Influencing SAP: Customer Connection
Delivery Call for Focus Topic CRM 2015

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Customer

SAP

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Agenda

- Recap of project timeline and approach

- Overview & demo of delivered improvements

- Overview of improvements in development

- Next Steps

Customer Connection Focus Topic project
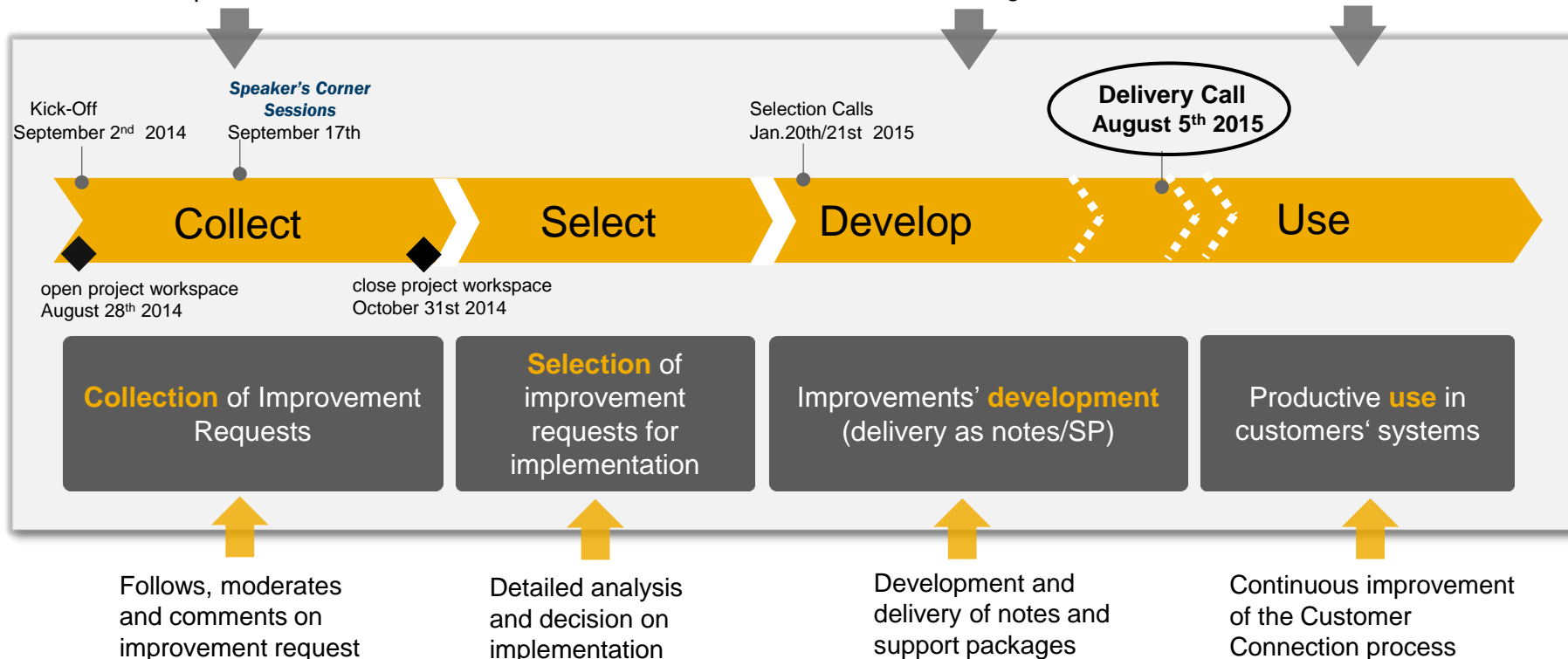## **CRM** 2015

Customers

Submit improvement requests, **subscribe** for IR prioritization

Provide feedback in development & support testing

Provide feedback on productive use

Kick-Off
September 2nd 2014

Speaker's Corner Sessions
September 17th

Selection Calls
Jan.20th/21st 2015

Delivery Call
August 5th 2015

Collect	Select	Develop	Use

open project workspace
August 28th 2014

close project workspace
October 31st 2014

Collection of Improvement Requests

Selection of improvement requests for implementation

Improvements' **development** (delivery as notes/SP)

Productive **use** in customers' systems

Follows, moderates and comments on improvement request

Detailed analysis and decision on implementation

Development and delivery of notes and support packages

Continuous improvement of the Customer Connection process

SAP **Project Team**

Improvement Request overview:
14 delivered improvements - WebUI Framework

ID	Title	Improvement Note	Lowest CRM Release
D6913	cancel search button should leads you back to search	2155098	7.0 EhP1
D6772	Timed out CRM does not show it is already timed out	2119701	7.0 EhP2
D7179	Enable navigation links to be opened within a new tab/browser	2135300	7.0 EhP2
D6770	Prominently Display the System ID and Client on the CRM WebUI	2139001	7.0 EhP2
D7356	Sequencing AND defaulting of drop down lists via configuration tool or something	2193909	n/a
D7068	Smart Input Help / Smart Value Help / Auto Complete Personalization Options	2149887	7.0 EhP2
D6773	Saved Search should save the sorting against multiple columns	2131434	7.0 EhP1
D7350	E-Mail editor: Default font can be changed ("times new roman")	2161387	7.0 EhP1
D6893	Change tab order for search criteria	2165904	7.0 EhP1
D7190	Common Field Labeling	2133755	n/a
D7386	UI copy configuration does not copy the buttons	2145324	7.0 EhP1

Improvement Request overview:
delivered improvements - WebUI Framework

ID	Title	Improvement Note	Lowest CRM Release
D7358	Service Configurator - validation of radio buttons (AET fields)	2145325	7.0 EhP1
D6911	SAP CRM save sorting for the session	1855398	7.0 EhP1
D7218	WebUI: Use BPath expression for tag attributes	2158293	7.0 EhP1

Cancel Search

Improvement Request: D6913
cancel search button should leads you back to search
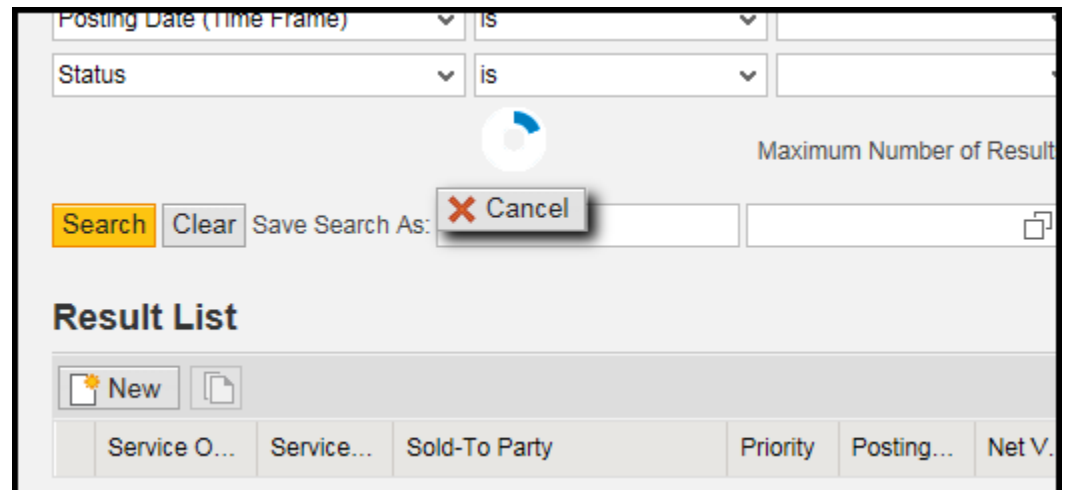
Improvement:

• When cancelling a long running search, the user shall be redirected to the original seach page.

Status:

• Delivered for SAP CRM >= EhP1 via SAP Note 2155098

Timeout Notification

Improvement Request: D6772
Timed out CRM does not show it is already timed out

Improvement:

- The user will receive a notification prio to the system timeout
- An optional clock in the header will show the remaining session time

Status:

- Delivered for SAP CRM >= EhP2 via SAP Note 2119701
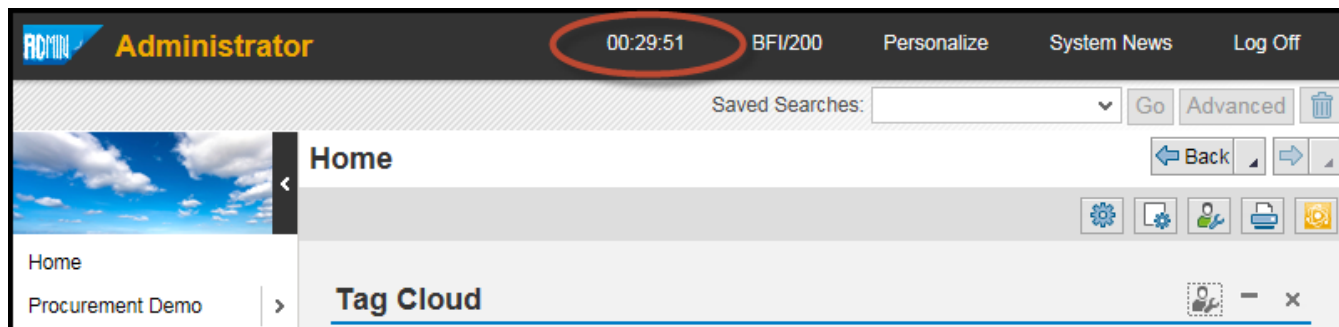
Open links in a new browser tab

Improvement Request: D7179
Enable navigation links to be opened within a new tab/browser

Improvement:

- The user should be able to open links in new browser tabs.

Status:

- Delivered for SAP CRM >= EhP2 via SAP Note 2135300

Result List

	New		
	Business Role		Description
	AXT		Application Enhancement Tool
	UIF		UI Framework Test Role Demo
	TEST_RSR		Admini&&&strator

Open
Open in new tab
Open in new window
Save target as...
Print target

KaYboard Shortcut 2
<hello
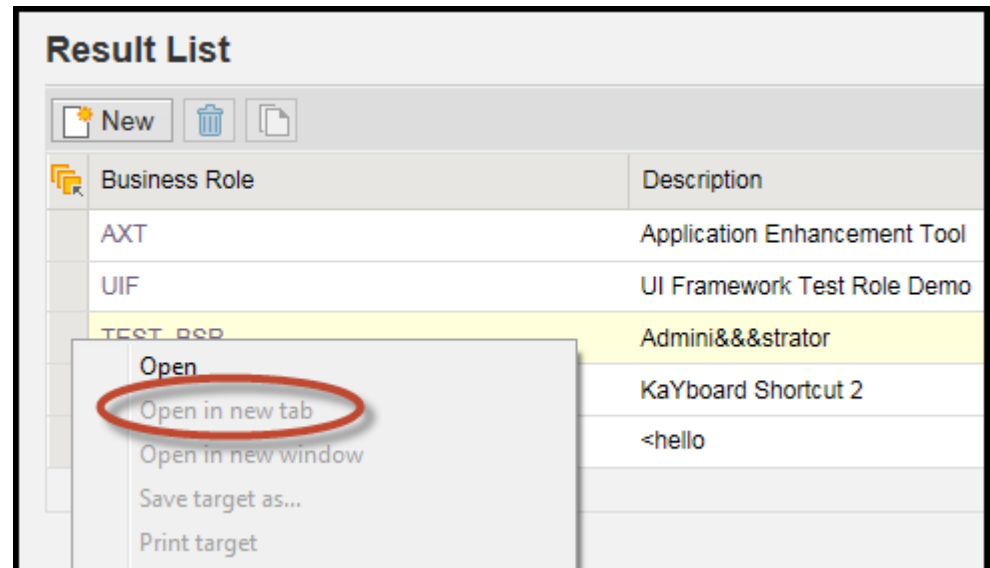
System ID/Client in Header

Improvement Request: D6770
Prominently Display the System ID and Client on the CRM WebUI

Improvement:

• Display the system ID and client in the CRM Header. Display connected system as well (*e.g.* ECC).

Status:

• Delivered for SAP CRM >= EhP2 via SAP Note 2139001
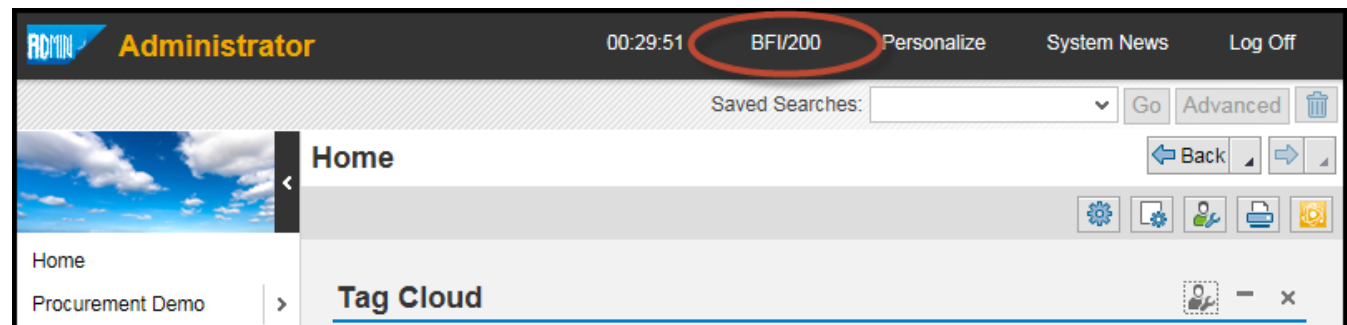
Default Value for Drop Down Lists

Improvement Request: D7356
Sequencing AND defaulting of drop down lists via configuration tool or something

Improvement:

• Provide a way for the power user to configure the default value of a drop down list.

Status:

• Consulting Improvement Note 2193909
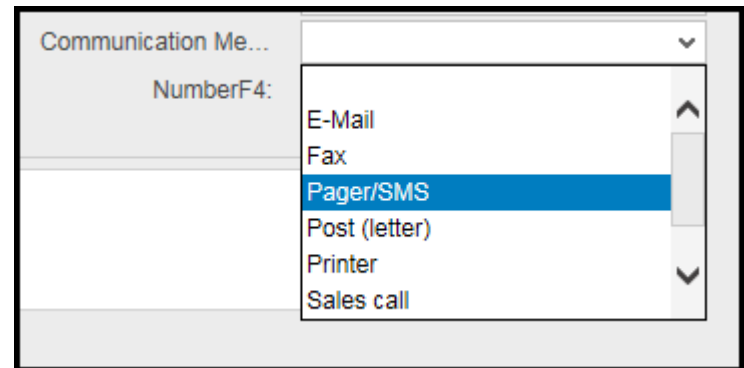
Smart Value Help Personalization

Improvement Request: D7068
Smart Input Help / Smart Value Help / Auto Complete Personalization Options
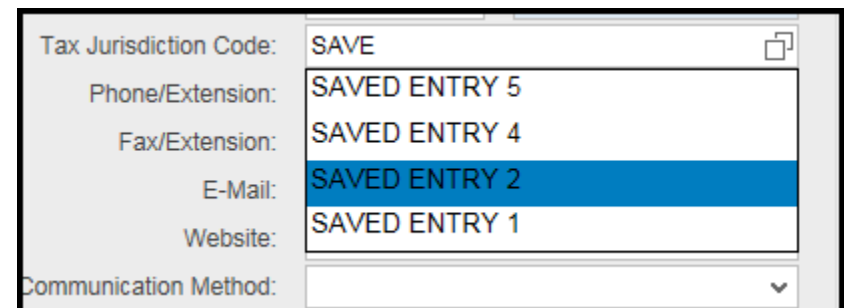
Improvement:

- Provide the user the option to turn on either the Saved Entries or the Smart Value Help features.
- Provide the user the option to delete previously Saved Entries.

Status:

- Delivered for SAP CRM >= EhP2 via SAP Note 2149887

Tax Jurisdiction Code:	SAVE
Phone/Extension:	SAVED ENTRY 5
Fax/Extension:	SAVED ENTRY 4
	SAVED ENTRY 2
E-Mail:	SAVED ENTRY 1
Website:	
Communication Method:	

Multi Column sorting

Improvement Request: D6773
Saved Search should save the sorting against multiple columns

Improvement:

- Allow the user to sort against multiple columns in a table.
- Saved Searches should also save multiple column sorting.

Status:

- Delivered for SAP CRM >= EhP1 via SAP Note 2131434

Rich Text Editor: set a default font

Improvement Request: D7350
E-Mail editor: Default font can be changed ("times new roman")

Improvement:

• Provides a way for the customer to set a default font system wide for the Rich Text Editors used in CRM.

Status:

• Delivered for SAP CRM >= EhP1 via SAP Note 2161387

Quickly navigate between Search Criteria

Improvement Request: D6893
Change tab order for search criteria

Improvement:

- Allow the user to quickly navigate between Search Criteria values rather than tabbing over Search Criteria and Search Operators before being able to enter a value.

Status:

- Delivered for SAP CRM >= EhP1 via SAP Note 2165904

Search Criteria

	Search For:	Partner by Partner Data	⌄		
Business Partner ID	⌄	is	⌄	1231456	✕ 🗇 ⊕ ⊖
Company	⌄	is	⌄		🗇 ⊕ ⊖
Company	⌄	is	⌄		🗇 ⊕ ⊖
				Maximum Number of Results:	100

Common field labeling

Improvement Request: D7190
Common Field Labeling

Improvement:

• Provide a comprehensive user guide on how to change labels in CRM (via Configuration, Design Layer, OTR etc…)

Status:

• Consulting Improvement Note 2133755

Copy OVP Button Configuration

Improvement Request: D7386
UI copy configuration does not copy the buttons

Improvement:

• When copying an Overview Page Configuration, the corresponding Button Configuration should be copied as well.

Status:

• Delivered for SAP CRM >= EhP1 via SAP Note 2145324

Validation of Mandatory Radio Buttons

Improvement Request: D7358
Service Configurator - validation of radio buttons (AET fields)

Improvement:

• As a radio button group can be initial (no radio button selected), it should be possible to flag this element as mandatory.

Status:

• Delivered for SAP CRM >= EhP1 via SAP Note 2145325

SAP CRM save sorting for the session

Improvement Request: D6911
SAP CRM save sorting for the session

Improvement:

- This new development enables Personalization and Configuration for sorting, filtering and fixed columns for tables across the Web Client UI.

Status:

- Delivered for SAP CRM >= EhP1 via SAP Note 1855398 (SP only)

Use BPath expression for tag attributes

Improvement Request: D7218
WebUI: Use BPath expression for tag attributes

Improvement:

• The Global Tag Attributes should support Bpaths

Status:

• Delivered for SAP CRM >= EhP1 via SAP Note 2158293

Improvement Request overview:
7 improvements in development - WebUI Framework

ID	Title	Planned Delivery[*1]	Lowest CRM Release
D7183	Enable customer defined help documents per screen	Q3 2015	7.0 EhP1
D6837	Design layer: ability to redefine GET/SET methods of context node	Q4 2015	7.0 EhP3
D6778	Bluecrystal (Fiori-like) theme for CRM WebUI	Q3 2015	7.0 EhP2
D6925	Option to display a field as loading bar / progress indicator	Q3 2015	7.0 EhP1
D6745	SAPGUI Dynpro/screen PBO-like influence for fields	Q4 2015	7.0 EhP1
D7339	Unique/direct link (URL) to create a Service Order or display the search result of a Saved Search	Q3 2015	7.0 EhP1
D7328	Search result list should show recently used objects	Q3 2015	7.0 EhP1

[*1] only planned - **no** commitment concerning release dates

Improvement Request overview:
29 delivered improvements – Applications (1)

ID	Title	Improvement Note	Lowest CRM Release
D6722	My Open Tasks on Home Page customizable	2124939	7.0 EhP1
D6981	Improve Business Partner search performance	2132825	7.0 EhP3
D6719	Create new contact person while maintaining an activity	2124940	7.0
D6836	Business partner merge: make it work for AET tables	2104164	7.0 EhP1
D7334	Show attachment symbol in result lists and assignment blocks	2141594	7.0 EhP1
D7355	Filter by Transaction Type in Interaction History-You can only add an admin filter on Tran Cat	2104946	7.0 EhP1
D6982	Drag and Drop attachment functionality for IC Email	2127681	7.0 EhP1
D7351	E-Mail editor: More comfortable Email functionality	2173692	7.0 EhP2
D6901	SAP Contact Center: Optimize View for autoalocation mode Q - result after History Search	2180029	SAP Contact Center 7.0 SP08
D7086	Displaying archived CRM-Data in the IC Webclient	1501341	6.0
D7375	Service Request Management: Enhance Checklist Step Partner Determination	2023386 (simple) 22023352 (decision based)	7.0 EhP1 (simple) 7.0 EhP3 (decision based)

Improvement Request overview:
29 delivered improvements – Applications (2)

ID	Title	Improvement Note	Lowest CRM Release
D7252	Agent Inbox in Classic View does not support Saved Searches	n.a.	7.0
D6720	Ask to delete (archive) person when last relation to organization is deleted	2104152	7.0 EhP1
D6776	Selection for different fact sheets for accounts	2104590	7.0
D6812	Add Partner Functions of Service Requests as Subscribers to Notification Framework	2161849	7.0 EhP2
D6881	CRM Service: make available "reason for status" to service request	2110959	7.0
D7428	Discrepancy in View- Interaction History & Service Request OV	2104955	7.0 EhP2
D6884	Update multiple iObjects by editing common values only one time	2129559	7.0 EhP1
D7140	Fast change of ERP sales document items (LORD interface)	2117218	7.0 EhP1
D1391	Prevent a Service Order from mismatch between Ship-To and iObject	2115697	7.0 EhP1
D6796	Enable Macros with Webservice data in Word templates	2112005	7.0 EhP1

Improvement Request overview:
29 delivered improvements – Applications (3)

ID	Title	Improvement Note	Lowest CRM Release
D6880	Business Partner: mutually exclusive BP roles	2104189	7.0 EhP1
D7251	CRM: "Save and Back" in Surveys	2161433	6.0
D7324	Near me feature for Accounts: Show Accounts on Map	2104728	7.0 EhP3
D6888	Create Service Contracts & Quotes from iBase Search Results	2147945	7.0 EhP3
D6890	Determine Contract Pricing and Discounts, based on iBase location	2106219 (consulting note)	7.0 EhP2
D6891	Copying custom fields from Quotation to Contract	2110739	7.0 EhP2
D7245	automatic refresh for transaction after creating attachments and archiving	2120547	7.0
D7332	Flexible assignment block on Account Overview to show Transactions	2104731	7.0 EhP1

Enable personalization and configuration data retrieval parameters in My Open Tasks

Improvement Request: D6722

Enable personalization and configuration of data retrieval parameters in My Open Tasks.

Improvement:

The personalization button and the configuration of data retrieval parameters is enabled to customize the transaction types which should be visible in "My Open Tasks" assignment block.

Status:
- Delivered for SAP CRM >= 7.01 with SAP Note 2124939
- CRM EHP3 SP09
- CRM EHP2 SP15
- CRM EHP1 SP14

Search by name without sorting result list by account ID

Improvement Request: D6981
Improve business partner search performance.

Improvement:
The performance of searching for accounts by name can be improved. The result list will not be sorted by account ID.

Status:
- Delivered for SAP CRM >= 7.13 SP08 with SAP Note 2132825

Enable a new button to quickly create contact person in partner selection popup

Improvement Request: D6719

Enable 'New' button to quickly create contact person in the dynamic popup of the partner selection.

Improvement:

In the Activity overview page, after having entered an account triggering the partner selection popup, a 'New' button is available in the popup that allows the possibility to quickly create a new contact person.

Status:
- Delivered for SAP CRM >= 7.00 with SAP Note 2124940
- CRM EHP3 SP09
- CRM EHP2 SP15
- CRM EHP1 SP14
- CRM EHP0 SP17
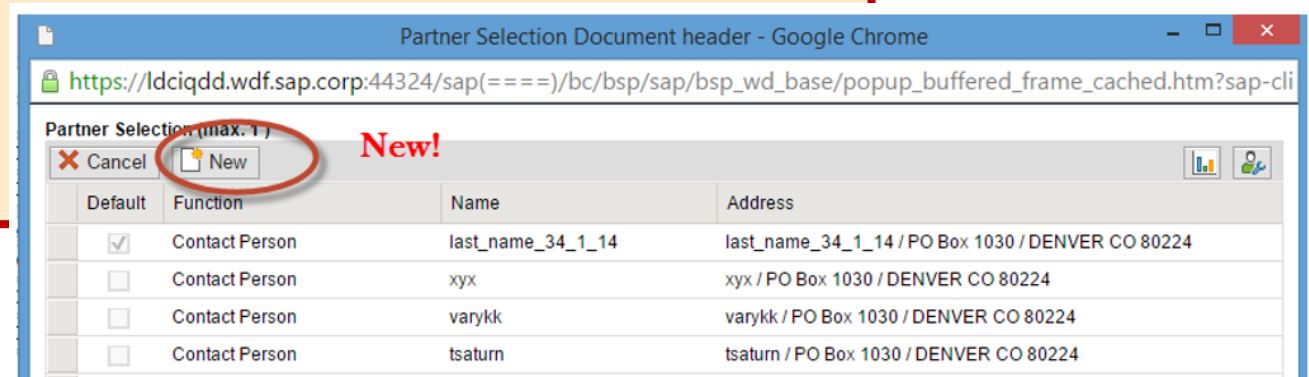
Option to merge the AET table enhancements

Improvement Request: D6836

When merging accounts (BUPA_CLEAR) all enhancements done with AET shall be considered, without additional customer-specific coding.

Improvement:

During a merge the table enhancements for BUT000, sales area data, relationship data are also considered.

Status:

- Delivered for SAP CRM >= 7.01 with SAP Note 2104164
- CRM EHP3 SP10
- CRM EHP2 SP16
- CRM EHP1 SP15

Attachment icon in result lists and assignment blocks

Improvement Request: D7334

Show attachment symbol in result lists and assignment blocks.

Improvement:

Search result lists for transactions like *Activities* or *Service Requests*, some assignment blocks and in the *Interaction History* now can contain an additional column indicating whether an entry contains one or more attachments.

Status:

- Delivered for SAP CRM ≥ 7.01 with SAP Note 2141594
- CRM EHP3 SP09
- CRM EHP2 SP15
- CRM EHP1 SP14

Additional parameters for data retrieval in the "Interaction History" assignment block of the account

Improvement Request: D7355
Filter by Transaction Type in Interaction History.

Improvement:
"Transaction Type" and further parameters are provided for data retrieval in the "Interaction History" assignment block in the "Account" overview page. For making available further data retrieval parameters a BAdI is provided.

Status:
- Delivered for SAP CRM >= 7.02 with SAP Note 2104946
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14
- CRM 7.0 SP17

Data Retrieval Parameters — Clear Parameters

Timeframe	is		
Start Date	is		
Posting Date	is		
Status	is		
Transaction Category	is		
Transaction Type	is		
Partner Function	is		
Partner Function Category	is		
Sales Organization	is		
Distribution Channel	is		
Division	is		
Impact	is		
Urgency	is		
Priority	is		

Drag and drop for attachments of e-mails in the IC

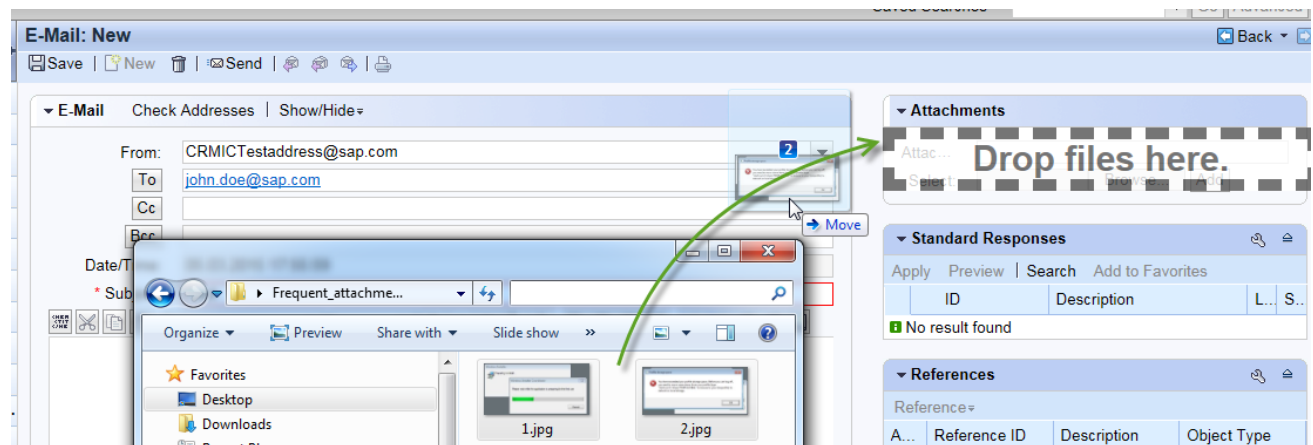**Improvement Request:** D6982

Drag and drop attachment functionality for Interaction Center e-mails.

Improvement:

Users can attach multiple files to e-mails in the IC via drag and drop.

Status:

- Delivered for SAP CRM >= 7.01 with SAP Note 2127681
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14

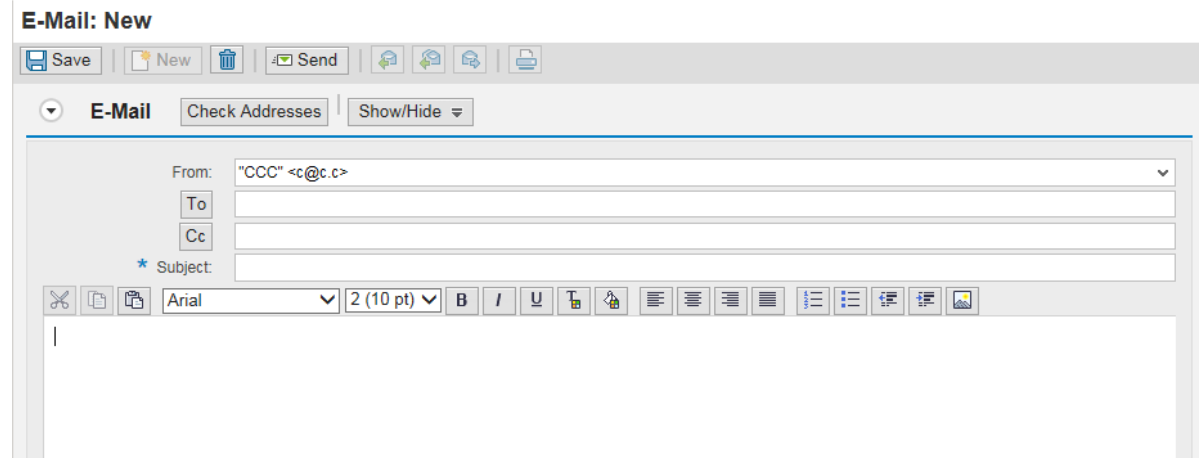# E-Mail editor: More comfortable Email functionality

Improvement Request: D7351
E-Mail editor: More comfortable Email functionality (in IC).

Improvement:

More formatting options with new editor, copy and paste of images.

Status:
- Delivered for SAP CRM >= 7.02 with SAP Note 2173692

Contact search in CDT / new search results view

Improvement Request: D6901
SAP Contact Center: Optimize view for autoalocation mode Q - result after history search.

Improvement:

- For email search in CDT new result fields (subject and agent) are added
- For the search itself the behavior of the search window by allowing it to remember the settings of previous search is improved

Status:

- Delivered in SAP Contact Center Version 7 SP8 see SAP Note:2180029

New search result fields:
- Subject Field
- Agent Field

SAP Interaction Center: Search for Archived documents

Improvement Request: D7086
Displaying archived CRM data in the Interaction Center WebClient.

Improvement:
A new flag in the interaction history screen enables agents to switch from a search in the current business transactions to a search in the business transactions that are already archived.

Status: Delivered for SAP CRM >= 600 with SAP Note 1501341

Partner determination for check list items

Improvement Request: D7375
Service request management: enhance check list item partner determination.

Improvement:
The feature enables the partner determination functionality within checklist items of the simple check list and the decision-based check list.

Status:

- Simple check list
  - Delivered for SAP CRM >= 7.01 with SAP Note 2023386
  - CRM EHP3 SP05
  - CRM EHP2 SP15
  - CRM EHP1 SP14
- Decision-based check-list
  - Delivered for SAP CRM >= 7.13 with SAP Note 2023352
  - CRM EHP3 SP05

Option to archive Contact Person when its last relationship to an account is deleted
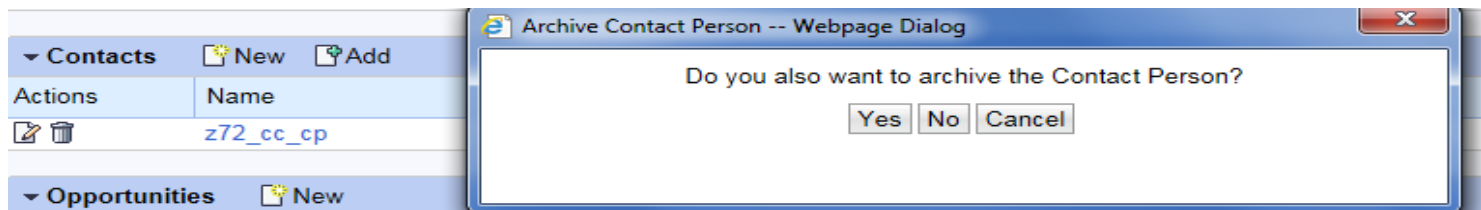
Improvement Request: D6720
Possibility to delete (set archiving flag of) a Contact Person when its last relation to an account is deleted.

Improvement:
When a contact relationship is deleted in the Contacts assignment block, and if the Contact Person is not a contact for any other account, it is now possible for the user to set the archiving flag for the Contact Person.

Status:
- Delivered for SAP CRM >= 7.01 with SAP Note 2104152
- CRM EHP3 SP09
- CRM EHP2 SP16
- CRM EHP1 SP15

Use of multiple PDF fact sheets in account overview page
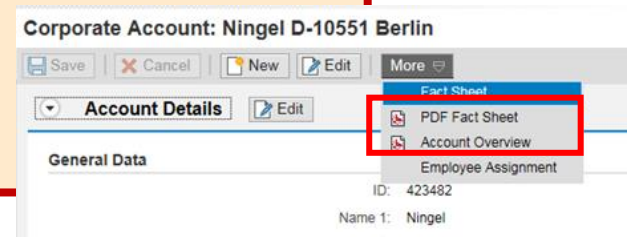
Improvement Request: D6776
Selection for different fact sheets for accounts.

Improvement:
Multiple forms can be entered for each PFCG role in the Customizing transaction SPRO, under Customer Relationship Management -> UI Framework -> UI Framework Definition -> Fact Sheet -> Visibility and Printing. In the "Account" overview page the different PDF factsheets are provided based on this Customizing.

Status:
- Delivered for SAP CRM >= 7.00 with SAP Note 2104590
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14
- CRM 7.0 SP17

Corporate Account: Ningel D-10551 Berlin

Save | Cancel | New | Edit | More

Fact Sheet
PDF Fact Sheet
Account Overview
Employee Assignment

Account Details | Edit

General Data

ID: 423482
Name 1: Ningel

New subscriber type 'Dynamic recipient' for notification framework
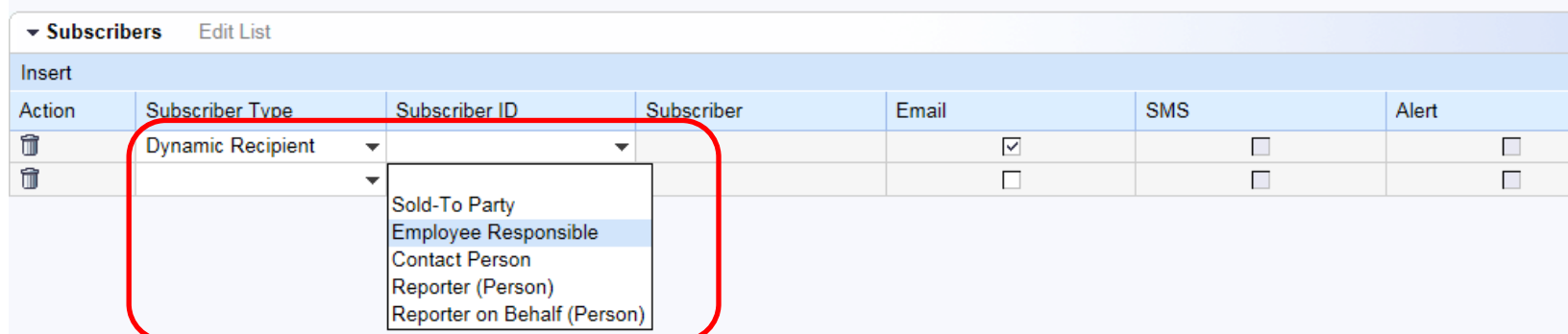
Improvement Request: D6812
Add partner functions of service requests as subscribers to notification framework.

Improvement:

In addition of sending a notification to a fixed entity (User, Organization Unit or a Business Partner), a new subscriber type called 'Dynamic Recipient' is provided. With this, a notification (Email, SMS, CRM alert) is sent to a business partner, which is automatically determined based on the related transaction.

Status:
- Delivered for SAP CRM >= 7.02 SP05 with SAP Note 2161849

Reason for status in service request/service order

Improvement Request: D6881
Introduce a reason status in service request and service order.

Improvement:

Users can set a reason similar to the sales scenarios.

Status:
- Delivered for SAP CRM >= 7.01 with SAP Note 2110959
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14

Consider partner function category "Contact Person" in "Service Requests" assignment block of account
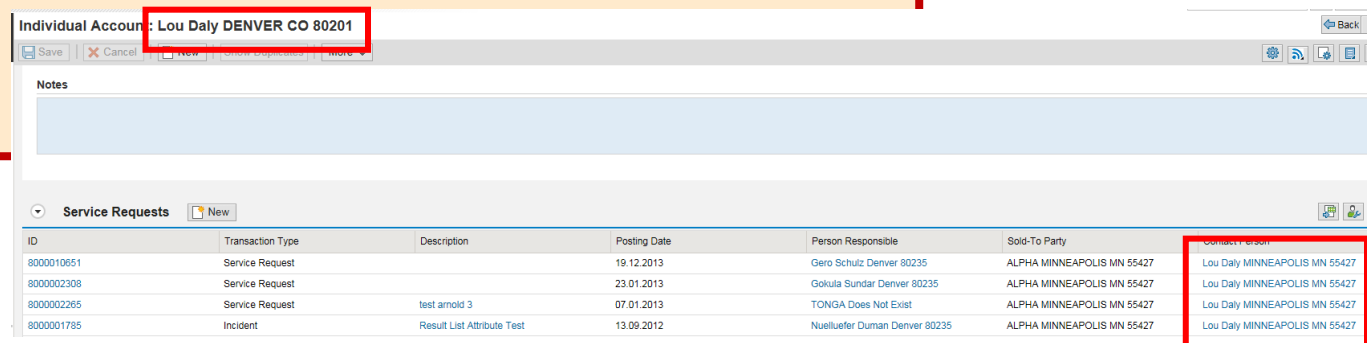
Improvement Request: D7428
Discrepancy in View - Interaction History & Service Request Overview Page (OSS 924345/2014).

Improvement:
The "Service Requests" assignment block in the "Account" overview page also shows transactions in which the account is assigned with a partner function of the category "Contact Person".

Status:
- Delivered for SAP CRM >= 7.02 with SAP Note 2104955
- CRM EHP3 SP08
- CRM EHP2 SP15

Mass change common attributes of installed base components (object type)
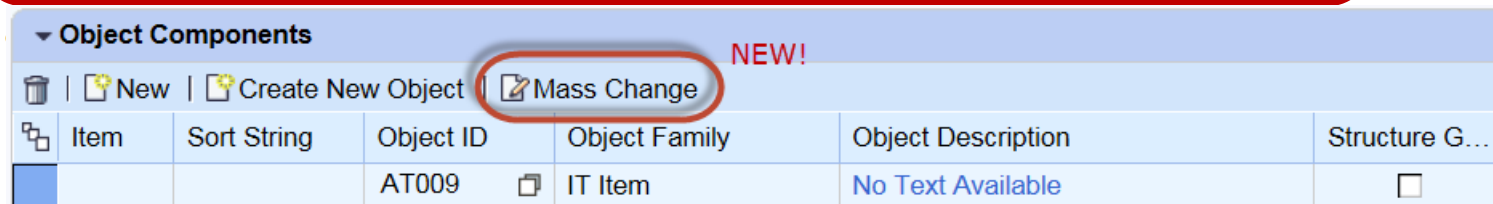
Improvement Request: D6884
Update multiple iObjects by editing common values only one time.

Improvement:

Add a Mass Change button to the Object Components assignment block. The button can be switched on or off in Customizing for different business roles. With this button, you can enable the mass processing of common attributes of multiple selected Installed Base Components (object type). The mass changeable standard fields are Description, Identification, Item, Sort string, other custom fields created with AET.

Status:
- Delivered for SAP CRM >= 7.01 with SAP Note 2129559
- CRM EHP3 SP09
- CRM EHP2 SP16

▾ Object Components				NEW!	
🗑 | 🗋 New | 🗋 Create New Object | ✎ Mass Change					
🔁 Item	Sort String	Object ID	Object Family	Object Description	Structure G...
		AT009 ▭	IT Item	No Text Available	☐

Fast change of plants, rejection reasons and requested delivery dates in ERP sales documents

Improvement Request: D7140
Edit / Fast Change of attributes in ERP sales documents in CRM WebClient UI.

Improvement:
The *Items* assignment block on the business transaction overview page of ERP sales order and ERP quotation is enhanced by new buttons that allow fast (mass) changes for more than one item at the same time.

Status:
- Delivered for SAP CRM ≥ 7.01 with SAP Note 2117218
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14
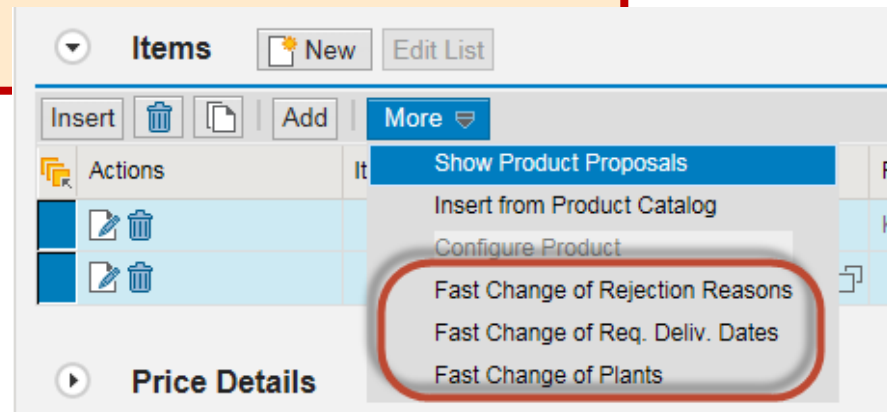
Prevent partner mismatch in service order

Improvement Request: D1391
The partners of the service orders should be compared with the ones maintained in the installed base.

Improvement:
If partners of the service order do not match the partners maintained in the installed Base the user is informed.

Status:
- Delivered for SAP CRM >= 7.01 with SAP Note 2115697
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14

Enable macros with web service data in Word templates

Improvement Request: <u>D6795</u>
<u>Enable Macros with Web service data in Word templates.</u>

Improvement:

When creating a MS word template in SAP CRM, after selecting "Template with Macro", the template can be downloaded to the local disk. The user can design this template by creating a macro, save it as ".docm" document and finally uploads it back to the system to finish the creation.

Status:
- Delivered for SAP CRM >= 7.01 with SAP Note <u>2112005</u>
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14

Mutually exclusive business partner roles

Improvement Request: D6880

Possibility to define which business partner roles are mutually exclusive for the CRM WebClient UI.

Improvement:

Improvement provides the concept of business partner exclusion groups as it was available in SAP GUI for Windows.

Status:

- Delivered for SAP CRM >= 7.01 with SAP Note 2104189
- CRM EHP3 SP01
- CRM EHP2 SP01
- CRM EHP1 SP03

Details BP role CRM000 deleted (CRM007 is valid BP role)

Message Details - Microsoft Internet Explorer

Diagnosis

The BP roles CRM000 and CRM007 are assigned to a role exclusion group and cannot be valid at the same time.

Since the validity period of the BP role CRM000 falls completely within the validity period of the BP role CRM007, the BP role CRM000 is deleted.
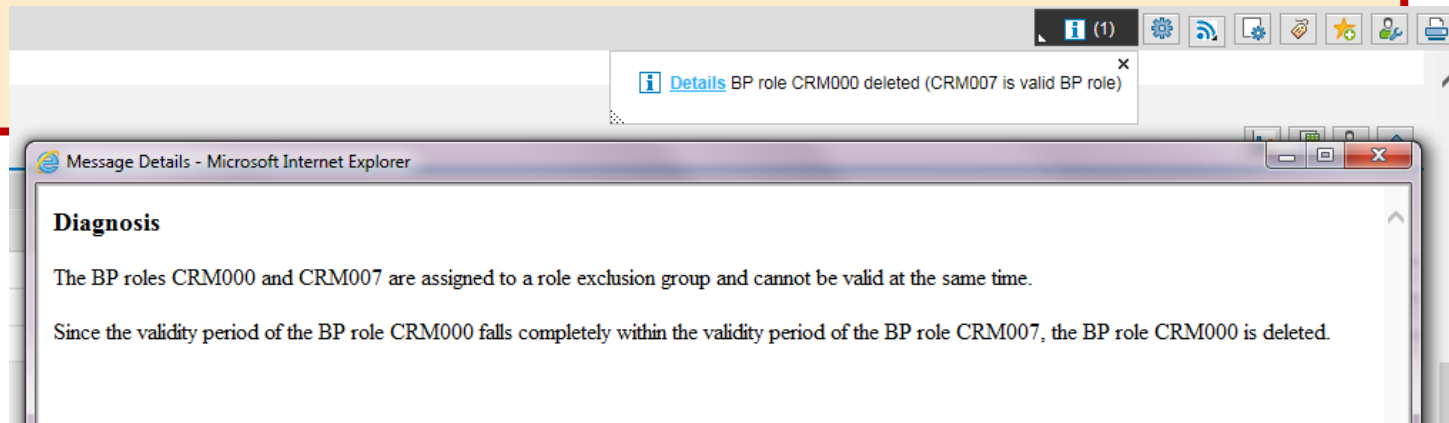
"Save and Back" in surveys

Improvement Request: D7251
Provides a button that enables save and back in one step.

Improvement:

When clicking on "Save and Back" the survey gets saved and the system navigates back, so the previously necessary two steps have been combined into one single step.

Status:

- Delivered for SAP CRM >= 6.0 (CRM 2007) with SAP Note 2161433
- CRM EHP3 SP09
- CRM EHP2 SP16
- CRM EHP1 SP15
- CRM 7.0 SP18
- CRM 6.0 SP17

View accounts of search result list in map

Improvement Request: D7324
Near me feature for Accounts: Show Accounts on Map.

Improvement:

The account search result list in the CRM WebClient UI of SAP CRM can be switched to a map view. This shows the accounts in the map. From there it can be navigated to the "Account" overview page of each account visualized in the map.

Status:

- Delivered for SAP CRM >= 7.13 SP10 with SAP Note 2104728

Creating and updating service contracts or quotations from installed base components

Improvement Request: D6888
Create service contracts and service quotations from installed base search results.

Improvement:

Enable the user to create or update Service Contracts and Service Contract Quotations from IBase search result. Partner information in Service Contracts and Service Contract Quotations will be derived from the Sold-To Party in IBase header and a BAdI is provided for customers to implement their own logic when creating or updating Service Contracts or Service Contract Quotations Line Item.

Status:

- Delivered for SAP CRM >= 713 via SAP Support Package, details in Note 2147945
- CRM EHP3 SP09

Result List: More Than 100 Installed Base Components Found

New | Create Service Contract/Quotation | Update Service Contract/Quotation | **NEW!**

Installed Base	Component	Identification	Component Type	Description	Valid From	Valid To
606	617		CRM Individual Object		12.10.2006 12...	31.12.9999 23...
1073	1076		CRM Individual Object		07.03.2012 09...	31.12.9999 23...
5500	5507		CRM Individual Object		14.01.2015 13...	31.12.9999 23...

Copy routine for service contracts

Improvement Request: D6891

Dates should be copied from service contract quotation to the follow-up service contract.

Improvement:

Copying control takes the date profile into consideration during the follow-up process, this means the dates can be copied form the service contract quotation to the service contract.

Status:

- Delivered for SAP CRM >= 7.01 with SAP Note 2110739
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14

Enable "Refresh" button on "Attachments" assignment block

Improvement Request: D7245

Automatic refresh for transaction after creating attachments and archiving.

Improvement:

Add a "Refresh" button on "Attachment" assignment block, which could be switched on/off via customizing for different business roles. It enables refreshing of the assignment block to get the latest attachments assigned to a business object.

Status:
- Delivered for SAP CRM >= 7.00 with SAP Note 2120547
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14

▼ Attachments	🗋 Attachment	🗋 URL	🗋 With Template	Advanced	♻ Refresh			
Actions		Name	Type	Create...	Created On		MIME ...	Defaul...
Properties 🗑		FAX_2...	Micros...	HOSU...	04.08.2014 19:10		applica...	☐
Properties 🗑		2003_...	Micros...	XIAJA	13.01.2014 04:44		applica...	☐

Flexible assignment block on Account Overview to show transactions

Improvement Request: D7332
Flexible assignment block on Account Overview to show transactions.

Improvement:
A guide is provided that describes how an own assignment block, containing transactions, for example of a specific type, can be created. This is based on the "Interaction History" assignment block.

Status:
- Delivered for SAP CRM >= 7.02 with SAP Note 2104731
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14
- CRM 7.0 SP17

Improvement Request overview: improvements in development - Applications

ID	Title	Planned Delivery[*1]	Lowest CRM Release
D6829	A simple method is needed to load selective ERP data into the CRM system, after the initial load	Q3 2015	7.0 EhP1
D6885	Business Partner: consistency between BP roles and BP relationships	Q3 2015	7.0 EhP1
D6912	SAP CRM Account search criteria sales organisation by SAP	Q3 2015	7.0 EhP1
D7189	Territory Management Enhancements	open	7.0 EhP1
D7372	Display UserID in Org Structure as per PPOMA_CRM	Q3 2015	7.0 EhP1
D7436	Wrong time zone used in billing and accounting	Q3 2015	7.0 EhP2

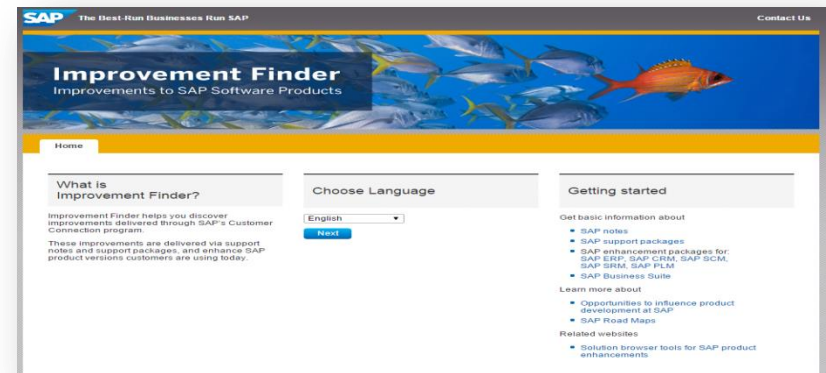[*1] only planned - **no** commitment concerning release dates

SAP Improvement Finder & Customer Influence site

Visit **SAP Improvement Finder:**

- **Find** areas for improvement in your SAP products
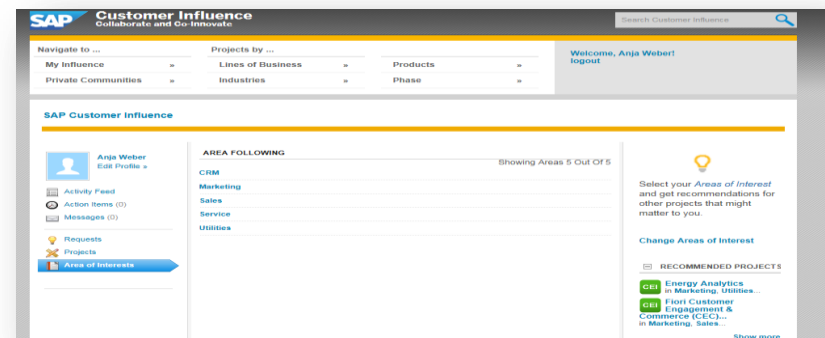- **Use** established maintenance processes (SAP Notes; support packages)

http://www.sapimprovementfinder.com ›

Benefit and Use

Visit **Customer Influence Site :**

- **Follow** areas for interest [maintain in your profile)
- **Receive** notifications about new influence projects

Never miss an influence opportunity

What's next ?

- **Adopt** the new improvements in your productive environment

- **Share** your experience with us & participate at the survey & share your story on Customer Influence

- **Join**- Do you have additional Improvement Requests ?

  Participate in the new project - join here https://influence.sap.com/CRM2016

Questions & Answers

Thank you!

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Questions or remarks? We are here for you.

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t:

Appendix

Improvement Request overview:
handed over and pending improvements - Applications

ID	Title	Planned Delivery[*1]	Lowest CRM Release
D6769	Rich Text Editor functionality in Notes of CRM transactions	t.b.d.	t.b.d.
D6774	Deletion program for inbound emails	t.b.d.	t.b.d.
D6775	Autocomplete/type ahead feature for account search	t.b.d.	t.b.d.
D7354	Text management: Separate logging for different text types	t.b.d.	t.b.d.
D7427	Ability to check and format phone numbers according to country rules	t.b.d.	t.b.d.