SkyMinder2Dynamics

User manual

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Introduction

SkyMinder2Dynamics connects the *SkyMinder interface* of CRIF to the ERP system Microsoft Dynamics 365 Business Central . This enables to check contacts, Customers and creditors - referred to as ***business partners*** in the context of this manual - by providing information.

The information provided is stored in a SkyMinder report and assigned to the business partner in Microsoft Dynamics.

Notes on the use of the interface

SkyMinder2Dynamics needs the app *CreditSolution2Dynamics* to work. This app is the interface management of mse Software GmbH and is mandatory to integrate the SkyMinder interface. When installing *SkyMinder2Dynamics,* this management app will be installed automatically and is free of charge.

In order to be able to use *SkyMinder2Dynamics,* a concluded contract with a CRIF partner is mandatory, which provides the required SkyMinder accesses. The usage regulations agreed between your company and CRIF are binding, the usage and billing data are not part of the interface and must be regulated separately between you and CRIF.

Costs may be incurred when retrieving the information data.

Available application languages

SkyMinder2Dynamics is available in German and English. The selection works via the language selection of the Dynamics client.

General functionality of SkyMinder2Dynamics

Information about business partners can be obtained with *SkyMinder2Dynamics* in the following way.

First of all, it is possible to make a single query for a business partner. First, the company can be selected from a list using a search function. Then a information type is selected for this and, in the case of immediately available information, this is downloaded and saved in Dynamics.

Use essential user flows

This paragraph describes the essential processes of *SkyMinder2Dynamics*. The processes, which start from the contact, work analogously for accounts payable and accounts receivable.

Assignment of customer , contact and vendor to a business partner

First of all, an assignment from a contact, Customer or creditor to a SkyMinder company or private person has to be made. This assignment is done via a so-called business partner.
This assignment is necessary to ensure that SkyMinder requests are made for the correct company.
When this assignment is made, the information from the credit report is linked to a business partner and can thus be viewed in both Contact, Creditor and Customer.

Starting a search query

- Open contacts and select a contact
- Click on "Start SkyMinder request"

- Input of known information about the searched company (At least the input of a name and a country is required)
- Click on "OK
- Selecting the searched company from the list of search results
- Click on "OK
- Thus the assignment to this contact is done
- Further information (-> Obtain information)

Solve the assignment

It is possible to undo the assignment that has already been made. This is necessary if an incorrect assignment has been made.
To do this, click on "Start SkyMinder inquiry" and open the inquiry card for the incorrectly assigned contact.
The connection is then released by clicking on the "New search" action item in the request card.

Use information

A credit report is a collection of information about a business partner. Depending on its type, a credit report contains different data such as credit limit, address, company structure, credit rating index, etc.

Request information

To request information, an assignment is necessary beforehand. If no assignment has been made yet, this must be done first. Further information (-> Search request)

- Click on "Start SkyMinder request
- Selecting a product (which ones are possible here, you have to ask your CRIF partner)
- Click OK
- Information card opens

If the information is available immediately, the fields are filled. Otherwise an empty information appears, which will be filled at delivery.

View existing information

Existing information can be called up in several places:

- In the customer/contact/vendor by selecting an entry and clicking on "Information".
- In the information list under Departments->Information-> Information
- Attached to the todo that was created for this information by clicking on "Information".

Investigation

If the company was not found via the search with suitable criteria, then an investigation can be ordered via SkyMinder. In this case CRIF searches for information about the company on the basis of the given search criteria. An investigation can be completed successfully, so that information is provided. Alternatively, an investigation can be terminated without results. Further information (-> Investigations/ Clarification cases)

Investigation assign

The commissioning of an investigation is carried out through the following steps:

- One click on "Start Skyminder request
- Enter the known information about the searched company (the more information entered here, the better the result of the assignment)
- Click on "OK
- Click on "Order Investigation
- Selecting a product
- Click on "OK
- An empty report is opened as a sign that the investigation is in progress.

View commissioned Investigations

To view commissioned Investigations, open the list "SkyMinder not delivered information". A filter on Skyminder clarification case shows all pending clarification cases.

Integration in the NAV BC- Standard

SkyMinder2Dynamics extends the Dynamics standard with additional fields and ActionItems in three lists and three card. Furthermore, the department menu has been extended by the *SkyMinder2Dynamics* section.

Standard page extensions (list + card)

- The following lists and cards are extended:
  - Customer list and card
  - Vendor list and card
  - Contact list and card
  - Sales order list and card
  - Sales quote list and card
- Extensions for contact, customer and vendor are analogous.
- Extensions for sales orders and sales offers are analogous.

Columns SkyMinder2Dynamics

SkyMinder2Dynamics adds six columns to the above-mentioned accounts receivable, accounts payable and contact lists. These are a subset of the fields from the *SkyMinder2Dynamics* tab, which will be discussed in the following chapter.

Rider SkyMinder2Dynamics

SkyMinder2Dynamics adds a tab to the above-mentioned accounts receivable, accounts payable and contact cards.

General:

Business partner no.	Internal identification number of the company. Pulled from the setup number series (-> see set up)

Active order	Shows the last, still active or not yet delivered, order. A click on [...] opens the ordered information.

Links :

Contact	Displays the contact no. of the linked contact, if it exists. A click on [...] opens the corresponding contact card.
Customer	Displays the customer no. of the linked customer, if it exists. A click on [...] opens the corresponding customer card.
Vendor	Displays the vendor no. of the linked vendor, if it exists. A click on [...] opens the corresponding vendor card.

Last information:

Status	Shows whether there is already information in the system for this company.
Information no.	Displays the information no. of the last delivered information . A click on [...] opens the corresponding information card.
Service	Indicates from which service the last information originated.
Provider	Indicates which provider has delivered the last SkyMinder information.
Product	Indicates what type of information the last report was.
Created	Indicates when the information was ordered.
Normalized valuation	Shows the creditworthiness index of the last report normalized by CRIF (1 to 5, integer). The best score is a 1.
Evaluation	Displays the creditworthiness index assigned by the **provider in** the last report (for German companies, according to school grades from 1.0 to 6.0)

Start SkyMinder request	Starts a SkyMinder query. If no assignment has been made yet, a search is started beforehand
Information	Opens a list of ready information about this company.
Todo	Opens a list of this company's unclosed todos.

Factboxes SkyMinder2Dynamics

SkyMinder2Dynamics adds a factbox with seven fields to the above sales order and sales quote list and card.

Setup

This section describes a standard setup of *SkyMinder2Dynamics.*

The prerequisite for setting up and later using the interface is that you have already been provided with access data by CRIF.

In addition, the setup requires a user who can access the BC task queue.

General facility

The general setup of SkyMinder2Dynamics is divided into sections corresponding to the tabs of the setupcard.
The setupcard can only be opened by users with the SkyMinder Admin permission set, because the setup is not user specific but global for the client.

Rider number series

Four number series are required for CreditSolution2Dynamics. These number series can either be entered in the fields of the respective series or be created automatically by the ActionItem in the menu ribbon. The ActionItem creates the number series one after the other and asks for each series if it should be inserted.

Search function tab

The "Max. number of search results" field can be used to specify the maximum number of search results that can be displayed for a search. The less relevant search results will not be displayed. If no number is specified, the limit for search results is set to 100 for technical reasons.

Rider traffic light

The CreditSolution2Dynamics traffic light setup is divided into two fields. These fields determine the threshold of the traffic light, i.e. when it turns from green to yellow and from yellow to red. These thresholds are applied to the "Normalized Rating" of an information and are by default 2.40 for "traffic light green/yellow" and 4.50 for "traffic light yellow/red" - but this can be changed at will.
As a rule, the traffic light accesses the normalized rating of a piece of information - for German companies, the provider rating is used.

Rider Services
Here the services supported by CreditSolution2Dynamics are selected. Here the checkbox for SkyMinder must be marked.

SkyMinder Options tab
This tab is only available when SkyMinder is enabled as a service.
For the SkyMinder service, a default setting can be made here, if the b.One layout should be delivered as PDF instead of the SkyMinder layout for German business partners. This setting determines whether the checkbox "Local PDF instead of SkyMinder PDF" is prefilled for an information request or not.

Active SkyMinder Todo tab
In the tab "Active Skyminder Todo" it can be configured if system message todo should be created. The types of system message todo are given by CRIF and are implemented by SkyMinder2Dynamics in Dynamics.

Tab Cleanup
The "Cleanup" tab ensures that obsolete PDFs, JSONs and HTMLs are deleted. For this purpose, you can set how old the data may become before it is deleted. For this purpose, the fields are filled with a number , which represents the maximum number of days.
For PDFs and HTMLs, the cleanup type can also be selected. This determines whether, instead of deleting the PDFs or HTMLs after a period of time , all PDFs or HTMLs except the current one for a business partner should be deleted.

Rider version
The "Version" tab displays information about the version of SkyMinder2Dynamics.

Menu buttons
- "Create number series" automatically creates number series and assigns them (-> Number series tab)
- "User" opens the user setup card of SkyMinder2Dynamics (-> User Setup).
- "Countries/Regions" opens the country list (-> Countries/Regions)
- "Currency Mapping" opens the currency mapping list
- "Text Templates" opens the todo text template list (-> Text Templates)

User setup
In the user setup, all users who are to be allowed to start queries or process todos are created. For this purpose the users are entered in the list and if they are to make requests they are provided with password and login of the service.

Create CreditSolution2Dynamics user
To create a user, the user setup list must be opened. This can be done from the setup card or from the "CreditSolution" section.
A new user is created in the list by pressing the "New" action item. Then the desired Dynamics user must be selected in the user ID and confirmed with "OK". Then the access of the desired service must be entered in the list entry.
Each Dynamics user that is to be entered in a "CreditSolution" todo must be entered here.

Each Dynamics user that is to make additional requests , must be entered here with service user and service password. From the user setup list, the connection to the service can be tested via the ActionItems "Test SkyMinder Connection".

Countries/ Regions

The "Countries/Regions" list is the list of countries that "SkyMinder2Dynamics" uses.
It also provides a link between standardized country codes and the BC country list.
This list is necessary because a country must be provided to CRIF in the form of a standardized country code when a request is made.
The country identifiers in the BC standard are unsuitable for this purpose, since the BC country identifiers can be freely defined and thus no unique identification of the countries is possible outside the BC system.
In the column "BC country code" an assignment of the BC country code to the standardized country codes can be made. This can be entered in the corresponding cell or selected from a list using the down arrow.
This connection is not necessary and is only used to pre-fill the country field in the search query card (-> Starting a search query).
The other columns are used to describe the country by name, description and three standardized abbreviations .

Country list import

When opening the list for the first time, the country list must be loaded into the BC system via the "Download country list" ActionItem.
Alternatively, the country list can also be imported, but for this the list must be available as a document.

Currency mapping

In the currency mapping list, the currencies supplied by CRIF are mapped to the currencies present in the Microsoft Dynamics 365 Business Central system.

Create currency mapping list

To create the list, the "Download List" ActionItem must be pressed. This will fill the list with all ISO currencies. After that you can assign the system currencies manually or partially automatically. This automatic assignment is done by the ActionItem "Currency Mapping". This ActionItem automatically assigns the currencies with the same currency codes to the ISO currencies. This assignment can be completed or changed manually.

Text templates

The text template list can be opened from the department or from the setup card.
In the text templates list dynamic text templates for todo comments (-> Todo - System) can be created.
These templates consist of a keyword (template) and a text.
These templates are used to create a comment from a keyword in a todo comment.
In this way, a comment does not always have to be rewritten, but only a keyword has to be entered. For example, the entry "insolvent" could be assigned to the comment "The company has filed for insolvency".

Setting up text templates is not absolutely necessary and only serves to shorten the time needed to enter routine texts in Todo.
The creation, deletion and editing of the templates can only be done by a user with SkyMinder Admin rights, a user with SkyMinder User rights can only view this list.

Initial setup procedure

The following is an example outline of the initial setup procedure along with suggested values.

- Select desired company
- Open the setup card
    - Press on the action item "Edit", if you are not in edit mode
    - Press the ActionItem "Create number series" and follow the displayed instructions
    - In the "Services" tab, check the box next to SkyMinder.
    - Check the version once, whether "All is well" is displayed in the Status field
    - Close the setup card
- Open the user setup list by clicking on "CreditSolution2Dynamics user setup".
    - Press the "New" action item
    - Press on User ID field
    - Select the desired user from the list
    - Enter SkyMinder user and SkyMinder password in the user line

  - Press the "Test SkyMinder Connection" button once during initial setup. In case of problems with the login, a list of common errors is available. (-> Common errors)
  - Close the user facility
- Open countries/regions list by pressing "Countries/Regions
  - Press the "Import country list" action item during initial setup.
  - For frequently used countries for queries, enter the BC country identifier in the list
  - Close countries/regions list
- Open the currency assignment list by pressing "Currency Assignment
  - Press the "Download currency list" action item during initial setup.
  - For frequently used currencies, enter the BC currency code in the list
  - Close currency assignment list

This completes the exemplary initial setup.

Periodic activities

Periodic activities is a BC report that automatically fetches new reports provided by SkyMinder. To avoid triggering the report manually, it is recommended to include the report in the task queue.

Include in the task queue

Queueing is done in the setup card via the "CreditSolution Job Queue" slider.
As soon as the slider is activated, the "periodic activities" report is automatically executed in periodic intervals.

Reports

A report card from *SkyMinder2Dynamics* is a BC realization of a current information collection about a company or a private person. Here, important information is displayed at first glance in the report card . For further information a PDF with all information of the collection is usually available.

report list

The columns of the list correspond to the fields in the report card and can be taken from the following chapter.

report card

The report card is divided into four sections, which are explained individually in the following chapters.

Rider General

No.	Unique number for this report in this BC system. Drawn from the number series set up (-> Setup).
Business partner no.	Unique number for the assigned CreditSolution2Dynamics business partner in this BC system. Pulled from the set up number series (-> Setup).
Service	Service through which the report was delivered

	(**SkyMinder, DDMonitor**)
Name	Name of the company or person assigned to the report.
Normalized valuation	Shows the creditworthiness index of the last report normalized by CRIF (1 to 5, integer). The best score is a 1. The traffic light to the right changes color according to the thresholds that have been configured. For international customers, this value is the data basis (-> setup).
Vendor rating	Displays the creditworthiness index assigned by the **provider in** the last report (for German companies, according to school grades from 1.0 to 6.0) For German companies, the traffic light is based on the provider rating
Credit limit	The proposed by SkyMinder credit limit with currency
Requested by	Name of the user who started the report request incl. date and time of the request

Rider SkyMinder Details

Provider	Name of the provider who provided the report
Product	Specification of what type of report is used
Identification number	Number by which the company, in combination with the provider, is uniquely identified.
SkyMinder Document ID	Unique SkyMinder related number of this report
SkyMinder Original Document ID	The unique number of the first report in this series of reports, if it is not the first report.
SkyMinder report supplied	Info checkbox whether report has already been delivered
Latest entry	The number of the latest report of this report series
Current	Info checkbox that shows at first glance if this report is the last of the report series.

Company information tab

Here you can find general contact information about the company or the private person, who is the subject of the report.

Menu buttons Report

If a button is hidden, then the associated action is not available for the current report .

Open PDF	Opens the document prepared by Partner CRIF, where all available information of this report is presented in a PDF document.
Open HTML	Opens the document prepared by Partner CRIF, where all the available information of this report is presented in an HTML document.
Text lines	Displays all the information of the report in text lines.
Transfer master data	Opens a card where information from the report can be transferred directly to the connected customer/contact/vendor. (-> Transfer master data)
Customer/ Contact/ Vendor	Opens the respective card for the business partner, if available

Transfer master data

Clicking on this action item opens the "Apply master data" card. Here you can see in four columns the information of the report or the search and that of the assigned contact, customer and vendor.
The checkmarks are used to decide which information is to be transferred and to which location it is to be transferred.
If a column is grayed out, there is no link to the respective contact, customer or vendor.
To apply the credit limit field, the "Default SkyMinder currencies" of the must be entered in the SkyMinder2Dynamics setup.
If the currency of the credit limit and the customer/contact/creditor currency are different, the amount will be converted using BC's own exchange rate function. The exchange rates are not checked separately by SkyMinder2Dynamics.
To apply the Country field, the country from the report must be assigned in the Skyminder2Dynamics setup.

reports without CRM assignment

This list contains reports that has not been assigned to a business partner. An report cannot automatically be assigned to a business partner if

- Report ordered or purchased from other BC system
- Report ordered or purchased from the web portal

The assignment can be made up manually by following the steps below:

- Press "Select from contact/customer/vendor" in the menu area.
- Select and confirm the corresponding record from the list

Reports that has been assigned disappears from the list. Reports and todos that belong to the same business partner as another report that is then assigned are assigned automatically.

not delivered reports

This list contains reports that has not yet been delivered.
Such entries exist when a report is purchased that is not immediately available.
As soon as the report is delivered, a todo is created and the report is removed from this list.

Obtain reports

The procedure for obtaining reports is described below.
An report request is always initiated via one of the ActionItems "Start SkyMinder request". These ActionItems are available in the Customer/ Contact/ Vendor cards and lists. After starting the inquiry, the "SkyMinder Search" card will open at for the first inquiry. If an assignment has already been made, the "SkyMinder Inquiry" card will open immediately.

Search query

In the search, a CreditSolution2Dynamics business partner is linked to a company present at CRIF.
When a request opens the "SkyMinder Search" card, this is either the first request for the business partner or the previous connection to a CRIF company has been disconnected.
If a connection already exists, the product selection will open immediately (see below).

In the search query, information can be given by which CRIF will deliver suitable results, here applies: the more information is given, the more suitable are the search results.
In any case, a country and a name must be given.
If in the "Countries/Regions" setup the BC country identifier has been linked to the matching country, the matching country will be pre-filled here.
If a request is started for the USA or Canada, the region/state must also be specified in the "Additional information" tab. For
German persons, all fields must be filled for legal reasons.
In order for the first name to be available here, Person must be selected in the "Type" field.
When all the given information has been entered into the fields, it is necessary to confirm with "OK".

Result selection

After the search has been successfully completed by the search query, the "SkyMinder Search Result Lines" list opens with the search results that the CRIF service has delivered.
Based on the column information, it is now up to the user to determine which of the rows is the correct one . This can then be confirmed with "OK" .
A product query is then started for the selected line and the "SkyMinder query" card is opened.

Inquiry card

After a successful product request through the "SkyMinder Search Result Lines" list, the "SkyMinder Request" card will open, where a product can be selected and ordered for the business partner.

- Tab: Business partner
  Here you can find general contact information about the business partner and the number of the connected contact, Customer and creditor.
- Tab: SkyMinder Job Criteria
  This tab displays information about the service . The "Provider" is the company that provides the information for this business partner.
  At "Product" a product for the business partner can be selected by the dropdown list.
- Columns in the product list:
  - Service and provider as in the request card
  - Report type: Report types offered by SkyMinder. Offered types depend on the contract with CRIF
  - Language: Here w er the languages are specified in abbreviations, which can be provided by the service
  - Available in: "immediately" provides report immediately after confirmation of the request. If the delivery time is not immediate, the report is expected to be delivered within the period specified at .
  - SkyMinder Delivery Method: The delivery method specified by CRIF. The possible delivery methods depend on the contract with CRIF.
- Tab: Options Business Partner Germany /USA/Canada/China
  In some countries (currently USA, China and Germany) a reason for request must be specified for legal reasons. This can be selected here in a drop-down list.
  For USA and Canada, the region from the search is still displayed here.
  For Germany there is still the possibility to get the local PDF delivered. The local PDF also has the b.ONE layout for SkyMinder requests. The local PDF usually contains the same information, as the SkyMinder PDF .
- Tab: Last report
  If there is already a report for the business partner, the current one is displayed here. For the information the info fields: Service, Provider, Product, Requested by (the user who started the request is displayed here), Requested on (the date + time of the last request is displayed here) and the credit index.
- Tab: Existing reports
  A list of all past reports about the business partner is displayed here . Also here are the menu buttons: Open PDF, Text lines, Apply master data

Investigations/ clarification cases

In case of an Investigation, the available information will be forwarded by the business partner to CRIF and CRIF will start a separate search for a suitable company. If CRIF has found a suitable company , a report will be provided subsequently.
An investigation should be triggered if a search does not return the desired result, even though the specified search criteria were correct.
In order to start an investigation, you have to click on the action item "Start investigation" in the search results list.
This opens a request card for product selection, as with a matching result.
For Investigations, the same product restrictions apply as for Inquiries , except that no immediately available products are available.

Todo - System

If a new report is delivered, you will be notified about it with todo entries. Whether you receive notifications can be configured in the setup (-> Todo's tab).

Todo - List

The columns of the list correspond to the fields in the Todo card in the General tab and can be taken from this section.

Todo -card

The todo card is divided into four sections, which are explained individually in the following chapters.

Rider General

No.	Unique number for this todo in this BC system. Pulled from the number series set up (-> Setup).
Type (kind)	Shows , what kind of todo it is.
Change	Shows in which supercategory a change has taken place
Detailed change	Shows in which subcategory a change has taken place
Details	Time the value which has changed in the form [old] -> [new].
Clarification case	Indicates whether the associated report is a clarification case
Original report no.	Number of the first report, if this is not the current report
Last report no.	Number of the current report, if one is available
Service	Indicates via which service the report was obtained
Customer no.	Number of the linked customer
Contact no.	Number of the linked contact
Vendor no.	Number of the linked creditor
Name	Company name
Status	Status of the todo (**Open**, **In progress, Solved**, **Ignored**)
Assigned user name	SkyMinder user to whom the todo is assigned
Occurred	Date on which the todo occurred
Solved	Time at which the todo was solved
Last comment	Last comment on this todo

Rider comments

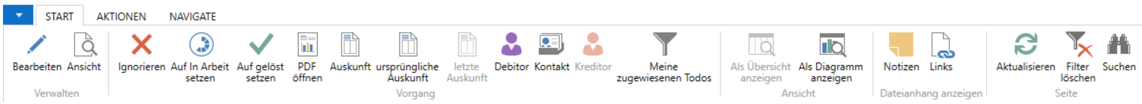
In the comment area you can leave a message for other employees. This will automatically be provided with your user ID as well as a timestamp. When writing the comments, previously defined text templates can be used (-> Text templates).

In addition, various actions are logged automatically, e.g. changing the status.

Further todo's tab

In the tab "further todo's" all further todo's of this company are displayed. In "other open todo's" this list is filtered to the open todo's or any in process.

Menu buttons



Ignore	Sets the status of the todo to **Ignored**
Set to In Work	Sets the status of the todo to **In progress** and assigns it to the current user
Set to solved	Sets the status of the todo to **Solved**
Open PDF	Opens a Windows dialog to open or save the PDF for the report, if available.
Report	Opens the corresponding report, if available (see **Fehler! Verweisquelle konnte nicht gefunden werden.**)
Original report	Opens the first report of the series, if available and not this one (see **Fehler! Verweisquelle konnte nicht gefunden werden.**)
Last report	Opens the last report of the series, if available and not this one (see **Fehler! Verweisquelle konnte nicht gefunden werden.**)
Customer	Opens the associated customer
Contact	Opens the associated contact
Vendor	Opens the associated vendor
Assign todo to me	Assigns the open todo to the current user (only in the todo card)
Solve open todo of Business Partner	Sets the status of all open todos of this business partner to **Solved** (see tab Other open todos) (only in the todo card)
My assigned todo **[only in list]**	Filters the list on todo's which are assigned to the current user

Business partner list

The business partner list shows all SkyMinder business partners and which Customers/contacts/creditors are connected to the business partner.
Additionally, some SkyMinder details are listed. The field "Number of identifiers" shows how many provider assignments exist to this business partner. If the field is filled with a zero, there is currently no connection to a SkyMinder company.

Menu buttons business partner list

- "Disconnect interface connection" removes the connection of the SkyMinder business partner to the SkyMinder company. This means that a new search will be started at the next SkyMinder request to this business partner.

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Help in case of support

For problems or errors with the BC interface that require assistance in resolving, contact support@mse365.de .

For problems with the reports and its content as well as conditions and contract details, please contact the CRIF contact person.

In any case, please note the following things in the email:
The support request should

- Describe your problem in detail or how the error occurred (preferably with a screenshot).
- describe what happened before the error is triggered
- in case of errors with a report provide the SkyMinder document ID, the identification number and the name of the company

In this way, the support request can be processed as quickly as possible and thus help can be provided as early as possible.

Common mistakes

Problem	**Possible solutions**
SkyMinder2Dynamics does not work	• Please check the installation in the Version tab in the CreditSolution2Dynamics setup (-> Version tab).
The connection test for the SkyMinder Connection failed	• Verify username and password • Make sure that the firewall does not block the connection.
A user cannot start SkyMinder requests	• Make sure that the user is also created in the user setup with user name and password (-> User setup).