

DATA INTEGRATION SETUP AND USER GUIDE

The logo for StiboSystems, featuring the company name in a white sans-serif font with a small icon of three diamonds above the 'i' in 'Stibo'. The logo is positioned on the left side of the page, partially overlapping a large orange triangle that points to the right.

StiboSystems

STEP Trailblazer 8.1

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Data Integration

The topics in this section detail STEP data integration with other systems. It is important to have a solid understanding of how STEP works before working through the topics in this section.

Dun & Bradstreet Integration

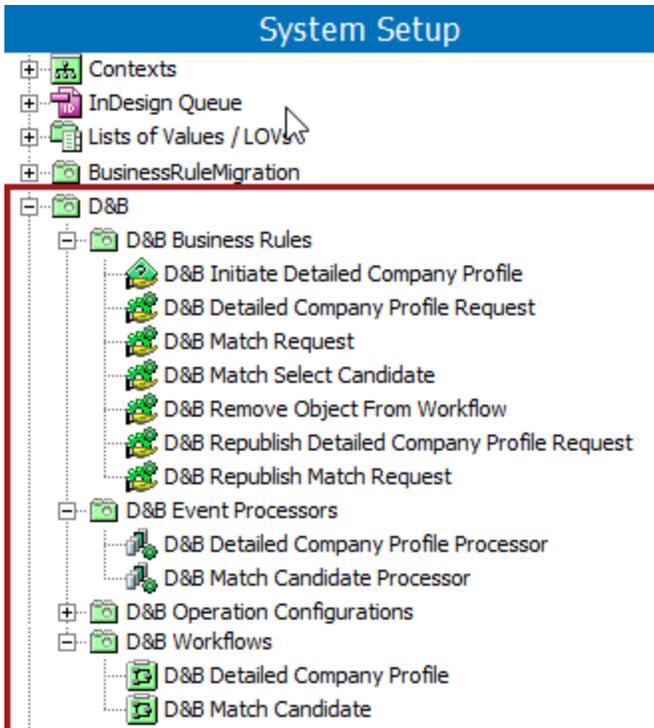
Both STEP Workbench and Web UI support matching data from the Dun & Bradstreet (D&B) database and then allow for enriching customer information in STEP with this data. These records, brought in either manually or through inbound integrations, can be matched using confidence scoring and enriched automatically through the use of new processors and workflows.

The integration to D&B services is implemented following an asynchronous integration pattern, using the following STEP components

- Event processors for matching and detailed company profile enrichment
- Business actions that enable matching, company profile enrichment, removal, republishing, and candidate selections
- Workflows for D&B integration
- D&B Integration component model

To assist with proper configuration, an automatic setup is available that creates all of the D&B mapping configurations, workflows, business rules, and event processors. STEP will create a D&B (STEP ID: DnBIntegration) setup folder in System Setup that contains the following:

- **D&B Business Rules** - Business actions that enable the D&B functionalities to process. Each one is named according to its function.
- **D&B Integration Event Processors** - Event processors used to request changes from third-party services.
- **D&B Integration Workflows** - There is one workflow for each D&B Service: D&B Match and D&B Detailed Company Profile. The workflows are used for controlling the information flow.
- **D&B Operation Configurations** - There is a node for each D&B operation with a configuration specific to each operation.



In addition to the D&B System Setup folder, attribute groups, attributes, and data containers are created as part of the automatic setup. There are over 200 attributes / data containers, and they are separated out between the ones used for candidate matching and the ones used for enriching company profiles.

Note: If you need to change any of these generated D&B tools, it is best practice to duplicate the supplied instance, then modify that business rule, workflow, event processor, etc. This method is advised because whenever D&B integration is updated, any values that were changed may be overwritten.

Prerequisites

To use the D&B functionality, the applicable license must be in place and the installation recipe applied.

Configuring the component model requires users to be familiar with the System Setup tab in the STEP Workbench and how to configure within this area (e.g., creation and maintenance of object types, attributes, and references). Users must also have the privileges required to carry out these tasks.

Also, users should be familiar with business rules, workflows, event processors, and it is expected that anyone configuring Web UI components is familiar with Web UI designer. If not, the users should search online help to understand these concepts and processes.

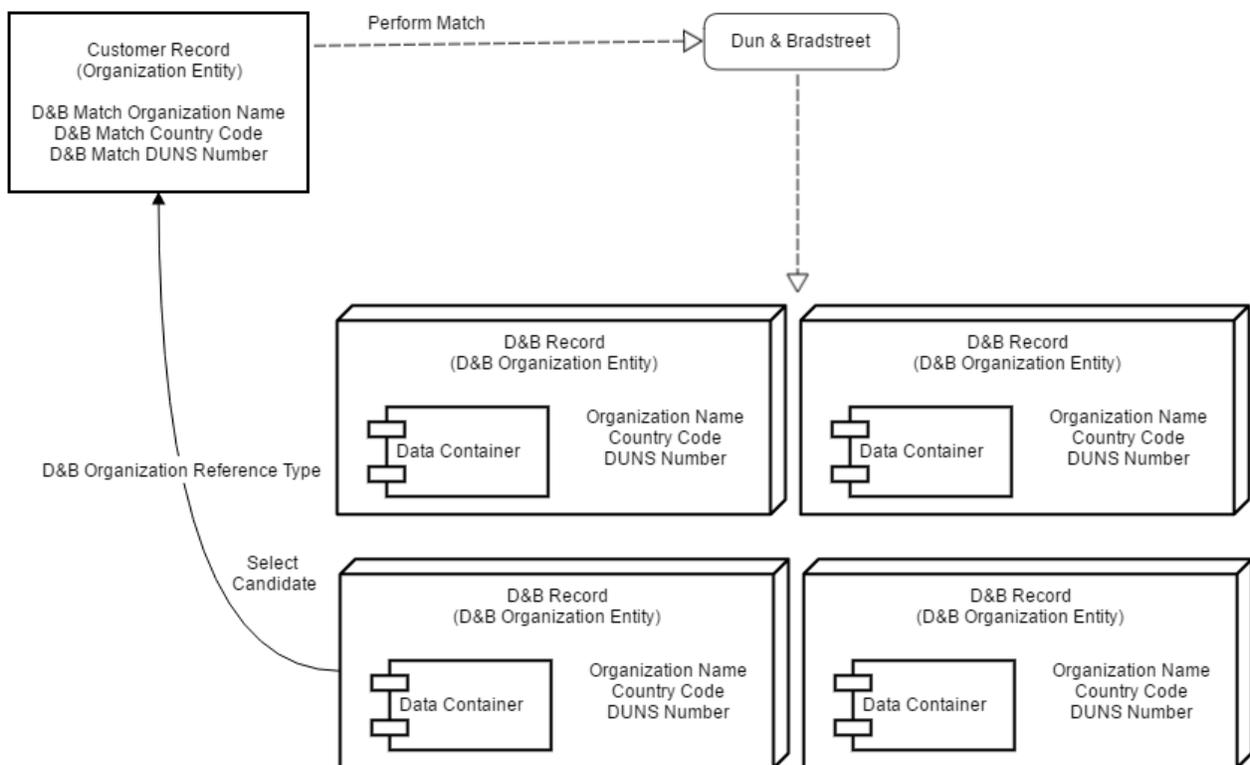
Anyone configuring or using the D&B setup package needs to have the proper privileges and understand how all the pieces work together. The automatic setup is designed to make it so that users have very little to do configuration-wise to get up and running as soon as possible and most of these concepts are not covered in this D&B documentation.

Customer Data Model

Before starting the D&B setup, the relevant data structures need to be defined. The proper entity object types should be created and the entity root for where the system will create new D&B organization entity records as returned from D&B. The D&B records will be referenced by a customer record, so the proper reference types and links also need to be configured prior to starting the D&B automatic / easy setup process. More information about the data model and what is required can be found by reading through the next section in this topic, so it is a good idea to read through that information to verify that your data model is setup as needed for D&B integration to function.

Here is an outline of the D&B process that shows why the setup is so important:

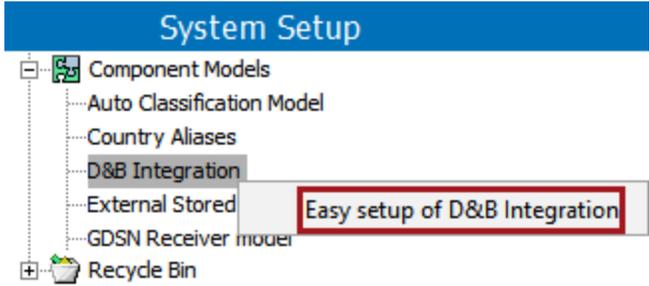
- Input for D&B Match requests is taken from a configurable set of attributes on the organization record
- Data returned from D&B is stored in an entity, in a fixed data model comprised of data containers and attributes that is created by the easy setup
- D&B Matching will create the D&B organization entities and a reference from the organization record to the D&B organization record



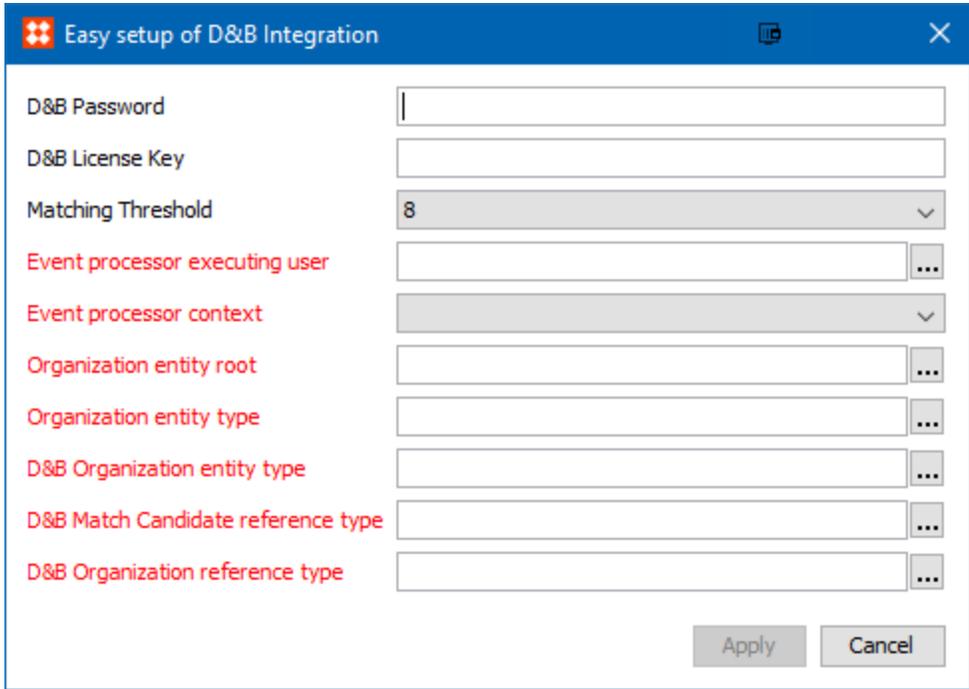
Configuring Dun & Bradstreet Integration

As mentioned, D&B Integration includes an automatic setup that will create all the setup files and needed attributes and data containers. To start the automatic configuration:

1. Go to System Setup > Component Models > Select **D&B Integration**.
2. Right-click the component model name (D&B Integration) and select 'Easy setup of D&B Integration.'



3. When this menu option is selected, the 'Easy setup of D&B Integration' dialog will display. The dialog requires a bit of setup to create the appropriate connections with D&B.



- **D&B Password** and **D&B License Key**: By default, STEP has a built-in key that allows customers access to 500 free D&B transactions. Nothing needs to be entered into these fields until the 500 transactions are used.

At that time, customers may purchase 'match' and 'profile' licenses directly from Stibo. Please note, the 'profile' license includes access to both 'match' and 'profile' transactions. One transaction of 'profile' gives you the ability to do a match first and then obtain a detailed company profile. Regardless of which license you buy, only one license key will be provided that will cover both 'match' and 'profile' transactions. Contact your Stibo account manager to purchase transactions.

- Select a **Matching Threshold** (integers 6 through 10) from the dropdown. This is a D&B-determined auto-linking threshold used for matching customer records to D&B record candidates. For example, if you set it at 6 and get one match candidate at that threshold, the D&B record auto-links to the customer record. The numbers

are labeled in the dropdown with 6 being a very low (match) threshold and 10 being a very high (match) threshold. The default is 8.

- **Event processor executing user** tells the system which user will be associated with all of automatic event processing done as part of the D&B processes. You can select the user by clicking the ellipsis button.
- **Event processor context** is the STEP Context the event processors will be configured to operate in. You can make an alternate selection via the dropdown.
- The rest of the values need to be populated before moving forward and the data modeling setup must be created prior to running the easy setup. The objects, roots, and reference types created for the modeling are the ones to be selected in the 'Easy setup of D&B integration' dialog.

Click the ellipsis button (...) for each parameter to set the entity roots, entity types, and entity-to-entity reference types as indicated within the dialog.

- **D&B Organization entity root** - Root where D&B records will be saved (shown as 'Organization entity root' in the images above / below).
- **Organization entity type** - Entity object type for the customer records.
- **D&B Organization entity type** - Entity object type for the D&B records.
- **D&B Match Candidate reference type** - Reference type for D&B match candidates. A reference is made from each candidate to the applicable customer record; once a match is made, all the non-matched records are removed from the system and this reference is no longer needed for that particular customer record since matching is complete.
- **D&B Organization reference type** - Reference type for D&B matches. Once a match candidate selection is made, the D&B record is then linked to the customer record with this reference type.

Here is an example of what an 'Easy setup of D&B Integration' dialog may look like filled out. Your setup will differ depending on your data model. Also, the D&B License Key shown is just an example and not representative of how an actual key would look when populated.

4. After completing this configuration, select 'Apply.' The component model will populate with the information provided, the setup folders will be created, and candidate matching can begin.

Dun & Bradstreet Component Model

After running the automatic setup, the Dun & Bradstreet component model will map the component model names (D&B data fields) to STEP attributes, entity object types, and entity reference types. A completed component model will appear like the following image:

No Title			
Component Model Configuration			
Name	Value	Description	
D&B Organization Entity Type	D&B Record	Used to set the entity type used for the D&B Organization Records.	
Organization Entity Type	Customer	Used to set the entity types used for Organization Entities.	
D&B Company Profile DUNS Number	D&B Match Company Profile DUNS Number	Attribute on the D&B record to hold DUNS number used when running Detailed Company Profile.	
D&B Match Address Line 1	D&B Match Organization Address Line 1	Attribute on the D&B record to hold first address line used for matching.	
D&B Match Address Line 2	D&B Match Organization Address Line 2	Attribute on the D&B record to hold second address line used for matching.	
D&B Match Confidence	D&B Confidence	Attribute on the D&B candidate references to hold confidence value on candidate references.	
D&B Match Country Code	D&B Match Country Code	Attribute on the D&B record to hold country code used for matching.	
D&B Match DUNS number	D&B DUNS Number	Attribute on the D&B record to hold DUNS number used for matching.	
D&B Match Organization Name	D&B Match Organization Name	Attribute on the D&B record to hold the organization name used for matching	
D&B Match Postal Code	D&B Match Organization Postal Code	Attribute on the D&B record to hold the postal code used for matching.	
D&B Match Registration Number	D&B Match Registration Number	Attribute on the D&B record to hold the registration number used for matching.	
D&B Match State/Territory	D&B Match Organization Territory/State	Attribute on the D&B record to hold the state or territory name used for matching.	
D&B Match Town Name	D&B Match Organization Primary Town	Attribute on the D&B record to hold the primary town name used for matching.	
D&B Phone Number	D&B Match Phone Number	Attribute on the D&B record to hold the phone number of a company.	
D&B Reason Code	D&B Match Reason Code	Attribute on the D&B record to hold the reason code if searching for a company located in Germany.	
D&B Match Candidate Reference Type	CustomerToD&BCandidate	Reference type used to link candidates to an organization record.	
D&B Organization Reference Type	CustomerToD&B	Reference type used to link organization records to their D&B Organization Records.	

If there are any issues with the automatic setup and not all values could be mapped, then you will be able to see what the issues are within the component model. If any of the object types, reference types, or attributes / data containers being mapped are unclear, the Description column will provide context for how these fields are to be used.

These attributes in the component model will map to the following corresponding D&B attributes:

Request Attributes	D&B Attributes
D&B Match Address Line 1	StreetAddressLine-n
D&B Match Address Line 2	StreetAddressLine-n
D&B Match Country Code	CountryISOAlpha2Code
D&B DUNS Number	DUNSNumber
D&B Match Organization Name	SubjectName
D&B Match Organization Postal Code	FullPostalCode
D&B Match Registration Number	OrganizationIdentificationNumber
D&B Match Organization Territory/State	TerritoryName
D&B Match Organization Primary Town	PrimaryTownName
D&B Match Phone Number	TelephoneNumber
D&B Match Reason Code	OrderReasonCode

Note: The D&B Match Confidence is a candidate reference attribute that is set by the D&B response based on the quality of the matched record.

Once the setup is complete, users can begin matching existing customer records. More information can be found in the **Dun & Bradstreet Matching** topic.

Errors during setup, matching, and detailed company profiling

The table below outlines different errors that are possible during the D&B process. Outlined is the type of error, if the system should retry the process, if the error stops the event processor, and if the error is recorded within the workflow.

Type of error	Retry	Stop event processor	Report to workflow (to data steward)
Connection timeout	Y	N	N

Type of error	Retry	Stop event processor	Report to workflow (to data steward)
Invalid license	N	Y	N
D&B finds no results (company profile)	N	N	Y
Invalid match request	N	N	Y
Internal unknown service error	N	Y	N
STEP internal error	N	Y	N
Response parse error	N	N	Y
Data model errors	N	Y	N
Other errors from D&B service	N	N	Y

Dun & Bradstreet Matching

The Dun & Bradstreet (D&B) data integration allows for users to do a matching request on a customer record. The D&B Match Candidate Workflow allows users to keep track of the tasks, described below.

Prerequisites

Prior to starting the matching process, the setup for D&B integration must be complete. See the **Dun & Bradstreet Integration** topic.

The D&B Integration Component Model is where you complete the setup and decide what data (i.e., attribute, object types, and reference types) you will use when performing a match. You are using values from your customer record to match against D&B records. If so desired, these attributes may be changed to calculated attributes based on other attributes in the organization entity. The Perform Match / Select Candidate tasks are described below.

D&B Match Candidate Workflow

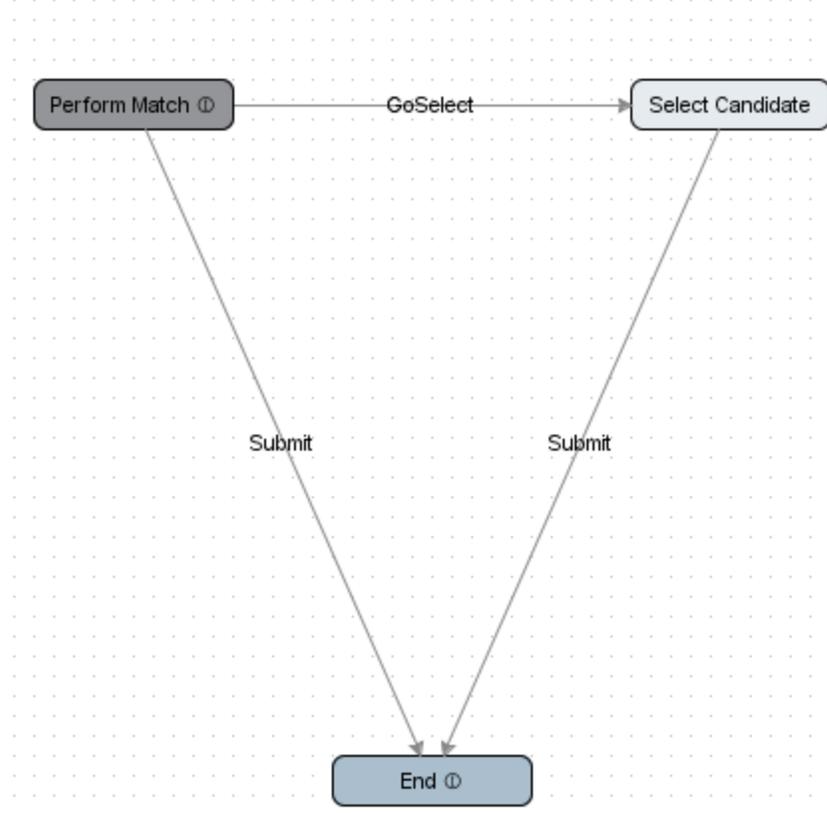
Matching is initiated by initiation of the organization entity (as designated in the D&B Integration component model) in the D&B Match workflow. Initiation is done via standard methods, including upon entity creation or through manual initiation, or initiated by a variety of other actions or processes such as business rules, imports, and bulk updates.

Initiating customer records triggers an event that is then processed via an event processor. A business action tells the system to make a call to D&B and try to match the customer record data (determined during setup) to D&B records. A response is received and sent back to STEP to write into a D&B record or records. At this time, if multiple candidates are found and returned from D&B, then the customer record moves to the Select Candidate task. If only one match candidate is returned from D&B, then the customer record transitions through the D&B Match workflow seamlessly, with the D&B Organization reference being made at the end.

When multiple match candidates are returned, and a Select Candidate task needs to be completed, users evaluate the D&B records based on designated criteria to make a best-match choice, and select one of those candidate D&B records to reference. Until a selection is made, D&B Match Candidate references are made from the customer record to the possible D&B Record candidates. When the event processor picks up the event asynchronously, it uses a business action to call D&B and matches via an entity-to-entity reference. These references and non-match candidates are deleted once a match is selected, and the D&B record selected then becomes a reference of the customer record via an D&B Organization reference. The Select Candidate process is best done in Web UI and described below.

Important: The processes described above are performed asynchronously, creating a queue of actions. Users must allow time for each match request to process.

D&B Match Candidate (DnBIntegrationMatch Candidate) Ⓜ



Perform Match

Matching can be done in the Web UI or in workbench. It does not matter where the initiation process begins.

A matching request is comprised of attributes mapped in the D&B Integration component model. As explained in the **Dun & Bradstreet Integration** topic, input for D&B Match requests is taken from a configurable set of attributes on the organization record. Those attribute values are part of the request sent to D&B, and each attribute has a match response returned from D&B. More details about configuring the component model can be found in that same topic. Each value has a description that describes what it is used for, and all but one attribute (the one mapped to D&B Company Profile DUNS Number) is used in the matching process.

Also, the MATCH_TYPE parameter and exclusion values from System Setup > D&B > D&B Operations Configurations > D&B Match Candidate Operations is pulled into request to D&B.

- The MATCH_TYPE options are SBRI, Advanced, or Basic. When MatchTypeText is set as 'SBRI', this indicates that the match will be performed against the D&B Small Business repository. The difference between basic and advanced matching lies in the level of detail in explanation of why each candidate matches the customer.
- Five exclusions can be enabled. When enabled via workbench, these exclusion options are also honored (but configurable) when doing a 'Modify Search' action in Web UI.

Operation Parameters and Flags	
Parameter	Value
> REASON_CODE	6333
> MATCH_TYPE	Advanced
> DEFAULT_COUNTRY_CODE	US
> CUSTOMER_ID	Stibo Systems

Value	Status
> Exclude Unreachable	<input type="checkbox"/>
> Exclude Non HeadQuarters	<input type="checkbox"/>
> Exclude Out of Business	<input type="checkbox"/>
> Exclude Undeliverable	<input type="checkbox"/>
> Exclude Non Marketable	<input type="checkbox"/>

Note: Matching candidates is based on the D&B Integration Matching Processor, found in the D&B folder that is created in the automatic setup. For information on maintaining event processors, see the **Event Processor** documentation.

References and Match Candidates

When one match exists, no selection needs to be made and the D&B organization entity (D&B record) is automatically referenced by the organization entity (customer record). Again, initial setup is done via the D&B Organization Reference Type mapping in the component model.

When multiple match candidates are found, a D&B reference is made from the customer record (organization entity) to each candidate record (D&B record / D&B organization entity) based on the D&B Match Candidate Reference Type in the component model.

A & C TOY rev.0.1 - References				
References	Referenced By	Status	State Log	Tasks
D&B Integration				
Reference Type			Target	
> CustomerToD&B	+			
> CustomerToD&BCandidate	+			

Customer	References	Referenced By	Status	State Log	Tasks
Ungrouped Entity References					
Reference Type	>	Target	>	DnBIntegrationConfidence	>
> CustomerToDnb	+				
> CustomerToDnb...	+	STIBO SYSTEMS, INC.	6		

Select Candidate

For organization entities that have multiple match candidates, a single candidate must be selected. This is best done through the Web UI. Detailed information regarding how to configure and use Web UI for D&B purposes can be found in the **Dun & Bradstreet Integration in Web UI** topic in the **Workflows in Web UI** documentation.



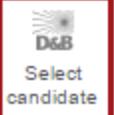
Users will make a selection based on the Task List that displays upon making a workflow task selection.

D&B Match Candidate - Perform Match - Available

Current Organization: A & C TOY, US, 130 SCHMITT, 11735, FARMINGDALE, NY



Modify search



Select candidate

	Confidence	ID	Name
<input checked="" type="checkbox"/>	8	DUNS11884616	A & C TOY CORP
<input type="checkbox"/>	8	DUNS30268783	A & H TOYS AND HOBBIES INC
<input type="checkbox"/>	8	DUNS968531491	A & A TOY CORP

Now, the customer record and D&B record are linked via the D&B Organization Reference Type mapping in the component model.

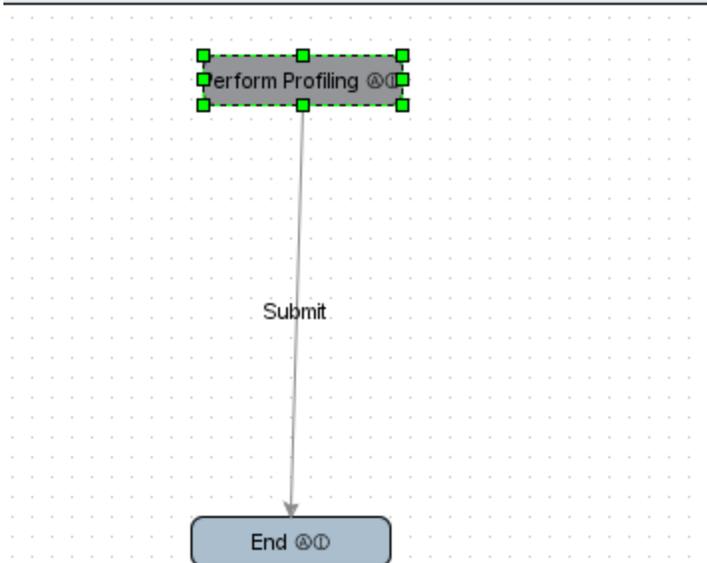
Dun & Bradstreet Detailed Company Profile Enrichment

As part of the easy setup, a **Detailed Company Profile** workflow is created. When entities are initiated into this workflow, an event is sent to the D&B Detailed Company Profile Processor. The event processor triggers a business action that will query additional data from the D&B 'Detailed Company Profile' service, write this

information back to the D&B Organization entity, and complete the workflow. Initiation can be done through the workbench or Web UI.

To perform detailed company profile enrichment, the customer entity must be linked to a D&B record.

D&B Detailed Company Profile (DnBIntegrationCompanyProfile)



Note: Detailed company profile enrichment is based on the D&B Detailed Company Profile Processor, found in the D&B folder that is created in the automatic setup. For information on maintaining event processors, see the **Event Processor** documentation.

For information on the matching process, see the **Dun & Bradstreet Matching** section of the **Data Integration** documentation.

Dun & Bradstreet Integration in Web UI

Dun & Bradstreet (D&B) integration allows customers to use the Web UI for matching and detailed company profile enrichment once all setup is complete.

- For matching, the Web UI must be configured with a Status Selector (Homepage / Sidebar) Widget for the D&B Match Candidate workflow. Also, a D&B Candidate Matching screen must be created, configured, and made accessible. This setup / process is used when an organization entity (customer record) has multiple D&B organization entity (D&B record) match candidates.
- For detailed company profiling, it is not necessary to create a Status Selector. Best practice is to initiate objects into the D&B Detailed Company Profile workflow using a bulk update, an automated business action rule, or by placing an action button on a node editor screen.

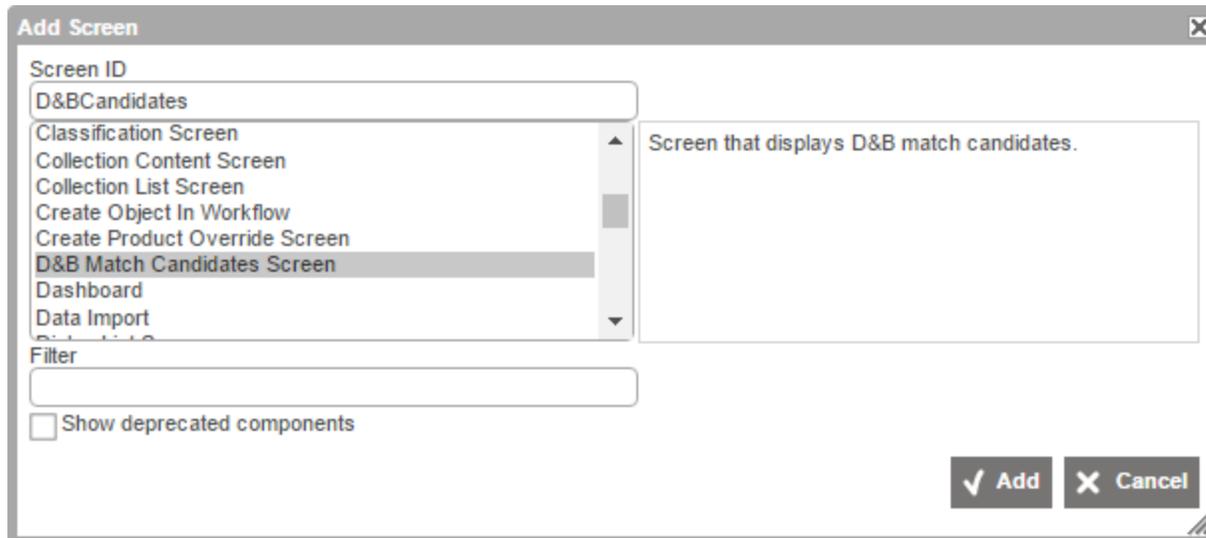
Prerequisites

This section of the D&B integration requires an understanding of the Web UI, how to create screens and widgets, and the necessary user permissions to do so. Please see the **Web User Interfaces** documentation for more information on these topics.

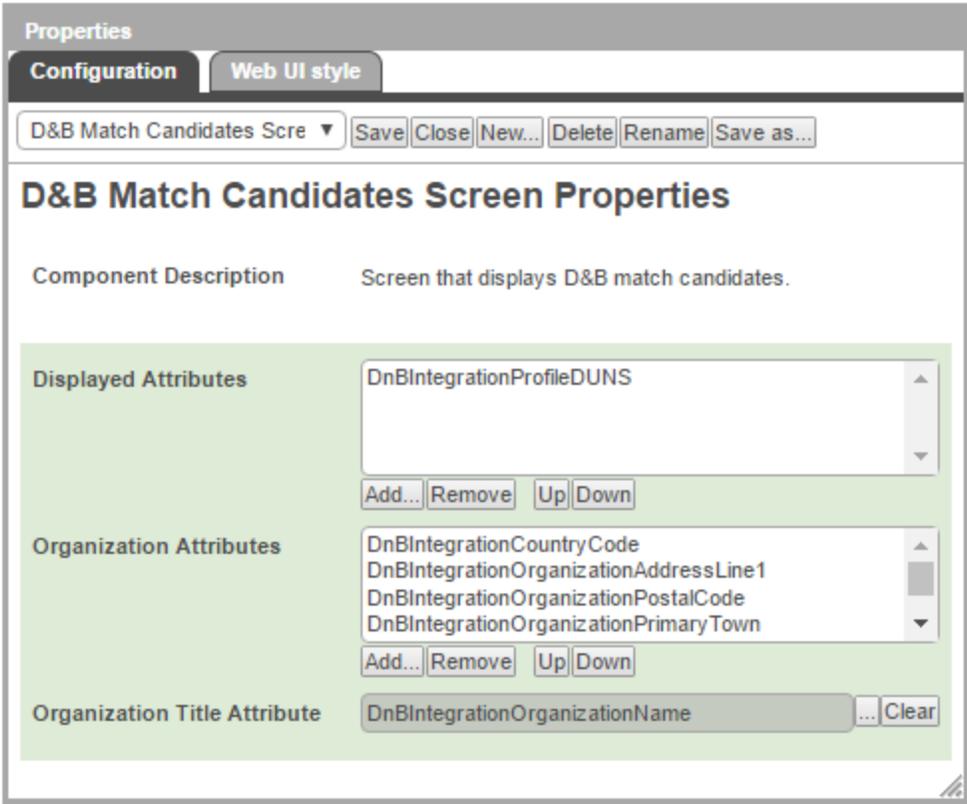
Additionally, users should be familiar with the D&B integration setup and processes. For more information, see the **Dun & Bradstreet Integration** section.

Creating a New D&B Match Candidates Screen

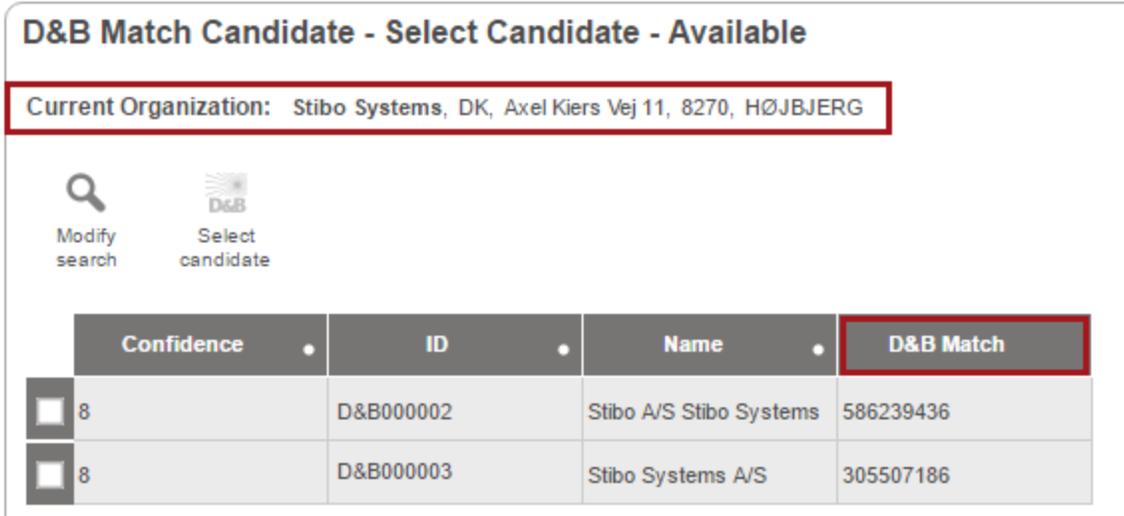
1. From the Web UI designer, select **New**.
2. From the Add Screen prompt, select the **D&B Match Candidates Screen** option from the list then select **Add**.



3. On the **D&B Match Candidates Screen Properties** configuration, select the desired attributes for both the Displayed Attributes and Organization Attributes parameters by choosing **Add**.
 - The Displayed Attributes are the titles of the attribute columns that will be included with the Confidence Score and Name of the Customer record within the task list on the screen.
 - The Organization Attributes are for the current organization entity and appear above the task list.
4. Click the ellipsis button (...) to make an **Organization Title Attribute** selection.
5. When configured as desired select **Save** then **Close** to exit design mode.



If configured correctly, the attributes selected in step 3 will appear on the screen as shown in the next image.

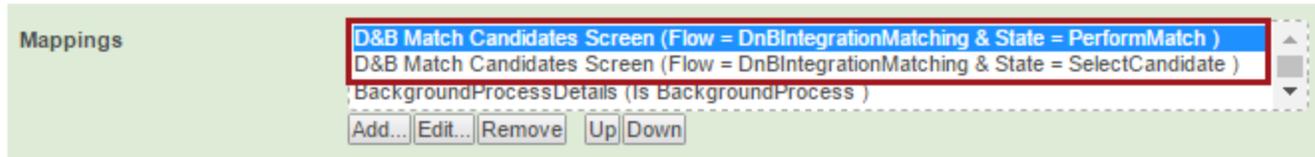


Before you can use the D&B Match Candidates Screen, you need to configure how a user will access the screen. This is done by mapping a Workflow Condition within the mapping field in Main Properties. Details on how to do this can be found in the **Mapping Workflow States in Web UI** topic of the **Workflows in Web UI** documentation.

Main Properties

Component Description

MAIN is used for configuring the overall behaviour of the Web UI. For example by setting up conditional mappings it is possible to decided the behaviour when navigating the Web UI. In addition the different side panels (left, right, top, bottom) and Corner bar can be configured on MAIN.



Each state of the D&B workflow will have a Workflow Condition, and the screen that you are selecting within the Screen Mapping Properties is the screen you just created.

Adding and Configuring a D&B Workflow Status Selector Widget

To process a customer record for matching to D&B data, the record must go through the D&B Integration Matching workflow. To access tasks for this workflow, a Status Selector Homepage /Sidebar widget is needed.

The directions for setting up a Status Selector widget are outlined in **Getting Started with Workflows in Web UI > Screen / Component Configuration and Mappings for Workflows** documentation.

For this example, we are adding the D&B Integration Matching workflow to the Web UI Homepage via a Status Selector Homepage widget. Configure the widget as desired. The next screenshot is an example of how this implementation may look. Select add when the widget is configured as desired.

Required parameters that must be selected to save the Widget Properties and use the functionality:

- **Results Screen:** select the screen ID for the Task List screen to be used.
- **States:** add the states for the applicable workflow.
- **Workflow:** select the ID of the applicable workflow. For D&B integration, select DnBIntegrationMatch Candidate.

Properties

Configuration Web UI style

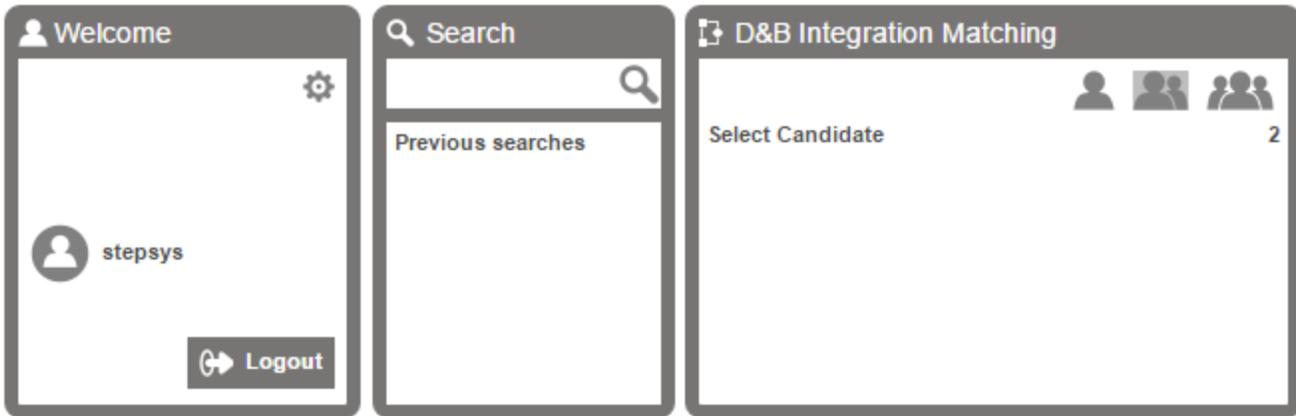
---[HOMEPAGE]--- Save Close New... Delete Rename Save as...

Status Selector Homepage Widget Properties [go to parent](#)

Auto Refresh Interval	<input type="text" value="0"/>
Component Title	<input type="text" value="D&B Integration Matching"/>
Initiate Label	<input type="text"/>
Initiate Screens	<div><input type="text"/> main</div> <div>Add Remove Up Down</div>
Result Screen*	<div>Tasklist</div> <div>... Add</div>
Show Collection Filter	<input type="checkbox"/>
Collection Top Nodes	<div><input type="text"/></div> <div>Add... Remove Up Down</div>
Show Initiate	<input type="checkbox"/>
Status Flags Enabled	<input type="checkbox"/>
Show Status Flag Headers	<input type="checkbox"/>
Show Total	<input type="checkbox"/>
States*	<div>SelectCandidate</div> <div>ApplicationDataImport Conversion</div> <div>Add Remove Up Down</div>
Total Label	<input type="text"/>
Workflow*	<input type="text" value="DnBIntegrationMatch Candidate"/>

Select **Save** and then **Close** to exit the Web UI designer.

After the Web UI refreshes, the widget will now appear on the home screen of the Web UI.



Using Web UI for Dun & Bradstreet Integration Matching

Customer records enter the D&B Match Candidate workflow via standard methods. An individual customer objects can be initiated in bulk or individually via Web UI or Workbench. You may want to add a business action button on a Node Details screen to initiate objects when looking at the details of the customer record. Initiating records is not covered in this topic but is a necessary step before you are able to work with tasks in the workflow.

Node Details

D&B Confidence	<input type="text"/>
D&B DUNS Number	<input type="text"/>
D&B Match Country Code	DK 
D&B Match Organization Address Line 1	Axel Kiers Vej 11 
D&B Match Organization Name	Stibo Systems 
D&B Match Organization Postal Code	8270 
D&B Match Organization Primary Town	HØJBJERG 
CustomerToD&B	Stibo A/S Stibo Systems (DUNS586239436)  
	
CustomerToD&BCandidate	
D&BAddressContainer	 
D&BAddressLine	<input type="text"/>
D&BCountryGroupName	<input type="text"/>
D&BCountryISOAlpha2Code	<input type="text"/>
D&BCountyOfficialName	<input type="text"/>

 Start D&B Matching  Start D&B Profiling

Here is a basic example of how a STEP user would use the D&B Integration Matching functionality. True functionality depends on the customer setup.

Perform Match

1. A user clicks the Select Candidate task within the D&B Match Candidate status selector.
2. Upon arriving at the Task List, the user selects a customer by clicking on the ID or Title link within a row.
3. A search is performed. The results list shown, determined by a D&B algorithm used to match the D&B records to the customer. If no candidates are found, a message will display, and users can click the 'Modify search' icon on the screen to edit the search.

i No candidates found with the given search criteria
Use the Search action to make a new search with different criteria

D&B Match Candidate - Perform Match - Available

Current Organization: Stibo Systems, DK, Axel Kiers Vej 11, 8270, HØJBJERG

Modify search

Modify Search

Search Type SBRI Basic Advanced

Organization Name

Country Code

DUNS Number

Registration Number

Phone Number

Address Line 1

Address Line 2

City

Postal Code

Territory/State

Reason Code

Match Confidence

Exclude

Non-Headquarters

Non-Marketable

Out of Business

Undeliverable

Unreachable

Select Candidate

1. A user clicks the Select Candidate task within the D&B March Candidate status selector. If doing a search above, the Select Candidate button should be available without switching screens.
2. Upon arriving at the Task List, the user selects a customer by clicking on the ID or Title link within a row.

- 3. The D&B Match Candidates screen is displayed, and the user can compare customer record information with the D&B records list shown.
 - The customer record information will display above the results list. The information displayed is determined by the Displayed Attributes selected on the D&B Match Candidates Screen Properties.
 - The D&B records are shown in a table with the Confidence, ID, and Name columns displayed by default. Any other columns are determined by the attributes designated within the Organization Attributes field of the D&B Match Candidate Screen Properties.
- 4. A candidate selection is made by clicking the checkbox at the beginning of the D&B record row, and then, clicking the 'Select candidate' button above the table. Only one candidate can be selected.

D&B Match Candidate - Select Candidate - Available

Current Organization: A-1 VISUAL SYSTEMS, US, 2856 S VAIL AVE, 90040, COMMERCE, CA

 Modify search  Select candidate

	Confidence	ID	Name	D&B Match
<input checked="" type="checkbox"/>	8	DUNS1	ENGRAVEX, INC	151583861
<input type="checkbox"/>	8	DUNS6	ENGRAVEX, INC	621439934

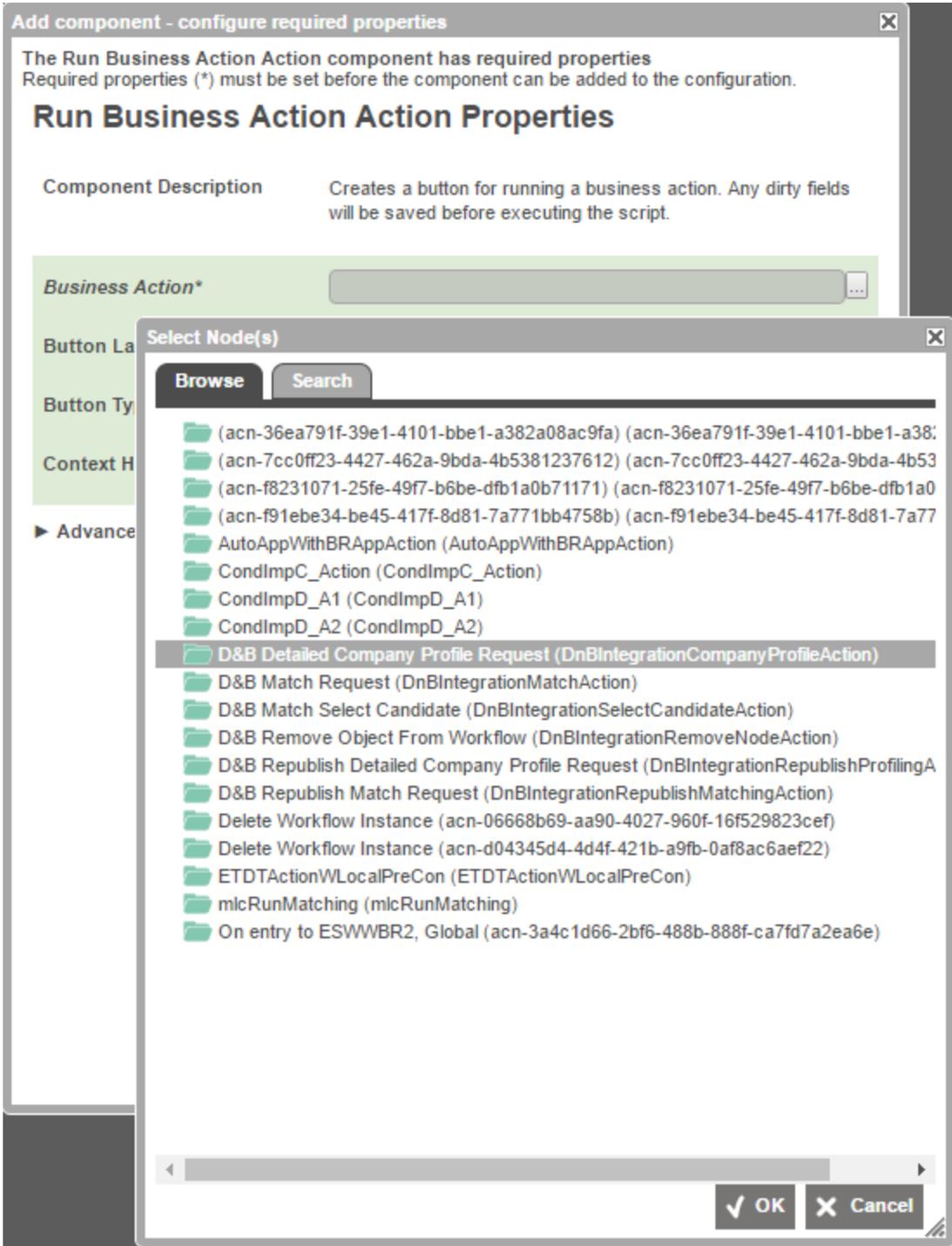
- 5. Users will see a message on the screen confirming a candidate selection:

 **Candidate selected**
The candidate has been selected as a match for the current customer

Using Web UI for Dun & Bradstreet Detailed Company Profile

Once a customer entity is linked to a D&B record, detailed company profiling can take place if you have the API license key and password from Stibo and have input it in the easy setup wizard in the workbench.

If you are doing detailed company profiling via the Web UI, you can add a button to a Node Details screen that runs the D&B Detailed Company Profile Request business action. This allows users to simply click a button to start the profiling process.



Alternatively, you can push the task through the workflow with the submit action within a Task List.

For more details about workflows, see the entire suite of topics in the **Workflows in Web UI** documentation. You will find information about widget setup, moving tasks through workflows, and initiating objects in a workflow.