


D&B360 Release Notes for SAP CRM v3.1 to 3.1.13

D&B360 for CRM version 3.1 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 Materials. For installation and deployment instructions, refer to the D&B360 Installation Guide for SAP.

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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.
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.

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.
Account: Incorrect Phone Number Format	Phone numbers are now correctly formatted in the Account display for SAP V3.0.
Family Tree: Missing Fields in Export	The "Active Account" and "Active Lead" fields now display in the Family Tree Export.

Issue	Description
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
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	<p>Role Configuration has been redesigned to be easier to use and more effective.</p> <ul style="list-style-type: none"> • 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	Fixed the issue where the duplicate account modal would not load initially after a transactional import from the Company People list.
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.

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.
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
Financial Data Import	Importing financial data causes 400 error.	Importing financial data causes 400 error.	March 19, 2015, Release 3.1.11

New Features and Pertinent Changes for Version 3.1.1.9

Feature	Description
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.
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.

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
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
SAP Cloud for Customer	Added support for SAP Cloud for Customer.
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. <div data-bbox="451 911 1068 1257" data-label="Image"> </div>
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.

Feature	Description
Build a List Export File Company Additional Fields	<p>The following fields have been added to the Build a List Company export file layout:</p> <ul style="list-style-type: none"> • Total Employees • Employees at This Location • Primary Industry • Primary US SIC Code • Primary SIC Description • Primary US NAICS Code • Primary NAICS Description • Company Fax
Build a List Export File Person Additional Fields	<p>The following fields have been added to the Build a List Person export file layout:</p> <ul style="list-style-type: none"> • 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.

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 screen credentials	The credential configuration on the Settings Admin page have been updated to require a current password when changing the credentials.
Error Page	A new error page displays when 360 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.	<p>Premium Contact credit is deducted when the Premium Contact is linked, even though the direct information is not exposed.</p> <p>Subsequent imports of the Premium Contact's information (via D&B Refresh) will pop a credit modal, but additional credits will not be charged.</p> <p>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.</p>	September 18, 2014 / V3.1.1.7

Known Issues for Version 3.1.1.4

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

Feature	Issue	Description	Resolved On Date/Release
Navigation from New Tabs	Links are not active in pages opened in their own window or tab.	<p>In DNB360 pages that are opened in their own window or tab, the links in the page that point to CRM Account or Contact pages will not be active. Specifically, these are the links that are displayed when the user clicks on a duplicate icon for a Company or Person.</p> <p>In DNB360, a new tab is automatically launched when the user clicks on the following links:</p> <ul style="list-style-type: none"> • Company and Person Links in BAL search results • Company and Person Links in unlinked Account and Contact search screens • Company and Person Links in linked Account and Contact mini screens 	
 <p>The screenshot shows a window titled 'Accounts' with a 'Close' button in the top right corner. The window displays the D-U-N-S# 687967554. Below this, there is a table with two columns: 'Account Name' and 'Owner'. The 'Account Name' cell contains 'Samsung Electronics Co., Ltd.' and 'Seoul, KOREA, REPUBLIC OF'. The 'Owner' cell contains 'QA Tester'.</p>			
Add D&B360 data to Accounts and Contacts	Native association feature for Accounts and Contacts is not fully functional	The ability to add D&B360 data to Accounts and Contacts is still being improved. Some companies cannot be merged, and some merge updates are not immediately reflected in the CRM	

Optimized Configuration for CRM Version 3.1

[caption]

Product D&B360 for CRM
SAP - On-Premise

Vendor	SAP America
Platform	SAP
Location	Customer Premise
D&B360 Release	3.1.4
CRM Configuration	SSO
Email Integration	N/A
Latest CRM patch / Rollup version supported	SAP 7.0 EHP3 SP3
In addition to the Requirements CRM Requirements	N/A
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)
Windows 7	IE 8, IE 9, Chrome 29-38, Firefox 23-26
Windows 8	IE 10*, IE11*
Mac	Safari 6.0.5*



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