Before Create determines to be a duplicate. Records are labeled as a duplicate when a D&B Company Record custom object with the D-U-N-S number referenced by the candidate record already exists in your org.

When 'Disabled', users will not have access to the "Create" button next to records determined to be duplicates:




To allow duplicate creation, change this setting to "Enabled"


Setting 3: Pre-fill Mappings


This section will allow you to manually choose (1) the D&B fields used to pre-fill after choosing a candidate records and (2) which of your Account (or Lead) fields they will be populated into.


The slider in this section is labeled "Use Match Mappings" and, by default, is set to 'Enabled'. When 'Enabled', Search Before Create will use the mappings you've chosen in your Data Integration Rule settings (See [Configuring Matching Fields](#) above) to pre-fill date. This setting ensures the data Search Before Create populates on your record is used in the Match and Enrich function of Optimizer.











When 'Disabled', the pre-fill mapping screen appears. By default, your pre-fill settings will still reflect the Data Integration Rule 'Match' mappings.

Enable On Account  Enabled

Allow Duplicate Creation  Disabled

Pre-fill Mappings 

Use Match Mappings  Disabled

 D&B Fields	 Account Fields
Company Name	Account Name 
Street Address	Billing Street 
DUNS Number	D&B DUNS Number 
City	Billing City 
Country	Billing Country 
Postal Code	Billing Zip/Postal Code 
State	Billing State/Province 
Website	Website 

Add Field

The core 8 fields must always be mapped:

- Company Name
- DUNS Number
- Street Address
- City
- State
- Postal Code
- Country
- Website

To change a mapping, select the dropdown under “Account Fields” (or “Lead Fields”), and select the desired field from your standard object.

To add a field, click “Add Field” in the bottom right corner. In the below example, the admin has (1) added mappings to send the address data to the shipping address fields along with billing address, and (2) added the previous unmapped field “Location Type”

SalesHomeOpportunitiesLeadsTasksFilesAccountsContactsCampaignsDashboardsReportsChatterGroupsCalendarPeopleCasesFore

Pre-fill Mappings

Use Match MappingsDisabled

D&B Fields	Account Fields
Company Name	Account Name
Street Address	Billing Street
DUNS Number	D&B DUNS Number
City	Billing City
Country	Billing Country
Postal Code	Billing Zip/Postal Code
State	Billing State/Province
Website	Website
Location Type	Location Type
Street Address	Shipping Street
City	Shipping City
State	Shipping State/Province
Postal Code	Shipping Zip/Postal Code
Country	Shipping Country

Add Field

Once saved, these pre-fill mappings will take effect

Leads

All Search...

Location Type *i*

Parent/Headquarters

NAICS Code

Year Started

Phone

Address Information

Billing Address

Billing Street

101 John F Kennedy Pkwy

Billing City

Short Hills

Billing State/Province

New Jersey

Billing Zip/Postal Code

07078-2716

Billing Country

US

Shipping Address

Shipping Street

101 John F Kennedy Pkwy

Shipping City

Short Hills

Shipping State/Province

New Jersey

Shipping Zip/Postal Code

07078-2716

Shipping Country

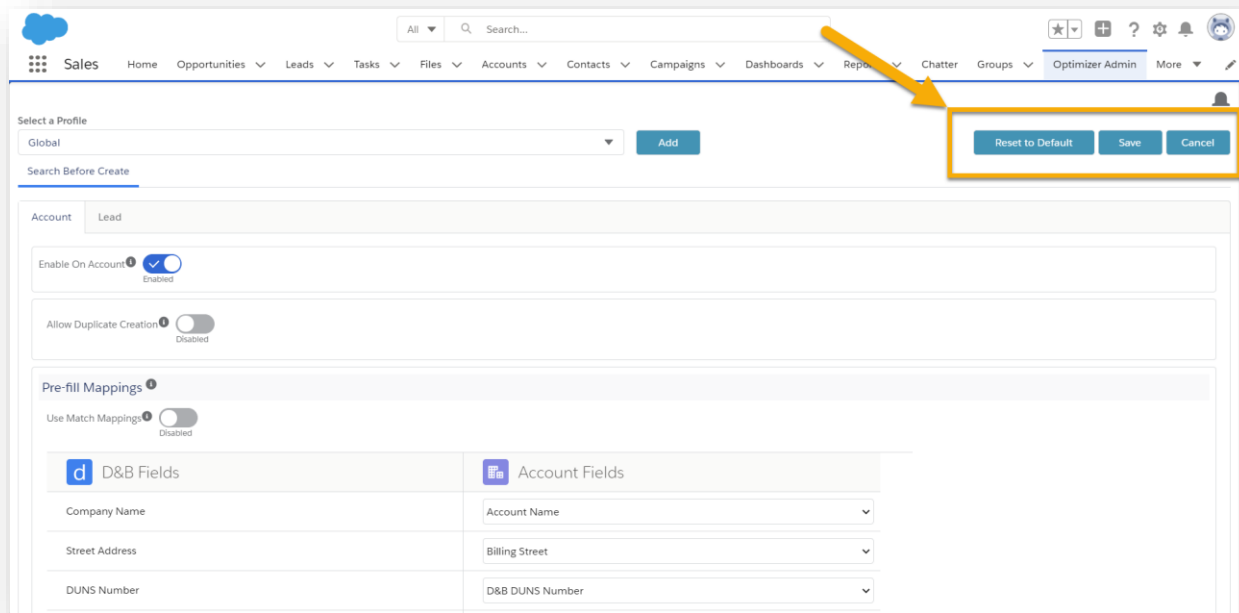
US

Cancel Save & New Save

90265-5098, US

b) Finalize your settings

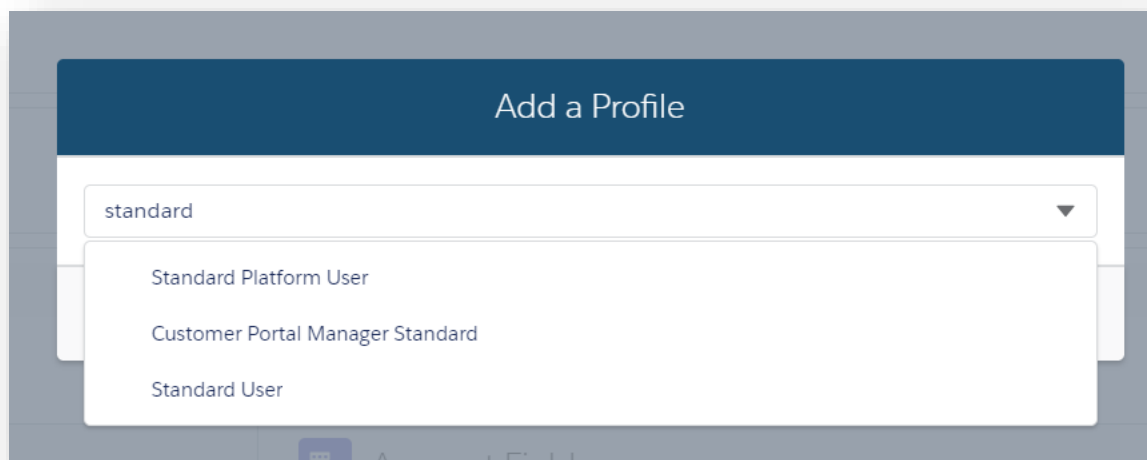
After customizing, you can either Save, Cancel, or Reset your settings to the package default

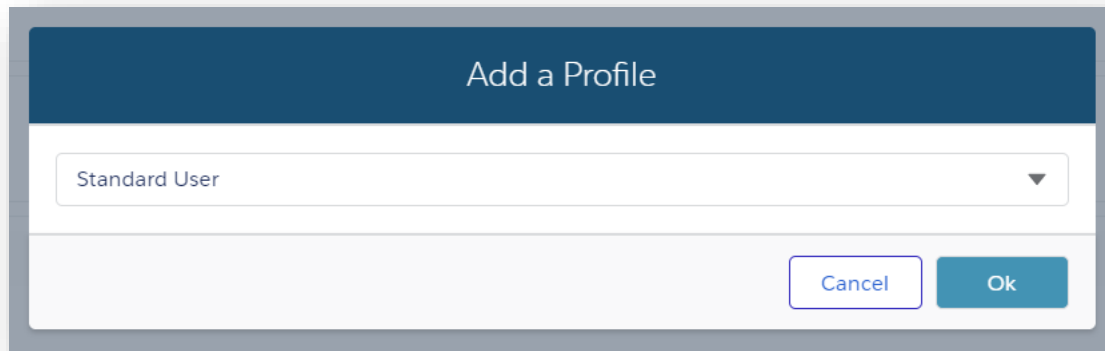


c) Add profile settings

To custom Search Before Create for a specific profile, select “Add” next to “Select a Profile”. This opens the “Add a Profile” dropdown.

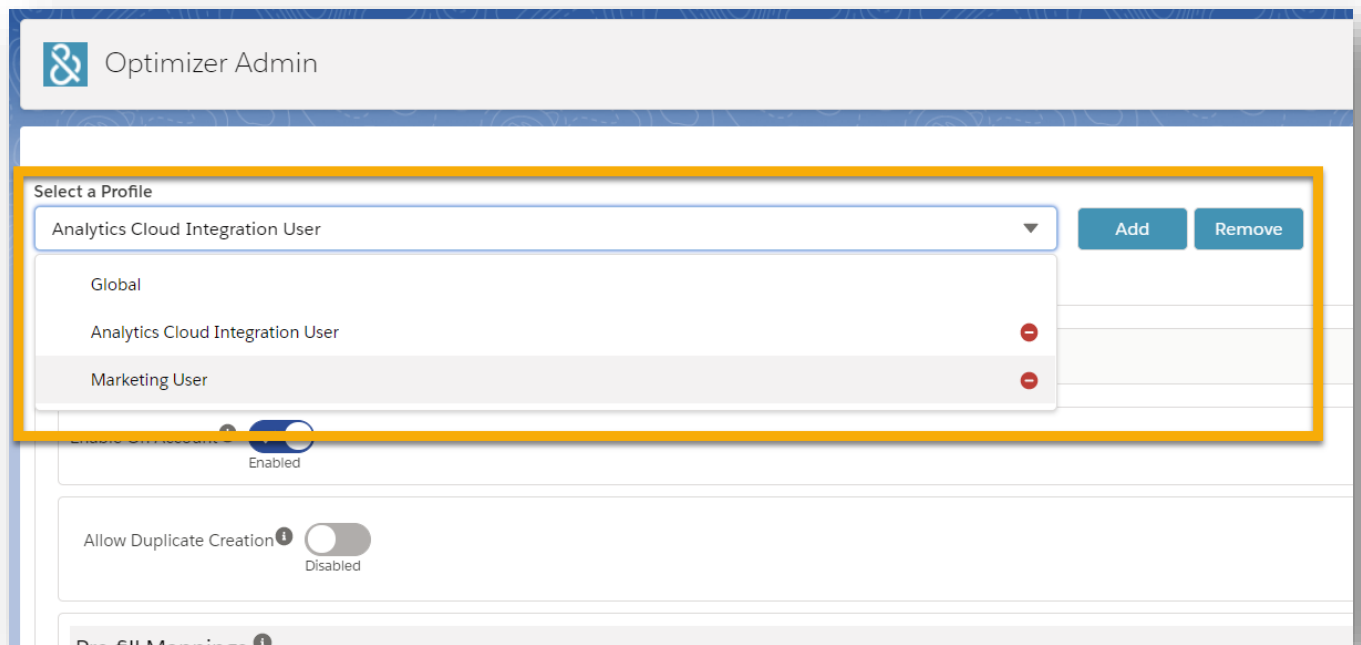
Use the type-ahead option to find and select a profile, then click “Ok”





Only the profiles you have added for custom SBC setting creation will have customized settings. All other profiles will have the “Global” settings. In the below example, the only profiles that have custom Search Before Create settings are “Analytics Cloud Integration User” and “Marketing User”. All other profiles have access equivalent to the “Global” profile.

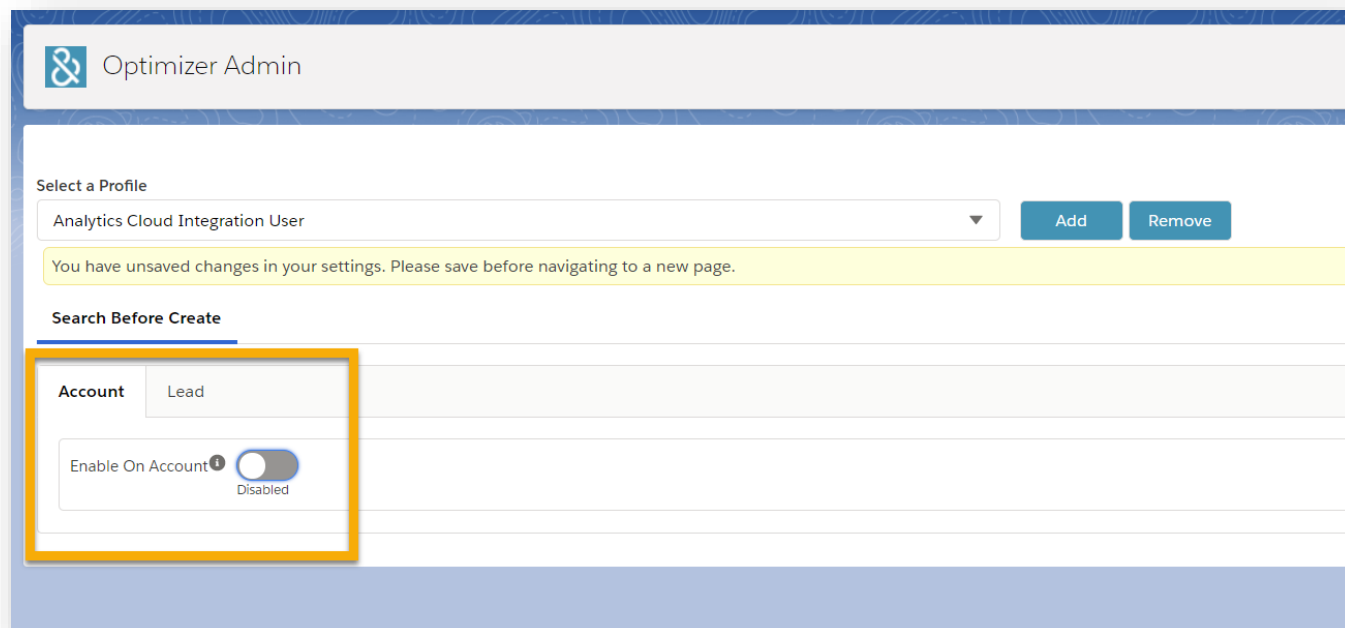
Removing a profile from this list will result in the removed profile’s Search Before Create access to default back to your “Global” settings.



d) *Restrict Access to Search Before Create*

To restrict access based on profile, simply add a profile using the “Select a Profile” dropdown.

After selecting your desired profile, you can restrict access by moving the “Enable on Account (or Lead)” slider to “Disabled”



When disabled, all users with the specified profile will no longer see the Search Before Create component when creating Accounts (or Leads).

3. Adding D&B Data to the Account & Lead Object Layouts

a) Adding the Visualforce Component

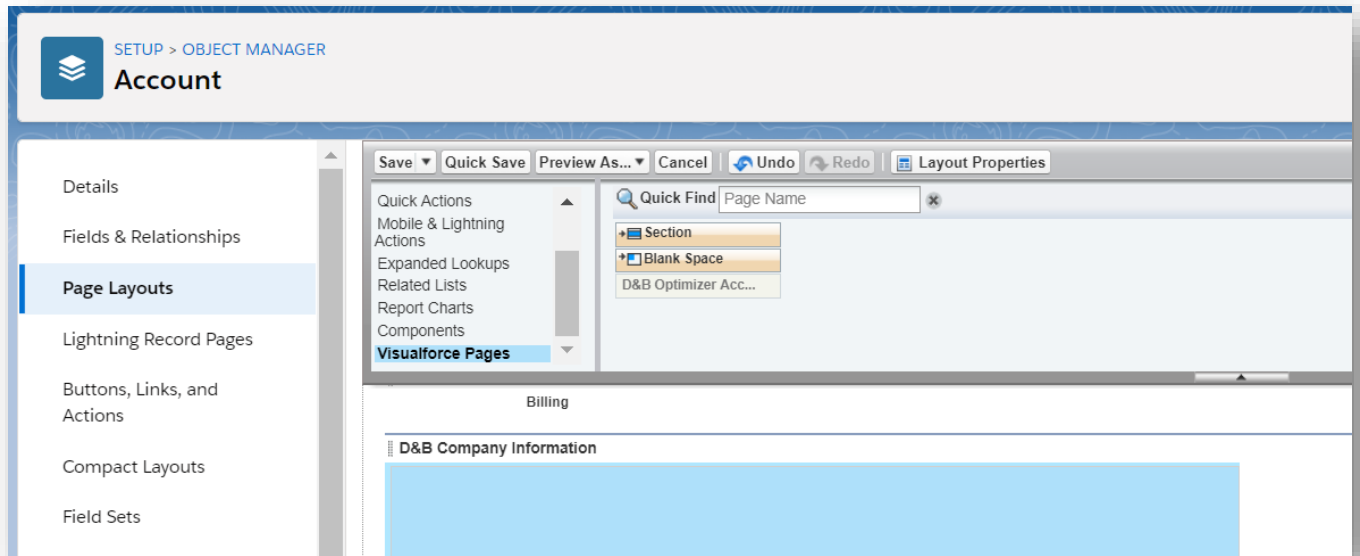
If you would like to see D&B information on your Account form, you will need to add a Visualforce component to your Account form layout.

Go to 'Setup', and quick search for 'Account' (Classic) or 'Object Manager→ Account' (Lightning).

Click on 'Page Layout.' Find the Account Page Layout appropriate for your use case and click 'Edit.'

In the page layout, select 'Visualforce Pages' and drag a new section onto the form. Then, provide a label for the section (we prefer 'Dun & Bradstreet Company Information').

From the previous step, drag the Visualforce component named 'D&B Optimizer Account Data View' Select 'Save.'



b) Addressing Leads

The steps above should also be followed for Leads.

Go to 'Setup', and quick search for 'Lead' (Classic) or 'Object Manager → Lead' (Lightning).

Click on 'Page Layout.' Find the Lead Page Layout appropriate for your use case and click 'Edit.'

In the page layout, select 'Visualforce Pages' and drag a new section onto the form. Then, provide a label for the section (we prefer 'Dun & Bradstreet Company Information').

From the 'Visualforce Pages' box, drag the component named 'DNB_Optimizer Data View' into the section.

Select 'Save.'

c) Adding Relevant Fields

Matches in D&B Optimizer for Salesforce are maintained through two fields – 'D&B DUNS Number' and 'AccountToDnB'/'LeadToDnB'.

Should you want to change a match created by D&B Optimizer for Salesforce, it is useful to have both of these fields on your Account or Lead form. To add these fields:

Go to 'Setup', and quick search for 'Account' (Classic) or 'Object Manager → Account' (Lightning).

Click on 'Page Layout.' Find the Account Page Layout appropriate for your use case and click 'Edit.'

In the page layout, select 'Fields' then drag and drop 'D&B DUNS Number' and 'AccountToDnB' onto the Account page, as desired.

Select 'Save.'

Repeat this process for Leads, as desired.

4. Add Integration Status to Classic UI

To clearly identify a match status in Classic view, a Related List should be added to the Account page layout. The lightning UI has a built-in button to do so.

Go to 'Setup', and quick search for 'Account.'

Click on 'Page Layout'. Find the Account Page Layout appropriate for your use case and click 'Edit.'

Add a new section to the Account layout where desired (a section can be added under 'Fields').

Click 'Related Lists' at the top of the screen.

Drag and drop the 'Data Integration Rules' Related List into the new section.

Select 'Save.'

a) Addressing Leads

The steps above should also be followed for Leads.

Go to 'Setup', and quick search for 'Lead' (Classic) or 'Object Manager → Lead' (Lightning).

Click on 'Page Layout'. Find the Lead page layout appropriate for your use case and click 'Edit.'

In the page layout, select 'Fields' then drag and drop 'D&B DUNS Number' and 'LeadToDnB' onto the Lead page, as desired.

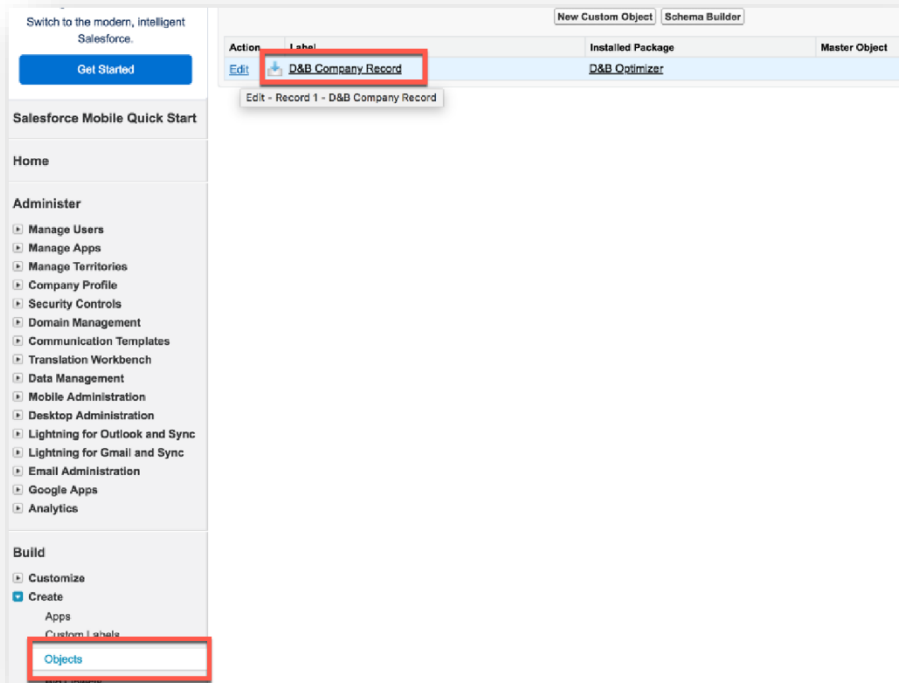
Select 'Save.'

5. Arrange fields on the D&B Company Custom object

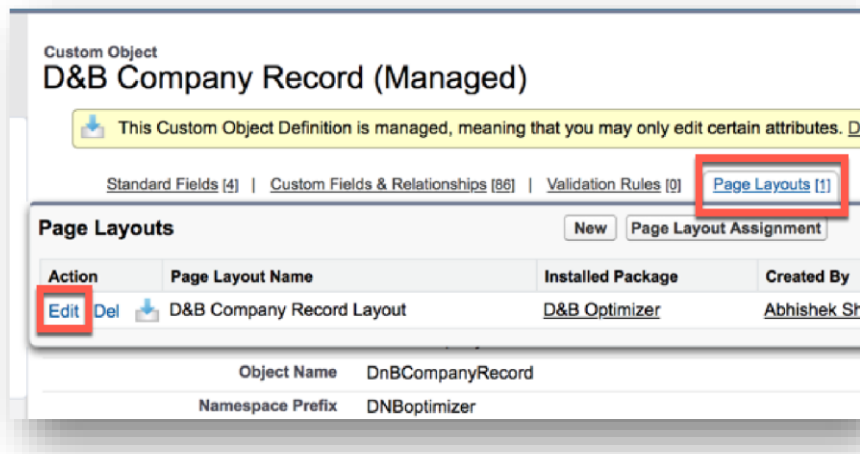
D&B data fields reside in a Custom object named 'D&B Company Data.' The page layout for this Custom object can be edited to your liking. To edit, drag and drop the fields onto the 'D&B Company Record' Custom Object layout.

For Classic, click 'Setup' and quick search for 'Objects.' Select it from the 'Create Objects' tab.

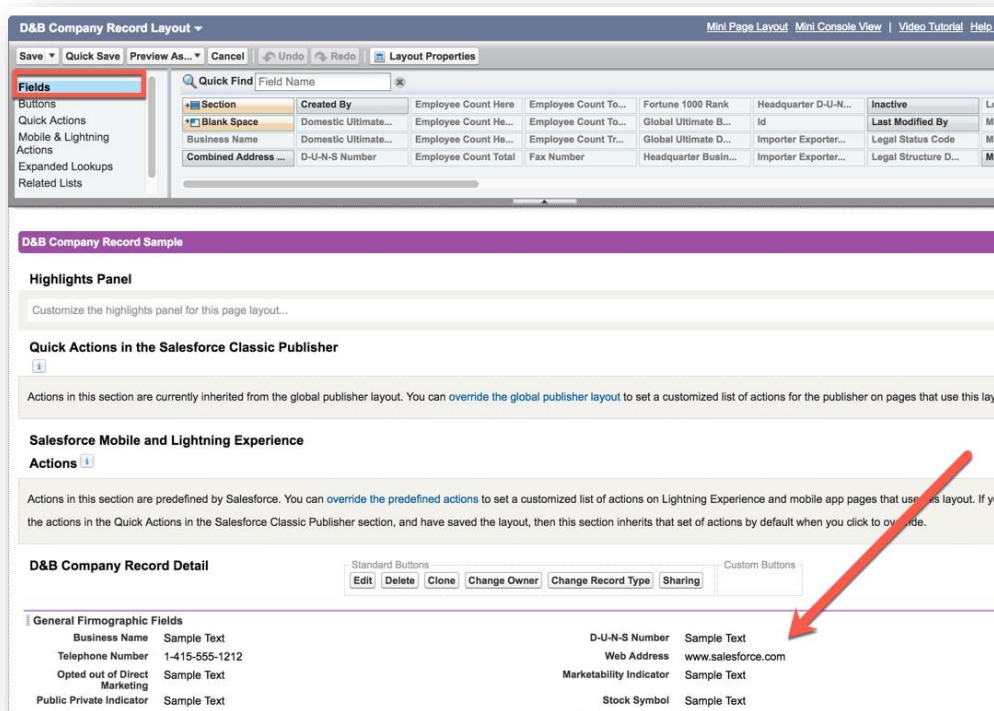
Click on the 'D&B Company Record' row. **Note:** do not click 'edit'.



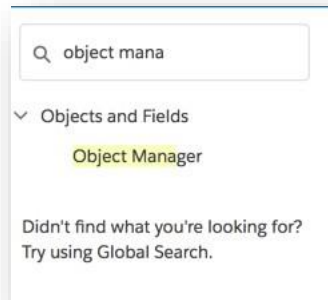
On the D&B Company Record page, click 'Page Layouts' and then 'Edit'.



Using the Fields section, drag and drop different D&B attributes onto the layout. Be sure to select 'Save' when done.



For Lightning, click 'Setup', quick search and select 'Object Manager,' then 'D&B Company Record.'



SETUP Object Manager	
36 Items, Sorted by Label	
Campaign	Campaign
Campaign Member	CampaignMember
Case	Case
Contact	Contact
Content Version	ContentVersion
Contract	Contract
D&B Company Record	DNBoptimizer__DnBCompanyRecord__c
Duplicate Record Item	DuplicateRecordItem
Duplicate Record Set	DuplicateRecordSet

Click 'Page Layouts' and then 'D&B Company Record Layout.'



Using the Fields section, drag and drop different D&B attributes onto the layout. Be sure to save your changes to the layout.

6. Restricting Access to the Application

To have all users benefit from D&B data, the application must be installed for all users (as mentioned above). However, it is possible to create an experience tailored to admins and users with a Data Stewardship focus. These steps help to separate power users from standard users.

To begin, take inventory of which profiles already exist in your Salesforce org. Are there already clear profiles for users who are admins and those who have more restricted access? If so, identify your profiles that should have the restricted access. If not, it would be wise to create a specific profile with the intention of restricting access.

For Admin Profiles:

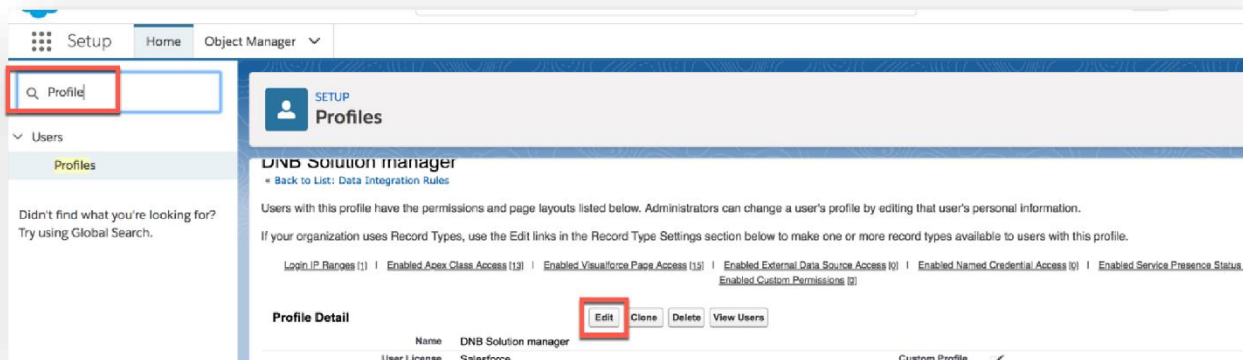
No action is required. By default, all parts of the application (D&B Data fields, Stewardship Dashboards & Account Segmentation) will be visible.

For Restricted Access Profiles:

In order to access the Data Stewardship dashboards, users must first have access to the “View All Custom Settings” permission.

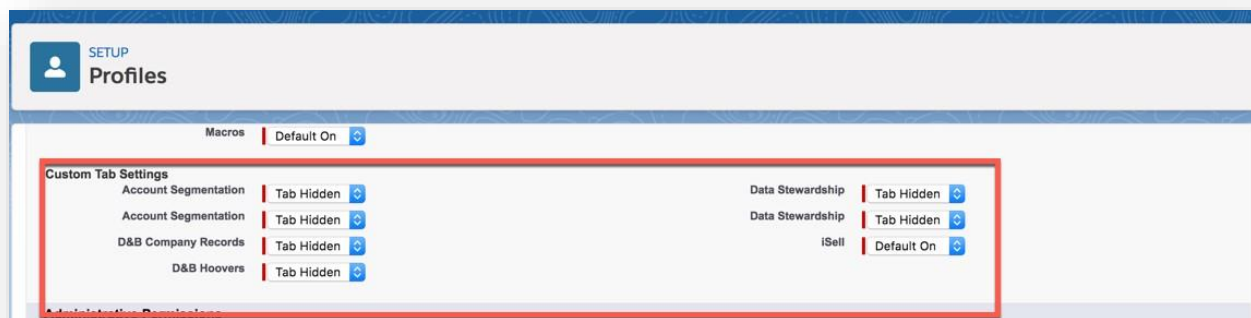
(Lightning/classic) Go to ‘Setup’ and quick find ‘Profiles.’

Select the profile to be used for restricted access users and click ‘Edit.’



Scroll down to ‘Tab Settings → Custom Tab Settings.’

As desired, change ‘Account Segmentation, Data Stewardship and D&B Company Records’ to ‘Tab Hidden’ status. These tabs will no longer be visible to users with the selected profile.



Note: D&B Optimizer is designed for both Lightning and Classic views, so the package includes two versions of the Data Stewardship and Account Segmentation tabs, as the screen shot above illustrates. If you have a combination of users on Lightning and Classic, please ensure you enable both versions. In Lightning view ‘Edit App Navigation’ both sets are available for inclusion, but the graphics will not display properly if you select the Classic version tabs. In Classic view ‘Customize My Tabs’, only the Classic-compatible set is available for inclusion.

If you wish to obscure visibility to D&B data entirely, scroll down to ‘Custom Object Permissions’ and uncheck the ‘Read, Create, Edit and Delete’ boxes.

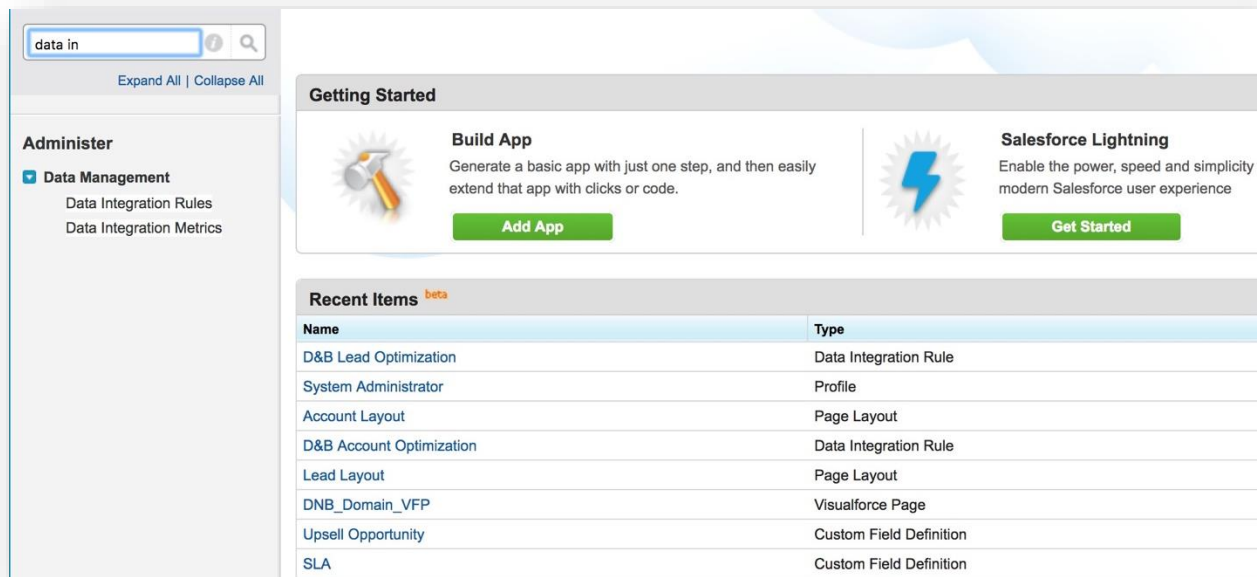


7. Setting the Confidence Code for Matching

The Confidence Code determines the threshold of certainty for matching. Low Confidence Codes are assigned to matches with many discrepancies between the user provided data and D&B’s data. High Confidence Codes are assigned when there is a tight match between key fields like Account Name, Address, City, State, Country, and Web Address.

The default Confidence Code (‘Match Score’ in the Salesforce interface) for both Account and Lead matching is 6. We recommend each client sets a Confidence Code that matches their accuracy expectations. Any Account or Lead that does not meet the set Confidence Code will be treated as unmatched. If you’d like to experiment with different Confidence Codes, please use a sandbox before proceeding to production.

To Set the Confidence Code for Accounts:
Go to ‘Setup’ and quick search ‘Data Integration Rules.’



Under ‘Administer’ (Classic) or ‘Data’ (Lightning), click on ‘Data Integration Rules.’

Click on the ‘D&B Account Optimization’ rule.

Click ‘Edit Rule Settings.’

Account Data Integration Rule
DUNSRIGHT Account Optimization
« Back to List: Data Integration Rules

Rule Details

[Edit Rule Settings](#) [Edit Field Mapping](#) [Deactivate](#)

Name	DUNSRIGHT Account Optimization
Description	DUNSRIGHT Optimize Salesforce account records by leveraging Dun & Bradstreet company data
Object	Account
Data Service	DnB_Test
Update all records (recommended)	<input checked="" type="checkbox"/>
Bypass triggers	<input type="checkbox"/>
Bypass workflow rules	<input type="checkbox"/>
Leave last-modified information unchanged	<input type="checkbox"/>
Minimum score for determining a match	6
Current Status	Active
Created By	User Admin, 7/11/2018 11:34 AM
Modified By	User Admin, 7/11/2018 12:56 PM

Navigate to the 'Match Score' section and use the drop down to select a Confidence Code.

Remember to click 'Save.'

Edit Data Integration Rule
DUNSRIGHT Account Optimization

Rule Details [Save](#) [Cancel](#)

Data Integration Rule Details

Name: DUNSRIGHT Account Optimization
Description: DUNSRIGHT Optimize Salesforce account records by leveraging Dun & Bradstreet company data
Object: Account
Data Service: DnB_Test

Data Integration Rule Settings

☒ Update all records (recommended) ⓘ

When records are updated, do the following:

☐ Bypass triggers
☐ Bypass workflow rules
☐ Leave last-modified information unchanged

Match Confidence

Before activating this rule, test the match confidence.

Minimum score for determining a match: ⓘ

[Save](#) [Cancel](#)

Note: For an overview and help with the other Rule Settings - 'Bypass triggers,' 'Bypass workflow rules,' and 'Leave last-modified information unchanged' - please see this [Salesforce documentation](#).

a) Addressing Leads

The same process should be followed to set a confidence code for Lead matching.

Under 'Administer' (Classic) or 'Data' (Lightning), click on 'Data Integration Rules.'

Click on the 'D&B Lead Optimization' rule.

Click 'Edit Rule Settings.'

Navigate to the 'Match Score' section and use the drop down to select a Confidence Code.

Remember to click 'Save.'

8. Enabling Contact Matching

If you opt in to contact optimization, you can enable two additional Data Integration Rules: D&B Lead Contact Optimization and D&B Contact Optimization. The Optimizer package automatically includes these two rules, however if you attempt to activate them without subscribing to the contact optimization service, matches will not be successful.

Use the same steps as outlined in previous sections to access the rule(s) you wish to activate. Contact matching relies on email address, so this is the only field available for Match Field Mapping.

- **NOTE:** 'Update all records' defaults to unchecked (false) for the D&B Lead Contact Optimization and D&B Contact Optimization rules. The default setting allows Optimizer to match your Lead Contacts and Contacts when new records are created or when manually updating a match. If you'd like to enable a bulk match of all existing records and ensure all records update on a rolling, 15-day basis, change this setting to checked (true).

Contact Data Integration Rule

D&B Contact Optimization

Rule Details

Edit Rule Settings

Edit Field Mapping

Deactivate

Name	D&B Contact Optimization
Description	Optimize Salesforce contact records by leveraging Dun & Bradstreet contact data
Object	Contact
Data Service	DnB_Contact
Update all records (recommended)	<input checked="" type="checkbox"/>
Bypass triggers	<input type="checkbox"/>
Bypass workflow rules	<input type="checkbox"/>
Leave last-modified information unchanged	<input type="checkbox"/>
Current Status	Active
Created By	User Admin, 10/30/2018 11:29 AM
Modified By	User Admin, 12/13/2018 5:46 AM

Edit Rule Settings

Edit Field Mapping

Deactivate

Data Integration Rule Field Mapping

MATCH UPDATE

Select fields in Salesforce to match with fields on the data service. Make sure to pair each data service field with a field in Salesforce.

Data Service Fields	Contact Fields
Email	Email

Cancel Save

Currently, D&B Optimizer for Salesforce matches on US and UK emails only. To prevent attempting matches on records that will never be successful, we recommend using Salesforce's record filtering capability, covered in the next section.

9. Exclude Records from Matching

Salesforce enables functionality to exclude certain Account, Lead, or Contact records from the Data Integration Rules that power D&B Optimizer's match and enrich process. Follow the below steps to choose which records to exclude. Custom logic can be written to apply this setting to groups of records.

a) New Records

Navigate to Setup > Object Manager.

Setup Home Object Manager

object manager

Objects and Fields

Object Manager

Select the appropriate object, find 'Fields & Relationships' and select 'New'.

SETUP > OBJECT MANAGER

Contact

Details Fields & Relationships Page Layouts

Fields & Relationships

28 Items, Sorted by Field Label

Quick Find New Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	AccountId	Lookup(Account)		✓

Under 'Field Type', Select 'Checkbox' and then 'Next'.

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

☐ None Selected

Select one of the data types below.

☐ Auto Number

A system-generated sequence number that uses a display format you define. The number is au

☐ Formula

A read-only field that derives its value from a formula expression you define. The formula field i

☐ Roll-Up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list o

☐ Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users

☐ External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside th

☒ Checkbox

Allows users to select a True (checked) or False (unchecked) value.

☐ Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a

☐ Date

Allows users to enter a date or pick a date from a popup calendar.

We recommend labeling the field ‘Allow D&B Optimizer’.

Next, the field name must be entered as ‘LD_USE_DnB_Optimize’ (case sensitive). If creating this for contacts, use ‘LD_USE_DnB_Contact’.

NOTE: If you wish to prevent matching on the Lead object. Both ‘LD_USE_DnB_Optimize’ and ‘LD_USE_DnB_Contact’ will need to be added as fields.

A box that is “Checked” will allow a match from Optimizer, where an “Unchecked” box will exclude the record from matching. We recommend setting the default to “Checked”, and unchecking subsets of records where you feel this could apply.

Change Field TypeSaveCancel

Field Label

Field Name

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Default Value

Allow D&B Optimizer

LD_USE_DnB_Optimize

Allows or prevents account match and enrich from D&B Optimizer

When checked, match and enrich from D&B Optimizer will process

User

--None--

--None--

☒ Checked

☐ Unchecked

Change Field Type

Save

Cancel

The next page allows you to choose which users will see this checkbox. We recommend at least turning the field on as ‘read-only’ for most users. Select ‘Next’.

Choose the desired page layouts where this field should exist, select ‘Save’.

Step 4. Add to page layouts

Field Label

Data Type

Field Name

Description

dnb optimizer

Checkbox

dnb_optimizer

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field

Page Layout Name

☒

Account Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

b) Existing Records

Existing records will not inherit the default value used for this feature. For example, choosing a default value of “checked” (allow match) will still populate a record created prior to the field being added, but will appear as “unchecked” (skip match). To ensure existing records are not impacted by the new field, you will need to run a re-upload of all existing records using the Data Loader or Data Import Wizard.

To begin, export all data to csv and include whichever field you'll use as a Unique Identifier. We recommend including Salesforce Account Id and DUNS. To edit the "allow" field, add that. To update all to "checked", enter the value as "TRUE". For "unchecked", enter "FALSE".

Open an import application, such as [Data Import Wizard](#) or [Data Loader](#)

Choose "Update Existing Records"

Ensure whichever field that holds the desired value for the "Allow D&B Optimizer" is mapped to the correct field in your standard object (whichever field label was given when the field was created).

IV. User Guide

A. Using the Data Stewardship Dashboards

D&B Optimizer for Salesforce provides four dashboards that provide an overview of data health, with the ability to take select actions to improve quality. In this section, we'll cover how to use the functionality across each.

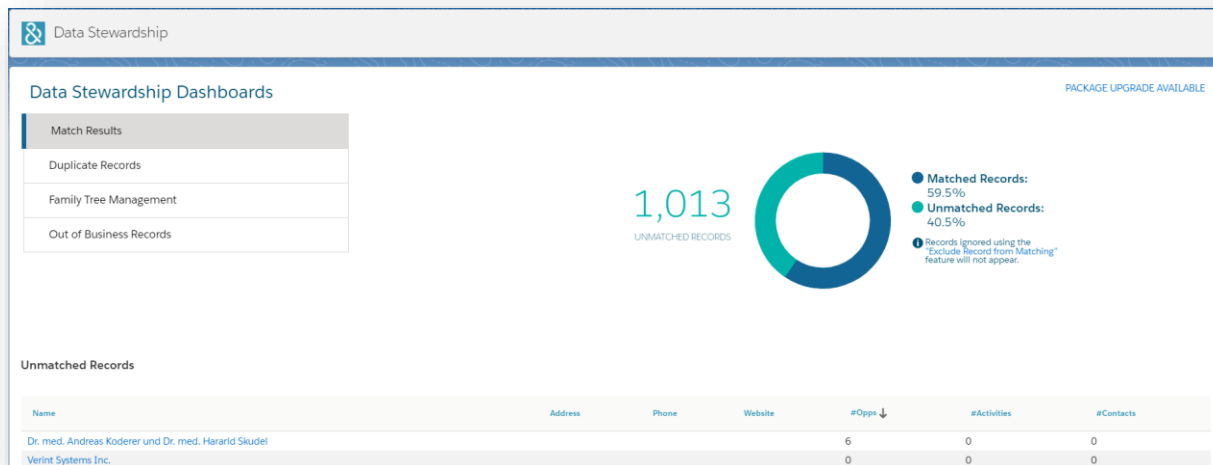
I. Match Results Dashboard

The Match Results dashboard provides a high-level overview of which accounts across your Salesforce instance have been matched to the Dun & Bradstreet Data Cloud based on your Match Score/Confidence Code selections, and which require more input from you to get a successful match. Information in the table is refreshed daily, so new accounts that are entered recently may not immediately appear in the dashboard. Records ignored using the [exclude records from matching feature](#) will also not appear in the data table.

The table helps to identify account records that require more information to get a successful match. We recommend prioritizing accounts that have activities or opportunities associated with them, and you can do so by clicking the column header at the top of the table to sort the list.

Note: Once you've identified accounts you'd like to match to D&B data, you'll need to edit the record and enter more information in blank fields to get a successful match. The minimum amount of data required by D&B Optimizer for Salesforce to get a successful match are:

- Business (Account) Name
- Country



2. Family Tree Management Dashboard

The Family Tree Management dashboard allows you to see which accounts within your Salesforce instance have an open linkage related opportunity. Linkage is the relationship between different business entities or specific sites within a corporate family. Linkage occurs in the D&B Data Cloud when one business location has financial & legal responsibility for another business location. The percentage of financial and legal responsibility determines the type of linkage relationship.

Business entities with majority ownership (> 50% of stock) have two types of legal linkage relationships in D&B's Data Cloud:

- Branch / Division to Headquarter linkage
- Subsidiary to Parent linkage

a) *Standalone Record*

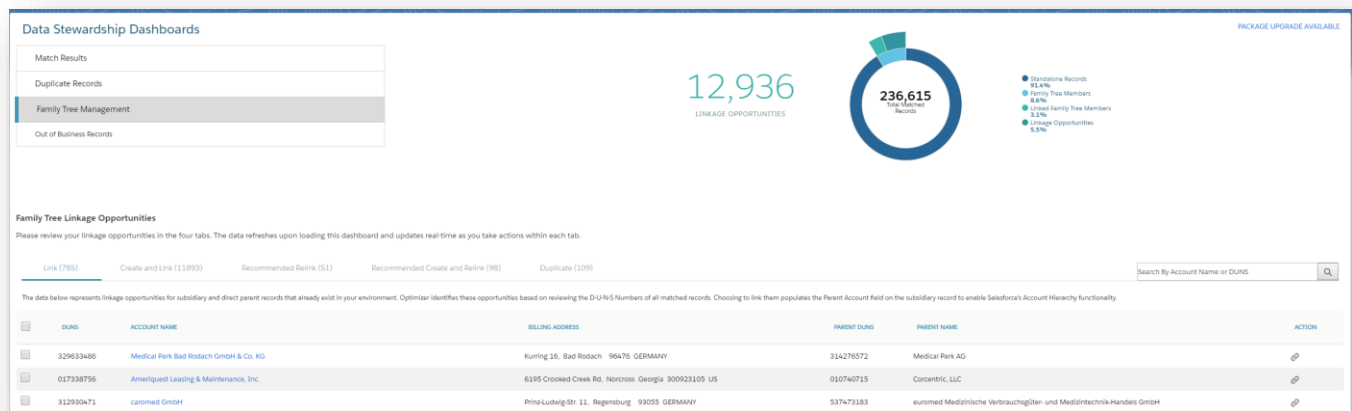
Standalone Records are accounts that do not belong to a corporate family (are not parents, subsidiaries, branches, etc.). No linkage opportunities exist for these records.

b) *Total Family Tree Members*

Family Tree Member Records represent accounts that have associated family members (subsidiaries, branches, etc.). Linkage opportunities exist for these records if they are not already linked in your environment. Each of the below linkage opportunities can be resolved using the appropriate tab in the Family Tree Management dashboard.

- **Linked Family Tree Members:** Accounts with a family tree linkage opportunity that have already been linked
- **Linkage Opportunities:** Accounts with an outstanding linkage opportunity. Optimizer identifies these opportunities based on reviewing the D-U-N-S Numbers of all matched records. Use linkage tabs in the table below to resolve these opportunities.
 - **Link:** Represents linkage opportunities for subsidiary and direct parent records that already exist in your environment. Optimizer identifies these opportunities based on reviewing the D-U-N-S Numbers of all matched records. Choosing to link them populates the Parent Account field on the subsidiary record to enable Salesforce's Account Hierarchy functionality.

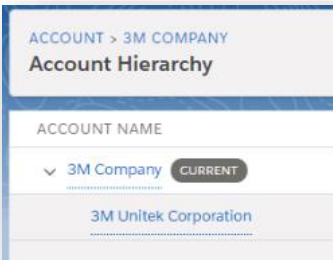
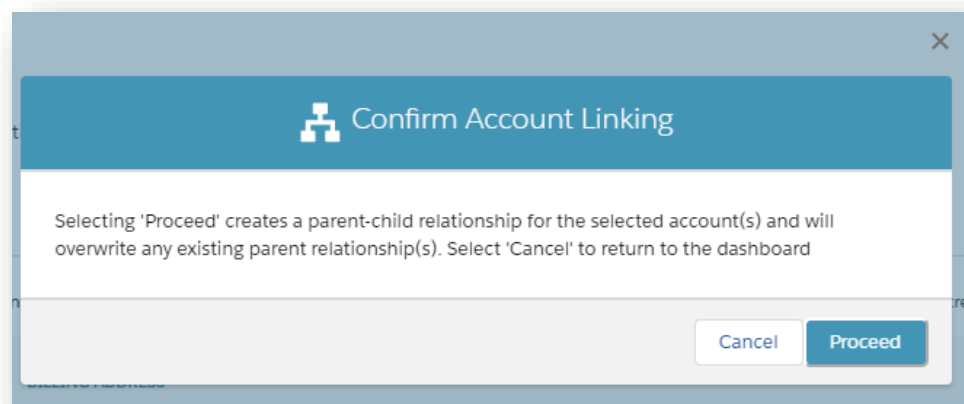
- **Create and Link:** Represents linkage opportunities for subsidiary and direct parent records where the parent record does not exist in your environment. Choosing to link them creates the parent record, then populates the Parent Account field on the subsidiary record to enable Salesforce's Account Hierarchy functionality.
- **Recommended Relinks:** Identifies relinking opportunities for subsidiary and direct parent records where the current value in the Parent Account field on the subsidiary record does not match D&B's value. Choosing to relink them overwrites the Parent Account field on the subsidiary record with the new value.
- **Recommended Create and Relinks:** Represents relinking opportunities for subsidiary and direct parent records where the current value in the Parent Account field on the subsidiary record does not match D&B's value and the parent record does not exist in your environment. Choosing to create and relink them creates the parent record, then overwrites the Parent Account field on the subsidiary record with the new value.
- **Duplicates:** Identifies linkage opportunities for subsidiary and direct parent records where duplicate parent records exist in your environment. Use the Duplicate Records dashboard or another method to resolve the duplicate parents, which moves these linkage opportunities into the Link tab and allow you to take action there.



Using the 'ACTION' column, you can create linkages for each account listed in the data table. To resolve multiple opportunities at once, see [Bulk Link](#) below.

PARENT NAME	ACTION
Toyota Motor Sales USA Inc	
Essilor Laboratories of America, Inc.	

Once you select the link action, a dialog box will appear to confirm the relevant action. Clicking 'Proceed' will initiate the linkage. Any existing parent relationship for the accounts will be overridden.



In the example above, you'll see the parent-child relationship between 3M and 3M Unitek on the Account Hierarchy view after clicking 'LINK' on the dashboard.

Notes: The Parent D-U-N-S Number provided is the most direct parent related to the matched record. The dashboard will only allow linking of an entity with the immediate upward parent in the family tree. In other words, you cannot link a parent company to its subsidiary, but you can link a subsidiary to its parent. Linkage is also only displayed on Active (not Out of Business) records. When a record moves to Out of Business status, the upward linkage is removed. If the company is no longer operating, we do not continue to report a linkage relationship – even historically.

c) Bulk Link

The Family Tree Management dashboard offers the ability resolve up to 20 linkages at once on the Link and Create and Link tabs.


Use the 'Bulk Link' action to resolve all linkage opportunities currently selected within the table. Selecting the checkbox in the header row of the table will select all linkages shown on the current page in the table. By using the checkbox next to the DUNS column, you can individually select or de-select accounts to include in your bulk link action.

Link (785)

Create and Link (11893)

Recommen

The data below represents linkage opportunities for subsidiary and direct parent recor


 Bulk Link

 Selecting 'Bulk Link' creates the parent record, then populates the Par

<input checked="" type="checkbox"/>	DUNS	ACCOUNT NAME
<input checked="" type="checkbox"/>	930569756	Tms North American Part Ctr KY
<input checked="" type="checkbox"/>	115355877	Dunlaw Optical Laboratories, Inc.
<input checked="" type="checkbox"/>	332674659	Senioreneinrichtungen der Stadt Krefeld

3. Duplicate Records Dashboard

Accounts that share the same D-U-N-S Number are grouped together in a single row on the duplicate records dashboard. By default, the table is sorted by number of duplicates from high to low, highlighting the biggest opportunity for consolidation. The table can also be sorted by the total number of Opportunities, Activities and Contacts attached to a set of duplicate accounts.

 Data Stewardship

Data Stewardship Dashboards

Match Results

Family Tree Management

Duplicate Records


Out of Business Records

1,963

DUPLICATE RECORDS

● Unique Records: 92.4%

● Duplicate Records: 7.6%



Duplicate Records

DUNS	ACCOUNT NAME	PRIMARY ADDRESS	#DUPLICATES ↓	#OPPS	#ACTIVITIES	#CONTACTS	ACTION
260027658	MINERVA	BEL AIR, BUAIS-LES-MONTS, NORMANDIE, 50640, FR	2	0	0	0	MANAGE
060704780	Apple Inc.	1 APPLE PARK WAY, CUPERTINO, California, 950140642, US	2	0	0	0	MANAGE
388626780	Michael Schäfer und Stephan Schulte	Ludwigsburger Str. 2, Waiblingen, Baden-Württemberg, 71332, DE	1	1	4	2	MANAGE

Find the account set of interest and click 'MANAGE' in the Action column.

A modal opens showing all individual accounts that share the same D-U-N-S Number.

Duplicate Records:

Merge Selection Screen

Select which records to merge. The master record will retain its values and inherit all related objects from other records involved in the merge. The first row of shaded data represents D&B's information for the DUNS Number, to help guide your selection of a master record.

Master?	Include?	Account Name	Address	#Opps	#Activities	#Contacts	Created	Last Modified
		D&B Data	MATTHIAS					
<input checked="" type="radio"/>	<input type="checkbox"/>	Dr.Thomas Hofer und Matthias Döbler	Kapellstr. 8, Donauwörth, 86609, FRANCE	1	3	1	2/12/2018	8/22/2018
<input type="radio"/>	<input checked="" type="checkbox"/>	Dr.med. Matthias Rudolph, Dr.Olga Lingert	Lindenweg 4, Mitwitz, 96268, FRANCE	0	0	0	4/19/2018	8/22/2018
<input type="radio"/>	<input checked="" type="checkbox"/>	Dr.med. Wolfgang Wohlieb, Dr. med. Wolfgang Schinkel, Dr. Matthias Schinkel	Rosenweg 2, Helmertingen, 87751, FRANCE	0	0	0	4/19/2018	8/22/2018
<input type="radio"/>	<input checked="" type="checkbox"/>	Dr. med. Angelika Kiem und Dr. med. Matthias Kiem	Kellerdamm 4, Friesoythe, 26169, FRANCE	0	0	0	4/19/2018	8/22/2018
<input type="radio"/>	<input checked="" type="checkbox"/>	Matthias Grein und Dr. Rainer Kempers	Schmölbersstr. 28, Rhede, 46414, FRANCE	0	0	0	4/19/2018	8/22/2018
<input type="radio"/>	<input checked="" type="checkbox"/>	Dr.med. Matthias Gregersen	Rödingsmarkt 1, Hamburg, 20459, FRANCE	0	0	0	4/19/2018	8/22/2018
<input type="radio"/>	<input checked="" type="checkbox"/>	Matthias Pott	Bahnhofstr. 64, Herne, 44623, FRANCE	0	0	0	4/19/2018	8/22/2018
<input type="radio"/>	<input checked="" type="checkbox"/>	Matthias Fabry	Riesstr. 3, Lörrach, 79539, FRANCE	0	0	0	4/19/2018	8/22/2018

The top row of the table displays the business name and address according to the D&B Data Cloud. It can be used as a reference row to determine the correctness of other accounts.

The following information is displayed for each individual account:

- Account Name, Address (Billing or Shipping, whichever has been matched as part of the Data Integration Rules), Number of Opportunities, Number of Activities, Number of Contacts, Created Date, Last Modified Date

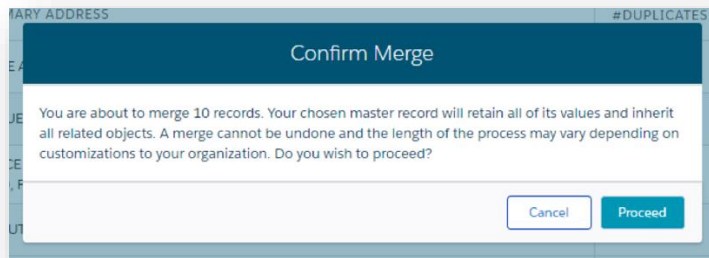
By default, the first record is selected as the master record, and the user can optionally select an alternative master. As the modal notes, the master record will retain all values and inherit all related standard objects (Opportunities, Activities, Contacts) from other records involved in the merge.

Note: Only one account can be selected as a master for a transaction. The radio button behaves accordingly.

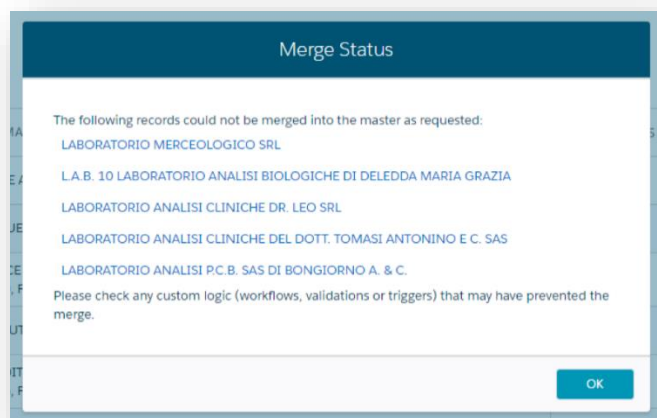
Select other accounts to be included in the merge. Users can select as many as they'd like.

Once the desired records are selected, click 'Merge'. The 'Merge' option activates when more than one record is selected.

A confirmation screen is displayed before the merge occurs. As the screen notes, a merge cannot be undone. Clicking 'Cancel' returns users to the previous screen and maintains their previous selections. Clicking 'Proceed' initiates the merge.

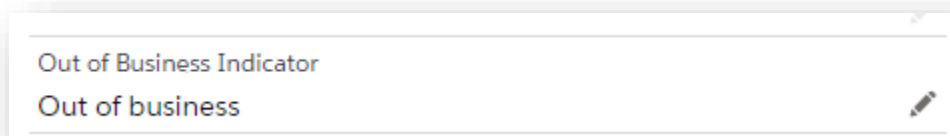


Failure Cases: It is possible for merges to fail if you have customizations (trigger, validations, workflows) that block the process. In this case, a modal appears explaining which accounts were not merged.



4. Out of Business Records Dashboard

The Out of Business Records dashboard identifies Accounts in your Salesforce instance that have discontinued operations according to the D&B Data Cloud. This is one of the 80+ data elements provided in the Custom Object on your Account records as shown below:



Once D&B Optimizer identifies the Out of Business Indicator field for the entity is flagged as 'Out of business' it displays on the dashboard for you to take any relevant actions.

a) How D&B determines inactive companies

D&B flags businesses as 'Out of business' using at least two separate authorities. We determine inactive status through transactional sources, direct manual investigations and its outbound data maintenance programs. The two sources can include management or owners of the company itself and / or multiple third-party sources such as:

- No active business licensing
- No listing with landlord at captioned address
- Inactive business registration with US Secretary of State or inactive on government registry
- No data signals over a set period of time, etc.

Single-source confirmations can exist for special sources in markets:

- Chapter 7 bankruptcy (US) filing – because this filing is liquidation, it will automatically trigger an out of business status
- Certain merger & acquisition scenarios may result in an out of business flag depending on the final structure the acquirer decides on the purchased entity

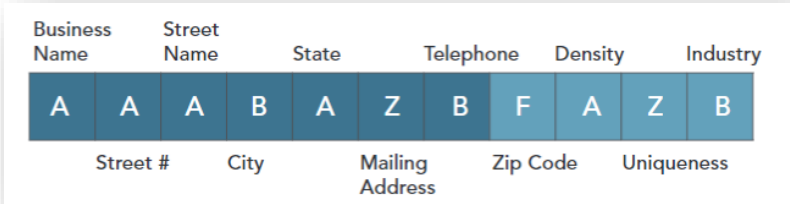
B. Understanding D&B Match Data & Confidence Codes

The goal of D&B DUNSRight Entity Matching® is to find the one entity in the D&B Data Cloud that most closely resembles the account data in your Salesforce environment. Based on your configurations of Data Integration Rules, the best company candidate is chosen, and additional feedback is provided to allow you to make the right business decisions.

To get full value out of D&B DUNSRight Entity Matching provided with D&B Optimizer for Salesforce, we'll cover some common terms you should become familiar with in the text below.

I. MatchGrade Pattern (Match Grade)

The MatchGrade Pattern (aka 'Match Grade' in Salesforce) is an evaluation of each inquiry data element based on similarity between the cleansed inquiry data and the candidate in the D&B Data Cloud. The MatchGrade Pattern answers the question: Why did we choose this match?



The MatchGrade Pattern provides qualitative assessment between components of inquiry & reference. Below is an example that shows how you can interpret the string of characters shown above:

(A) Should be considered same:	Smith Bros Clothiers vs. Smith Brothers Clothing
(B) Some similarity:	Smith Bros Clothiers vs. Smith Clothing Store
(F) Should be considered not same:	Smith Bros Clothiers vs. Smitty's Bar and Pub
(Z) Missing information to conclude:	One or both are blank or not used

There are four values to the score assigned to each of the specific components of the MatchGrade. See the table below for each of the eleven components:

MatchGrade Component	Data Element	Comments
1	Company Name	Maps one (1) customer input 'Business Name' field to the following D&B elements: <ul style="list-style-type: none"> • Current or former Business Name or Tradestyle ('Doing Business As') Business name (up to 5) • Registered Company Name (non-US, only) • Current Primary or Additional Contact (owner/CEO/key exec)
2	Street Number	The input Street Address Number is matched to the current or former business address, or an additional address (i.e., home address) of a key executive
3	Street Name	The input Street Name is matched to the current or former business address, or an additional address (i.e., home address) of a key executive. Bear in mind that a Street Name may be a number, such as '3 rd Ave.'
4	City Name	The input City is matched to the current or former business address, or an additional city (i.e., home city) of a key executive
5	US = State; Canada = Province; Other = Country	The input State/Province or Country is matched to the current or former business address, or a state/province (i.e., home state/province) of a key executive
6	Mail Address/PO Box	The input PO Box number is matched to the current or former PO Box number
7	Telephone Number	The input Phone Number, including area code, is matched to the current or former Phone Number
8	ZIP Code	The standardized and corrected input ZIP Code is matched to the current or former ZIP Code, or an additional ZIP code (i.e., home address) of a key executive
9	Density	A score based on the number of businesses per square mile within a specific ZIP Code.
10	Uniqueness	A = Inquiry name has only 1 record in the match reference database within State B = Inquiry name has only 2-3 records in the match reference database within State F = Inquiry name has more than 3 records in the match reference database within State
11	Industry	A score is defined based on line of business (Standard Industrial Classification, or SIC) imputed from words in the inquiry Business Name. This imputed SIC is compared for similarity to the up to six SIC codes D&B has assigned to its candidate record

2. Match Score/Confidence Code

The Confidence Code (aka 'Match Score' in Salesforce) is the qualitative evaluation indicating the overall match quality for each inquiry. It answers the question: How confident are we that the resulting D-U-N-S Number accurately matches to your account on a scale of 1-10? A Confidence Code 10 indicates a high degree of confidence. A Confidence Code 4 indicates a low degree of confidence. Anything that scores between a 1-3 is for D&B internal use only and is not surfaced within the product.

Confidence Codes group similar quality matches. Many MatchGrades relate to one Confidence Code. Confidence Codes are used to aid in the evaluation of match results and for creating auto-decisioning rules. All MatchGrades are mapped to one of the 10 MatchGrades, with the highest/best matches categorized as 10 and non-matches categorized as 00.

3. Match Data Profile

Match Data Profile (MDP) describes how a match was made between the Match Reference file and the inquiry data. MDPs exist for name, physical address, mailing address and telephone Number. The Match Data Profile is a series of seven 2-digit codes used to define the source of the matched record within the D&B Data Cloud. The MDP provides specific detail for each of the first seven positions of the MatchGrade and describes the type of D&B Data Cloud record to which the input record matched. At a high-level, record type categories can be described as:

- Current/Primary
- Former
- Additional
- Not Available

Matched Elements	MDP Notation
Name Matches	Digits 1-2
Primary Name	00-xx-xx-xx-xx-xx-xx
Registered Name*	01-xx-xx-xx-xx-xx-xx
Tradestyle	02-xx-xx-xx-xx-xx-xx
CEO Name	03-xx-xx-xx-xx-xx-xx
Additional Executive	04-xx-xx-xx-xx-xx-xx
Former Business Name	05-xx-xx-xx-xx-xx-xx
Former Tradestyle	06-xx-xx-xx-xx-xx-xx
Former CEO	07-xx-xx-xx-xx-xx-xx
Former Executive	08-xx-xx-xx-xx-xx-xx
Short Name	09-xx-xx-xx-xx-xx-xx
Brand	11-xx-xx-xx-xx-xx-xx
Primary Name – not available	98-xx-xx-xx-xx-xx-xx
Physical Address Matches	Digits 3-10
Physical Address	xx-00-00-00-00-xx-xx
Registered Address*	xx-01-01-01-01-xx-xx

Former Physical Address	xx-02-02-02-02-xx-xx
Additional (EHA/DDM)Address	xx-03-03-03-03-xx-xx
Physical Address – not available	xx-98-98-98-98-xx-xx
Mail Address Matches	Digits 11-12
Mail Address	xx-xx-xx-xx-xx-00-xx
Registered Mail Address*	xx-xx-xx-xx-xx-01-xx
Former Mail Address	xx-xx-xx-xx-xx-02-xx
EHA/DDM Mail Address	xx-xx-xx-xx-xx-03-xx
Mail Address – not available	xx-xx-xx-xx-xx-98-xx
Phone Matches	Digits 13-14
Current Phone	xx-xx-xx-xx-xx-xx-00
Registered Phone*	xx-xx-xx-xx-xx-xx-01
Former Phone	xx-xx-xx-xx-xx-xx-02
Current Phone – not available	xx-xx-xx-xx-xx-xx-98
* for non-US applications	

4. Locating Individual Record Match Data

These three attributes – Match Data Profile, Match Grade, and Match Score/Confidence Code have a 1-1 relationship with each matched company on the Account or Lead object. As such, this data is not available in the D&B Company Record custom object, which maintains a 1-1 relationship with a particular D-U-N-S Number. There is a 1-N relationship between the D&B Company Record and the Account/Lead objects (i.e., when duplicates exist). There are two locations of this data:

1. The Data Integration Rules section in the Setup menu. Here, the match data can be Mapped to custom fields on the Account/Lead objects. This guide does not explicitly cover the Update mapping functionality available through Salesforce, so please reference this [Help Topic](#) for more information.
2. the Other Matches option available to Lightning view users as described in [Select or Change a Match Result \(Lightning view\)](#)

Lightning view users have an ‘Other Matches’ option to select the desired match if Optimizer does not find one at the selected Match Score or override the automatic match.

Navigate to the desired Account or Lead.

Click ‘Check for New Data’ on the Account or Lead then select ‘Update’ and ‘Other Matches.’

Records Are Different

Some Salesforce and data service field values differ.

Salesforce Record

Select All

Matched Record from D&B
Company Data for Accounts

Other Matches

Select All

BILLING STREET

150 Chestnut Street

25 Munro Blvd

Up to 10 matches are presented in the table, along with Match Score (Confidence Code) and location.

Selecting a radio button for a suggested match highlights additional information on the right-hand side, including firmographics, Match Grade, and Match Data Profile.

Matches from D&B Account Optimization

Account
Oracle Corporation

Type
Prospect

Phone
650-506-7000

Website
http://www.oracle.com

Account Owner
Stewart Macdonald

Account Site

Industry
Technology

10 matches available

COMPANY NAME	MATCH SCORE	CITY	STATE/PROVINCE	COUNTRY
<input checked="" type="radio"/> Oracle Corporation	10.0	REDWOOD CITY	California	US
<input type="radio"/> Kai Blue Inc	10.0	REDWOOD CITY	California	US
<input type="radio"/> Oracle Japan Holding, Inc.	10.0	REDWOOD CITY	California	US
<input type="radio"/> Oracle International Inve...	10.0	REDWOOD CITY	California	US
<input type="radio"/> Oracle Complex Systems ...	10.0	REDWOOD CITY	California	US
<input type="radio"/> Oracle Corporation	10.0	REDWOOD CITY	California	US
<input type="radio"/> Oc Acquisition LLC	9.0	REDWOOD CITY	California	US
<input type="radio"/> Oracle International Corp...	9.0	REDWOOD CITY	California	US
<input type="radio"/> Oracle Systems Corporati...	9.0	REDWOOD CITY	California	US
<input type="radio"/> Oracle Credit Corporation	9.0	REDWOOD CITY	California	US

Account Phone
+16505067000

D&B DUNS Number
144709193

Website
www.oracle.com

Account Name
Oracle Corporation

Match Grade
AAAAZAAFFZ

Match Data Profile
0000000000980000000000009898

Cancel

Match

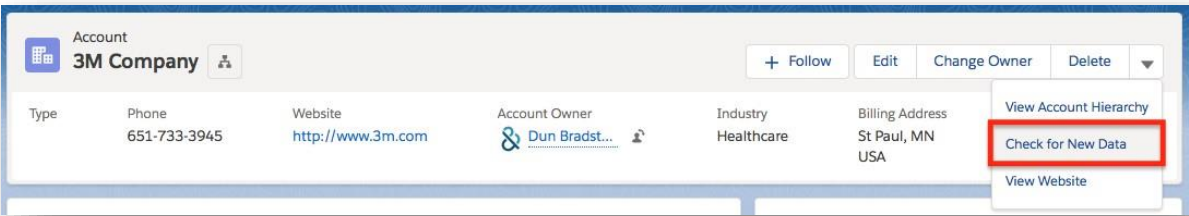
Select the desired match or alternate match, select ‘Match’ and then on the stare and compare screen, select ‘Confirm’. This will update the D&B DUNS Number and create the linkage to populate the Visualforce page and provide access to the D&B Company Record. For previously un-matched records, this is all that is required to facilitate a match.

For a re-match scenario, there is an additional step necessary to update the linkage to the D&B Company Record. To complete the re-match and link to the appropriate record, remove the value from the ‘AccountToDnB’ or ‘LeadToDnB’ field and hit ‘Save’. The record is now fully up to date with the proper linkage. To automate the re-match process, please refer to our re-match process builder setup guide [here](#)

C. Individual Record Match Status/Data

I. Check the Match Status

In Lightning, navigate to the Account or Lead. Click the down arrow then the ‘Check for New Data’ button.



In Classic, ensure that you have the ‘Data Integration Rules’ section on your Account or Lead layout (see guide section Add Integration Status to Classic UI).

Navigate to the Account or Lead.

Scroll on the page to find the ‘Data Integration Rules’ section.

Data Integration Rules					Data Integration Help ?
Action	Status	Data Integration Rule Name	Data Service	Last Updated	
Update	Not Found	DUNSRIGHT Account Optimization	DnB_Test	Just now	

2. Interpret the Match Status

The table below defines each match status. Match statuses are sometimes called “Data Statuses” as in the table below.

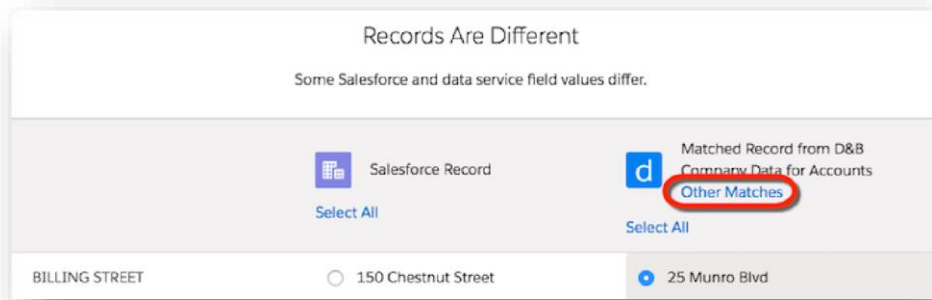
Data Statuses	
When you check for new data on a record, the data status indicates how the record compares with data service records.	
Available in: Professional, Enterprise, Performance, and Unlimited Editions	
DATA STATUS	DEFINITION
Not Compared	The Salesforce record wasn't compared with records in the data service.
In Sync	The Salesforce record matches a record in the data service, and the fields to be updated have identical values.
Reviewed	The Salesforce record matches a record in the data service, but not all values from the matched record were accepted. Only values for fields to be updated are used to determine the status. A record retains Reviewed status until someone updates the record manually or the data service record becomes unavailable.
Different	The Salesforce record matches a record in the data service, but the fields to be updated have different values, and the differences haven't been reviewed.
Match Available	The data service doesn't have a record that qualifies for automatic matching, but it does have one or more possible matches.
No Match	The data service has no records similar to the Salesforce record.
Skipped	The Salesforce and data service records were compared, but an error (for example a validation or trigger error) prevented the data status from being updated.

3. Select or Change a Match Result (Lightning view)

Lightning view users have an ‘Other Matches’ option to select the desired match if Optimizer does not find one at the selected Match Score or override the automatic match.

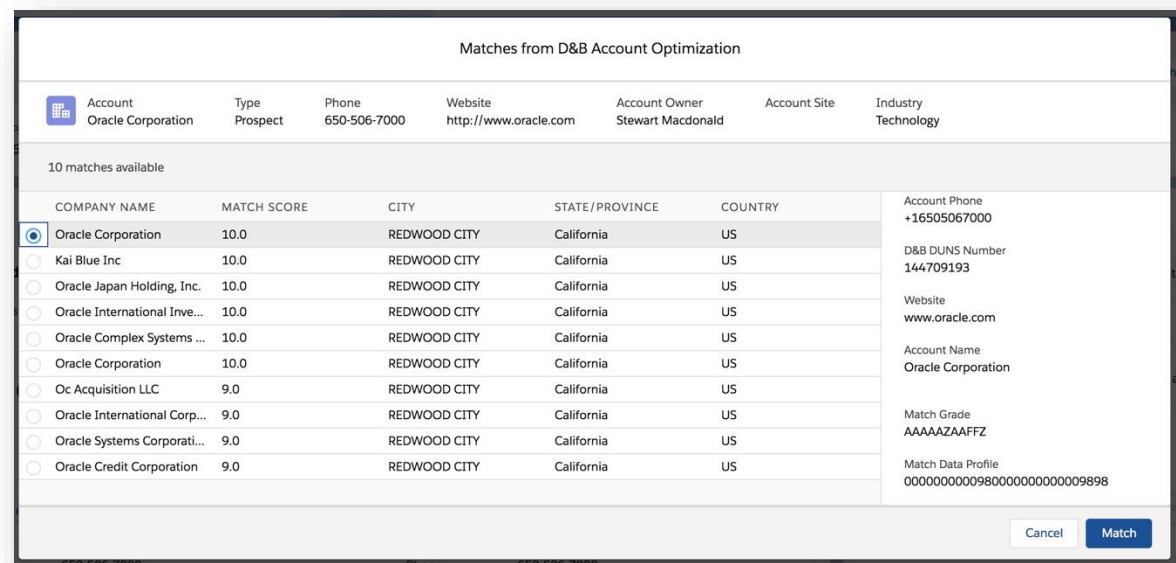
Navigate to the desired Account or Lead.

Click ‘Check for New Data’ on the Account or Lead then select ‘Update’ and ‘Other Matches.’



Up to 10 matches are presented in the table, along with Match Score (Confidence Code) and location.

Selecting a radio button for a suggested match highlights additional information on the right-hand side, including firmographics, Match Grade, and Match Data Profile.



Select the desired match or alternate match, select ‘Match’ and then on the stare and compare screen, select ‘Confirm’. This will update the D&B DUNS Number and create the linkage to populate the Visualforce page and provide access to the D&B Company Record. For previously un-matched records, this is all that is required to facilitate a match.

For a re-match scenario, there is an additional step necessary to update the linkage to the D&B Company Record. To complete the re-match and link to the appropriate record, remove the value from the ‘AccountToDnB’ or ‘LeadToDnB’ field and hit ‘Save’. The record is now fully up to date with the proper linkage. To automate the re-match process, please refer to our re-match process builder setup guide [here](#)

4. Change a Match Result (Classic view)

Classic view users do not have the 'Other Matches' option, so the path to matching an unmatched record is to improve the matching fields data and let the service try to automatically re-match. Matches are maintained through the use of two fields – 'D&B DUNS Number' and 'AccountToDnB.' When you want to re-attempt or change a match result, you need to remove the data from those two fields in a single action.

Navigate to the desired Account or Lead.

Click 'Edit' on the Account or Lead.

The screenshot shows the '3M Company' account page. At the top, there's a header with '3M Company' and navigation links like 'Customize Page', 'Edit Layout', 'Printable View', and 'Help for this Page'. Below the header is a 'Post' section with a text input and a 'Share' button. A 'Followers' section shows 'No followers.' Below that is a 'Back to List: Leads' link. A navigation bar contains links for 'Data Integration Rules (1)', 'Contacts (0)', 'Open Activities (0)', 'Activity History (0)', 'Opportunities (0)', 'Cases (0)', 'Partners (0)', and 'Notes & Attachments (0)'. The 'Account Detail' section shows the account name '3M Company', SIC Code '38410000', D&B DUNS Number '185082492', and AccountToDnB 'a02100000B4Zzo'. The 'Edit' button is highlighted with a red box.

Remove the 'AccountToDnB' and the 'D&B DUNS Number' values from the record and click 'Save.'

The screenshot shows the 'Account Edit' form for '3M Company'. The form has tabs for 'Account Information', 'Billing Information', and 'Shipping Information'. The 'Account Information' tab is active. It contains fields for 'Account Name', 'SIC Code1', 'Total Company Employees', 'Sales Volume USD (\$)', 'SIC Code1 Description', 'Billing Street', 'Billing City', 'Billing State/Province', 'Billing Zip/Postal Code', 'Billing Country', 'D&B DUNS Number', 'AccountToDnB', 'Parent Account', 'Global Ultimate Parent Name', 'Phone', 'Website', 'Shipping Street', 'Shipping City', 'Shipping State/Province', 'Shipping Zip/Postal Code', and 'Shipping Country'. The 'D&B DUNS Number' and 'AccountToDnB' fields are highlighted with a red box. The 'Save', 'Save & New', and 'Cancel' buttons are at the bottom.

a) To replace the existing match with a known D-U-N-S Number

Follow the steps above to remove the existing match, then enter the known D-U-N-S Number in the 'D&B DUNS Number' field.

Click 'Save' on the record.

A match will be reattempted using the newly provided D-U-N-S Number. You may need to refresh the page to see the results of the match.

b) To replace the existing match and attempt a new one

Follow the steps above to remove the existing match, then change matching field data on the record as desired. The key match criteria are: Account Name, Street, City, State, Country, in accordance with the match rules configured on the Data Integration Rule.

Click 'Save.'

A match will be reattempted using the newly provided information. You may need to refresh the page to see the results of the match.

D. Writing D&B Data to Standard Objects

Salesforce enables writing data from the Lightning Data platform (which powers D&B Optimizer) in a couple of ways, by using Update Field Mapping in the Data Integration Rules or by using Workflow Rules. Depending on your needs, you can choose the method that works best for you. This section provides an overview of this functionality, but it is owned and maintained by Salesforce, so please consult them for deeper guidance.

I. Update Field Mapping

When activating the Data Integration Rule(s), in addition to editing the fields evaluated for Match (as in Configuring Matching Fields) you can also map data to the Account/Lead/Contact standard object fields. See this [Help article](#) for more information. With Salesforce's Spring '19 release, additional functionality is available to auto-overwrite existing values in bulk versus only writing to non-null fields as outlined in this [Release Notes article](#).

Additionally, salesforce offers out-of-the-box functionality to assist with your business processes. Please see Salesforce's [Automate Your Business Process](#) guide for assistance with these features.

NOTE: If you are mapping address fields in the Update section and have picklists enabled on the standard address fields, you must map ISO values for Primary or Mailing Address State and Country in the Update field mappings. Depending on which D&B field you decide to use, any of following must be mapped:

- Primary Address Country/Region Code ISO
- Primary Address State Province ISO
- Mailing Address Country/Region Code ISO
- Mailing Address State Abbrev ISO

If ISO values are not mapped, you will see "Skipped" status for most or all records, with no "Message" information.

E. Understanding Contact Accuracy Scores

If you opt in to contact optimization, there are some important differences to understand relative to company optimization. Unlike with the company-based Data Integration Rules, there is no Match Score/Confidence Code

to determine the threshold for determining a match, Contact matching looks for the existence of the email address in the D&B database and returns all matches, regardless of quality. We don't score contacts in the same way when evaluating match candidates. However, there are scores for contacts that you can use to determine the quality of the contact. They include Email Deliverability and Phone Accuracy. The D&B Contact Record contains two indicators for each – a raw score and a related rating of quality.

The Email Deliverability Score is a value from 0 to 99 that predicts the probability that a contact can be reached by the email listed for the contact, at the time of the most recent email verification. For example, a record with an Email Deliverability Score of 16 has a 16% chance of reaching the intended inbox. We recommend that you use this score as a driver for how you manage the anticipated deliverability levels of your contact records.

The Email Deliverability rating identifies the quality range within which the score falls. This field can contain the following output values:

- Excellent
- Good
- Fair
- Poor
- Very Poor

The Email Deliverability Score and Email Deliverability ratings are associated as follows:

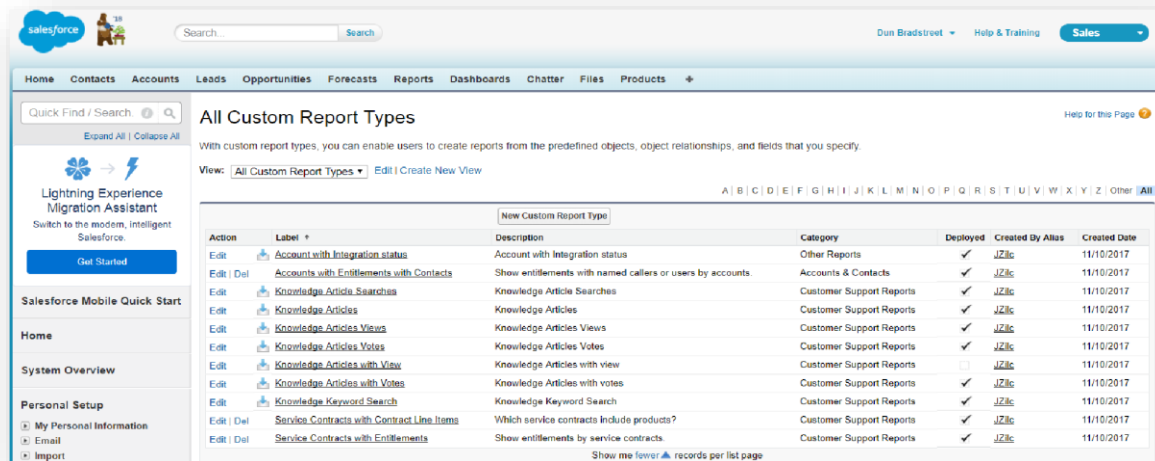
Score	Rating
90- 99	Excellent
80- 89	Good
40- 79	Fair
20- 39	Poor
0- 19	Very Poor

F. Use D&B Data in Reporting

Want to gain more insights out of your D&B data? To do so, utilize our data in Salesforce reporting. To configure this, you will need to enable a new report type.

Go to 'Setup' and type 'Report Types' in the Quick Find search box. Click on 'Report Types' under 'Create' (Classic) or 'Analytics' (Lightning).

Depending on previous experiences, you may see a section titled 'What is a Custom Report Type?' This is informational, but useful as it describes some of what we'll be doing in subsequent steps. After reading this section, click 'Continue.'



Click on 'New Custom Report Type.'

On the next form, select 'Accounts' or 'Leads' as the primary object.

Enter the appropriate values for how and where you want this report type to show up. For example, we named the report type 'Accounts with D&B Data,' and we placed this report in the 'Accounts and Contacts' category because it fit with other Account reports.

Lastly, select 'Deployed' as the Deployment Status.

New Custom Report Type Help for this Page

Step 1. Define the Custom Report Type Step 1 of 2

Next Cancel

Report Type Focus ! = Required Information

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object: Accounts

Identification

Report Type Label: Accounts with D&B Data

Report Type Name: Accounts_with_D_B_Data

Description: This report type will blend my account data with D&B data.

Store in Category: Accounts & Contacts

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status: ☐ In Development ☒ Deployed

Next Cancel

Click 'Next.'

New Custom Report Type
Accounts with DnB Data Help for this Page

Step 2. Define Report Records Set Step 2 of 2

Previous Save Cancel

This report type will generate reports about Accounts. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Accounts
Primary Object

(Click to relate another object)

A

A

Previous Save Cancel

Accounts should be the only object associated with this report type. Click 'Save.'

On the next screen, select the 'Edit Layout' button in the 'Fields Available for Reports' section.

Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.

Custom Report Type Definition Edit Delete Clone

Report Type Label	Accounts with D&B Data	Report Type Category	Accounts & Contacts
Report Type Name	Accounts_with_D_B_Data	Deployment Status	Deployed
Description	This report type will blend my account data with D&B data.		
Created By	Dun Bradstreet, 2/14/2018 12:13 PM	Modified By	Dun Bradstreet, 2/14/2018 12:13 PM

Object Relationships Edit Object Relationships Help

Accounts (A)
with or without related records from Integration Rule Info (B)

A B

A B

Fields Available for Reports Edit Layout Preview Layout Fields Available for Reports Help

Source	Selected Fields
--------	-----------------

On the next screen, click on 'Add fields related via lookup.'

Edit Custom Report Type

Accounts with DnB Data

Set how fields display on the Select Columns page in the report wizard via this report type by selecting fields from the right-hand box and dragging them to a section on the left. Arrange fields on sections as they should appear to users in the report wizard. Fields not dragged onto a section will be unavailable to users when they generate reports from this report type.

- You can select and move multiple fields together by using Ctrl+click to select fields individually or Shift+click to select a group of fields.
- To rearrange the sections, select the section header and drag it to the desired location.

Field Layout Properties Save Cancel Preview Layout

Total Fields in Layout: 81

Edit Properties Create New Section

Accounts				Edit Delete
Account ID	✓ Account Name	Account Number	Account Owner	
Account Site	Account Source	AccountToDnB	Active	
Annual Revenue	Billing Address	Billing City	Billing Country	
Billing Geoco...	Billing Latit...	Billing Longi...	Billing State...	
Billing Street	Billing Zip/P...	Clean Status	Company Name	

Legend

- Not in Page Layout
- Used in Page Layout
- Selected
- ✓ Checked by Default
- Added via Lookup

View: Accounts Fields

Add fields related via lookup »

Accounts Fields (Page 1 of 1)

Next Page »

Expand the 'AccountToDnB' option.

Add Fields via Lookup

Add Fields Related to **Accounts** Via Lookup

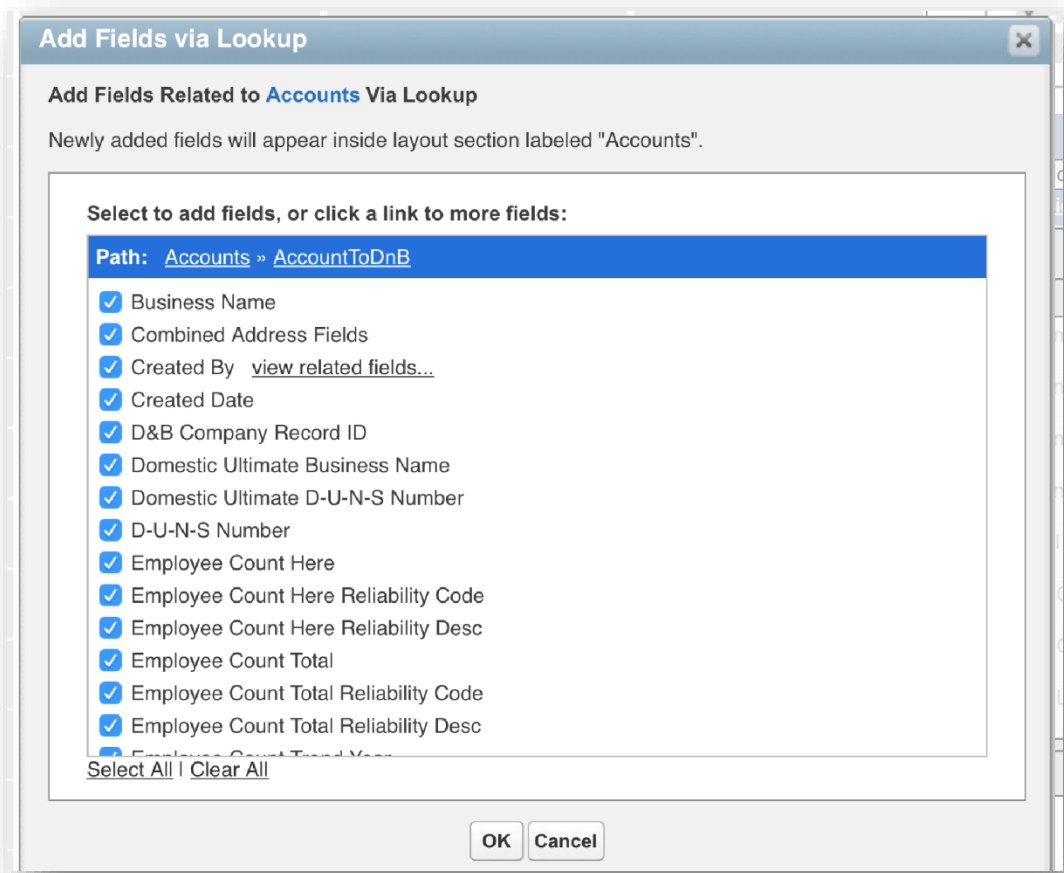
Newly added fields will appear inside layout section labeled "Accounts".

Select to add fields, or click a link to more fields:

Path: Accounts

- Account Owner
- AccountToDnB »
- Created By
- Last Modified By »
- Parent Account »

Select the fields that you'd like to use in reporting. We recommend that you select all fields here so that all D&B fields are accessible through this report type. Click 'OK.' Back on the 'Field Layout Properties' page, click 'Save.'



G. Lightning vs. Classic view

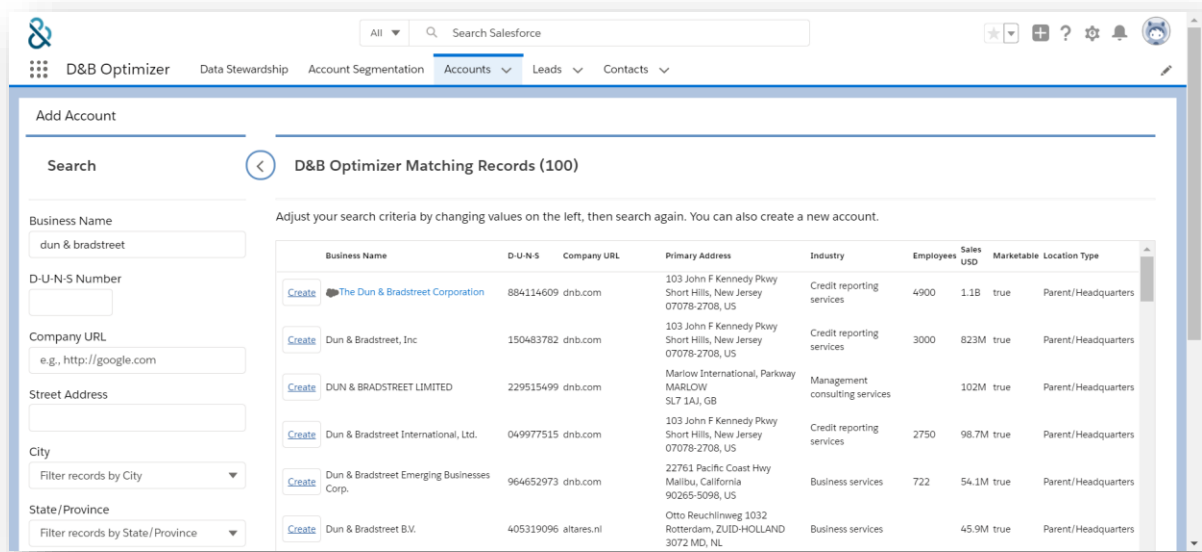
In addition to the differences in re-match and selecting a match for an unmatched record discussed in another section, there are some other differences between the Optimizer product experience in the two views. Salesforce continues to enhance the functionality in Lightning to the benefit of Optimizer and other partners, as a way to entice clients to move to the Lightning experience. To learn more about the differences, reference these links:

[Evaluate and Roll Out Lightning Experience for Your Org](#)
[Enable Lightning Experience Trailhead](#)

Functionality	Lightning	Classic
Match	Upon Save and navigation to Detail, match typically completes, and D&B custom object is populated	Upon Save, with custom object on main Account object, user must Refresh to see match result and population of D&B data
Unmatched Record	Use Check for New Data>Update>Other Matches to find desired match	Edit address data to attempt a re-match
Re-match	Use Check for New Data>Update>Other Matches to find desired match	Edit address details, as desired, then delete D&B DUNS Number and AccountToDnB values in a single Save action

H. Search Before Create

Search Before Create requires users to complete at least one search before bypassing the selection process. To start, search for a Business Name, D-U-N-S Number, or Company URL. Once criteria are entered, Search Before Create looks through Dun & Bradstreet’s database for matching candidates.



After the primary search, the remaining filters are made available to fine tune your search results. By default, the top 100 results are presented. Use the additional filters to narrow your search and find the correct account. While your candidates load, D&B Optimizer searches through your account or lead database to identify duplicates. Duplicate accounts are marked by a ‘cloud’ icon with the Business Name acting as a link to the existing account.

Add Account

Search

Search Create New Reset Filters

Street Address

City

Filter records by City

State/Province

Filter records by State/Province

Country

Filter records by Country

Phone Number

Industry - SIC

Filter records by Industry

Standalone Indicator

Location Type

Filter records by Location Type

D&B Optimizer Matching Records (100)

Adjust your search criteria by changing values on the left, then search again. You can also create a new account.

Business Name	D-U-N-S	Company URL	Primary Address	Industry	Employees	Sales USD	Marketable	Location Type
Create Dun & Bradstreet Holdings, Inc.	117359154	dnb.com	101 John F Kennedy Pkwy Ste 5 Short Hills, New Jersey 07078-2716, US	Credit reporting services	4037	1.7B	true	Parent/Headquarters
Create The Dun & Bradstreet Corporation	884114609	dnb.com	101 John F Kennedy Pkwy Ste 5 Short Hills, New Jersey 07078-2716, US	Credit reporting services	4037	845M	true	Parent/Headquarters
Create Dun & Bradstreet, Inc.	150483782	dnb.com	101 John F Kennedy Pkwy Ste 5 Short Hills, New Jersey 07078-2716, US	Credit reporting services	3000	551M	true	Parent/Headquarters
Create Dun Bradstreet do Brasil Ltda	914609722	brasilmodelos.com.br	Av. BERNARDINO DE CAMPOS 98, Cj 22 SAO PAULO, SAO PAULO 04004-040, BR	Mfg motor vehicle parts/accessories		278M	false	Single Location
Create DUN & BRADSTREET LIMITED	229515499	dnb.co.uk	The Point, 37 North Wharf Road LONDON W2 1AF, GB	Management consulting services	108M		true	Parent/Headquarters
Create Dun & Bradstreet International, Ltd.	049977515	dnb.com	101 John F Kennedy Pkwy Ste 5 Short Hills, New Jersey 07078-2716, US	Credit reporting services	2750	82.3M	true	Parent/Headquarters
Create Dun & Bradstreet B.V.	405319096	altares.nl	Otto Reuchlinweg 1032 Rotterdam, ZUID-HOLLAND 3072 WD, NL	Business services	44.9M		true	Parent/Headquarters
Create Dun & Bradstreet Emerging Businesses Corp.	964652973	dnb.com	22761 Pacific Coast Hwy Malibu, California 90263-5098, US	Business services	722	43.6M	true	Parent/Headquarters
Create Dun & Bradstreet Holdings B.V.	414518555	altares.nl	Stationsplein 45 CIC Rotterdam4t Rotterdam, ZUID-HOLLAND 3013 AK, NL	Trust management	134	32.4M	true	Parent/Headquarters
Create DUN & BRADSTREET INFORMATION SERVICES INDIA PRIVATE LIMITED	918438805	dnb.co.in	ICC Chambers, Sakli Vihar Road, Powai, Andheri East Mumbai, Maharashtra 400072, IN	Information retrieval services	372	24.9M	true	Parent/Headquarters

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When a candidate is found, select “Create” to pre-fill the create account form with this business. SBC pre-fills the Account or Company (Leads) Name, D-U-N-S Number*, Billing Street, Billing City, Billing State, and Billing Country fields with D&B data. Users have the option to change data in order to comply with your company’s validation rules or required fields before saving. In the event a candidate is not found, users have the option to select “Create New” and send pre-fill the “Account Name” (Account) or “Company Name” (Lead) field with the attempted business name search criteria.

New Account

Account Information

Account Owner
John Iannone

Phone

Fax

Website

Employees

D&B DUNS Number ⓘ
884114609

Parent Account
Search Accounts...

Type
--None--

Industry

D&B ID

AccountToDnB ⓘ

Cancel Save & New Save

The screenshot shows a web form for address management. The 'Address Information' section is divided into 'Billing Address' and 'Shipping Address'. The 'Billing Address' section is highlighted with an orange border. It contains the following fields: 'Billing Street' (103 John F Kennedy Pkwy), 'Billing City' (Short Hills), 'Billing State/Province' (New Jersey), 'Billing Zip/Postal Code', and 'Billing Country' (US). The 'Shipping Address' section contains similar fields: 'Shipping Street', 'Shipping City', 'Shipping State/Province', 'Shipping Zip/Postal Code', and 'Shipping Country'. Below these is the 'Description Information' section with a 'Description' field. At the bottom right are three buttons: 'Cancel', 'Save & New', and 'Save'.

How does this help Optimizer match?

Optimizer uses the field data that exists on your standard account or lead object. Search Before Create creates those records with the data that exists in the D&B Business Cloud, allowing for the most accurate account or lead lookup possible. D-U-N-S numbers allow for a direct D-U-N-S match ensuring a consistent data experience from Search Before Create through the Optimizer match.

Duplicate Prevention – Setup

Search Before Create reads the D-U-N-S Numbers in the D&B Custom Object in order to determine which records are duplicates. It's best to activate your Data Integration rules and allow Optimizer to match your accounts or leads before exposing Search Before Create to your users. Additionally, using standard Salesforce duplicate rules can further prevent duplicate account or lead creation. More information on enabling duplicate rules can be found [here](#).