



Frequently Asked Questions D&B360 Version 3 – General Use

Microsoft Dynamics

1. What platforms are included in D&B360 version 3?
 - MSD On-Premise and MSD On-Demand CRMs as well as an On-Premise and cloud based version of the D&B360 Agent. SAP v3.1. On-Premise will be released on 21Mar14 with an On-Demand version to be released in the summer of 2014.
2. What is the D&B360 Agent?
 - The D&B360 Agent is the workhorse of the product. It performs the overwhelming majority of all the D&B360 functionality. Version 3 has been redesigned so that just a small amount of code gets installed into the CRM while the much larger piece of code is stored in the independent agent. This agent runs in the D&B cloud, but we have a standalone version available for customers who want to install it locally.
3. When will the standalone version of the D&B360 agent become available?
 - The standalone version of the D&B360 agent is available now. Customers can contact the D&B360 Technical Support team for packages and instructions to install.
4. What are the advantages and disadvantages of using the standalone version of the D&B360 Agent when it becomes available?
 - The only advantage, or benefit, of using the standalone version is that you install it locally on your system, and you have control of it. Using the cloud version provides many more advantages. For example, you do not have to install or maintain anything, and when we release software updates to address issues, we apply them to your instance automatically. You'll get the benefit of those fixes without having to do anything.
5. If we use the cloud version of the agent with an On-Premise CRM, are there any security issues or requirements?
 - No, there are no issues. However, you must open port 5555 so that our agent can communicate back to your CRM. You also need to add the agent URL to your browser's Trusted Sites.
6. How long does the install process take?
 - It should take approximately 15 minutes, assuming a reasonable response time, plus the time it takes to configure the system.

7. When I received the Welcome Letter, there is a Username and Password that are provided to me. What are these used for?
 - The Username and Passwords are validated by the D&B360 agent to ensure that you have permission to access D&B360 data. If these are stated incorrectly, you will not be able to use D&B360. They are entered into a form that the installer issues and propagated to your CRM.
8. Will there be any changes to the Informatica Secure Agent?
 - The current configuration will be maintained with Informatica. Both the external D&B360 agent and the locally installed agent will communicate with the Informatica secure agent. Eventually, we are going to migrate batch processing from Informatica to a process written and maintained in-house.
9. What browsers will be supported with version 3?

Note: Supported browser information is maintained in the D&B360 for MSD Release Notes.

 - IE8, IE9, & IE10
 - Firefox
 - Safari
 - Chrome Google
10. As a CRM Administrator, I can do anything inside the CRM, but I am still denied access to D&B360. Why is that?
 - You must have the Security Role D&B Administrator or D&B User defined to access the product.