

A9011 - February 2017 Release Note

Overview

February 2017 release of Convergence is the first release of the year and is composed with user stories from sprint 9.

This release offers 10 changes described hereafter.

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Main features

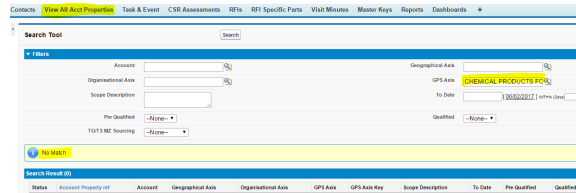
Prospect deletion

It is now possible to delete your own prospect(s) if no document is linked to it. Example: a prospect can be deleted right after its creation. But, if there is a contact for this prospect, it will no longer be possible to delete the prospect (unless contact is removed).

Search tool enhancement

1 - It is now possible to search for Account Properties (qualifications) on any Master Key even for those flagged as "Unmarked for Qualification". Example: a search on "IT-SOFTWARE" will display all Account Properties for "IT-SOFTWARE" and for parent Master keys (domain "IT AND TELECOMMUNICATION"). Before, there was an error message and no search at all. With this change, it is possible to check that no Account Property was created on a Master Key "Unmarked for Qualification".

2 - Search tool is now accessible from the tab "View All Acct Properties". Old tab "Account properties" was removed to ensure user experience consistency.



Contacts flagged for deletion

1 - When a contact is flagged for deletion, a red mark is visible in related lists and list views.

A screenshot of the 'Recent Contacts' table. The table has columns: Name, Active, Account Name, Job Title, and Email. The 'Active' column contains checkboxes. The first row, 'BOBD', has a red 'X' in the 'Active' column, indicating it is flagged for deletion. The other rows have green checkmarks. The table also includes a 'New' button in the top right corner.

Name	Active	Account Name	Job Title	Email
BOBD	<input checked="" type="checkbox"/>	PROSPECT C		
Schmitt	<input checked="" type="checkbox"/>	BRENNTAG - US		brenntag-f
DOE	<input checked="" type="checkbox"/>	BRENNTAG - US		fsdfs6d5df
TARTEMPION	<input checked="" type="checkbox"/>	AARTI INDUSTRIES LTD		

2 - It is no longer possible to select a contact flagged for deletion in processes like RFI, Specific RFI, CSR, Guests in Visit Minutes and Supplier tasks.

Account properties management

As a Solvay Account manager of a supplier, it is now possible to edit and update Account Properties (qualifications)

Other features

RFI - Address: replace House Number by State / Province

To be consistent with Contact form, the RFI form was updated to display the same address information.

A screenshot of the 'Address' section of an RFI form. It includes input fields for 'Street', 'State/Province', 'City', and 'Zip/Postal code'. There is also a 'Country' dropdown menu with a 'Nope' option selected.

Other bug fixes

1 - RFI / Company Geographical Coverage: Missing countries names. Only country codes were displayed, making the selection difficult. There were replaced by countries' real names.

2 - Account: Bubble Help: a spelling error was corrected on the field bubble help "Purchasing block".

SBS Release Notes

Sprint 9

[Link here](#)

Related articles

- [A1415 - Search for suppliers' qualifications with the Search Tool](#)

Need help

How to ask for assistance?

Dear Salesforce Convergence user,

For any question or issue regarding Convergence, please :

- create a request in **Service One** with the following information:
 - I want to update data in Convergence [Maintain data ownership in CONVERGENCE](#)
 - I want to mass upload procurement data [Maintain procurement data in CONVERGENCE](#)
 - Process : Data & Analysis
 - PTP-Subprocess: Purchasing Tools Support
 - PTP-Category: Convergence

For account creation, please refer to [here](#).

Thank you very much,

Convergence Team.