

D & B Optimizer

for MICROSOFT

Empower Your Organization With Accurate, Actionable Data in the Cloud

DIRECT ACCESS TO QUALITY DATA

Businesses are drowning in data that is outdated, inaccurate, and at times, unmanageable in volume. Powered by the Dun & Bradstreet Data Cloud – the world’s most comprehensive source of business data and insights – D&B Optimizer for Microsoft ensures the company data within your Microsoft Dynamics CRM environment is clean, complete, and actionable.

HOW IT WORKS

D&B Optimizer continuously manages data quality within your Microsoft Dynamics CRM environment so you do not have to. It enables your organization to have greater confidence in data that drives decision-making and alignment across your business. By offering seamless connectivity through Microsoft’s Azure cloud services, D&B Optimizer provides direct access to real-time, quality data so you can:



● **Improve alignment** with access to the same quality, trusted data across your organization



● **Accelerate growth** by prioritizing accounts based on 100+ fields of advanced information



● **Increase sales productivity** by eliminating manual data entry efforts



● **Visualize key business segments** with robust dashboards powered by Microsoft PowerBI



● **Define rules to flexibly ingest data** based on DUNSRight matching



Ensure Continuous Data Hygiene

Maintain a single source of data truth and increase alignment and efficiency within your Microsoft Dynamics instance



Enrich Data in Real Time

Ensure all records contain accurate core business firmographics, intelligence, and hierarchical relationships



Improve Analysis and Visualization

Dynamic dashboards help you analyze accounts by revenue, industry, employee size, and geographic location



D&B Optimizer has done wonders for us. Not only has this app cleaned and enriched our account records, it has also helped us manage duplicates and establish account hierarchies.”

James Lines, Digital Media Specialist, Multisorb

TAKE CONTROL OF YOUR DATA WITH DATA STEWARDSHIP

D&B Optimizer for Microsoft provides access to the Dun & Bradstreet Data Cloud, comprising over 420 million companies curated from tens of thousands of sources and continuously updated. With native access to real-time data and reporting within your Microsoft Dynamics CRM, you will be empowered to:

Manage Data Health

Access pre-built dashboards and reports to quickly assess your data health including match rate and duplicates.

Visualize Your Data

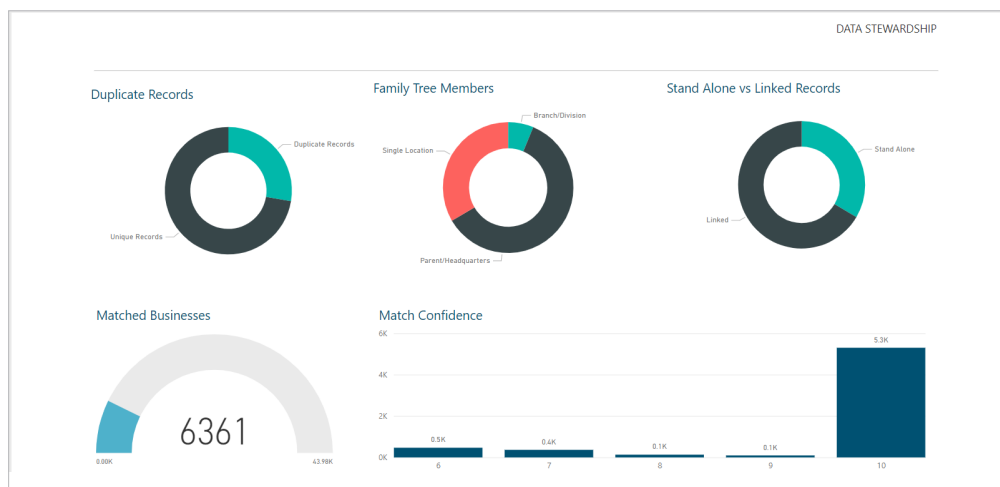
See records that were successfully matched to the Dun & Bradstreet Data Cloud, how many records were enriched with corrected information, and how many were appended with new information.

Increase Match Rate

Review how many records D&B Optimizer for Microsoft has matched from your database. Then, add information to those records and try to re-match.

Improve Decision-Making

Append matched records with up to 100+ fields of intelligence providing you greater insight into your customers, prospects, and suppliers.



ELIMINATE BAD DATA WITH EASY DUPLICATE MANAGEMENT

Duplicate accounts cause confusion and waste time for CRM users. They are often created by mistake or when multiple CRM instances are combined. D&B Optimizer helps you to consolidate duplicate accounts with ease.

Prevent Duplicates from the Onset

Search against your instance and the Dun & Bradstreet Data Cloud to prevent duplicate creation – all within your Microsoft Dynamics instance.

Identify Duplicates

Leverage the power of the Dun & Bradstreet D-U-N-S® Number to flag redundant records.

Manage Unlimited Dups

Select as many duplicates that exist for an entity in Microsoft Dynamics.

Merge Duplicates

Choose a master record to inherit all related objects contained within duplicates.

Duplicate Account records

Note: Optimizer uses Microsoft Dynamics technology to identify duplicate records. These records are brought into reporting on an interval basis so they may not be seen immediately.

DUNS	Business Name	Address	# Duplicates	Action
144709193	Oracle Corporation	2200 Oracle Way, Austin, Texas, 78741-1400, US	20	Manage
080704780	Apple Inc.	1 Apple Park Way, Cupertino, California, 95014-0042, US	16	Manage
081460849	Microsoft Corporation	1 Microsoft Way, Redmond, Washington, 98002-8300, US	14	Manage
084430332	American.com, Inc.	410 Tarcy Ave N, Seattle, Washington, 98109-3210, US	13	Manage
823447912	General Motors Company	305 Renaissance Dr Ste 51, Detroit, Michigan, 48243-1403, US	11	Manage
048724774	Salary.com, LLC	810 Lincoln St Ste 200, Waltham, Massachusetts, 02451-2105, US	10	Manage

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

Master?	Include?	Business Name	Address	#Opps	#Contacts	#Leads	#Activities	Created	Created by	Last Modified	Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Oracle Corporation	2300 Oracle Way, Austin, Texas, 78741-1400, US	0	103	0	1	12/1/2020 10:29 AM	Brian Maurer	8/9/2021 10:35 AM	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Oracle Corporation	586, Austin, CA, US	0	0	0	0	2/9/2018 9:43 AM	Robert Del Bono	8/6/2021 11:27 PM	✖
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Oracle Corporation	Austin, CA 94065, US	0	0	0	0	10/26/2018 12:04 PM	Justin Corcoran	8/6/2021 11:27 PM	✖
<input type="checkbox"/>	<input type="checkbox"/>	Oracle Corporation	500 Oracle Proxy, Austin, CA 94065-1677, US	0	37	0	0	9/11/2018 11:10 AM	Justin Corcoran	8/6/2021 11:27 PM	✖
<input type="checkbox"/>	<input type="checkbox"/>	Oracle Corporation	500 Oracle Proxy, Austin, CA 94065-1677, US	0	0	0	0	10/2/2018 11:52 AM	Brian Maurer	8/6/2021 11:27 PM	✖
<input type="checkbox"/>	<input type="checkbox"/>	Oracle Corporation	500 Oracle Proxy, Austin, CA 94065-1677, US	0	0	0	0	10/2/2018 12:00 PM	Brian Maurer	8/6/2021 11:27 PM	✖
<input type="checkbox"/>	<input type="checkbox"/>	Oracle Corporation	Austin, CA, US	0	0	0	0	11/16/2018 11:35 AM	Cessey Askeland	8/6/2021 11:27 PM	✖
<input type="checkbox"/>	<input type="checkbox"/>	Oracle Corporation	500 Oracle Proxy, Austin, CA 94065-1677, US	0	2	0	0	12/27/2018 2:03 PM	Justin Corcoran	8/6/2021 11:27 PM	✖
<input type="checkbox"/>	<input type="checkbox"/>	Oracle Corporation	500 Oracle Proxy, Austin, CA 94065-1677, US	0	37	0	0	5/23/2018 11:14 AM	Justin Corcoran	8/6/2021 11:27 PM	✖
<input type="checkbox"/>	<input type="checkbox"/>	Oracle Corporation	Austin, CA, US	0	0	0	0	10/26/2018 11:56 AM	Cessey Askeland	8/6/2021 11:27 PM	✖
<input type="checkbox"/>	<input type="checkbox"/>	Oracle Corporation	500 Oracle Proxy, Austin, CA 94065-1677, US	0	0	0	0	10/2/2018 11:58 AM	Brian Maurer	8/6/2021 11:27 PM	✖
<input type="checkbox"/>	<input type="checkbox"/>	Oracle Corporation	500 Oracle Proxy, Austin, CA 94065-1677, US	0	0	0	0	10/3/2018 8:44 AM	Brian Maurer	8/6/2021 11:27 PM	✖
<input type="checkbox"/>	<input type="checkbox"/>	Oracle Corporation	500 Oracle Proxy, Austin, CA 94065-1677, US	0	1	0	0	10/3/2018 9:13 AM	Brian Maurer	8/6/2021 11:27 PM	✖
<input type="checkbox"/>	<input type="checkbox"/>	Oracle Corporation	Austin, US	0	0	0	0	12/6/2019 3:11 PM	Ryan Kellogg	8/19/2021 9:07 AM	✖
<input type="checkbox"/>	<input type="checkbox"/>	Oracle Corporation	500 Oracle Proxy, Austin, CA 94065-1677, US	0	0	0	0	3/30/2020 9:26 AM	Brian Maurer	8/6/2021 11:27 PM	✖
<input type="checkbox"/>	<input type="checkbox"/>	Oracle Corporation	500 Oracle Proxy, Austin, CA 94065-1677, US	0	0	0	0	2/24/2020 3:12 PM	Farwan Soebagio	8/6/2021 11:27 PM	✖

Perform Parenting check

UNDERSTAND YOUR ACCOUNTS WITH ACCOUNT SEGMENTATION

The D&B Optimizer for Microsoft dashboard provides a breakdown of your data by key firmographics empowering you to better identify and understand your top segments. By leveraging these insights, your organization will be empowered to make faster, more confident decisions about the companies you do business with – whether they are customers, suppliers, partners, or prospects.

Analyze Accounts

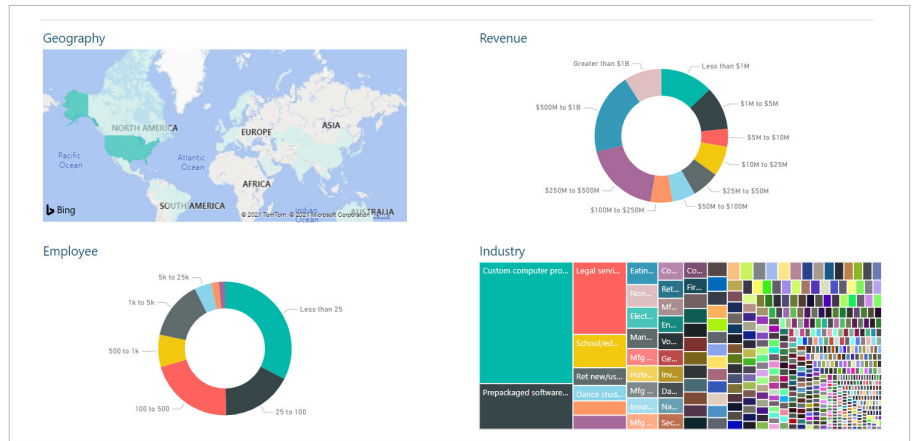
Visualize key business segments within an executive overview to drive better market analysis.

Segment Accounts

View a break-down of accounts by revenue, industry, and employee size to easily view critical market segments.

Map Accounts

Obtain a clear view of where your customer base resides today to assist with growth initiatives and territory alignment.



HARNESS THE DUN & BRADSTREET DATA CLOUD

Today, 90% of the Fortune 500, and companies of all sizes around the world, rely on Dun & Bradstreet products to help grow and protect their businesses.

The Dun & Bradstreet Data Cloud offers the world's most comprehensive business data and analytical insights to empower companies to make better decisions. Our Data Cloud covers hundreds of millions of businesses and millions of contacts globally – sourced from 10's of thousands of sources, 10's of millions of websites, and updated continuously.

Learn more about

D&B OPTIMIZER FOR MICROSOFT

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Dun & Bradstreet, a leading global provider of B2B data, insights and AI-driven platforms, helps organizations around the world grow and thrive. Dun & Bradstreet's Data Cloud fuels solutions and delivers insights that empower customers to grow revenue, increase margins, manage risk, and help stay compliant – even in changing times. Since 1841, companies of every size have relied on Dun & Bradstreet. Dun & Bradstreet is publicly traded on the New York Stock Exchange (NYSE: DNB). Twitter: @DunBradstreet