



D&B360 Release Notes for SAP CRM v2.3 and 2.3.1

April 2013

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

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New Features and Pertinent Changes

New Features and Pertinent Changes for Version 2.3.1

Note: Any customers who are using a service pack earlier than SP 10 need to install the "SAP Note 1587860" before they install D&B360 v2.3.1.


Feature	Description
Change History for Accounts	<p>Changes to the D&B table for the Account window are now listed in the D&B360 Change History table. Changes to the Account table are now listed in the CRM Change History table.</p> <p>You can see changes after you:</p> <ul style="list-style-type: none"> • Create a new account using D&B360. • Add D&B data to an existing account. • Change an existing account's D&B data. <p>The New Value column will display ***Created*** after a change has been implemented.</p>
Contact Credits	A message now displays to inform you of the exact number of contact credits that will be used if you proceed.
Change to Spreadsheet Export	When you use the export to spreadsheet feature from the D&B360 View window D&B360 Family Tree Query and Family Tree Hierarchy tabs, or from D&B360 Build a List window company searches, the spreadsheet now displays the existing account indicator.
Employee Responsible feature configurable	In the D&B Administration window, System Settings, D&B Import Options area, an administrator can select Enable Assignment for Employee or Enable Assignment of Role . This specifies whether or not to allow D&B360 to assign the employee responsible feature.
Configuring User Access to D&B360 Features	Administrators can now create user roles according to user needs and logical groupings. If an Administrator wants to set limitations to user actions that apply to more than one user, he or she can create a Role with these parameters and assign users to that Role. For detailed information about this feature, see the next section, <i>Configuring User Access to D&B360 Features</i> .

Feature	Description
Change History for Accounts	<p>Changes to the D&B table for the Account window are now listed in the D&B360 Change History table. Changes to the Account table are now listed in the CRM Change History table.</p> <p>You can see changes after you:</p> <ul style="list-style-type: none"> • Create a new account using D&B360. • Add D&B data to an existing account. • Change an existing account's D&B data. <p>The New Value column will display ***Created*** after a change has been implemented.</p>
Contact Credits	<p>A message now displays to inform you of the exact number of contact credits that will be used if you proceed.</p>
Change to Spreadsheet Export	<p>When you use the export to spreadsheet feature from the D&B360 View window D&B360 Family Tree Query and Family Tree Hierarchy tabs, or from D&B360 Build a List window company searches, the spreadsheet now displays the existing account indicator.</p>
Employee Responsible feature configurable	<p>In the D&B Administration window, System Settings, D&B Import Options area, an administrator can select Enable Assignment for Employee or Enable Assignment of Role. This specifies whether or not to allow D&B360 to assign the employee responsible feature.</p>
Configuring User Access to D&B360 Features	<p>Administrators can now create user roles according to user needs and logical groupings. If an Administrator wants to set limitations to user actions that apply to more than one user, he or she can create a Role with these parameters and assign users to that Role. For detailed information about this feature, see the next section, <i>Configuring User Access to D&B360 Features</i>.</p>

Configuring User Access to D&B360 Features

When an Administrator enables or disables group authorizations, users will have corresponding access either at the Group level or only Button-level access.

- For Accounts with D&B360: Administrators can set Buttons/Access control for Create Accounts, Search Accounts, Remove Accounts, and Update Accounts.
- For Contacts with D&B360: Administrators can set Buttons/Access control for Create Contacts, Search Contacts, Remove Contacts, Merge Contacts, and Update Contacts.

If an Administrator disables a feature in a Role, when users assigned to that role try to use that feature, a SAP disabled message displays on the related window . The user can click the message to get more information.

Examples:

If you want to create a Role for an Account group, you can specify these options:

- 001 Accounts D&B360 Contacts Button
- 002 Accounts D&B Look-A-Like Button
- 003 Accounts Change Button
- 004 Accounts Remove Button
- 012 Accounts Link - Company Search Add
- 014 Menu D&B Accounts
- 015 Accounts Button FTQ – Search
- 016 Accounts Button FTQ - Create
- 017 Accounts Button FTH - Search
- 018 Accounts Button FTH – Create
- 022 Accounts D&B360 View
- 023 Accounts D&B360 Industry
- 024 Accounts D&B360 Financials
- 025 SAP Account Search Navigation

You might name the previous role /DNB/ACCOUNTS. The users that you assign to this role will have access only to the specified options.

If you want to create a Role for a Contact group, you can specify these options:

- 008 Contacts Create Button
- 009 Contacts Merge Icon
- 010 D&B Contacts Menu
- 026 SAP Contact Search Navigation
- 027 Contacts with auto Account

You might name the previous role /DNB/CONTACTS. The users that you assign to this role will have access only to the specified options.

If you want to create a Role for both Accounts and Contacts options, you can specify these options:

- 001 Accounts D&B360 Contacts Button
- 002 Accounts D&B Look-A-Like Button
- 003 Accounts Change Button
- 004 Accounts Remove Button
- 005 BAL Button Create
- 006 BAL Tab People Result
- 007 BAL Tab Company Result
- 008 Contacts Create Button
- 009 Contacts Merge Icon
- 010 D&B Contacts Menu
- 011 BAL Link - Company overview Add
- 012 Accounts Link - Company Search Add
- 014 D&B Accounts Menu
- 015 Accounts Button FTQ – Search
- 016 Accounts Button FTQ - Create
- 017 Accounts Button FTH - Search
- 018 Accounts Button FTH – Create
- 019 Accounts Button Competitors
- 020 Accounts Button Competitors - Create
- 021 Accounts Link Add D&B Data
- 022 Accounts D&B360 View
- 023 Accounts D&B360 Industry
- 024 Accounts D&B360 Financials
- 025 SAP Account Search Navigation
- 026 SAP Contact Search Navigation
- 027 Contacts with auto Account

You might name the previous role /DNB/ACCOUNTS_AND_CONTACTS. The users that you assign to this role will have access only to the specified options.

Combining the previous roles is not possible. You cannot have /DNB/ACCOUNTS and /DNB/CONTACTS because they belong to the same authorization object. For this reason, you must create the role /DNB/ACCOUNTS_AND_CONTACTS.

For more detailed information about SAP role maintenance and changing role authorizations, refer to the *SAP CRM Administration Guide*.

Note: This feature was not tested on the Netweaver framework.

New Features and Pertinent Changes for Version 2.3

Category	Feature	Description
Rest of World	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.
Account and Contact Data	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 confirmation 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.
	Employee Responsible	When the confirmation message displays, you can specify which employee is responsible.
	Business Partner and Contact links	When viewing results, a new Business Partner column provides a link to the Corporate Account window for that contact. A new Contact ID column provides a link to a contact's information.
	Improved Duplicate Account and Contact icons	The triangle icons for duplicate accounts and contacts are easier to see and identify.
	Improved Navigation	You can navigate to the D&B360 search windows for accounts and contacts directly from the native search. This allows an easy transition from an internal search to D&B360 Account searches and D&B360 Contact searches.

Category	Feature	Description
Importing Data	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.
Exporting Data	Export Displayed Company Results from Build A List	In the Build a List results window, you can export the lists of companies that display to your local computer directory as a .csv file.
	Export Family Tree Results	You can download family tree hierarchy results to an Excel or other spreadsheet program and analyze them offline.
Other Enhancements	Dynamic Help	You can display online Help about an item on the user interface by clicking Help .
	Access to D&B360 Training registration site	D&B360 training is now available from the About D&B360 window.
	Change to Batch Jobs	The weekly option for running a Batch Refresh job is no longer available. You can also customize account selection logic in the IDocs account for batch match jobs.
	Full D-U-N-S Number	This feature is available through your sales representative and allows you to view the full D-U-N-S number before you download an account.

Known Issues

There are no known issues for version 2.3.1 or 2.3.

Resolved Issues

Resolved Issues for Version 2.3.1

These are described in the *New Features and Pertinent Changes for Version 2.3.1* section.

Resolved Issues for Version 2.3

Issue	Description
Refresh Button	In the Account window, D&B 360 Account Details area, the Refresh button now displays correctly after an account is refreshed.
Postal Code Limitation	Postal codes with more than 7 numeric characters, such as for Japan, now process correctly.
Commas and Periods	In the Stare and Compare window fields, you can now use commas and periods without errors occurring.
Archive Accounts in New Batch Jobs	New Batch jobs no longer incorrectly include accounts set for Archive.
Zip Code Format	In the D&B360+ window, zip codes are now formatted correctly.
Contact Function Field	In the Contact window Work area, the Function field now correctly populates the contact's title information.

Changes to Product Documentation for Version 2.3

Changes to the Administration Guide

- Revisions have been made to the instructions for installing the Informatica Cloud Secure Agent.
- New section on ROW and changes to configuring ROW options for users
- 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 enhanced user interface windows
- 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