Frequently Asked Questions
Migrating To D&B360 Version 3

<u>**Microsoft Dynamics**</u>

1. When will v3.0 be released for General Availability?

2. D&B360 for CRM v3.0 was first made available at the end of October 2013 and includes support for both On-Demand and On-Premise CRMs. The D&B360 Agent, the application that runs D&B360, currently resides in the D&B cloud. A local version of the agent that you can install on your company's local server is also available. However, we recommend that customers use the cloud version of D&B360.

3. What platforms are included in this release?

   ➤ MSD On-Premise and MSD On-Demand.

4. We are running CRM 2011 but are planning an upgrade to CRM 2013. Does version 3 support both?

   ➤ Yes, you can install version 3 into either CRM. Each environment has its own installer. Be sure to download the correct one for your CRM environment. If you are running D&B360 in CRM 2011 and you upgrade to 2013, you must re-install D&B360 using the 2013 installer.

5. Will I be able to install the Standalone D&B360 agent and the web pages in a single install package?

   ➤ Yes. The Standalone D&B360 installer provides the option to install the agent to a unique directory structure outside of the CRM. Contact the D&B360 Technical Support team to request the installer and instructions for installing the agent on a local server.

6. When will the Standalone version of the D&B360 agent become available?

   ➤ It is available now. You can obtain it by opening a support ticket with the D&B360 Technical Support team.

7. 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.

8. 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.

9. Will a utility be available for migrating objects such as saved searches, security roles, users, batch schedules, and so forth?

> The D&B360 agent will now interface with Informatica. Because the batch schedules are sent to Informatica, these types of objects will remain in place, but no other data will be migrated.

10. Will I be able to maintain all of the imported data such as D&B Company records, contacts, and Admin Review records?

> Yes, and the association between D&B data and CRM account/lead/contact data will remain intact.

11. Will I be able to upgrade to v3.0 from any other version of D&B360?

> No. If you are running any release previous to 2.3.1.66, you must first upgrade to 2.3.1.66. Then you can upgrade from 2.3.1.66 to 3.0. This applies to both On-Demand and On-Premise CRMs.

12. How long does the upgrade process take?

> It should take approximately 15 minutes, assuming a reasonable response time, plus the time it takes to configure the system.

13. If I upgrade to v3.0, because the new version is an agent external to the CRM, what happens to the old version?

> The upgrade does not remove existing objects. Only running an uninstall will do that. The v3.0 installation leaves remnants of the previous installation, but that is a practice that Microsoft frequently uses. You will have to disable certain entities in v2.3 releases. These entities are described in the "Installing D&B360, Upgrading from a Previous Version" section in the *D&B360 Administration and Installation Guide for MSD CRM*.

14. When the new Registration System is in place, will my registration information be migrated to it?

> You will need to register on the new v3 registration site. The D&B360 Operations team will capture your administration, metering limits, and usage information and migrate that information to the new registration system.

15. Can you briefly describe the new Registration Process?

> After you inform D&B that you want to upgrade to version 3, the D&B360 Operations team will set up your entitlements for v3.

  a. An automated implementation case is created for Customer Support.

  b. You will receive a Welcome Letter email, which will include the URL of the registration site and contain your MaxCV UserID and Password. Keep it where you can find it.

> Next, you will register on the new registration site and download the version 3 installer.

> Customer Support will contact you to see if you need assistance.

16. When I receive the Welcome Letter email, it contains a Username and Password. What do I use these for?

   ➢ The Username and Passwords are validated by the D&B360 agent to ensure that you have permission to access D&B360. 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 propagates to your CRM.

17. Will there be any changes to the Informatica Secure Agent?

   ➢ The current configuration will be maintained with Informatica. The external D&B360 agent will communicate with the Informatica Secure Agent.

18. Will the Duplicate DUNS Report be included in v3.0?

   ➢ This report is currently unavailable. However, this can be easily obtained using a native CRM feature. If you need help, please contact D&B360 Technical Support team.

19. Is there anything else that is in v2 that is not in version 3?
   ➢ The D&B Credit entity has been removed from v3. However, the Marketing Pre-Screen data is still available and is stored in the D&B Company record.

20. Will I be able to maintain all downloaded D&B data after migration?
   ➢ Yes, the Company records, Contact records, and the records in Admin Review list are all preserved. The association between D&B data and native account/lead/contact is also maintained.

21. What browsers will be supported with the v3.0 launch?

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

   ➢ IE8, IE9, & IE10
   ➢ Firefox
   ➢ Safari
   ➢ Chrome Google

22. Are there any changes to the data schema going from D&B360 v2.3 to v3?
   ➢ No. The exact tables and their column names are being used in both versions.

23. With version 3, I am defined as a CRM Administrator, but I still am denied access to D&B360. Why is that?
   ➢ Version 3 works a little differently than version 2. With version 2, you could access D&B360 because you were defined as a CRM Administrator. But in version 3, you must have a Security Role as D&B Administrator or D&B User defined to access the product.