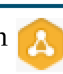
D&B360 Release Notes for Microsoft Dynamics CRM V3 - 3.1.13

D&B360 for CRM version 3.0 features a completely redesigned interface, taking sales intelligence to the next level, and thereby increasing sales, productivity, and CRM ROI. To better understand the features of the product, refer to the D&B360 User Guide. For installation and deployment instructions, refer to the D&B360 Installation Guide for Microsoft Dynamics CRM.

New Features and Pertinent Changes for Version 3.1.13

Feature	Description
Build a List: Related Icon	Related accounts are indicated with a new Related icon  in Build A List results. The icon helps reveal up-sell and cross-selling opportunities by indicating relationships in the corporate hierarchy with any of your existing accounts. Clicking the icon displays more detail.
What's New	Important new updates for D&B360 are displayed in a "What's New" window.
MSD On Demand 2015 Certification	D&B360 is now MSD On Demand 2015 certified.
Contacts / Accounts / Leads: D&B Initial Association Date / Status	Contacts, Accounts, and Leads now includes the D&B Initial Association Date and Status. The Initial Association Date is the date an entity was first assigned a D-U-N-S Number.
D&B360 Access: Insight Tab	D&B360 for MSD 2013 and MSD 2015 can now be accessed from a "D&B Insight" tab that replaces the "Workplace" inside your CRM. **NOTE:** You must re-install or upgrade in order to take advantage of this feature.

Issues Resolved in Version 3.1.13

Issue	Description
Person Overview: Employment History	Employment History in the Person Overview now shows the cumulative years the person has been at a company, holding the same title.
Industry Financials: Quick Ratio Panel	The Industry Financials Quick Ratio panel now displays only when data is available.
Industry Business Challenges: Expand / Collapse	The IndustryBusiness Challenges sections can now be expanded/collapsed as indicated by the Hand symbol during hover.
Build a List Industry Browse: Industry Selection	When selecting a parent industry on the Build a List Industry Browse, all of its children are now automatically selected.
Account Match: Large Revenue Display	The Account Match (also known as Stare& Compare Merge) screen is now displaying large revenue correctly.
Company Overview: Industry Links	The Company Overview Industry links on the Quick look page are now working correctly.
Company Overview: Sales / Employees Panels	The Company Overview Sales and Employees panels are no longer overlapping.
Family Tree: Missing Fields in Export	The "Active Account" and "Active Lead" fields now display in the Family Tree Export.
Build a List: Returning to Edit Criteria Filters	The Build a List Returning to Edit Criteria page now retains the user-selected filters.
Build a List: Your Saved Lists Filters	The Build a List Your Saved Lists now retains the user-selected filters when loading saved lists.
Account/Lead/Company: Build a List Filters	The Account, Lead, and Company Loading Find Similar now retains the Build a List filters.
Search: Results Pagination	The Company and Person Search Results pagination no longer shows negative page number return results.
Company Competitors Results: Column Sorting	The Employees column sorting in Company Competitors Results is now working.
Role Configuration: Column Sorting	The Roles column sorting in Settings Role Configurations is now working.
Role Configuration: Access for New Roles	Newly added roles do not have full D&B360 access by default.

New Features and Pertinent Changes for Version 3.1.12

Feature	Description
Batch Match for Leads	A new section on the Batch Settings page has been added to set up schedules for Lead Matching.
Batch Refresh for Leads	The D&B360 Batch Refresh now automatically refreshes D&B records that are associated to both Accounts and Leads.
Batch Admin Review - Leads	A new section has been added on the Data Management Settings page for a Leads Admin Review List to enable customers to manually match unmatched Leads.

Important Notes for Batch for Leads:

- Available only to customers on v3.0.
- Customers will need to download the latest D&B360 schema.
- The following warning message will appear in the Lead Match Activity Log if the schema is not the latest one: This feature is unavailable for your version of D&B360. Please update your D&B360 application in order to enjoy this feature.
- Lead records can be picked for cleanse match based on the flag setting. (Details to follow.)
- The schedule for Lead matching and Account matching should be 6-8 hours apart to avoid possible duplication.
- A warning pop message will appear when schedules are closer than four hours apart.

Family Tree Export	Users now have the option to export an entire family tree for a company via the Export Results button on the Company Overview page. The export will run offline and, once complete, will be emailed to the customer as an attachment.
Build a List: Company Keyword Search	Added a Keyword Search for companies. Keyword Search for Person is now combined with Company and placed under one section called, "Keyword Search".
Build a List: Hoovers Industry Code	Search by Hoover's Industry Codes is available in the Industry filter. Only one type of industry code--SIC, NAICS, or Hoover's--can be used in the search criteria at a time.
Role Configuration	Role Configuration has been redesigned to be easier to use and more effective. • CRM Roles that are enabled with D&B360 are shown, rather than showing all available CRM roles • By default, only two D&B360 roles will be shown – D&B360 Admin and D&B360 User. • CRM administrators can use the plus (+) symbol to search, add, and enable certain CRM roles for access to D&B360.

New Features and Pertinent Changes for Version 3.1.11

Feature	Description
Troubleshooting Screen	Added more troubleshooting capabilities to help resolve common issues that occur within the environment. If an error occurs, a pop-up window displays with the type of error and possible solution. A listing of errors that occurred can also be found in the Troubleshooting tab under Settings. If you are unable to resolve the issue on your own, please contact your administrator.
Financial Data Provider Change	The financial data provider in D&B360 has changed from Morningstar, Inc. to Mergent, Inc.
Support Information	Additional support information is available by clicking CNTL+Shift 9 (on either a Mac or a PC). This information will be needed when submitting a trouble ticket.
Role Screen Redesign	The Administrator role has to be enabled for at least one CRM role.
Company Logos	Company Logos now display on the Company Overview page.
Company People Import	Fixed the issue where the duplicate account modal would not load initially after a transactional import from the Company People list.
Security	A number of security enhancements have also been included with this release.
Company Import	Fixed an issue preventing imports when the Company Synopsis was greater than 2,000 characters.

New Features and Pertinent Changes for Version 3.1.10

Feature	Description
Address Fields	Address fields have been added to better support the transactional import of multi-line addresses. All of the new address fields can be exported. Address (line 2) and Address (line 3) can be imported into standard CRM address fields. The Company Overview page only displays Address 1 and Address 2 fields.
Industry Alerts	Alerts can now be set for an industry. On the Manage My Alerts page and on alerts emails, a new "Industry" section has been added. If, for example, you have alerts set up for a company and an industry, you will receive one comprehensive email with a section for companies and a section for industries.
D&B360 Proxy	A D&B360 Proxy is now available that offers an easy and secure connection between CRMs and the D&B360 Cloud Server. The D&B360 Proxy enables CRM customers to get full access to the D&B360 functionality without worrying about data being at risk with its use of two-way authentication. Whenever the D&B360 Cloud Server needs to connect to the CRM Server, it will execute an https call to the D&B360 Proxy, which will translate that to the native protocol used by the CRM Server.

Feature	Description
Extended Data Length of Company Data Fields	The data length of several fields in the Company table have been extended in order to resolve an importing issue.
Option for Changing Match Criteria	When no matches occur for an unlinked account, a new option displays to update the match criteria, instead of displaying a blank screen.

Known Issues for Version 3.1.10

The following issue is expected in D&B360 Release 3.1.10.

Feature	Issue	Description	Resolved On Date/Release
Contact Import	Company phone number is not populating for non-premium imports.	Contact importing does not populate non-premium Phone with company phone	March 19, 2015, Release 3.1.11
Account and Lead Merge	Stare and compare merge does not populate Country field with code when using ISO Code settings.	When merging accounts and leads using stare and compare, the Country field should populate with code when using ISO Code settings.	March 19, 2015, Release 3.1.11

New Features and Pertinent Changes for Version 3.1.1.9

Feature	Description
Read-Only Access for D&B360 Default Roles	The default D&B360 security roles (D&B360 User and D&B360 Administrator) have been modified to remove privileges for creating or updating accounts, leads, or contacts. D&B360 users will no longer be able to create or modify records in the CRM by default. The new restriction in privileges gives customers the flexibility to confer create and update privileges to targeted set of users through their specific, custom CRM roles. The updates to the CRM privileges on these roles will take effect only after running the latest installer.
Lead/Account Duplicate Prevention When Creating New Contacts	Fixed the issue of Lead/Account prevention settings not being enforced during the async import of a contact. When configured to prevent Lead/Account duplicates, D&B360 prevents the creation of a contact through the "Add Selected" function if creation of the corresponding account would result in a Lead/Account duplicate in the CRM.

Feature	Description
Account Duplicate Prevention When Creating New Contacts Requires Creation of New Accounts	Fixed the issue of Account prevention settings not being enforced during async import of a contact. When a user does not have permissions to "Add/Link" accounts in D&B360, the application now prevents the creation of a contact through the "Add Selected" function if the creation of the contact would require creation of a new account.

Known Issues for Version 3.1.1.9

The following issue is expected in D&B360 Release 3.1.1.9.

Feature	Issue	Description	Resolved On Date/Release
Field Length of Phone Numbers	Importing companies with phone or fax numbers longer than 16 characters results in an error.	For D&B360 version 3.1.1.8 or earlier, attempting to import a company with phone or fax numbers longer than 16 characters will result in an error.	December 4, 2014 / v3.1.1.9 Upgrading to version 3.1.1.9 or later resolves this issue.

New Features and Pertinent Changes for Version 3.1.1.8

Feature	Description
Specify Range for Company and Person Imports Using the "Add Selected" Feature	You can now specify a range of results to import for a Company or Person when using a simple search or Build a List. The amount of imports allowed is a maximum of 1000.
Phone Number Formatting	The formatting of phone numbers has been improved in order to be consistent with standard conventions. The improved formatting is applied in the Build a List export file and in the display of phone numbers on all D&B360 user interface screens.
Prevent Cross-Object Duplicates	A new Settings option allows administrators to "prevent cross-object duplicates" for Role Configurations which prevents duplicate CRM objects of different types from being created (i.e., a company lead will not be created if an account for that company already exists). This option will be selected by default. If this option is selected and a duplicate is detected, the plus (+) sign will be grayed out when trying to create a lead, for example.
Postal Codes on the Build a List Export File	Postal and ZIP Codes have been added to the Build a List export file.

Known Issues for Version 3.1.1.8

The following issue is expected in D&B360 Release 3.1.1.8.

Feature	Issue	Description	Resolved On Date/Release
Browser	Chrome Incompatibility	The latest version of Google Chrome is incompatible with D&B360. This is a Microsoft defect whose fix needs to be implemented by the CRM admin. Refer to the Microsoft support page for more information: http://support.microsoft.com/kb/3000002	
Authentication	Authentication Issues with Internet Explorer 11	There are authentication issues when using Internet Explorer 11 if you have two or more CRM instances open within one browser session.	

New Features and Pertinent Changes for Version 3.1.1.7

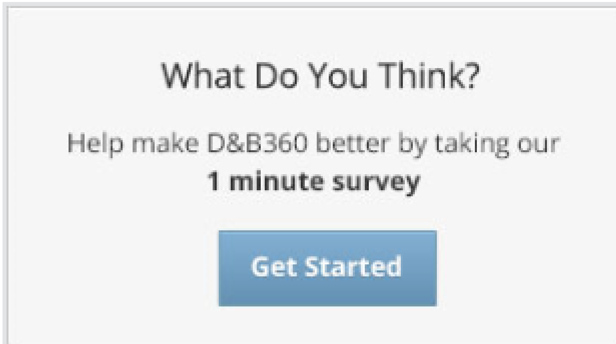
Feature	Description
Type-Ahead/Auto-Suggest for Simple Search	Simple Search for Companies, People, and Industries now features type-ahead search suggestions.
Fixed Error When Importing Direct Contact Information	A bug was fixed that occurred during a Lead or Contact merge. The CRM Contact is now being updated with the direct email or phone number upon the initial Contact merge.

Known Issues for Version 3.1.1.7

The following issue is expected in D&B360 Release 3.1.1.7.

Feature	Issue	Description	Resolved On Date/Release
Large Exports in Build A List	Temporary reduction in application performance when export from Build A List.	Running a large export from Build A List (i.e., a list containing greater than approximately 500 records) may cause a temporary reduction in application performance while the export file is being generated.	

New Features and Pertinent Changes for Version 3.1.1.6

Feature	Description
New "What Do You Think" survey	Users will now be presented with a brief survey on D&B360's Home page. 
Fixed Error on Batch Page	A bug was fixed that displayed prior to batch setup. It caused an error message to be displayed when accessing the Settings, Batch page and Batch Setup modal if Batch was not previously set up.
Online User Materials	The D&B360 user materials for all platforms has been moved to an online format.
Build a List Search by Premium Contact Data	A new Build a List Contact Details section has been added. You can now search by the following criteria in the People section: Company and Title Only; Email OR Direct Phone Available; Email Available; Direct Phone Available; Email AND Direct Phone Available.
Specify Range of Exports	You can now specify a range of results to export for either a Company or Person export. The amount of exports allowed has increased to a maximum of 1000.
Build a List Export File Company Additional Fields	The following fields have been added to the Build a List Company export file layout: • Total Employees • Employees at This Location • Primary Industry • Primary US SIC Code • Primary SIC Description • Primary US NAICS Code • Primary NAICS Description • Company Fax

Feature	Description
Build a List Export File Person Additional Fields	The following fields have been added to the Build a List Person export file layout: • Longitude • Latitude • Doing Business As • Location Type • Total Employees • Employees at This Location • Primary Industry • Primary US SIC Code • Primary SIC Description • Primary US NAICS Code • Primary NAICS Description • Fax
Build a List Export Button	The Build a List Export button will not be displayed for D&B360 users with Limited CRM integration.
Update to Fields Displayed for Account Merge	For an Account Merge or Check for Updates, the fields displayed on the Add D&B Data screen are only those supported by the CRM being updated.
Search Criteria Persists	Search criteria entered in a simple search will remain when the user changes search types. Clicking the Home tab displays the most recent simple search run during the user's session.
Batch Settings Modal Updates	Users need only supply user name, password, and connection name for the Batch Settings modal. the modal will automatically be presented on the Settings, Batch page if Batch credentials are blank or invalid.
IFD Performance Increases	Caching has been implemented on the IFD proxy to increase application performance for IFD installations.
MSD 2013 Service Pack 1 and CRM Online Spring '14 Support *(Applies to MSD 2013 only)*	D&B360 has been tested and certified to support MSD 2013 with Service Pack 1/ CRM Online Spring '14. For more information about the service pack: http://support.microsoft.com/kb/2941390

New Features and Pertinent Changes for Version 3.1.1.5

Feature	Description
News coverage for subsidiaries	News coverage for subsidiaries has been expanded.
Trade style added to Company Overview	The DBA (Doing Business As) title now displays below the company name in the Company Overview and Company Mini Screen header.

Feature	Description
New "About" tab	A new About tab has been added next to the Settings tab. It contains the About and Terms and Conditions information that was previously in the Settings tab. It also includes links to training information. The About tab is accessible to all users.
LinkedIn button	The new LinkedIn feature appears on the Person Overview page and Person Mini Screen. By clicking on the icon, users can navigate to the LinkedIn site that opens in a new window. The LinkedIn page will display the search results for the person being viewed if the user is already logged into LinkedIn. If not logged in, the user will be directed to the LinkedIn login page.
Build a List Search criteria for Location and Company Information	Users have addition search criteria for Build a List. Location criteria now includes US County. Company Information criteria now includes Location Type (i.e., Headquarters, Single, Location, Branch), Manufacturing (i.e., Manufacturing Locations Only), and Legal Status (i.e., Corporation, Partnership, Sole Proprietorship, Other Organization Types, and Not Available).
Build a List export file	Additional columns have been added to the Build a List export file for Existing Account, Lead, Contact.
Admin Settings credentials	The credential configuration on the Admin screen under the Settings tab have been updated to require a current password when changing the credentials.
Error Page	A new error page displays when D&B360 cannot access the CRM.

Known Issues for Version 3.1.1.5

The following issue is expected in D&B360 Release 3.1.1.5.

Feature	Issue	Description	Resolved On Date/Release
Stare and Compare / Merge feature	Direct contact information is not being imported or displayed after linking a D&B Premium Contact to a CRM Lead or Contact with the Stare and Compare/ Merge feature.	Premium Contact credit is deducted when the Premium Contact is linked, even though the direct information is not exposed. Subsequent imports of the Premium Contact's information (via D&B Refresh) will pop a credit modal, but additional credits will not be charged. This behavior is isolated to linking (Stare and Compare). Direct information is delivered properly when creating (importing) Leads and Contacts from the Search Results or Person Overview pages.	September 18, 2014 / V3.1.1.7

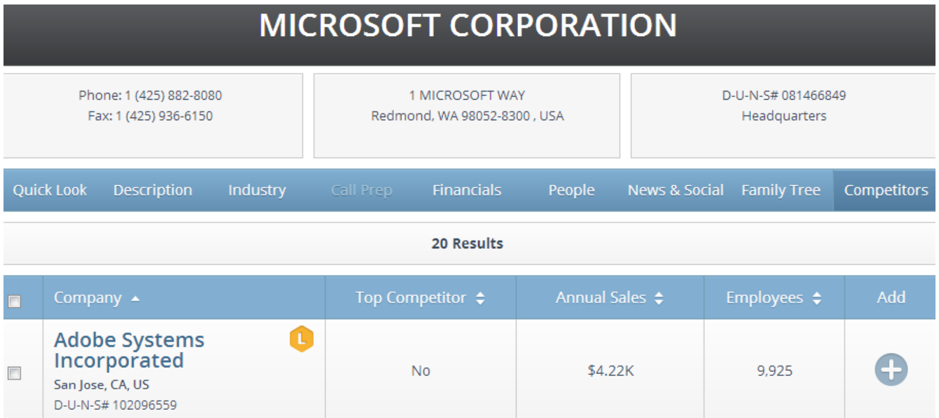
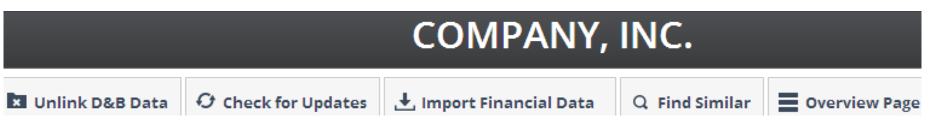
New Features and Pertinent Changes for Version 3.1.1.4

Feature	Description
Marketability Filter	Users can now access "Non-Marketable" company and person records that were previously not exposed in Simple Search and Company Overview pages. Users can filter search results based on the marketability status of company or person records.
Enhancements to the Industry Panel on the Company "Quick Look" page	The user can now navigate directly to the "Quick Look" page for a company's primary industry.
Company Address now displayed in BAL People Results	On the BAL People Results page, the company's address is now present in the Company column of each "person" result.

New Features and Pertinent Changes for Version 3.1.1.3

Feature	Description
Support for Outlook	D&B360 customers who use Microsoft Dynamics within Outlook can access D&B 360 features from within Outlook's CRM interface. The requirements for this include Windows 7, IE v9 and v10, Outlook 2010, and CRM 2011 with Rollup 15. For configuration requirements, see Optimized Configuration for CRM Version 3.1. Refer to the D&B360 User Materials for instructions.
Internet-Facing Deployment	IFD configuration is supported for Microsoft On Premise Customers.

New Features and Pertinent Changes for Version 3.0.1.4

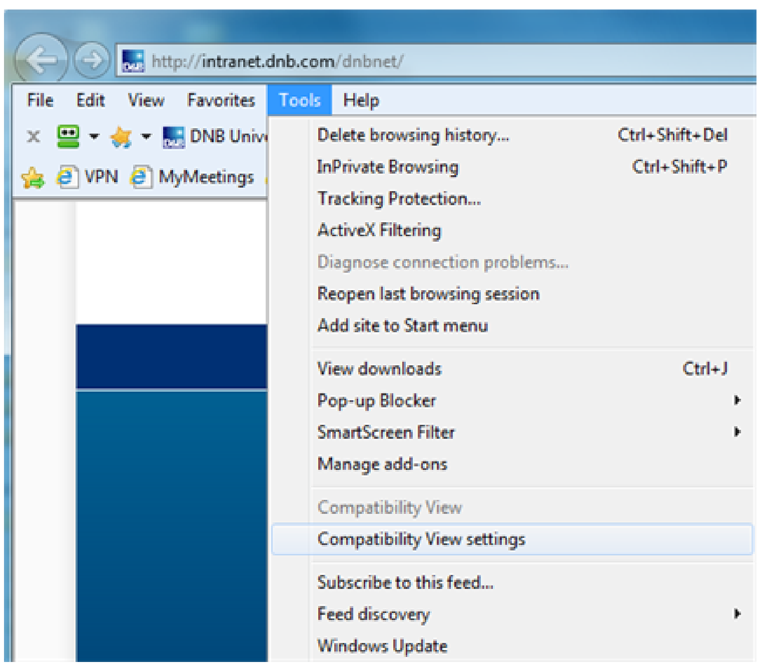
Feature	Description
Employee Numbers for Competitors	On the Competitor tab for a company, users can view the number of employees for each competitor. 
D&B360 Logo	The D&B360 logo displays on all D&B360 user interface windows, including the mini overview screens that display in the CRM window D&B360 area.
Find Similar available on for Leads	In addition to the Find Similar button that displays on the Account window for a company you've added as an Account, the Find Similar button displays on the Lead window for a company that you've added as a Lead. 
Unlink D&B Data button	The button for unlinking D&B data for Accounts, Leads, and Contacts, is labeled Unlink D&B Data and displays in the CRM window, D&B360 area, mini screen. 
Asynchronous Imports	For Build A List and simple Company and People searches, you can add up to 1000 records to your CRM. These imports include importing up to 1000 Companies as Accounts, Companies as Leads, People as Contacts, and People as Leads. When D&B360 adds multiple records in this way, they are imported asynchronously, which allows multiple records to be imported simultaneously and without interrupting other processes.
Role Configuration	Administrators can configure which of the eight available privileges they want to allow for each user. This task is done in the Settings window, Role Configuration tab. For more information, refer to the D&B360 User Materials.

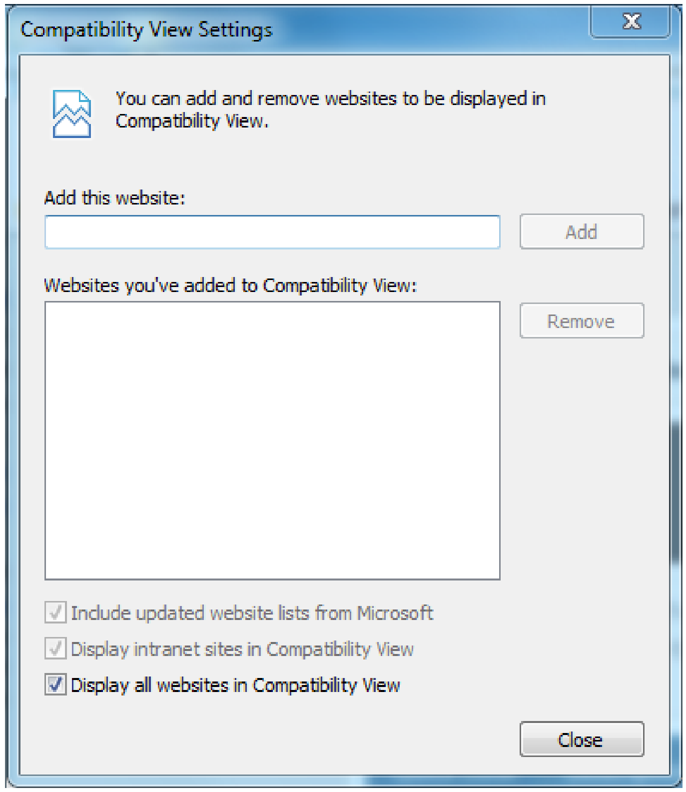
Common Configuration Issues

Feature	Issue	Description
CRM Feature Integration	Missing D&B360 Company field	For this field to display, you need to configure the CRM. D&B Company is a custom field that you need to add to the Account and Lead forms. Refer to the MSD CRM documentation on how to add Account and Lead forms. For more information, refer to the D&B360 Installation Guide.
	Phone number does not display	The phone number imported into the CRM might not display because of the way the Account form is configured. You might need to add the field **Address Phone** to the Account form. Refer to the D&B360 Installation Guide for information on how to add fields to a form. Alternatively, for the phone number to display in the Address area, you can change from the Account view to the Information view. The phone number also displays in the **D&B360** area.

Known Issues for Version 3.0 to 3.1.1.4

The following issues are expected in D&B360 Release 3.0 to 3.1.1.4. For most of these issues, a workaround has been included.

Feature	Issue	Description	Resolved On Date/Release
IE 9 Compatibility	Blank Page	In IE 9, when you click certain links to Company or Person detail pages, a new blank screen appears if the browser's "Compatibility View Settings" have been configured. The affected pages are the ones that are opened by the following links: • Clicking on a Company Link in a BAL Company Results Page • Clicking on a Person or Company Link in a BAL Person Results Page • Clicking on the "Overview Page" button in the DNB360 Company "Mini-Screen" in a CRM Account or Lead Page • Clicking on the "Overview Page" button in the DNB360 People "Mini-Screen" in a CRM Contact or Lead Page You can change the IE9 Compatibility View settings by selecting: **Tools>Compatibility View Settings**. 	

Feature	Issue	Description	Resolved On Date/Release
		 If any of the checkboxes in this screen are checked, particularly "Display all websites in Compatibility View", this behavior may occur. If you experience this issue, please uncheck these settings.	
CRM Integration Feature (CRM 2013 with IE 9 only)	Incorrect page opens	In IE 9, if you navigate to a linked CRM Account, Lead, or Contact page from within a DNB360 page (by clicking the "duplicate" icon and selecting a CRM Account, Lead, or Contact), performing an update via the "Check for Updates" feature will successfully update the CRM record, but will take you to the D&B360 search screen instead of refreshing the current page.	
Outlook Integration	Inconsistent Linking to D&B360 windows	When you click a link from some D&B360 windows, they open either within Outlook or in a new IE window rather than consistently opening within Outlook.	
	New window displays after data merge	When using Outlook for MSD CRM On-Demand, after you merge data for accounts, leads, or contacts, a new blank form window opens. The workaround is to close the window, then find and reopen the item to see the merged data.	

Feature	Issue	Description	Resolved On Date/Release
MS IFD Configuration	Linking D&B data	This issue applies only to Microsoft IFD Configuration. When you link D&B data to an existing account, a brief timeout error displays before the account is successfully updated with D&B data.	
CRM Feature Integration	D&B association Lead	When you add a Lead through association, the description is not added in the CRM. However, you can see the description on the Company Overview window.	
People Search	Account Indicator	When you run a People Search and add a Contact from the results, the Account Indicator for the corresponding company does not immediately update. However, the account is created and associated to the Contact. Refresh the results page to correctly display the duplicate icon.	
Build A List	Employees	The Employee column sorting is not functional in this release.	

Issues Resolved in Version 3.1.1.4

Issue	Description
HTML Tags displaying in description fields	HTML tags no longer incorrectly display in the description field of Lead windows.
Credit Check: Inconsistent credit message	The credit check message when you download a Contact is now consistent and displays with correct authentication of credits. Credits are charged correctly when a new premium contact is downloaded.
Missing data in the D&B360 Company data table	Data is no longer missing in the D&B360 window including Industry, mailing address information, and number of family members.
D&B Association requires closing and reopening (CRM 2011 only)	After you link a CRM contact, you no longer need to click **Check for Updates** and go through the merge process again for CRM to update the phone and email address. This situation applied only to Contact and Leads that associated with new D&B premium contacts.
Employee and Sales	Employee and Sales revenue now display in the match results.
Phone number (CRM 2013 only)	Company phone numbers are now correctly imported in the CRM.
Filtering	In a People search, when you filter by **Has Neither Email/Phone** the Results count is updated, and the results display correctly.

Optimized Configuration for CRM Version 3.1

Product	D&B360 for CRM MS Dynamics - On-Premise CRM 2011	D&B360 for CRM MS Dynamics - On-Demand CRM 2013	D&B360 for CRM MS Dynamics - On-Premise CRM 2013
Vendor	Microsoft	Microsoft	Microsoft
Platform	MS Dynamics	MS Dynamics	MS Dynamics
Location	Customer Premise	Cloud	Customer Premise
D&B360 Release	3.1.1.3	3.1.1.3	3.1.1.3
CRM Configuration	Active Directory and IFD	N/A	Active Directory and IFD
Email Integration	Outlook 2010 (Rollup 15 , IE 9 or IE 10)	Outlook 2010 (IE 9 or IE 10)	TBD
Latest CRM patch / Rollup version supported	Rollup 14, Rollup 15, Rollup 16	Orion	TBD
In addition to the Requirements CRM Requirements	CRM connectivity to a cloud-based 360 UI agent	N/A	TBD
While several configurations are expected to work with D&B360, D&B has tested the following configurations and certifies compatibility.			
Operating System	Certified Browsers (*Indicates limited testing)	Certified Browsers (*Indicates limited testing)	Certified Browsers (*Indicates limited testing)
Windows 7	IE 8, IE 9, Chrome 29-38*, Firefox 23-26*	IE 8, IE 9, Chrome 29-38*, Firefox 23-26*	TBD
Windows 8	IE 10*	IE 10*	TBD
Mac	Safari 6.0.5*	Safari 6.0.5*	TBD

Dun & Bradstreet
103 JFK Parkway
Short Hills, N.J. 07078

www.dnb.com