

Dun & Bradstreet for NetSuite Integration



Copyright © 2005, 2018, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

If this document is in public or private pre-General Availability status:

This documentation is in pre-General Availability status and is intended for demonstration and preliminary use only. It may not be specific to the hardware on which you are using the software. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to this documentation and will not be responsible for any loss, costs, or damages incurred due to the use of this documentation.

If this document is in private pre-General Availability status:

The information contained in this document is for informational sharing purposes only and should be considered in your capacity as a customer advisory board member or pursuant to your pre-General Availability trial agreement only. It is not a commitment to deliver any material, code, or functionality,

and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described in this document remains at the sole discretion of Oracle.

This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Master Agreement, Oracle License and Services Agreement, Oracle PartnerNetwork Agreement, Oracle distribution agreement, or other license agreement which has been executed by you and Oracle and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced, or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Sample Code

Oracle may provide sample code in SuiteAnswers, the Help Center, User Guides, or elsewhere through help links. All such sample code is provided "as is" and "as available", for use only with an authorized NetSuite Service account, and is made available as a SuiteCloud Technology subject to the SuiteCloud Terms of Service at www.netsuite.com/tos.

Oracle may modify or remove sample code at any time without notice.

No Excessive Use of the Service

As the Service is a multi-tenant service offering on shared databases, Customer may not use the Service in excess of limits or thresholds that Oracle considers commercially reasonable for the Service. If Oracle reasonably concludes that a Customer's use is excessive and/or will cause immediate or ongoing performance issues for one or more of Oracle's other customers, Oracle may slow down or throttle Customer's excess use until such time that Customer's use stays within reasonable limits. If Customer's particular usage pattern requires a higher limit or threshold, then the Customer should procure a subscription to the Service that accommodates a higher limit and/or threshold that more effectively aligns with the Customer's actual usage pattern.

Beta Features

Oracle may make available to Customer certain features that are labeled "beta" that are not yet generally available. To use such features, Customer acknowledges and agrees that such beta features are subject to the terms and conditions accepted by Customer upon activation of the feature, or in the absence of such terms, subject to the limitations for the feature described in the User Guide and as follows: The beta feature is a prototype or beta version only and is not error or bug free and Customer agrees that it will use the beta feature carefully and will not use it in any way which might result in any loss, corruption or unauthorized access of or to its or any third party's property or information. Customer must promptly report to Oracle any defects, errors or other problems in beta features to support@netsuite.com or other designated contact for the specific beta feature. Oracle cannot guarantee the continued availability of such beta features and may substantially modify or cease providing such beta features without entitling Customer to any refund, credit, or other compensation. Oracle makes no representations or warranties regarding functionality or use of beta features and Oracle shall have no liability for any lost data, incomplete data, re-run time, inaccurate input, work delay, lost profits or adverse effect on the performance of the Service resulting from the use of beta features. Oracle's standard service levels, warranties and related commitments regarding the Service shall not apply to beta features and they may not be fully supported by Oracle's customer support. These limitations and exclusions shall apply until the date that Oracle at its sole option makes a beta feature generally available to its customers and partners as part of the Service without a "beta" label.

Table of Contents

| | |
|---|----|
| Dun & Bradstreet for NetSuite Integration | 1 |
| Setting Up D&B for NetSuite Integration | 2 |
| Setup Requirements for D&B for NetSuite Integration | 2 |
| Common D&B Setup Tasks | 8 |
| Setting Up D&B Data Management | 14 |
| Setting Up DNBi Risk Management | 16 |
| Using D&B Data Management for NetSuite | 19 |
| Matching with D&B Reference Records | 19 |
| Creating Entity Records Using D&B Data | 25 |
| Updating Entity Details with D&B Values | 26 |
| Using Data Monitoring for D&B Reference Records | 27 |
| Using DNBi Risk Management for NetSuite | 30 |
| Applying for Credit for Entities | 31 |
| Applying for Credit on Sales Orders | 32 |
| Viewing and Processing Credit Applications | 34 |

Dun & Bradstreet for NetSuite Integration

Dun & Bradstreet (D&B) for NetSuite Integration lets you use your D&B account to access subsets of D&B data within NetSuite. It enables you to add the DUNS number and other commercial information to existing entity records for leads, prospects, customers, and vendors. You can search for D&B records and retrieve data that you can use to create new entity records. It also includes validations to identify and prevent duplicate entity records from being created and matched with the same D&B reference record. To help maintain the quality of your NetSuite entity records, you have the option to update incorrect or incomplete records with select D&B data. For DNBi Risk Management for NetSuite subscribers, you can also apply for credit within your NetSuite account.

For more information, see the following topics:

- [Using D&B Data Management for NetSuite](#)
- [Using DNBi Risk Management for NetSuite](#)

Availability

SuiteApp availability

Dun & Bradstreet for NetSuite Integration is available as a SuiteApp. It is a public bundle that you can install in your NetSuite account. However, you must contact your NetSuite account manager first to get the credentials for setting up the SuiteApp in your account.

Feature availability

The features that you can access depend on the D&B SKU that you subscribe to.

- **D&B Data Management for NetSuite** - This SKU enables you to match and create entity records using D&B data.
- **DNBi Risk Management for NetSuite** - For subscribers of this SKU, you can create and submit credit applications for customers, leads, and prospects. Also, you have limited access to entity matching features.



Important: Use of DNBi Risk Management for NetSuite requires that you have the following entitlements enabled in your D&B account: Core, Decision Maker, and DNBi NetSuite Integration. For more information, see [Setting Up D&B Accounts and Preferences](#).

The following table shows the list of features available for D&B Data Management, DNBi Risk Management, or both.

| Feature | Available for: | |
|--|----------------------------------|-----------------------------------|
| | D&B Data Management for NetSuite | DNBi Risk Management for NetSuite |
| Batch matching | Y | N |
| Single entity matching (for vendors, customers, leads, and prospects) | Y | N |
| Access to the following D&B data subsets: Identity, Hierarchy, Firmographic, Diversity, Industry Codes | Y | N |
| Update of entity details with D&B data | Y | Y (1) |
| Creation of new entity from D&B data | Y | Y (1) |
| Data monitoring | Y | N |

| Feature | Available for: | |
|---|----------------|-------|
| Credit application with matching (for customers, leads, and prospects) | N | Y (1) |
| Credit request on sales orders | N | Y (1) |
| Request for more credit | N | Y |
| Access to DNBI Risk Management fields on the entity record | N | Y |
| D&B account authentication | Y | Y |
| D&B role permissions configuration | Y | Y |
| (1) For DNBI Risk Management for NetSuite, only the basic company profile information is available for the following features with matching: Creation of new entity and update of entity details with D&B data, Credit application with matching, and Credit request on sales orders. | | |

Limitations of D&B for NetSuite Integration

Be aware of the following limitations of D&B for NetSuite Integration:

- When matching or creating entity records, any equivalent entity in another subsidiary not accessible to the user is not detected as a duplicate. However, duplicates are not allowed for entities that belong to the same subsidiary. You can have duplicate records only for entities that belong to different subsidiaries.
- Creating new entities from D&B records is not available for individual entities. Only companies are supported.
- Credit requests for sales order records generated through import are not supported.
- For Data Monitoring, updates for industry codes and DUNS transfers currently are not supported, including expired registrations.

Setting Up D&B for NetSuite Integration

- [Setup Requirements for D&B for NetSuite Integration](#)
- [Common D&B Setup Tasks](#)
- [Setting Up D&B Data Management](#)
- [Setting Up DNBI Risk Management](#)

Setup Requirements for D&B for NetSuite Integration



Important: Before installing and setting up D&B for NetSuite Integration, be sure to get the credentials from your NetSuite account manager.

- [Prerequisites for D&B for NetSuite Integration](#)
- [Installing D&B for NetSuite Integration](#)
- [D&B Roles and Permissions](#)
- [Using D&B Custom Entity Forms](#)

Prerequisites for D&B for NetSuite Integration

- [Enabling required features and preferences](#)

Enabling required features and preferences

Before setting up D&B for NetSuite Integration, you must enable the required features and preferences. Go to Setup > Company > Setup Tasks > Enable Features.

- On the **SuiteCloud** subtab, check the box for the following features:
 - Custom Records
 - Client SuiteScript
 - Server SuiteScript
- When using DNB Risk Management, with or without D&B Data Management, you must enable the following:
 - On the **Accounting** subtab, check the box for **A/R** (Accounts Receivables).

For more information about enabling required features, see the help topic [Enabling Features](#).

Installing D&B for NetSuite Integration

After you have enabled the required features, you can install the SuiteApp. Go to Customization > SuiteBundler > Search & Install Bundles. Look for the SuiteApp with the following details:

- Bundle Name: **Dun & Bradstreet for NetSuite Integration**

For detailed instructions, see the help topic [Installing a Bundle](#).


D&B Roles and Permissions

- [Understanding D&B Roles](#)
- [Assigning D&B Record Permissions to Custom Roles](#)
- [Configuring D&B Role Permissions](#)

Understanding D&B Roles

D&B for NetSuite Integration uses the standard Administrator role for account setup, batch matching, and other D&B setup tasks. You can use the following custom roles for other tasks specific to the use of D&B features:

- **D&B Buyer** - Use this role for Data Management tasks: single entity matching, creation, and update of vendor records with D&B data.
- **D&B Sales Rep** - Use this role for Data Management tasks: single entity matching, creation, and update of lead, prospect, and customer records with D&B data. For DNB Risk Management subscribers, this role can also be used for submitting credit requests for prospects, leads, and customers.

 **Note:** Users with this role must be set as a sales representative in the employee record. To set up an employee, go to Lists > Employees > Employees, and then open the record to be updated. On the Employee record, click the **Human Resources** subtab and then check the **Sales Rep** box. For more information about this option, see the help topic [Marking an Employee as a Sales Rep](#).

- **D&B Sales Manager** - Use this role for Data Management tasks: single entity matching, creation, and update of lead, prospect, and customer records with D&B data. For DNB Risk Management subscribers, this role can also be used for submitting credit requests and viewing of credit application details in NetSuite.

- **D&B Credit Manager** - Use this role for Risk Management tasks: credit application and viewing of credit application details in NetSuite and DNBi.

Click the following link to open the Microsoft Excel file that contains the list of D&B features that each D&B role can access by default: [D&B Role Access Matrix](#).

To assign a D&B role to a user, see the help topic [Assigning Roles to an Employee](#). If you want to set up your custom roles with the permissions assigned to D&B roles, see the following topics:

- [Assigning D&B Record Permissions to Custom Roles](#)
- [Configuring D&B Role Permissions](#)

Assigning D&B Record Permissions to Custom Roles

You can provide custom roles in the Classic, Accounting, and Sales centers, access to specific D&B records and features. Go to Setup > User Roles > Manage Roles, and then click the Edit link to open the role record. Refer to the following list of D&B records that you can assign to your custom role, based on your business requirements.

Note: You can give custom roles the same set of permissions as one of the D&B roles or provide access only to specific components of a D&B record. For more information, see [Configuring D&B Role Permissions](#).

- On the **Permissions** subtab, click the **Custom Record** subtab and then assign the recommended level for the following:

| Record | Recommended Level | Description |
|-------------------------------------|-------------------|---|
| D&B Setup (1) | View | View D&B account setup and DNBi preferences. |
| D&B GUID (1) | View | View DNBi preferences. |
| D&B User | Edit | Set up DNBi user credentials. |
| D&B Process Status | Edit | View the list of D&B processes that have been run in the account. Edit select details of a process. |
| D&B Reference Record | Edit | View the list of D&B reference records matched with NetSuite entity records. Edit select details of a reference record. |
| D&B Role Permissions (2) | View | View predefined D&B Role Permissions records. |
| D&B Data Link – Industry Code | Edit | View the Industry Codes section on the D&B Information subtab of entity records. |
| D&B Master List – Industry Code | Edit | View the master list of industry codes that are used for D&B matching. |
| D&B Data Link – Registration Number | Edit | View the Registration Numbers section on the D&B Information subtab of entity records. |

| Record | Recommended Level | Description |
|---|-------------------|---------------------------------------|
| D&B Credit Application | Edit | Create and view DNBI credit requests. |
| (1) Like the D&B Credit Manager role, you can assign similar custom roles access to set up the DNBI Risk Management preferences. Assign the Edit access level for the D&B GUID and D&B Setup permissions. | | |
| (2) Assign the Edit level for D&B Role Permissions, to users who want to add roles to D&B Role Permissions records. | | |

- On the **Permissions** subtab, click the **Setup** subtab and then assign the recommended level for the following:

| Record | Recommended Level | Description |
|--------------|-------------------|------------------------------------|
| Custom Lists | View | View D&B Role Permissions records. |
| SuiteScript | View | View D&B Role Permissions records. |

- On the **Forms** subtab, click the **Custom Record** subtab and then check the **Enabled** box for the following forms:

| Type | Form Name | Enabled |
|-------------------------------------|---|---------|
| D&B Setup | Standard D&B Setup Form | Yes |
| D&B Process Status | Standard D&B Process Status Form | Yes |
| D&B Reference Record | D&B Reference Record (Quick View) | Yes |
| D&B Reference Record | Standard D&B Reference Record Form | Yes |
| D&B User | Standard D&B User Form | Yes |
| D&B Data Link – Registration Number | Standard D&B Data Link – Registration Number Form | Yes |
| D&B Data Link – Industry Code | Standard D&B Data Link – Industry Code Form | Yes |
| D&B Credit Application | Standard D&B Credit Application Form | Yes |
| D&B Role Permissions | Standard D&B Role Permissions Form | Yes |
| D&B Master List – Industry Code | Standard D&B Master List – Industry Code Form | Yes |

Note: Provide access for D&B Credit Application records and forms only to custom roles with tasks pertaining to creation or processing of D&B credit requests.

For more information about customizing roles, see the help topic [Customizing or Creating NetSuite Roles](#).

Configuring D&B Role Permissions

D&B Role Permissions records contain D&B permissions that you can assign to multiple roles in your account. Each D&B role has a predefined record with default permissions for fields, buttons, and pages. Use these records to assign the same set of permissions to your custom roles.

- For more information about D&B roles, see [Understanding D&B Roles](#).
- To view the list of default permissions on each predefined record, click the following link to open the Excel file: [D&B Role Access Matrix](#). In the file, refer to the table on the **D&B Role Permissions Matrix** tab.

Key points for using D&B Role Permissions records:

- You must provide custom roles access to the following standard and D&B records first before adding the roles to D&B Role Permissions records:

- D&B Role Permissions
- Custom Lists
- SuiteScript
- Standard permissions for entity records: customers, leads, prospects, or vendors

For more information about providing access to D&B records, see [Assigning D&B Record Permissions to Custom Roles](#). For information about enabling permissions for standard records, see the help topic [Working with Records](#).

- When updating D&B Role Permissions records:

- Update predefined records if you want to add your custom roles without changing the default set of permissions.
- If you want to change the default permissions, you can make a copy of the predefined record, instead of updating it directly. For example, you want a custom role to have the same permissions as the D&B Credit Manager role, except the Edit permission for D&B Role Permissions records. On your copy of the D&B Credit Manager record, add the custom role and then deselect the permission, **Button - Edit Role Permission**.

To make a copy, go to Dun & Bradstreet > Account Setup > Manage Role Permissions, and then click the View link for the predefined record. On the D&B Role Permissions page, click the Actions submenu, and then select Make Copy.

- To prevent conflicting permission assignments, you cannot add the same role to multiple D&B Role Permissions records. When you create a copy of a record, be sure to remove roles that are selected on the original record.


To configure D&B role permissions:




1. Go to Dun & Bradstreet > Account Setup > Manage Role Permissions.
2. On the D&B Role Permissions list, click the Edit link for the record.



Important: When in edit mode, be sure not to delete a predefined D&B Role Permissions record. If you delete a record, the associated D&B role loses default permissions that enable access to D&B records.

3. On the D&B Role Permissions page, you can update the following fields:

| Field Name | Description |
|--------------------|--|
| Name | Edit the name of the D&B Role Permissions record. |
| Inactive | Check this box if you want to inactivate the record. |
| | <div>  Note: Roles associated with an inactive record are not granted access to the permissions selected on the record. </div> |
| Roles | Select more roles that you want to assign the D&B permissions to. You can also deselect roles that you want the permissions to be removed from. Both custom and standard roles in your account are displayed in the list. |
| Custom Permissions | Select more D&B permissions to be assigned to the roles. You can also deselect permissions. |

| Field Name | Description |
|---------------------|--|
| |  Important: NetSuite recommends that you do not update the default permissions of predefined records for D&B roles. Permissions cannot be reset or returned automatically after you have saved the record. Instead, you can make a copy of a predefined record if you want update the default permissions. |
| Has Customer Access | Check this box if you want to provide access to the D&B permissions for customers, leads, and prospects.  Note: Enabling Customer Access does not automatically assign the standard permissions for customer records and lists. Verify that these permissions are enabled in the account. For more information, see the help topic Working with Records . |
| Has Vendor Access | Check this box if you want to provide access to the D&B permissions for vendors.  Note: Enabling Vendor Access does not automatically assign the standard permissions for vendor records and lists. Verify that these permissions are enabled in the account. For more information, see the help topic Working with Records . |

4. Click **Save**.

Click **Reset** before saving if you want to remove your customizations and to return the default settings.

To view the list of updates, open the D&B Permissions record in view mode, and then click the **System Notes** subtab. Look for the updated permissions or roles, including their old and new values.

Using D&B Custom Entity Forms

When entity records have been matched with D&B records, the following fields are shown in the Classification section:

- **DUNS Number** – This field displays the DUNS number associated with the entity. Clicking the link opens the D&B Reference Record that has been matched with the entity record.
- **D&B Last Match Date** – This field displays the date when the entity has been matched with the D&B record.
- **Monitoring Status** – This field displays the latest registration status for data monitoring from D&B.

To show the D&B fields in their own section, you can use these custom entity forms:

- **D&B Vendor Form** - Use this form for vendor records.
- **D&B Customer Form** - Use this form for customer, lead, or prospect records.

Refer to the screenshot of the Dun & Bradstreet section and fields shown on both custom forms.

| Dun & Bradstreet | | |
|------------------|-----------------------|-------------------|
| DUNS NUMBER | D&B LAST MATCH DATE | MONITORING STATUS |
| 187505206 | 11/23/2016 9:18:37 am | Pending |

Setting D&B custom entity forms as preferred

You can set the D&B custom entity forms as preferred by going to Customization > Forms > Entry Forms. On the Custom Entry Forms page, check the **Preferred** box for the forms, and then click **Submit**.

For more information about setting up preferred forms, see the help topic [Defining Preferred Forms](#).

Displaying D&B fields on custom forms

If you have your own custom entity forms, you can update them to show the D&B fields. Go to Customization > Forms > Entry Forms. On your custom entity form, look for the D&B fields on the **Fields** subtab. Do the following for each field:

- Check the box in the **Show** column.
- Select **Inline Text** from the list in the **Display Type** column.
- Select **Dun & Bradstreet** from the list in the **Field Group** column.

For more information about setting up fields on custom forms, see the help topic [Configuring Fields or Screens](#).

Common D&B Setup Tasks

After enabling the required features, installing the SuiteApp, and assigning permissions, you can proceed to the setup tasks for D&B for NetSuite Integration.

For tasks that apply to both D&B SKUs, see the following subtopics:

- [Setting Up D&B Accounts and Preferences](#)
- [Defining D&B Saved Searches](#)

For tasks specific to each D&B SKU, refer to the sequence of tasks in the following topics:

- [Setting Up D&B Data Management](#)
- [Setting Up DNBi Risk Management](#)

Setting Up D&B Accounts and Preferences

For administrators, you must enter and verify the credentials for your D&B account. Also, you can enable D&B preferences according to your business requirements.

Key points for setting up D&B accounts in NetSuite:

- You set up both D&B SKUs in your NetSuite account: D&B Data Management for NetSuite and DNBi Risk Management for NetSuite. If there are features available in both SKUs, the implementation for D&B Data Management is followed. To view the list of available features per D&B SKU, see [Availability](#).
- For DNBi Risk Management subscribers, testing your credentials displays the status of your DNBi entitlements. To use the features of D&B for NetSuite Integration, you must have the following entitlements enabled: Core, Decision Maker, and DNBi NetSuite Integration. If any of these entitlements are not enabled, you may contact NetSuite Support to verify your account.

To set up D&B accounts and preferences:

1. Go to Dun & Bradstreet > Account Setup > Manage D&B Preferences.
2. On the Manage D&B Preferences: Encryption Key page, set up the encryption key:
 - a. In the **Secret Key** field, enter a 16-character secret key.
The secret key is used to encrypt the D&B API Key for the account. You need to set up the encryption key one time only.

- b. Click **Save**.
3. On the **Manage D&B Preferences** page, set up your D&B accounts.
 - Set up data management on the **D&B Data Management** subtab:
 - On the **Data Management** subtab, do the following:
 - Check the **Enabled** box.
 - Enter your user ID and password for the D&B Data Management for NetSuite account.



Important: If you use the Data Monitoring feature, do not change the user ID or replace the D&B account that has been set up for D&B Data Management for NetSuite.

- Optionally, on the **Data Monitoring** subtab, you can do the following:
 - Check the **Enabled** box.



Note: You cannot disable D&B Data Management while Data Monitoring is still enabled. If you want to pause tracking and automatic updates of registered D&B reference records, clear the **Enabled** box for Data Monitoring. For more information about this feature, see [Using Data Monitoring for D&B Reference Records](#).

Enabling this preference for the first time in the account automatically creates the monitoring and notification profiles.



Important: Because Data Monitoring can be set up only one time per account, do not change the user ID or replace the D&B account that has been set up for D&B Data Management for NetSuite.

- If you have enabled Data Monitoring, you can check the **Automatic Register for Matched Entities** box to enable automatic registration of matched entities.
- This preference is applicable to the matching features within D&B Data Management only: batch matching, record linking for entities with multiple matches, single matching on entity records, and creation of entity records through matching.

| Manage D&B Preferences | |
|---|--|
| <div> <input type="button" value="Edit"/> <input type="button" value="Test Data Management Credentials"/> <input type="button" value="Test Risk Management Credentials"/> </div> | |
| <div> <div>D&B Data Management for NetSuite</div> <div>DNBi Risk Management for NetSuite</div> </div> | |
| <div> <div>D&B Data Management</div> <div>Data Monitoring</div> </div> | |
| <input checked="" type="checkbox"/> ENABLED <input checked="" type="checkbox"/> AUTOMATIC REGISTER FOR MATCHED ENTITIES NUMBER OF DAYS TO RETRIEVE UPDATES 3 MONITORING LEVEL Level1 PRODUCT ID Data Management Premium | MONITORING ID 3699 NOTIFICATION ID 6258 MONITOR PROFILE NAME NETSUITE_DCP_PREM_MONITOR USER PREFERENCE NAME NETSUITE_DCP_PREM_USER_PREFERENCE NOTIFICATION PROFILE NAME NETSUITE_DCP_PREM_NOTIFICATION |
| <div> <input type="button" value="Edit"/> <input type="button" value="Test Data Management Credentials"/> <input type="button" value="Test Risk Management Credentials"/> </div> | |

- You can specify the duration that the Data Monitoring component will backtrack to retrieve updates to registered D&B reference records. To do this, click Edit and then go to the **Data Monitoring** subtab. In the **Number of Days to Retrieve Updates** field, enter the number of days that you want Data Monitoring to backtrack and retrieve updates. For example, you entered 10, the system will retrieve updates starting from the past 10 days up to the current date.
- Set up risk management on the **DNBi Risk Management** subtab:
 - Check the **Enabled** box.
 - Enter your user ID and password for the DNB account.

- Select the preferences that you want to enable:
 - **Automatically request credit for new customers, leads, prospects**
Check this box if you want to automatically submit credit requests when creating customers, leads, and prospects with matching. For more information, see [Applying for Credit for Entities](#).
 - **Automatically request credit upon sales order creation**
Check this box if you want to automatically submit credit requests on new sales orders. For more information, see [Applying for Credit on Sales Orders](#).
 - **Overwrite NetSuite credit limit and terms**
Check this box if you want to overwrite the entity's credit limit and terms in NetSuite with DNBi values from your credit request results.



Important: When you use the Overwrite NetSuite credit limit and terms preference, you must have Edit permission to the entity records. For information about roles and permissions, see the help topic [Customizing or Creating NetSuite Roles](#).

The overwrite takes effect when the status of the credit application is Approved or Approved-Additional Credit Requested.

- The NetSuite credit limit is replaced with the recommended credit limit from D&B.
- The NetSuite term is replaced based on the DNBi term and discount combination. For more information, see [Creating Term Records for DNBi Terms and Discounts](#).

Because these are default settings on the entity record, transactions that use credit limits and terms are automatically populated with these values during creation.

When a credit application is declined, the NetSuite credit limit and D&B recommended credit limit are both set to zero. Also, the NetSuite **Terms** field is left blank when the DNBi payment term is any one of the following: CIA, Pre-pay, and Credit.

4. Click **Save**.

After saving the record, click **Test Data Management Credentials** or **Test Risk Management Credentials** to validate the user ID and password. These test buttons are available in view mode only.



Note: If you have repeatedly attempted to test the credentials with an invalid user ID or password, you may be locked out of the D&B account.

To set up DNBi user credentials:

For DNBi Risk Management users, you can set up the credentials for your own DNBi account in NetSuite. You can have access to the DNBi account where you can view your own credit requests. If you do not have your own DNBi account, you can gain access to credit applications through the DNBi credentials provided by the administrator. For more information, see the instructions to set up D&B accounts and preferences in this section.



Note: If you do not set up your DNBi credentials, you are prompted to enter them when you try to use the credit application link on sales orders and entity records.

1. Go to Dun & Bradstreet > Account Setup > Manage DNBi User Credentials.
2. On the Manage DNBi Credentials page, click **Edit**.
3. Enter the user ID and password for your own DNBi account.

4. Click **Save**.
5. Click **Test DNBi User Credentials** to validate your credentials.

Defining D&B Saved Searches

Use saved searches to track the status of credit applications, entity matching processes, and reference record updates. You can use the predefined D&B saved searches or define your own according to your business requirements.

- [Setting Up Predefined D&B Saved Searches on a Dashboard](#)
- [Defining Saved Searches for Data Monitoring](#)

Setting Up Predefined D&B Saved Searches on a Dashboard

Set up the predefined D&B saved searches in custom search portlets on the Home or Dun & Bradstreet dashboard:

- To set up portlets on the Home dashboard, click the Home icon and then click **Dashboard**.
- To set up portlets on the Dun & Bradstreet dashboard, go to Dun & Bradstreet > Dun & Bradstreet Overview. This dashboard is available to roles in the Classic, Accounting, and Sales centers.


For instructions on setting up portlets, see the following topics:

- [Displaying Multiple Saved Searches on Your Home Page](#)
- [Adding a Portlet to a Dashboard](#)
- [Setting Up Dashboard Portlet Content](#)

You can set up the following D&B saved searches in custom search or reminders portlets:

- **My DNBi Credit Applications**
This portlet displays all credit applications that you have created and submitted in the account.
- **DNBi Credit Application for Review**
This portlet displays all credit applications in your account for review. Click the View link for a record to view the credit application details.
- **D&B Process Status**
For administrators, this portlet displays the status of processes that have been run in the account. Click the View link to open and view the D&B Process Status record.

The list in the portlet can also be displayed by going to Dun & Bradstreet > D&B Schedules > View Process Status.

 **Note:** You can create a copy of the saved searches to set up email notification before using them in a portlet. Go to Lists > Search > Saved Searches. On the Saved Searches list, click the Edit link for the saved search. On the saved search record, click the **Email** subtab and then add the recipients of the email notification. Click **Save As** to save your copy. For more information, see the help topic [Enabling Saved Search Scheduled Email](#).

After setting up the portlets, you can publish the dashboard to apply the changes to user's dashboards. For more information, see the topics in [Publishing Dashboards Overview](#).

The following screenshot shows a sample DNBI Credit Application for Review custom search portlet.

| DNBI Credit Application for Review | | | | | | | | |
|------------------------------------|-------------|----------------------|------------------|--------------------|-------------|-----------------------|------------------|-------------------------|
| LATEST DECISION DATE | | | All | | | | | |
| | | | ENTITY | | | | | |
| < > | | | 3/15/2016(3) | | | TOTAL: 46 | | |
| NEW | EDIT VIEW | LATEST DECISION DATE | APPLICATION DATE | APPLICATION NUMBER | ENTITY | TRANSACTION REFERENCE | REQUESTED AMOUNT | STATUS |
| | Edit View | 3/15/2016 | 3/15/2016 | FC96MXDV8 | | | | Further Review Required |
| | Edit View | 3/15/2016 | 3/15/2016 | FC93MXA3W | MAYO CLINIC | | | Further Review Required |
| | Edit View | 3/15/2016 | 3/15/2016 | FC9HMXA84 | MAYO CLINIC | | | Further Review Required |
| more... | | | | | | | | |

Defining Saved Searches for Data Monitoring

Create saved searches to track the registration status and reference record updates pertaining to D&B Data Monitoring. You can set up your saved search in a portlet to display the results on a dashboard.

To define saved searches for Data Monitoring:

1. Go to Lists > Search > Saved Searches > New.
2. From the New Saved Search list click the D&B Reference Record link.
For administrators, you can create a saved search that retrieves all logs on Data Monitoring updates. If you want to create this saved search, click the Server Script Log link. For more information, see [Saved search filter for retrieving logs on D&B updates](#).
3. On the Saved D&B Reference Record Search page, enter the following settings:
 - On the **Criteria** subtab, add the filters for the saved search you want to create. For the list of filters per saved search, see [Saved search filters for D&B Data Monitoring](#).
 - On the **Results** subtab, set the fields to be used for the results based on your saved search:

Note: Aside from setting the column fields in the table, you can also add or remove those that you do not want to display in the results.

| Column Fields | Values |
|--|------------------------|
| DUNS Number | Summary Type: Group |
| Business Name | Summary Type: Group |
| System Notes Fields (1) | Field: Field |
| System Notes Fields (1) | Field: Old Value |
| System Notes Fields (1) | Field: New Value |
| (1) These System Notes Fields are applicable for Saved search filters for retrieving D&B reference records with updates . They are used to display the old and new values of updated fields. | |

| Columns • Drill Down Fields • | | | | |
|-------------------------------|--------------|--------------|---------|-----------------------|
| Remove All | | Add Multiple | | |
| FIELD * | SUMMARY TYPE | FUNCTION | FORMULA | WHEN ORDERED BY FIELD |
| ⋮ DUNS Number | Group | | | |
| ⋮ Business Name | Group | | | |
| ⋮ System Notes : Field | | | | |
| ⋮ System Notes : Old Value | | | | |
| ⋮ System Notes : New Value | | | | |

- If you want users to receive email alerts, set the following on the **Email** subtab:

- Check the box: **Send email alerts when records are created/updated**

Note: Be aware that enabling this preference sends an email notification when D&B reference records are created during batch matching. For more information about email alert settings, see the help topic [Enabling Saved Search Email Alerts](#).

- On the **Specific Recipients** subtab, add the recipients. To receive alerts when records are updated, check the following boxes: **Send on Update** and **Show Recent Changes**. For more information about email alert settings, see the help topic [Enabling Saved Search Email Alerts](#).

| | | | | | | | | |
|--|-------------------------------------|---------------------|-------------------|----------|-------|--------------|-------------|---------------|
| Criteria | Results | Highlighting | Available Filters | Audience | Roles | Email | Audit Trail | Execution Log |
| <input checked="" type="checkbox"/> SEND EMAIL ALERTS WHEN RECORDS ARE CREATED/UPDATED <input type="checkbox"/> SEND EMAILS ACCORDING TO SCHEDULE <input type="checkbox"/> SUMMARIZE SCHEDULED EMAILS <input type="checkbox"/> SEND IF NO RESULTS | | | | | | | | |
| Specific Recipients Recipients from Results Updated Fields Customize Message • Schedule • | | | | | | | | |
| Add recipients here for alerts and/or scheduled emails, if you know them in advance. If you define a filter such as "Sales Rep is Mine" on the Criteria subtab, listed recipients receive emails only if they match the filter. Enable the Allow Users to Subscribe option to allow users to add themselves as alert recipients at Home > Set Preferences. | | | | | | | | |
| <input type="checkbox"/> ALLOW USERS TO SUBSCRIBE | | | | | | | | |
| RECIPIENT * | SEND ON UPDATE | SHOW RECENT CHANGES | BCC | | | | | |
| Group - Lead | <input checked="" type="checkbox"/> | Yes | | | | | | |

If you want to further customize your saved search, see the help topic [Defining a Saved Search](#).

4. Click **Save** to save the record, or click **Save & Run** to save the record and then run the saved search.

After creating a saved search, you can set it up in a portlet to display the results on dashboards. For more information, see [Setting Up Predefined D&B Saved Searches on a Dashboard](#).

Saved search filters for D&B Data Monitoring

This section contains the list of basic filtering criteria for saved searches that you can set up for D&B Data Monitoring.

Saved search filters for retrieving D&B reference records with updates

Add the following filters to create a saved search that displays a list of D&B reference records with updates:

| Filter Fields | Values |
|---------------------|---|
| System Notes Fields | Filter: Context Context: any of, Script (Suitelet) |
| System Notes Fields | Filter: Type |

| Filter Fields | Values |
|---------------------|--|
| | Type: Change |
| System Notes Fields | Filter: Field Field: none of, Monitoring Status |

| Standard | Summary |
|------------------------|--------------------------|
| FILTER * | DESCRIPTION * |
| System Notes : Context | is Script (Suitelet) |
| System Notes : Type | is Change |
| System Notes : Field | is not Monitoring Status |

Saved search filter for retrieving D&B reference records that failed the registration

Add the following filter to create a saved search that displays a list of all D&B Reference Records with **Failed** monitoring registration status:

| Filter Fields | Values |
|-------------------|-------------------------------|
| Monitoring Status | Status: any of, Failed |

Saved search filter for retrieving logs on D&B updates

For administrators, add the following filter to create a saved search that displays a list of all script execution logs on D&B updates:

| Filter Fields | Values |
|---------------|--|
| Name | Name: contains, ChangeNoticeProcessId |

Note: The retrieved logs on D&B updates include new field values only by default, without the old values. For more information about logs on D&B updates, see [Viewing D&B Updates in Logs](#).

You can add more filters to further refine your list. For more information, see the help topic [Defining a Saved Search](#). After adding the filtering criteria, you can continue setting up your saved search and enabling other settings. For more information, see [Defining Saved Searches for Data Monitoring](#).

Setting Up D&B Data Management

Follow the sequence of tasks to set up D&B Data Management and its features, some of which are optional or based on your business requirements:

1. [Setup Requirements for D&B for NetSuite Integration](#)
2. [Setting Up D&B Accounts and Preferences](#)
3. [Creating Deployments for Batch Matching](#)
4. [Defining D&B Saved Searches](#)

Creating Deployments for Batch Matching

With D&B Data Management for NetSuite, you can search for D&B records or candidates to be matched with NetSuite entities using script deployments.

Batch matching uses the default script deployment named **DNB MR Match**. You can create new batch matching deployments based on the default, with your own specifications. Separate deployments can be created, for example, to match records of a particular entity type. Based on your business requirements, you can also change the deployment schedule.

Understanding the Batch Matching Criteria

Batch matching applies the following criteria to search for matching D&B records or candidates:

- Company name
- Address
- Telephone number
- Confidence code

Considerations in Setting the Confidence Code as Criteria

Automatic matching is done if the confidence code of the D&B record is equal to or greater than the Auto Accept Confidence value that you set as criteria for batch matching.

A D&B record with a confidence code that is less than the Auto Accept Confidence value set in the criteria will be included as candidate match.

If Auto Accept Confidence code is not set, all D&B records returned will be queued as candidate matches.



Note: Batch matching returns one candidate match per record. A reference record is created for that candidate match.

Conditions and results in setting the Auto Confidence Code criteria:

| Auto Confidence Code Criteria | Confidence Code of the D&B Record | Result |
|-------------------------------|-----------------------------------|-------------------|
| When set | Is equal or higher | Automatic match |
| When set | Is lower | Queued for review |
| When not set | Is equal, higher or lower | Queued for review |

To create a script deployment for batch matching:

1. Go to Dun & Bradstreet > D&B Schedules > Batch Schedules.
2. On the D&B Batch Schedules list, click **New Schedule**.
3. On the Script Deployment page, you can do the following:
 - Set the deployment status and enter other deployment details.
For detailed instructions, see the help topic [Steps for Defining a Script Deployment](#).
Be sure to set the appropriate deployment status before saving the record. For information about the deployment status, see the help topic [Understanding Scheduled Script Deployment Statuses](#).
 - On the **Schedule** subtab, set your preferred schedule of deployment.

Note: D&B script deployments can be run only one at a time. When you create multiple deployments, you can set the schedules to run at different times. For more information about schedules, see the help topic [When Will My Scheduled Script Execute?](#)

- On the **Parameters** subtab, set the following:
 - In the **Entity Type** field, select the entity type of the records to be included in batch matching.
 - Optionally, you can add the following filtering criteria for batch matching:

| Field Name | Description |
|------------------------|--|
| Entity Status | Select the status specific to the entity type. |
| Subsidiary | For OneWorld accounts, select the subsidiary of the entity records to be included in the batch. |
| Group | Select the group from which records are selected. <div> <p>Note: If you add a group filter, selections for the entity type, status, and subsidiary are not considered during batch matching.</p> </div> |
| Auto Accept Confidence | Select the minimum confidence code, from 4 to 10, which a D&B reference record should have, to be automatically matched with an entity. |
| Process ID | The Process ID is automatically generated. Leave this field blank. |

4. Click **Save**.

The new script deployment is added to the list on the Batch Schedules page. For information about running the deployment that you have set up, see [Running Batch Matching](#).

Setting Up DNBi Risk Management

Follow the sequence of tasks to set up DNBi Risk Management and its features, some of which are optional or based on your business requirements:

1. [Setup Requirements for D&B for NetSuite Integration](#)
2. [Creating Term Records for DNBi Terms and Discounts](#)
3. [Setting Up D&B Accounts and Preferences](#)
4. [Setting Up Web Service Integration in DNBi](#)
5. [Scheduling Credit Request Updates for Syncing Failures](#)
6. [Defining D&B Saved Searches](#)

Creating Term Records for DNBi Terms and Discounts

For subscribers of DNBi Risk Management for NetSuite, you can use the same payment terms and early payment discounts that have been set up in your DNBi account. In NetSuite, you can assign payment terms on sales order transactions or set them as the default term on entity records.

Note: If you want to use the Overwrite NetSuite credit limit and terms preference, you must create a term record for each discount and payment term combination used in your DNB account. NetSuite recommends that you create the term records before setting up your account.

Review the guidelines specific for creating term records for DNB payment terms and discounts:

- To create term records, go to Setup > Accounting > Setup Tasks > Accounting Lists. For instructions on creating NetSuite terms, see the help topic [Creating Terms of Payment](#).

When assigning names for the NetSuite terms, combine the DNB early payment discount and payment term values. For example, set up a NetSuite term named **Net 10-1% Net 30** for the following DNB combination: early payment discount of **Net 10-1%** (with 10 as the number of days till the 1% discount expires) and payment term of **Net 30**.

Important: When using the Overwrite NetSuite credit limit and terms preference, you must strictly follow the naming convention: early payment discount value followed by payment term value, with one space in between the values. If no matching NetSuite term could be found, the DNB term and discount from your credit request results cannot automatically be applied to the entity.

- Using the Overwrite NetSuite credit limit and terms preference, the selection in the **Terms** field on entity records is automatically overwritten with the NetSuite term that matches the DNB discount and term combination.
 - For cases where DNB payment terms are returned with no corresponding discount, be sure to create a term record with a name that uses only the payment term value. The **% Discount** field must be left blank.
 - For cases where DNB discounts are returned with no corresponding payment term, be sure to create a term record with a name that uses only the discount value. The **Days Till Net Due** field must be left blank.
 - You do not need to create term records for DNB payment terms used for declined credit requests. Examples of these DNB payment terms include CIA, Pre-pay, and Credit.

For more information about the preference, see [Setting Up D&B Accounts and Preferences](#). For more information about viewing credit request results, see [Viewing and Processing Credit Applications](#).

- On sales order transactions, you can assign the payment term on the **Billing** subtab. For prospects and customers, you can set a default term on the entity record. For more information about assigning payment terms, see the following topics:
 - [Using Terms of Payment](#)
 - [Adding Billing Information to a Transaction](#)

Setting Up Web Service Integration in DNBi

For administrators, you must set up outbound services in your DNBi account to enable automatic updates of credits requests in NetSuite. Use the same DNBi account that you have set up for DNBi Risk Management. For more information about setting up DNBi accounts in NetSuite, see [Setting Up D&B Accounts and Preferences](#).

To set up web service integration in DNBi:

1. Go to Customization > Scripting > Script Deployments.
2. On the Script Deployments list, click the View link for the **DNB SU Process DNBi Update** script.
3. On the Script Deployment page, copy the link in the **External URL** field.
4. Follow the steps to add the link when you set up outbound services in your DNBi account:
 - a. Log in as administrator to your DNBi account.
 - b. In the **DNBi** field, located at the upper right side of the page, select **Integration Administration** and then click **Go**.
 - c. On the DNBi Integration Admin page, click **Automated Tasks**.
 - d. On the **Web Services** subtab, click **Edit** for Enable Outbound Services.
 - e. In the Set Up Contract section, enter the following details:
 - In the **Client ID** field, enter or verify the user ID for the DNBi account.
 - In the **Endpoint URL** field, enter or paste the External URL that you copied from the NetSuite script.
 - f. In the Set Up Action Triggers section, for Decision Maker, select the action triggers that you want to enable based on your business requirements.
 For example, if you want to send an outbound notice when credit requests are approved, you can select the **Approve** option.
 - g. Click **Save**.

Scheduling Credit Request Updates for Syncing Failures

Syncing credit applications that have been updated in DNBi (<https://na3.dnbi.com>) and the corresponding NetSuite credit application records may encounter errors during processing. Failed updates are automatically reprocessed by the DNB SU Process DNBi Update script on an hourly basis. For administrators, you can change the default schedule of the deployment based on your business requirements.

To schedule updates for failed credit requests:


1. Go to Customization > Scripting > Script Deployments.
2. On the Script Deployments list, click the Edit link for the **DNB MR Sync Credit** script.
3. On the Script Deployment page, change the settings on the **Schedule** subtab.
 For information about scheduling script deployments, see the following topics:
 - [When Will My Scheduled Script Execute?](#)
 - [Scheduled Script Best Practices](#)
4. Click **Save**.

The DNB MR Sync Credit script locates all failed credit application updates using the Need Sync flag on the D&B Credit Application record. To view this record, go to Lists > Search > Saved Searches. On the Saved Searches list, click the View link for DNBi Credit Application for Review. On the results page, click the View link for the credit application record. On the D&B Credit Application page, the **Need Sync** box is checked when an attempt to update it has failed. This box is cleared again when the update has been processed successfully.

Alternatively, you can set up the DNBi Credit Application for Review saved search as a custom search portlet. You can view credit application records on the Home or Dun & Bradstreet dashboard. For more information, see [Defining D&B Saved Searches](#).

Using D&B Data Management for NetSuite

For subscribers of D&B Data Management for NetSuite, NetSuite entity records can reference a D&B master record and can be updated with select firmographic data from D&B. You can also create lead, prospect, customer, and vendor records using D&B data.

 **Note:** Matching, creating entity records, and updating entity records are also available for DNBi Risk Management for NetSuite subscribers, with limited access to D&B data. To view the list of features per D&B SKU, see [Availability](#).

- [Matching with D&B Reference Records](#)
- [Creating Entity Records Using D&B Data](#)
- [Updating Entity Details with D&B Values](#)
- [Using Data Monitoring for D&B Reference Records](#)

Matching with D&B Reference Records

Entity records that belong to different subsidiaries can be matched with the same D&B reference record. Entity records with multiple possible matches are included in the list of unmatched entities. You can select which D&B reference record to match with the entity.

- [Running Batch Matching](#)
- [Viewing the Batch Matching Status](#)
- [D&B Process Status](#)
- [Matching Entities to D&B Reference Records](#)
- [Matching Existing Entities to D&B Records](#)
- [Viewing Matched Records](#)
- [Removing Candidate Matches from Entity Records](#)

Running Batch Matching

Batch matching includes only entity records that are not yet associated with a DUNS number. Records that are already associated with candidate matches are excluded from batch matching. You can run batch matching only one at a time. You cannot run the same deployment again, if one is still in progress.

Batch Matching on Demand

To run the default scheduled script for batch matching:

1. Go to Dun & Bradstreet > D&B Schedules > Run Batch Schedules.
2. On the Run Batch Matching page, enter appropriate values in any of the following filters to define the batch you want to match:
 - Subsidiary
 - Entity Type
 - Entity Status
 - Group

Note: You can use Subsidiary, Entity Type and Entity Status in combination, as they work together. The Group filter works separately, if you select a value for Group, the system will only accept the Group filter and reject the other three filters.

3. After defining the batch, select a value for Auto Accept at Confidence criteria. Select a value from a confidence code range of 4 to 10. The value you select will be the basis for matching the batch of entities to D&B reference records.

Note: If you do not define any filters or criteria, the system will process all existing entities and then assign candidate matches to them.

For more information the confidence code criteria, refer to the table in [Understanding the Batch Matching Criteria](#).

4. Click **Run**.

The D&B Process Status page is displayed where you can view the runtime status and verify that batch matching has been completed. For more information, see [D&B Process Status](#).

To select and run a batch matching script deployment that you have set up:

1. Go to Dun & Bradstreet > D&B Schedules > Batch Schedules.
2. On the D&B Batch Schedules page, in the Select column, choose the radio button of the deployment that you want to run.
3. Click **Run Now** to run the selected deployment.

The D&B Process Status page is displayed where you can view the runtime status and verify that batch matching has been completed. For more information, see [D&B Process Status](#).

Batch Matching on Schedule

When deployed, batch matching scripts automatically run according to their defined schedule. You can edit a script deployment to adjust its schedule for batch matching according to your business need.

To edit a script deployment to adjust its schedule for batch matching:

1. Go to Dun & Bradstreet > D&B Schedules > Batch Schedules.
2. On the D&B Batch Schedules page, in the Schedules list, click the Edit link of the deployment schedule you want to edit.
3. On the Script Deployment page, edit as necessary the script details and settings on the **Schedule** and **Parameters** subtabs.

For more information about D&B script deployments, see [Creating Deployments for Batch Matching](#).

Viewing the Batch Matching Status

When a deployment runs on-demand or on schedule, you can view the runtime status by going to Dun & Bradstreet > D&B Schedules > View Process Status. On the D&B Process Status: Results page, you can see the runtime status and other details for each deployment.

- You can monitor deployments in **Queued** or **In Progress** status.
- You can view the run start date and time, and the end date and time.
- For completed runs, the **Record Count** column shows the number of processed records. To view the entity records with candidate matches, go to the **Audit Logs** subtab in the D&B process status record. To view the number of matched entity records, go to the **Confidence Code Summary** subtab in the D&B process status record. For more information, see [D&B Process Status](#). For entities that have not been matched, you can select the D&B record of the matched candidate stored locally.
- For failed runs, you can do the following:
 - Change the filtering criteria and other deployment details. For more information, see [Creating Deployments for Batch Matching](#).
 - Rerun the failed batch matching process. For instructions, see [Running Batch Matching](#).


D&B Process Status

D&B process status records contain information about the batch matching processes that were run. You can open a D&B process status record by clicking its View link on the D&B Process Status: Results page. On the D&B Process Status page, the following details are indicated:

- ID
- Process Name
- Status
- Record Count – indicates the total entities captured with the defined filters
- Fail Count
- Run Date
- Start Date
- End Date
- Results
- Notes – indicates the parameters used in the process
- User – indicates the user who ran the process
- User Email

If the process failed, the error is displayed in the **Results** field.

In the **Audit Logs** subtab, click the link under Filename to download a CSV file containing detailed information about the batch matching results.

 **Note:** For each file, the file size of audit logs is limited to around 9.5 MB.

In the **Confidence Code Summary** subtab, the number of candidate matches under each confidence code is indicated.



Important: In order for the Confidence Code Summary to display accurate information, the MR script must be in a single queue.

To set the Confidence Code Summary for a multiqueue account, configure the DNB MR Match script to use only a single queue:

1. Go to Customization > Scripting > Script Deployments.
2. Click the Edit link of the DNB MR Match script.
3. On the Script Deployment page, clear the box for Queues – Select All.
4. Select Queue 1.
5. Click **Save**.

Matching Entities to D&B Reference Records

After batch matching, each entity will have a single candidate D&B match. This candidate is displayed on the Select D&B Reference Match page, where you have the option to match the entity to the candidate, get more candidate matches, remove the candidate D&B match, or cancel to leave the page.

To match a single entity to a D&B reference record:

1. Go to Dun and Bradstreet > List > Matched Candidates for Review.
2. On the Matched Candidates for Review page, you can do the following to find an entity record from the list:
 - By default, records of all entity types are displayed in the list. If you want to filter the list, use the Run Date From, Run Date To, or Entity Type criteria. When you enter a value for a filter, the page automatically refreshes with search results.
 - If there are a number of entities in the list, select a range of matched candidates from the **Page List** field to view the next or previous set of candidates.
3. On the Matched Candidates for Review page, click the View link of an entity record.

The Select D&B Reference Match page is displayed with one candidate whose confidence code is closest to the auto confidence code set in the batch matching criteria.

4. On the Select D&B Reference Match page, choose the radio button of the D&B candidate to be matched with the entity record.

Select D&B Reference Match More

Match Record **Cancel** **Get More Matches**

ENTITY
Wolfe Electronics
SUBSIDIARY
Parent Company

ADDRESS
44 St. US US
PHONE

| D&B Reference Matches * | | | | | | | | |
|-------------------------|-------------------|------------|-------------------|--------------------|---------|-------|-------------------|------------|
| SELECT | DUNS NUMBER | CONFIDENCE | COMPANY NAME | FAMILY TREE MEMBER | ADDRESS | PHONE | OUT OF BUSINESS * | MATCH WITH |
| <input type="radio"/> | 037934544 | 6 | WOLFE ELECTRONICS | | US | | | |
| <input type="radio"/> | None of the above | | | | | | | |

If you want to view more matches, click **Get More Matches**. The Update Customer: Search D&B page is displayed, with new candidate D&B matches added in the results list.

Choose the **None of the above** radio button if the candidate is not a match or if you do not want to link the entity to the candidate D&B record. The entity record is removed from the list of the Matched Candidates for Review page. The None of the above radio button and the Remove button on the Remove Review Candidates page perform the same action.

5. Click **Match Record**.

The entity is automatically linked to the D&B reference record. You can view the D&B data on the entity record. For more information, see [Viewing Matched Records](#).

Click **Cancel** if you want to return to the Matched Candidates For Review page.

Matching Existing Entities to D&B Records

Existing entity records can be matched, one at a time, to D&B records.

To match existing entities to D&B records:

1. Go to Lists > Relationships > (Entity).
2. On the entity list, click the View link to open the record.
3. On the entity page, click **Match via D&B**.

The D&B Reference Match page is displayed, where you can view the list of D&B records that can be matched to the entity.

If there is no match, click **Cancel** to return to the entity page.

4. In the **Select** column, choose the D&B record.



Note: Choose **None of the above** if there is no matching D&B record or if you do not want to link the entity to a D&B record.

5. Click **Match Record**.

You can view the D&B data on the entity record. For more information, see [Viewing Matched Records](#).

Viewing Matched Records

■ Viewing Matched D&B Reference Records

To view the list of matched D&B reference records, go to Dun and Bradstreet > List > D&B Reference Records. On the list of records, you can determine from the **Is Customer** and **Is Vendor** columns if the D&B reference record has been tagged or linked to a NetSuite customer (including lead or prospect), vendor, or both.



Important: You must not delete D&B reference records. Linked reference records contain D&B data that are used for NetSuite entities. Unlinked reference records are used as candidate matches for NetSuite entity records.



Note: Entities of different types that use the same D&B record are not created separate D&B reference records. For example, creating a vendor using a D&B reference record that has been associated with a customer only tags the existing D&B reference as a vendor. No new D&B reference record is created for the vendor.

From the list, click the View link for the reference record that you want to open for viewing. The record displays the D&B details of the organization or entity.

■ Viewing the D&B Data of Matched Entity Records


Matched entity records can be viewed through the regular NetSuite navigation path: Lists > Relationships > (Entity). On the list of leads, prospects, customers, or vendors, the following columns are added: **DUNS Number** and **D&B Last Match Date** columns. These fields are also shown on the entity page. The DUNS number is displayed as a link that you can click to open the D&B reference record that has been matched with the entity.

On the **D&B Information** subtab, more details are displayed under **Identity**, **Hierarchy**, **Firmographic**, and **Diversity**.

| Identity • Hierarchy • Firmographic • Diversity • | | |
|--|--|---------------------------|
| EMPLOYEE QUANTITY (ALL) 6.0 | LINE OF BUSINESS Nonclassifiable establishments | SALES REVENUE AMOUNT |
| EMPLOYEE QUANTITY RELIABILITY (SINGLE) Actual | WEBSITE ADDRESS | SALES REVENUE CURRENCY |
| MAJOR INDUSTRY CATEGORY | EMPLOYEE QUANTITY RELIABILITY (ALL) Actual | SALES REVENUE RELIABILITY |
| EMPLOYEE QUANTITY BASIS Principals | EMPLOYEE QUANTITY (SINGLE) 6.0 | SALES REVENUE UNITS |
| Industry Codes | | |
| INDUSTRY TYPE TEXT | INDUSTRY CODE | INDUSTRY DESCRIPTION |
| No records to show. | | |

On the **Identity** and **Firmographic** subtabs, you can also view the following sections:

- Registration Numbers – On the **Identity** subtab, this section displays the list of registration types and numbers assigned to the organization.
- Industry Codes – On the **Firmographic** subtab, this section displays the list of industry type codes and industry codes with description assigned to the organization. For industry type codes associated with multiple industry codes, only the first industry code based on the display sequence value is included in the list.


 **Note:** For permissions required to view industry codes and registration numbers, see [D&B Roles and Permissions](#).

Removing Candidate Matches from Entity Records

If a batch of entities was matched incorrectly or you want to change the matching criteria, you can unmatch or remove the candidate matches from the batch of entity records they were associated with. After batch removal of candidate matches, you can run a new matching process for the same batch.

To remove candidate matches from entity records in batches:

1. Go to Dun & Bradstreet > D&B Schedules > Remove Review Candidates.
2. On the Remove Review Candidates page, enter appropriate values in any of the following criteria to define the batch you want to unmatch:
 - Subsidiary
 - Entity Type
 - Entity Status
 - Group

 **Note:** You can use Subsidiary, Entity Type and Entity Status in combination, as they work together. The Group filter works separately, if you select a value for Group, the system will only accept the Group filter and reject the other three filters.

If you do not define any criteria, the system will remove the candidate matches of all entities that are pending review.

3. Click **Remove**.

The D&B Process Status page is displayed with details of the unmatching process. For more information, see [D&B Process Status](#).

Creating Entity Records Using D&B Data

Search for the record to be used for the new entity, directly from the D&B database. Create new customer, lead, prospect, and vendor records, one at a time, from the D&B record that you select. You can assign the entity type, subsidiary, or both for each single or batch process. The newly created entity records are enriched with D&B data, which includes the DUNS number, contact details, and other commercial information.

Note: If you subscribe to DNBI Risk Management for NetSuite, you can set a preference to automatically send a credit application when you create entity records. For more information, see [Setting Up D&B Accounts and Preferences](#) or [Applying for Credit for Entities](#).

To create entity records using D&B data:

1. Go to Lists > Relationships > (Entity) > New.
2. On the entity record, click **Create via D&B Match**.
3. On the create entity page, enter your criteria to search for matching D&B records.

You can use any of the following criteria:

- DUNS number alone
- Company name and country with address, city, state, or phone.

Note: To search for companies in the U.S., enter the country, and then select the state. It narrows down the results and improve your chances of getting an exact match. Generally, match results with a confidence code of 8 and above are considered very close matches.

Important: If you subscribe to Using DNBI Risk Management for NetSuite and you do not subscribe to D&B Data Management for NetSuite, only the following criteria can be used in searching: Company Name, Country, State, Address 1, and City.

For more information about each field or search criteria, see the following table:

| Field Name | Description |
|--------------|--|
| DUNS Number | Enter the complete DUNS number. |
| Company Name | Enter the complete or partial company name. |
| Country | Enter the country name. When you have entered at least 3 characters, you can select from results displayed below the field. This field does not accept the country code. |
| State | Enter the state name. This field accepts U.S. state codes. |
| Address 1 | Enter the complete or partial address. |
| City | Enter the city name. |
| Phone | Enter the telephone number for the company. |

4. Click **Search**.

View the list of D&B records that match the criteria on the **Search Results** subtab. The list displays the DUNS number, company name, complete address, and phone number.

Click **Reset Criteria** if you want to clear all the search fields.

5. On the **Search Results** subtab, do the following:
 - a. For NetSuite OneWorld accounts, in the **Subsidiary** field, select the subsidiary to be associated with the new entities.

Note: For each entity type, you cannot create duplicate records within the same subsidiary.

- b. In the **Select** column, choose the company record.

Search Results •

To create a customer record: Enter values for the required entity fields, select a company, and click the Create button.

SUBSIDIARY *

| SELECT | DUNS NUMBER | CONFIDENCE | COMPANY NAME | FAMILY TREE MEMBER ROLE | ADDRESS | PHONE # |
|-----------------------|-------------|------------|--------------|-------------------------|------------------|------------|
| <input type="radio"/> | 027370027 | 4.0 | COMPANY, THE | | 3817 CLERMONT DR | 12345678 |
| <input type="radio"/> | 052992711 | 4.0 | COMPANY THE | | 140 SAINT J | 22538326 |
| <input type="radio"/> | 064724050 | 4.0 | COMPANY THE | | 2955 RIDGELAKE | 1212121212 |

- c. Click **Create**.

Note: You cannot create records with the same DUNS number and subsidiary. For vendors, in particular, you cannot create records with the same company name, regardless if the DUNS number or subsidiary are different. If you select a D&B record that has been matched with an entity, a message is displayed with the record ID of the entity. You can click the record ID to view the entity details.

After the record has been successfully created, the entity page is displayed for viewing. The D&B data is displayed on the **D&B Information** subtab. For more information, see [Viewing Matched Records](#).

You can edit the entity record to enter more information. For instructions on entering entity details, see the topic for creating records specific to each entity:

- [Creating a Lead Record](#)
- [Prospects](#)
- [Customers](#)
- [Adding a Vendor Record](#)

Updating Entity Details with D&B Values

You can update incorrect or incomplete entity details in NetSuite with data from D&B. This option applies to matched or linked entities and entity records created from D&B data, which have been updated with the DUNS number.

To update entity details with D&B values:

1. Go to **Lists > Relationships > (Entity)**.
2. On the entity list, click the **View** link for the record to be updated.
3. On the entity page, click **Update Using D&B Values**.

This button is available in view mode only.

4. On the Update customer popup, in the **Select** column for each field, you can select one of the following:
- **NetSuite (Retain)** - Select this option to retain the NetSuite data.
 - **D&B** - Select this option to update the field with D&B data.
 - **Custom** - Select this option, and then enter the data in the **Custom Value** field.

Note: For blank NetSuite fields, the default setting is the D&B information.

Update Customer

Submit **Cancel**

Select values that will be applied to the entity record.
Choose fields to update by selecting the dropdown value which will be applied to the corresponding row.

| SELECT | FIELD | NETSUITE VALUE | D&B VALUE ▲ | CUSTOM VALUE |
|---------------------|------------------|--------------------------|--------------------------|--------------|
| NetSuite (Retain) ▼ | Company Name | Reliance Capital Limited | RELIANCE CAPITAL LIMITED | |
| NetSuite (Retain) ▼ | Phone | 2233036007 | 022 3303 1000 | |
| NetSuite (Retain) ▼ | Addressee | Reliance Capital Limited | RELIANCE CAPITAL LIMITED | |
| NetSuite (Retain) ▼ | Street Address 1 | Reliance Energy Centre | Reliance Energy Centre | |
| D&B ▼ | Street Address 2 | (None) | Santacruz (E) | |
| NetSuite (Retain) ▼ | City | Mumbai | Mumbai | |
| D&B ▼ | State | (None) | MH | |
| NetSuite (Retain) ▼ | Postal Code | 400055 | 400055 | |
| NetSuite (Retain) ▼ | Country Code | IN | IN | |

Submit **Cancel**

5. Click **Submit**.
- On the entity record, you can view the fields updated with your selected or entered data.


Using Data Monitoring for D&B Reference Records

With Data Monitoring, you can track changes and updates to details on registered D&B reference records. To enable Data Monitoring for D&B Data Management, see [Setting Up D&B Accounts and Preferences](#). For more information about D&B reference records, see [Matching with D&B Reference Records](#).

Key points when using data monitoring:

- Refer to the procedures described in the following topics to register D&B reference records:
 - To register existing records created prior to enabling Data Monitoring in your account, see [Registering or Deregistering D&B Reference Records](#)
 - To automatically register new records created during entity matching, enable the Automatic Register for Matched Entities preference. For more information about this preference, see [Setting Up D&B Accounts and Preferences](#).
- Only fields on registered D&B reference records are monitored and automatically updated.
 - D&B changes to fields that are not part of the reference record are ignored.
 - Changes are also reflected automatically in corresponding fields on the **D&B Information** subtab of matched entity records. For more information, see [Viewing Matched Records](#).


- For limitations on updates supported by Data Monitoring, see [Limitations of D&B for NetSuite Integration](#).
- D&B updates are monitored through the DNB MR Change Notice scheduled script, which runs daily, starting at 12 a.m. During each run, it retrieves D&B updates within the last 3 days, to ensure that nothing had been missed in previous runs. For more information, see [Viewing D&B Updates in Logs](#).
- Registered reference records are initially set to **Pending** status. A scheduled script runs daily to track D&B changes to the status and automatically updates pending registrations to **Active** status. You can view the latest status on the D&B Reference Record page, in the **Monitoring Status** field. For more information, see [Viewing D&B Updates on Reference Records](#).

 **Note:** You can also view the **Monitoring Status** field on entity records.

- You can set up saved searches to track updated D&B reference records and the registration status. For more information, see [Defining Saved Searches for Data Monitoring](#).


Registering or Deregistering D&B Reference Records


You can manually register existing D&B reference records that have been created prior to enabling Data Monitoring in your account. You can also deregister records that have been previously registered.


 **Important:** Be reminded that deregistering records disables data monitoring and automatic application of D&B updates.

To register or deregister D&B reference records:

1. Go to Dun & Bradstreet > List > Monitoring Registration.
2. On the D&B Monitoring Registration page, use any of the following filters to search for entities that you want to register.


 **Important:** By default, the D&B Monitoring Registration page opens in registration mode. To switch to deregistration mode, search by using either **Active** or **Pending** from the list in the **Status** field. In deregistration mode, only registered records are retrieved based on your selected filters.

| Field Name | Description |
|-------------|--|
| Entity Type | <p>Select the entity type of records that you want to retrieve.</p> <ul style="list-style-type: none"> ■ None – Select this status to retrieve unregistered records, including those created prior to the enabling of Data Monitoring in your account. ■ Active – Use this status to deregister active records. ■ Pending – Use this status to deregister records that have been submitted for registration, but are not yet active. ■ Failed – Select this status if you want to register records that have not been successfully processed in a previous registration. <p> Note: Currently, the Expired status is not applicable to Data Monitoring registrations through NetSuite.</p> |
| Subsidiary | For OneWorld accounts, select the subsidiary associated with the records. |
| Group | Select the group that the entities belong to. |


| Field Name | Description |
|--------------|--|
| |  Note: If you add a group filter, all records associated with the group are retrieved, regardless of your filter selections for entity type, status, and subsidiary. |
| Company Name | Enter the complete or partial company name. |
| DUNS Number | Enter the DUNS number of the entity to narrow down the results. |
| Country | Enter the country name. When you have entered at least 3 characters, you can select from the results displayed below the field. |

3. Click **Search**.

Search results are displayed in the Entities sublist.

 **Note:** Registered records and those pending registration are not displayed in the sublist to prevent resubmission.

4. In the Entities sublist, check the box for the records you want to register.

 **Tip:** Click the **Mark All** button to select all records on the current page. You can do the same for records on any succeeding pages. Click the **Unmark All** button to deselect records across all pages.

In the **Entity** column, you can click the View link to open and view the D&B Reference Record page.

5. Click **Register** or **Deregister**.

Click **Reset** if you want to return the default settings of the filters. Resetting a page also clears the search results.

If you selected 10 records or less, registration is immediately submitted for processing. If you selected more than 10 records, registration is queued for processing, which might take a few minutes to complete. During processing, you can view the progress on the D&B Process Status page. On this page, click **Refresh** to get the latest processing status. After processing has been completed, you can view the following details:

- **Record Count** – This field displays the total number of records for registration.
- **Results** – This field displays the breakdown of records:
 - **Processed** – Total number of successfully processed records
 - **Skipped** – This count is used for registered records, to display the total number of records with no D&B changes to the monitoring status.
 - **Failed** – Total number of records that were not processed successfully due to errors

Note: As administrators, you can view processing errors or details of failed registrations in the execution logs of the DNB MR Register Duns script. If you want to set up a saved search that retrieves failed registration records, see [Defining Saved Searches for Data Monitoring](#).

Viewing D&B Updates on Reference Records

D&B updates are applied automatically to registered reference records. To view reference records, go to Dun & Bradstreet > List > D&B Reference Records. On the D&B Reference Records: Results page, click the View link of a record to open it. On the D&B Reference Record page, you can view the D&B fields and the following details:

- In the **Monitoring Status** field, view the status of the registration.

Note: Status updates from D&B are monitored automatically through the DNB MR Register Duns script, which runs daily, every 12 a.m. The script checks for updates to the status of registered records. It automatically reflects any updates in the **Monitoring Status** field.

- On the **System Notes** subtab, you can view details of an update, which include the date when the change was made, updated fields, and their new values.

If you want to set up a saved search that retrieves records with D&B updates, see [Defining Saved Searches for Data Monitoring](#).

Viewing D&B Updates in Logs

D&B updates are displayed in execution logs of the DNB MR Change Notice script. As Administrators, you can view the logs for each run by going to Customization > Scripting > Scripts. On the Scripts list, click the View link for the script. On the Script page, under the **Execution Log** subtab, look for logs with **ChangeNoticeProcessId** in the **Title**, and then view the D&B updates in the **Details** column:

- **ReferenceRecordId** – Internal Id of the process record
- **Change Event** – Contains the following details: field Id from D&B, name or label of the updated field, internal Id of the field label, new field value

Note: If you want to set up a saved search that retrieves available logs from completed runs, see [Defining Saved Searches for Data Monitoring](#).

Using DNBi Risk Management for NetSuite

For DNBi Risk Management for NetSuite subscribers, you can request for credit for both new and existing leads, customers, and prospects within your NetSuite account. You can also request for credit on new and existing sales orders. The credit application details and status can be monitored on the entity or sales order record.

Review the following guidelines for credit requests:

- When you submit a credit request, you receive the recommended credit limit from DNBi in the base currency of your company. You can verify that this currency matches the one on the entity record.

For more information, see the help topic [Working with Currencies](#) for single currency accounts or [Assigning Currencies to Entities](#) for multicurrency accounts.

- To submit credit requests for entities or on sales orders, entities must have either the DUNS number or country specified in the **Address** field of the record. You can view the address of an entity by going to Lists > Relationships > (Entity). On the entity record, the address is displayed in the Email | Phone | Address section and on the **Address** subtab.

You have the option to choose a matching D&B record for the entity along with the credit request.

- Credit decisions for automatic requests are based on the policies and rules that you have set up in your DNBi account.

For more information about credit requests through DNBi Risk Management, see the following topics:

- [Applying for Credit for Entities](#)
- [Applying for Credit on Sales Orders](#)
- [Viewing and Processing Credit Applications](#)

Applying for Credit for Entities

To apply for credit for new entities

With DNBi Risk Management for NetSuite, with or without D&B Data Management, credit applications can be automatically included during the creation of entity records. This option is available only if you have enabled the following preference: **Automatically request credit for new customers, leads, prospects**. For more information about the preference, see [Setting Up D&B Accounts and Preferences](#).

Review the following guidelines for submitting credit requests for new entities:

- To create entity records with automatic credit requests, use the **Create via D&B Match** button. If you do not use this option, you can create the entity record first before submitting a credit request.
- When you create an entity using D&B data, without D&B Data Management, you cannot use the DUNS number to search for possible D&B record matches. You can use only the company name and country with other address details. For more information, see [Creating Entity Records Using D&B Data](#).
- On new entity records, you can view the details and status of the credit application. For more information, see [Viewing and Processing Credit Applications](#).
- For general credit request guidelines, see [Using DNBi Risk Management for NetSuite](#).

To request for credit for existing entities:

You can create a credit application for entities matched with D&B reference records or existing records that have not yet been matched or updated with a DUNS number. For unmatched entities, you have the option to select a matching D&B reference record aside from submitting a credit request.

1. Go to Lists > Relationships > (Entity).
2. On the entity list, click the View link for the entity record.
3. On the entity record, click **D&B Credit Request**.
4. Do either of the following for matched or unmatched entities:
 - For matched entities

On the Request Credit page, in the **Requested Amount** field, enter the requested credit amount.

Request Credit

ENTITY
188 BOEING COMPANY, THE

CREDIT UTILIZED
0.00

EXISTING CREDIT LIMIT
0.00

REQUESTED AMOUNT
0.00

- For unmatched entities
 - On the Request Credit page, in the **Requested Amount** field, enter the requested credit amount.
 - To match the entity, in the **Select** column, choose the matching D&B record.
 - If you do not want to match the entity, choose the **None** option that is displayed in the **DUNS Number** column.

Request Credit More

ENTITY
192 BOEING CO

CREDIT UTILIZED
350.00

EXISTING CREDIT LIMIT
0.00

REQUESTED AMOUNT
0.0

Candidates *

You may submit the credit request as one of the companies listed below:

| SELECT | DUNS NUMBER | CONFIDENCE | COMPANY NAME | FAMILY TREE MEMBER ROLE | ADDRESS | PHONE A |
|----------------------------------|-------------|------------|----------------|-------------------------|----------------------------|-----------|
| <input checked="" type="radio"/> | 624294025 | 6.0 | BOEING CO, THE | | AIRTRAN BLVD ORLANDO FL US | 072402777 |
| <input type="radio"/> | None | | BOEING CO | | | |

5. Click **Submit**.

The Request Credit page is displayed where you can view the details and status of the application. For select roles, you can click the Application Number link to view the credit application record in your DNBi account. For more information about viewing credit details, see [Viewing and Processing Credit Applications](#).

Applying for Credit on Sales Orders

You can submit credit requests on new and existing sales orders for leads, prospects, and customers. This option is available to entities with or without a credit limit.

The following guidelines apply to credit requests on sales orders:

- The requested credit amount defaults to the sum of the balance and unbilled orders on the entity's record. For entities without existing orders, the requested amount defaults to the total amount of the sales order. You cannot change the requested credit amount.
- Entity records are verified to determine if the sum of the values in the **Balance** and **Unbilled Orders** fields meets or exceeds the value in the **Credit Limit** field. Depending on your credit limit settings, you cannot create sales orders and submit credit requests when the credit limit has been met or exceeded. Depending on your credit limit settings, you cannot create sales orders and submit credit requests when the credit limit has been met or exceeded. For the following credit limit settings, you can create sales orders, but you cannot submit manual or automatic credit requests, even when the credit limit has not been exceeded:
 - On the entity record, the credit limit hold setting is **On**.
 - For Accounting Preference, the customer credit limit handling setting is **Enforce Holds**.
 - On the sales order, using the Standard Sales Order - Invoice form, or using the Standard Sales Order form with the terms set on the **Billing** subtab.

In cases where you cannot submit a credit request on the sales order, you can submit a credit request on the entity record first. For more information, see [Applying for Credit for Entities](#).

Note: If you have the Overwrite NetSuite credit limit and terms preference enabled, the NetSuite credit limit is replaced with the value of the recommended credit limit from D&B. Succeeding credit requests for the entity are validated using this limit from D&B. For more information about this preference, see [Setting Up D&B Accounts and Preferences](#).

For more information about credit limit holds, see the following topics:

- [Customer Credit Limits and Holds](#)
- [The Standard Sales Order Form](#)
- Sales order approval is separate from credit application approval. It is possible for sales orders on pending approval to have an approved credit request.
- For general credit request guidelines, see [Using DNBi Risk Management for NetSuite](#).

To request for credit on new sales orders:

For entities without a credit limit, you can include a credit request when you create the sales order transaction. To request for credit on sales orders, you must enable the following preference: **Automatically request credit upon sales order creation**. For more information about this preference, see [Setting Up D&B Accounts and Preferences](#).

Review the following guidelines for submitting credit requests on new sales orders:

- When you create sales orders with credit requests, you also have the option to match entities with D&B records. After a sales order has been saved, the D&B Match popup is displayed where you can select from the list of candidate matches. For more information, see the instructions in the next section for requesting credit on existing sales orders.
- After you have submitted a sales order, the credit request link is displayed in the **Last Credit Application** field. For select roles, you can click the link to view the credit request details in DNBi. For information about viewing the credit request status, see [Viewing and Processing Credit Applications](#).

To request for credit on existing sales orders:

You can submit credit requests on existing sales orders when the entity's credit limit exceeds the sum of the balance and unbilled orders on the entity record. Otherwise, on the sales order, the **D&B Credit Request** button is not displayed.

1. Go to Transactions > Sales > Enter Sales Orders > List.
2. On the Sales Orders list page, click the View link for the sales order record.
3. On the Sales Order page, click **D&B Credit Request**.
4. On the Request Credit page, do any of the following:

- For matched entities

On the Request Credit page, you can view the requested amount.

Request Credit

Submit

Cancel

| | |
|--|------------------|
| ENTITY | CREDIT UTILIZED |
| 200 AMERICAN INTERNATIONAL GROUP, INC. | 120,500.00 |
| TRANSACTION | REQUESTED AMOUNT |
| Sales Order #77 | 120,500.00 |
| EXISTING CREDIT LIMIT | |
| 100,000.00 | |

- For unmatched entities
 - On the Request Credit page, you can view the requested amount.
 - To match the entity, in the **Select** column, choose the matching D&B record.
 - If you do not want to match the entity, choose the **None** option that is displayed in the **DUNS Number** column.

Request Credit

ENTITY: 25 Advocate Health Care Network
 TRANSACTION: Sales Order #97
 EXISTING CREDIT LIMIT: 0.00

CREDIT UTILIZED: 1,600.00
 REQUESTED AMOUNT: 1,600.00

Candidates*

You may submit the credit request as one of the companies listed below:

| SELECT | DUNS NUMBER | CONFIDENCE | COMPANY NAME | FAMILY TREE MEMBER ROLE | ADDRESS | PHONE # |
|----------------------------------|-------------|------------|------------------------------|-------------------------|---|----------|
| <input checked="" type="radio"/> | 006914337 | 6.0 | ADVOCATE HEALTH CARE | Headquarters | 450 HIGHLAND | |
| <input type="radio"/> | 022961450 | 6.0 | ADVOCATE HEALTH | | 7850 KEDZIE AVE | 11574011 |
| <input type="radio"/> | 022164437 | 6.0 | ADVOCATE HEALTH NETWORK | Branch | 17 HWY 22, BLDG1, STE 16 BARRINGTON IL US | |
| <input type="radio"/> | None | | Advocate Health Care Network | | | |

5. Click **Submit**.

The details and status of the credit application are displayed. For select roles, you can click the Application Number link to view the credit application record in your DNBi account. For more information about viewing credit request details, see [Viewing and Processing Credit Applications](#).

To return to the sales order page, click the sales order number link in the **Transaction** field.

Viewing and Processing Credit Applications

You can view credit applications that you have submitted through entity or sales order records. You can also access credit applications in your DNBi account through a link on the record.

Note: If you have not set up your DNBi credentials, when accessing the DNBi page for the first time, you are required to enter the user ID and password for your DNBi account. For more information, see [Setting Up D&B Accounts and Preferences](#).

If the D&B portlets have been set up in your account, you can view the list of credit applications on the Home or Dun & Bradstreet dashboard. For more information, see [Defining D&B Saved Searches](#).

To view all credit applications:

1. Go to Dun & Bradstreet > DNBi Risk Management > Credit Application Records.
The list of all credit applications in the account is displayed.
2. On the Credit Applications list, click the View link for the application that you want to open.
You are redirected to your DNBi account where you can view the credit application record. For approvers, you can also process the credit application. Any updates to the status or credit amount in the DNBi account are reflected on the entity record, on the **DNBi Risk Management** subtab.

You can apply the following filters to limit the applications displayed in the list:

- **Application Date From** - Enter the start date for the range of application dates.
- **Application Date To** - Enter the end date for the range of application dates.
- **Application Status** - Select the credit application status.

After you have applied the filters, click **Refresh**.

To view credit applications per entity:

On records for customers, leads, and prospects, you can view credit applications that have been requested directly on the entity record or through a sales record.

1. On the entity list, click the View link for the entity record.
2. Go to Lists > Relationships > (Entity).
3. On the entity page, click the **DNBi Risk Management** subtab.

On the **Credit Application History** subtab, you can view the details of all credit applications that have been submitted for the entity. Credit requests that have submitted on a sales order are displayed with the sales order number in the **Transaction Reference** column.

For roles with credit permissions, you can access the latest credit application through the link in the **Last Credit Application** field. This link is displayed only after you have submitted an initial credit request. The link redirects you to your DNBi account where you can view the credit application details. For credit approvers, you can also process or approve the credit application. Updates to the status and other credit details are reflected on the entity record.

To view the credit application on sales orders:

For roles with credit permissions, you can access a credit application through the link on the sales order record. For information about setting up permissions, see [D&B Roles and Permissions](#).

1. Go to Transactions > Sales > Enter Sales Orders > List.
2. On the Sales Orders list page, click the View link for the sales order record.
3. On the Sales Order page, click the link in the **Last Credit Application** field.

The **Last Credit Application** field is displayed only after you have submitted a credit request. The link redirects you to your DNBi account where you can view the credit application record. For credit approvers, you can also process the credit application. You can view the status of the credit application and other details on the entity record in NetSuite.