

D&B360 Release Notes for Microsoft Dynamics CRM v2.3 to v2.3.6

For installation and deployment instructions, see the *D&B360 Administration and Installation Guide* for Microsoft Dynamics CRM and these Release Notes, which include:

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Version 2.3

New Features and Pertinent Changes for v2.3

Feature	Description
Preview a Company	Before you import a company to the CRM, you can view its D&B company information in the search results. This helps keep your CRM uncluttered by giving you a chance to research and identify the right company before you add it to your CRM.
ROW and Social Media	You can bring more relevant business news and social content to the CRM by using the new rest of world (ROW) applications. You can find better targeted data from a company's official site than you would find in a general Internet search. A new Favorites feature allows you to save individual items from other tabs.
Sales Alerts in ROW	To increase sales opportunities, you can set custom alerts about changes that occur at your companies of interest. Set these alerts to receive daily digest emails about company mergers and acquisitions, title and funding changes, awards, and other information.
Import D&B Company as a Lead	When you import a D&B company record, you can import that record as an account or as a lead to your CRM.
Export Company Results from Build A List	In the Build a List results window, you can export the lists of companies to your local computer directory as a .csv file.
Biographies for Contacts	When you search by contacts, by clicking that person's name, you can view biographical information about that person including employment and salary history and other relevant information.
Contact Usage	Each time you are about to import a new contact, a message displays to inform you of your total contact credits and how many you have used so far. You can use this information to make a decision as to whether you want to create that contact.
Access to D&B360 Training registration site	D&B360 training is now available from the About D&B360 window.
Change to Refresh Batch Jobs	The weekly option for running a Refresh Batch job is no longer available.

Known Issues for v2.3

There are no known issues for this release.

Resolved Issues for v2.3

Issue	Description
Silverlight error	You should no longer encounter a Silverlight error when you attempt to use Build A List to search for companies.
Creating contacts	Having a contact title that contains too many characters should no longer prevent you from successfully creating a contact.
Build A List Contacts	Build A List contacts are now correctly associated to their corresponding accounts.
Phone Numbers	Phone numbers should successfully populate for contacts.
Stare and Compare	You should be able to change fields in the Stare and Compare window without an intermittent, unhandled Silverlight error occurring.

Changes to Product Documentation for v2.3

Changes to the Administration Guide

- The installation instructions for on-demand environments (also known as Live) and on-4 premise environments (also known as Active Directory) differ. To help you more easily find the specific steps for your environment, the instructions have been reorganized.
- Revisions have been made to the instructions for installing the Informatica Cloud Secure Agent to include Microsoft CRM Office 365 and identifying a country or region as your default country.
- Instructions for integrating D&B360 in Outlook for your users
- New section on ROW and changes to configuring ROW options for users
- New section on enabling D&B360 administration on a customized site map
- New section on finding your SOCID and TPCID
- New preface that includes information about how to navigate in the PDF file
- An index for improved searchability

Changes to the User Guide

- Updated section about ROW, which has changed for this release, and how to use it
- Instructions for how to set custom alerts
- New illustrations of user interface windows to show changes such as the new icons that indicate an existing account, contact, or lead
- Instructions for exporting Build A List results to your local directory
- Information about the new D&B360 Person Biography button

- New preface that includes information about how to navigate in the PDF file
- An index for improved searchability

Version 2.3.2

Note: This release is specific to the Microsoft Dynamics Classic view. For optimal performance of D&B360 in the Microsoft Dynamics CRM, continue to use the Classic view. Do not use the Flow user interface.

Resolved Issues for v2.3.2

Issue	Description
Account window display problem after Polaris upgrade	After an upgrade to Microsoft Polaris, when you display a D&B360 account, an error message no longer opens and the Account window now displays correctly.
Sales window chart error	In the Sales window, when you click Click here to view chart , the chart now displays.

Version 2.3.5

New Features and Pertinent Changes for v2.3.5

Issue	Description
D&B360 Role Administration	System Administrators can now control the creation of D&B Accounts, Contacts, and Leads by user role. The D&B360 Role Administration feature is located on the D&B360 Administration window.
Global Sales Currency in Dollars	D&B360 Administrators can specify annual revenue to display in either US Dollars or native currency. This applies to Account and Lead records. The Global Sales Currency in Dollars control is located on the D&B360 Administration window.
Build A List — Company Export to Excel	We have enhanced the Build A List, Company Export to Excel to include whether the Account or Lead already exists in the user's database.

Known Issues in v2.3.5

Issue	Description
Sporadic error after installing or upgrading D&B360	<p>After you install or upgrade D&B360, when you initially open a native account, contact, or lead, this error might display:</p> <p style="text-align: center;">There was an error with this field's customized event. Field: window. Event: onload. Error: 'DnB360. DnBAccess' is null or not an object.</p> <p>Click OK to continue. The error is sporadic and rarely displays again.</p>
D&B360 ribbon displays as dimmed or disabled	<p>The D&B 360 menu ribbon might become dimmed, or disabled, after you remove D&B data from an account, and then immediately add D&B data to the account.</p> <p>After D&B 360 refreshes the account with the new data, the CRM takes a long time to refresh. The ribbon buttons display as disabled or dimmed.</p> <p>Close and reopen the record to enable the D&B ribbon buttons.</p>
User role of Delegate does not enable D&B buttons	When an administrator assigns the role of Delegate to a user, and the user creates new records, the D&B buttons become dimmed, or disabled. D&B 360 is unable to change this; it is beyond the scope of D&B360 to control.
Build A List	This issue only affects Canadian Provinces. The Global State/Province criteria does not return search results if you enter the full name of a Canadian province. For example, if you type Ontario as the criteria in this field and run a search, no results will be returned. For this field you need to use the ISO code. In this example, you would type ON for Ontario to receive valid search results.

Resolved Issues in v2.3.5

Issue	Description
Look-A-Like for Canadian Companies	When you access the Look-A-Like feature from Canadian companies, the window now loads correctly.
Create Lead as a Company	You will no longer be charged a contact credit when you add D&B company data to an existing Lead record.
D&B360 Search functions not opening through Outlook Integration	When you access D&B360 through Outlook, you can now successfully access the D&B360 search functions.
JavaScript errors in D&B360 with Microsoft Rollup 11	You should no longer receive Javascript errors when using D&B360 in On Premise organizations that have Microsoft Rollup 11 installed.

Documentation Corrections and Additions for v2.3.5

Administration Guide Addition

Instructions for D&B360 Role Administration

The D&B360 Role Administration button is visible and accessible to all administrators. However, only a user with the role of System Administrator is authorized to make changes.

As a System Administrator, when you click **D&B360 Role Administration**, a list of configurable roles displays. From this list, click the user role to be configured. You can then enable or disable the creation of D&B360 Accounts, Contacts, and Leads from the following areas of D&B360:

- Accounts With D&B360
- Leads With D&B360
- Leads With D&B360 – Company
- Contacts with D&B360
- Build A List – Company Results
- Build A List – People Results
- D&B360 View
- D&B Competitors

After you have configured the roles, select **Enable D&B360 Privilege Enforcement Yes** and then click **Save**. When users with these roles next log on to the CRM, the changes you made are enforced. In the case of a user having multiple roles, any role that has an enforced privilege overrides any role that has the same privilege set as disabled.

Version 2.3.6

New Features and Pertinent Changes for v2.3

Feature	Description
Internet Facing Deployment (IFD) Platform Certification	<p>D&B360 is now fully functional on the IFD platform.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: When you install D&B360 using the IFD platform, you should select the Connect via option of Microsoft Dynamics CRM 2011/Internet Facing Deployment (IFD). You must enter your User Name and Password. The <i>Connect as</i> option of Current User is functional only when installing on Microsoft Dynamics CRM 2011.</p> </div>

Known Issues for v2.3.6

Issue	Description
IE Browser Issues	If you access D&B360 through Outlook 2007, D&B360 opens in Internet Explorer 2007. The first time you do this, the message “DnB360 is not yet optimized for other browsers, please use IE 8 or 9” displays. After that, the message displays only if you clear the cache and access D&B360 again later. To avoid this message displaying, only clear your cache if you have to.
Batch Activity Logs Incorrect Total Accounts Processed	If you run a new or refresh batch that has no eligible records to be extracted, the activity logs display –1 for the Total Accounts Processed.

Resolved Issues for v2.3.6

Category	Issue	Description
Install/Upgrade	Sporadic Error after Installing or Upgrading D&B360	The error related to a field's customized event when initially opening a native account, contact, or lead no longer displays.
D&B360 Label	Contact Record Linked to D&B360 Label	The Linked to D&B360 label for a record would display even if that record was not associated to a D&B Company. We have removed the 'Linked to D&B' label. To determine whether a contact is associated to a D&B Company, look to see if the D&B Person Biography button is enabled.
Contact Search	Job Title Check Boxes do not Clear	If the search criteria for a Company Search includes job titles, when you change from a Company search to Person search, D&B360 now correctly removes all the criteria the next time you run a Person Search.
Pricing	New Pricing Structure Messages	We have updated the Entitlement Messages based on the new pricing structure.
D&B Competitors	Create Button Display	The Create button on the DnB Competitors window now displays the same way as it does on other windows.
	Create Button Disabled	The Create button is no longer enabled when no data is available; now it is disabled in this situation.
D&B Industry	Code 1713 Not Displaying	When Industry code 1713 is associated, the data now displays.
D&B Financials	Top Competitors Graph	The Top Competitor graphs now display company data for companies that contain an ampersand (&) in the company name.

Category	Issue	Description
D&B360 Administration	Admin Window Settings Reset	When you upgrade or reinstall D&B360 and specify Maintain Manual Settings, the Administration settings no longer incorrectly set back to default, and are retained.
	D&B360 Admin Review List – Search for Accounts with D&B360	When you update an account record in the Admin Review List with a country that is different from the CRM default country, duplicate rows are no longer sporadically produced in the search results.
	D&B360 Admin Review List – Create Lead	If you selected a record to add D&B data to and chose to create a Lead rather than an Account, D&B360 removed the account record from the Admin Review List. In this scenario, the Company Overview displayed a Create Lead link in the search results. Now when you search from the Admin Review list, the Create Lead link no longer displays on the Company Overview window.
	D&B360 Admin Review List	When you searched for a D&B Company from the Admin Review List to add to an account, you were allowed only one search. Now if an Administrator clicks Select in the Admin Review List to run a Company search, he or she can edit any of the pre-populated criteria fields and run a new search.
	Enhancement to Role Administration	The Role Administration feature now has a save confirmation window.
	Allow Duplicates Setting	You can no longer inadvertently create Duplicate records through Competitors when the setting is off.

Category	Issue	Description
Build a List	Clarify Error Messages Enhancement	Data validation messages are now more user friendly.
	SIC and NAICS Codes Criteria	If you selected Primary Only when searching by SIC or NAICS codes, the results included secondary SIC and NAICS codes. Now when you select Primary Only, D&B360 returns only primary SIC and NAICS results.
	SIC and NAICS Codes Behavior	<ol style="list-style-type: none"> 1. If you add SIC and NAICS codes from the menu and manually enter a code in the criteria field, it will not be overwritten. 2. Two-digit and four-digit SIC codes no longer auto-populate in the criteria field. Two-digit NAICS codes no longer auto-populate in the criteria field.
	International Numbers	On the Company Search results window, only US companies display the phone number format of (###) ###-####.
	Area Around US Zip Codes	The Area Around US Zip criteria accepted values that were greater than the search limitation. This field now accepts only values up to the limit of miles or kilometers that will produce an accurate result.



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