



## Frequently Asked Questions D&B360 v3.0 Product Launch

### Microsoft Dynamics

1. When will v3.0 be released for General Availability?
  - MSD 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 will be available in early March 2014.
2. What platforms are included in this release?
  - MSD On-Premise and MSD On-Demand.
3. Will I be able to install the On-Premise agent and the web pages in a single install package?
  - Currently, the agent is cloud-based only. Eventually the On-Premise installer will provide the option to install the agent to a unique directory structure outside of the CRM.
4. Will a utility be available to migrate 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.
5. 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.
6. Will I be able to upgrade to v3.0 from any other version of D&B360?
  - No. If you are running an 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.
7. 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.

8. If I upgrade to v3.0, since the new version is an agent external to the CRM, what happens to the old version?
- The upgrade won't remove existing objects. Only running an uninstall will do that. The v3.0 install leaves remnants of the previous install, 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*.
9. 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 Operations team will capture your administration, metering limits, and usage information and migrate this information to the new registration system.
10. Can you briefly describe the new Registration Process?
- After you inform the Operations team that you want to upgrade to version 3, the Operations team will set up your entitlements to 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.
11. 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.
12. Will the Duplicate DUNS Report be included in v3.0?
- This report is currently unavailable.
13. What internal steps are taken to upgrade from v2.3 to v3.0?
- The Product team will send an email on your behalf to the Operations Team requesting an upgrade. If this upgrade is a renewal, the email to the Operations Team is automated and will specify whether you will upgrade to v3.0.
  - The Operations Team performs the following steps to set up your credentials in the back-end system and MaxCV:
    - a. Checks to see if you are an existing customer (using the DUNS number).
    - b. Logs in to OAM and creates a new MaxCV user ID under the D&B360 subscription group.
    - c. Adds your MaxCV user ID on the existing entitlement system. Because the User IDs for MaxCV are unique, they should not impact your 2.3 production system
    - d. Sends an email to you that includes your User ID and Password.
  - You download the D&B360 v3.0 installer from registration site.
  - You follow the steps described in the *D&B360 Administration and Installation Guide for MSD CRM*, you will run the installer.

14. Will I be able to maintain all downloaded D&B data?

- Yes, the Company records, Contact records, and the records in Admin Review list will all be preserved. The association between D&B data and native account/lead/contact will also be maintained.

15. 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

16. What is the URL for the Sales Demo System? How do I login?

- <https://dnb360ifdemo.hoovers.com/main.aspx#> (IFD support starting on 13Feb14).
- <http://msddemo.hoovers.com:5555/DnB360SalesDemo/main.aspx#> (until 13Feb14).
- To log in, use your network credentials – that is, DNBINT or AD followed by your userid.
- Note that you may not have access to this system. You must take and pass the certification training conducted by the Sales Training Team headed by Renee Remington.