DueDil Enrich - User Guide

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Introduction

Once DueDil Enrich has been installed by an administrator of your organisation's Dynamics tenant, you will have access to the widget on all of your accounts. The widget is where you can match an account to a DueDil company record, choose the fields you'd like to enrich the account with and update the data. Complete the following steps to match, update, modify the mapping or rematch the account.

If you encounter a problem or have any questions about DueDil Enrich, find answers to common queries in the FAQ section. If you're still having problems, contact your administrator.

Step-by-step guide

Matching

1. On the DueDil Enrich widget, click on "Search for a match" to begin the matching and enriching process. DueDil Enrich will use the company registration number if it is present and valid, or the company name if not.
2. After a few seconds, the widget will display a list of possible matches to your account. To help you choose the correct match, each item in the list displays the registered name, the company registration number and the registered address. Scroll down the list and click on the + icon to the right of the correct match. Note: If you cannot find the company that you expect, add the company registration number to the account (this is a custom field called "Company registration number", not the native Dynamics account number).

3. After selecting the correct match, you can now choose which fields you'd like to copy into the account from DueDil. Choose a field by clicking on the checkbox in the further right column. If you'd like to copy all fields, click on the checkbox in the table header. Consult the Data Dictionary section of this document to understand the field names and the data they contain. **Warning**: The fields you selected will overwrite the existing fields in the account, so it is important to select the correct fields at this step.
4. Click on "Copy" in the top right corner of the widget, then "Continue" to copy the fields into your account.
5. The page will now reload and the new data will have been copied into your account.

Updating

Once an account has been matched, the widget will enable any user to update the account with the newest data from DueDil. Click on "Update" to complete this process. Once the page reloads, the freshest data will be displayed. There is no need to save the changes as this is done automatically. Note: Clicking on Update will only update the fields that were originally chosen during the Matching process.

Modifying the Mapping

1. Once an account has been matched, the widget will enable any user to change which fields are copied across from DueDil. To start this process, click on "Modify mapping".
2. You are now presented with a table where you can now choose which fields you'd like to copy into the account from DueDil. This is the same table and process that is completed when first matching an account (see steps 3 to 5 in the Matching section). Choose a field by clicking on the checkbox in the further right column. If you'd like to copy all fields, click on the checkbox in the table header. Consult the Data Dictionary section of this document to understand the field names and the data they contain. **Warning**: The fields you selected will overwrite the existing fields in the account, so it is important to select the correct fields at this step.
3. Click on "Copy" in the top right corner of the widget, then "Continue" to copy the fields into your account.
4. The page will now reload and the new data will have been copied into your account.

Rematching

Once an account has been matched, the widget will enable any user to change the company is DueDil that the account is matched to. Start this process by clicking "Rematch". This will enable the user to follow the Matching workflow (see the Matching section). Note: Clicking "Rematch" and then *not* completing the Matching workflow will not change the matched account; if the page is refreshed or closed at any point in the Matching workflow the original match will still be in place. See FAQs for guidance on how to remove a match entirely.

Data Dictionary

Field name	Description	Field is custom? (i.e. not a default Dynamics field)
Account name	The registered name of the company.	
Incorporation date	The incorporation date of the company.	Y
Simplified status	The status of the company. Can be one of "active", "closed", "intermediate" or "unknown".	Y
Primary website	The website of the company.	
Keywords	A comma-separated list of labels that describe the company's activities.	Y
EBITDA	Earnings before interest, tax, depreciation and amortization. (Operating profit + depreciation + amortisation of intangibles)	Y
Post-tax profit	Profit generated before taxation.	Y
Total assets	The value of all assets on the Balance Sheet.	Y
Net assets	Total Assets less Total Liabilities.	Y
SIC code	Standard Industrial Classification code (2007).	
Annual revenue	Revenue generated from business activities.	
Number of employees	The number of staff the company employs.	
Description	The Companies House business description.	
Business type	The jurisdiction-specific company type.	
Address 1: Address type	Always "Registered".	
City	The city of the company's registered address.	
Country	The county of the company's registered address.	
Address 1: County	The country of the company's registered address.	
Address 1: Latitude	The latitude of the company's registered address in decimal degrees format.	
Address 1: Longitude	The longitude of the company's registered address in decimal degrees format.	
Address 1: Premises	The premises (first line) of the company's registered address.	
Address 1: Street 2	The street of the company's registered address.	
Address 1: Street 3	The second street (if applicable) of the company's registered address.	
ZIP/Postal code	The ZIP/Postal code of the company's registered	

	address.	
Company ID	The company registration number (not displayed during field mapping as it must be copied into the account to link it to DueDil).	Y

Configuring Views in Dynamics

Data stored to the account by DueDil Enrich will not be displayed on the account summary view by default. However, views can be configured easily to surface this data. Use Microsoft's documentation here for step-by-step guides on configuring views.
Note: Some data from DueDil Enrich does not fit into the default Dynamics data schema; these custom fields are denoted in the data dictionary.

FAQs

● How do I remove a match after an account has already been matched, so that an account has no connection to DueDil?

> Find the "Company registration number" field on the account and delete the number. Save the changes and refresh the page; the account will no longer be linked to DueDil and be in a prematched state. Note: Any data that has been copied from DueDil into the account will remain in place after the match has been removed.

● I made a mistake when selecting the match, how do I change the matched company?

> If you're still in the Matching workflow, click on Back in the top left of the widget to return to the match options. If the account has already been matched, click on "Rematch" on the widget and follow the Matching workflow again.

● I can't find the correct match in the list, what should I do?

> The matching algorithm uses the company number or the company name if the company registration number is not present or valid. If you have a company registration number on the account but cannot find the correct match then double-check the company number. Note: Do not omit the leading "0" if there is one in the original company registration number. If you do not have a company registration number then adding one will improve the quality of the matches significantly, making this a great option if it is possible.

● I can't find the DueDil Enrich widget, how do I enable it?

> If you're an administrator on your Dynamics tenant then please refer to the Installation guide. If you're not an administrator then please contact your Dynamics administrator who will enable the DueDil Enrich widget on your account.

- I can't find some of the DueDil data that I selected during the Matching workflow, where is it?

  The data is stored to the account but your view may not be set up to display this data, especially for custom fields from DueDil like keywords and some of the financial data. If you have permission to modify your account views then refer to the "Configuring Views in Dynamics" section of this document. If you do not have permission to modify account views, contact your administrator who will be able to expose this data for you.