Automated Credit Decisioning From Dun & Bradstreet PoweredBy Jitterbit

Our joint solution supports organizations digital transformation goals to streamline and automate processes as well as helping customers improve their DSO and reduce bad debt.

Credit teams are facing mounting pressure to speed up the credit decisioning process to increase sales and keep businesses growing – while continuously juggling compliance with regulations. Automating credit analysis and decision-making is vital for saving time and resources – and helping to create consistent and unbiased decisions.
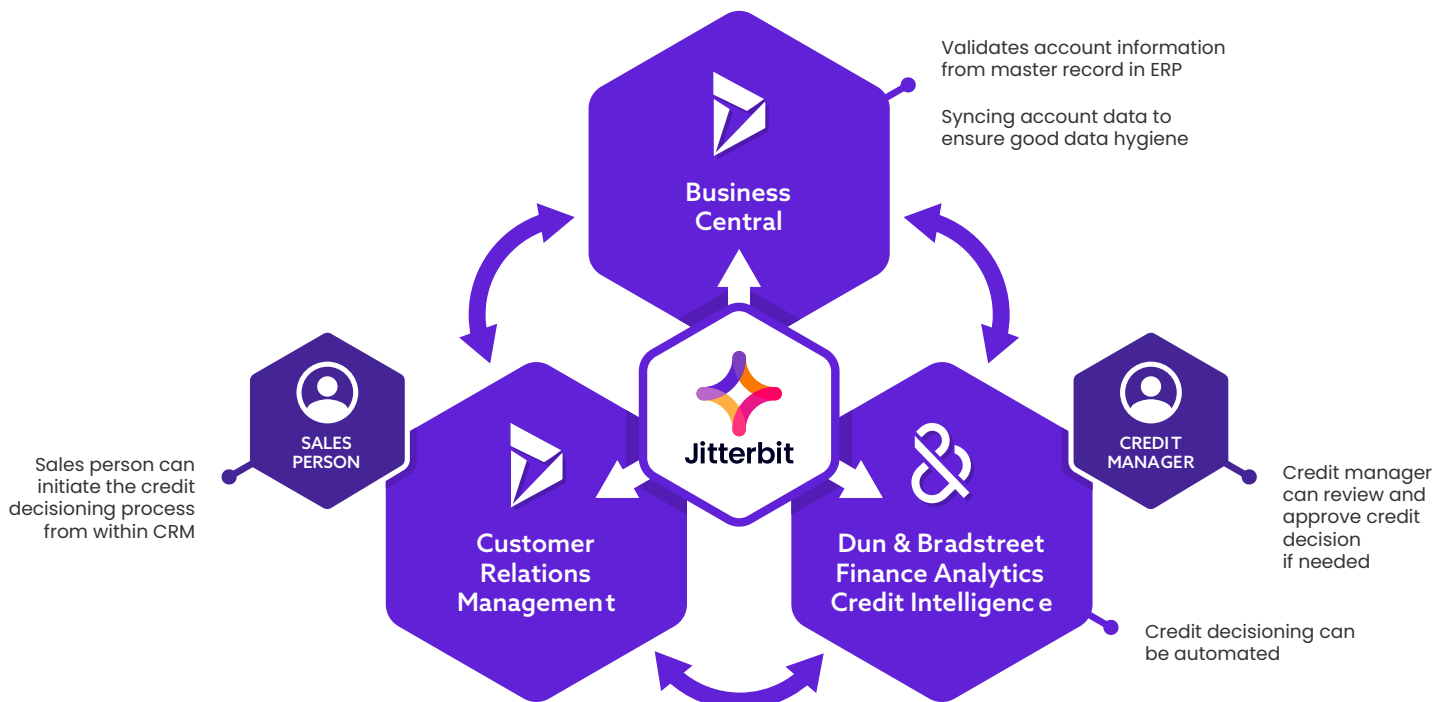
Integrate D&B Decision Maker Into Your Existing Systems

Dun & Bradstreet and Jitterbit have collaborated to build a connector and an automated credit decisioning workflow template that integrates Dun & Bradstreet's Decision Maker from their flagship credit decisioning platform, D&B Finance Analytics, right into your existing ERP and CRM.

Decision Maker from D&B Finance Analytics automates credit decisioning with AI-driven global credit intelligence for comprehensive risk assessments to help quickly onboard customers, set the right terms, collect payment on time, and improve working capital.

This integration and workflow template, PoweredBy Jitterbit, enables you to automatically initiate real-time credit decisions from your existing applications – helping you streamline processes, improve DSO, and reduce bad debt.

A SAMPLE OF THE SYSTEM INTEGRATION WITH DUN & BRADSTREET POWEREDBY JITTERBIT

Validates account information from master record in ERP

Syncing account data to ensure good data hygiene

Business Central

Jitterbit

SALES PERSON

Sales person can initiate the credit decisioning process from within CRM

Customer Relations Management

Dun & Bradstreet Finance Analytics Credit Intelligence

CREDIT MANAGER

Credit manager can review and approve credit decision if needed

Credit decisioning can be automated

A Powerful
Integration Platform

The Automated Credit Decisioning Workflow Template Supports the Following Capabilities:

- Automatically trigger a credit review based on the status of an opportunity in your CRM.

- Automated credit decisioning that will leverage the opportunity amount from your CRM, the amount the customer currently owes, and the credit limit from your ERP.

- Submit opportunities requiring credit review to Decision Maker.

- Apply your custom scorecard and rules to Credit Requests to credit limits and terms for customers.

- Approvals and Declines coming out of D&B Finance Analytics update your CRM and ERP applications in seconds.

Benefits:

When automated tools such as Dun & Bradstreet's Decision Maker and credit scorecards are integrated with your CRM & ERP, and shared on an enterprise level, credit management workflows can become more efficient and more effective, helping you to:

- Better collaboration throughout the quote-to-order process to close deals faster.

- Improve credit decision turnaround time and increase protection against bad debt.

- Eliminate data silos by integrating customer data across CRM, D&B Finance Analytics, and ERP.

- Reduced manual steps in the credit decisioning and approval process.

WHY CHOOSE JITTERBIT INTEGRATION

The Jitterbit automated credit decisioning workflow template provides pre-built mappings and workflows for Microsoft Dynamics CRM to D&B Finance Analytics Decision Maker and Microsoft Dynamics ERP integration needs. Templates provide a jump start to the integration project so that you don't have to build everything from scratch. They provide common field mappings and use cases that customers need.

- ✓ Our pre-built integrations accelerate time to deployment by up to **80%**
- ✓ **95%** of customers achieve ROI from Jitterbit deployments in less than a year
- ✓ **100s** of pre-built connectors make it easy to add new systems as you grow

✦ **Jitterbit**

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