Summer '23 Release Notes (v9.10)

August, 2023

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Release Overview

Altify 9.10 is a targeted release that delivers real benefits to users in some key areas.

In Account Manager, a significant improvement is the ability to plan against opportunities belonging to child accounts in your account plans. While Altify currently has this function at the Account Manager level, we now bring that same synergy to Altify Account Plan. This closes a gap in planning so that no matter how your organization plans accounts with Altify, you can command a full view of the opportunity pipeline.

Also in Account Manager, important information – descriptions of potential opportunities, and the status of inactive solutions – is now surfaced where it is needed by your users. In the same vein, information that has been attached to a Plan Details response is now accessible when an Account Manager plan is exported to PowerPoint.

For relationship maps and insight maps, the 9.10 enhancements are all about establishing trust in your data. You can see when contacts or insights were last updated and by whom. You can also see when an insight was created or confirmed and by whom. In addition, a contact's contact detail can now be edited inline in a relationship map, a task that no longer needs to be performed on the Salesforce Contact record.

In terms of reporting, we have made the work of your report builders a lot easier with a full review and update of all Altify field descriptions. The scope of Account Manager reporting is broadened significantly with the ability to include accounts that are not currently planned against (in an Account Manager plan or account plan).

Altify 9.10 also sees the introduction of a new license edition: Altify Insights. Spanning relationship maps and insight maps, our new solution drives revenue by identifying who key decision makers are and understanding what matters most to them. You can read more about it on the Upland website.

Reporting for Altify Insights is ready to go with the enhancement alluded to above, and we have created a detailed guide to generating reports on relationship map and insight map completeness in our online help.

Summary of Changes

The following lists all enhancements introduced with Altify 9.10:

Account Manager

- Importing opportunities of child and grandchild accounts in account plans – import opportunities of accounts in your Salesforce hierarchy into the Potentials page.
- Flagging of inactive solutions – inactive solutions are flagged in account plans and Account Manager plans.
- Description column added for potential opportunities – a description column for potential opportunities is displayed in dialogs in account plans and Account Manager plans.
- Clickable Plan Details attachments in PPT exports – a link is generated for every attachment in the PPT export of Account Manager plans.

Relationship Map

- Editing contact details in a relationship map – edit a contact's name, phone number or email address in a relationship map.
- Viewing a contact's 'last updated' data – a new date stamp identifies when the contact was last updated and by whom.

Insight Map

- Viewing an insight's 'last updated' data - a new date stamp identifies when the insight was last updated and by whom.
- Viewing an insight's 'created by' data - a new date stamp identifies when the insight was created and by whom.
- Viewing an insight's 'confirmed by' data - a new date stamp and tooltip identifies when the insight was confirmed and by whom.

Reporting

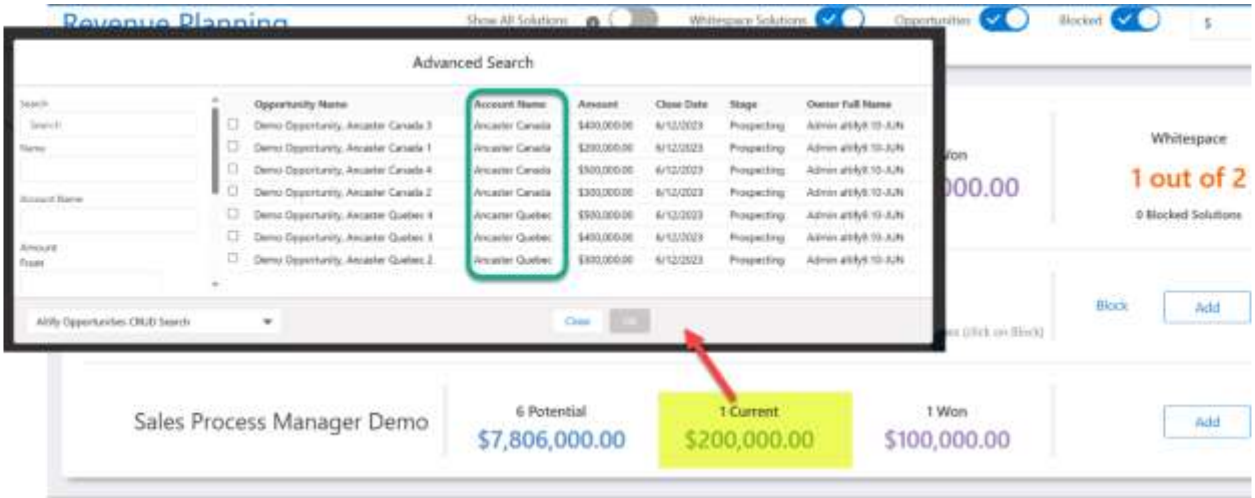
- Altify field descriptions - all Altify field descriptions are reviewed and updated. –
- Completeness scores for account relationship maps and insight maps - completeness reporting now possible on relationship maps and insights that are not part of an account plan or Account Manager plan.

Account Manager

New user functionality

Importing opportunities of child and grandchild accounts in account plans

Import the opportunities of child and grandchild accounts on the Potentials page in account planning.



By default, only current and won opportunities belonging to the planned account can be imported. An Altify Administrator can switch on the ability to import opportunities from associated accounts in the Salesforce hierarchy.

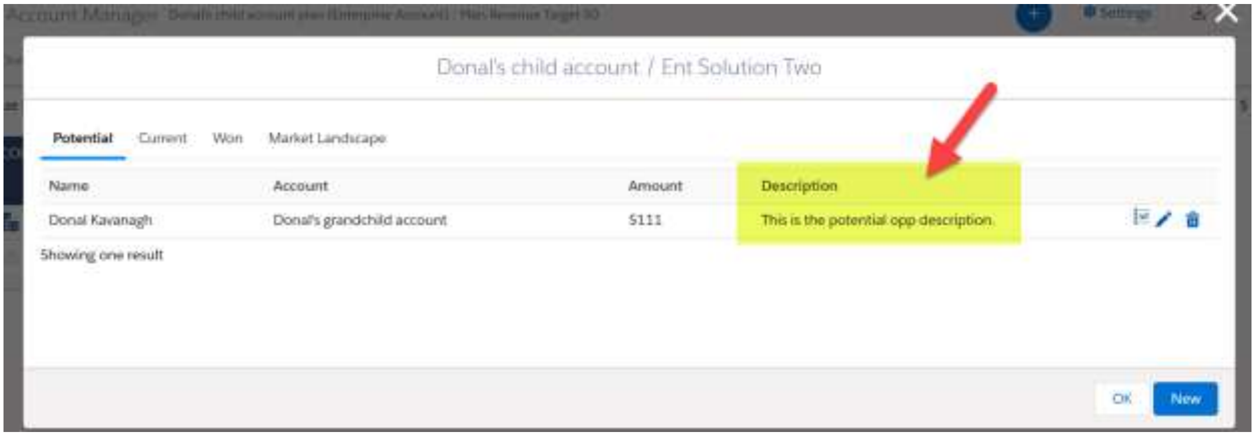
Flagging of inactive solutions

When an Altify Solution is deactivated, it continues to be displayed in any Account Manager plan or account plan where it already existed. Inactive solutions are now flagged in Account Manager plans and account plans (with the icon indicated in the example below) to alert users as to their status. A tooltip also lets users know that the solution is inactive.

For more information, see Deactivating an Altify Solution.

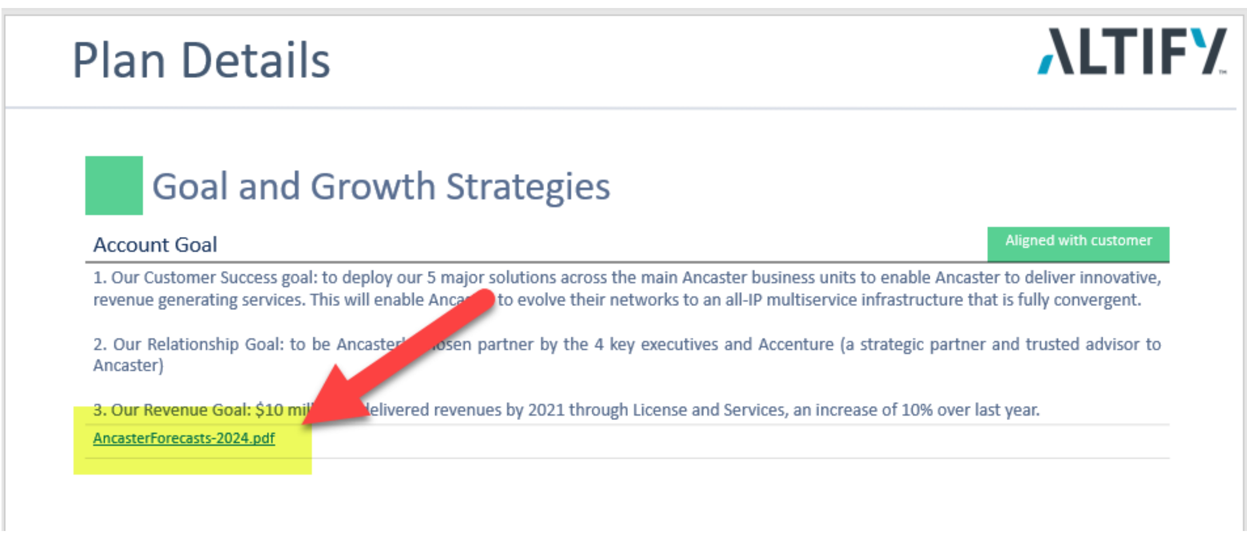
Description column added for potential opportunities

A description of potential opportunities is now displayed in the solution dialog on the Potentials page in an account plan, and in the intersection dialog of an opportunity map in an Account Manager plan (as shown in the example below).



Clickable Plan Details attachments in PPT exports

Attachments in answers to Plan Details questions in an Account Manager plan are now listed in the PowerPoint export and can be accessed by clicking a hyperlink that is generated for each attachment.



Added in 9.10.7 – Attachments in responses to Row Details questions are also listed and clickable in a PPT export.

New functionality to be administered

Respecting the Salesforce hierarchy in account plans

A new custom setting in Altify Account Manager Settings, *Potentials page respects SF hierarchy*, enables the import of opportunities from child and grandchild accounts into the Potentials page of an account plan.

For more information, see Surfacing Opportunities from the Salesforce Hierarchy on Potentials Page in the online help.

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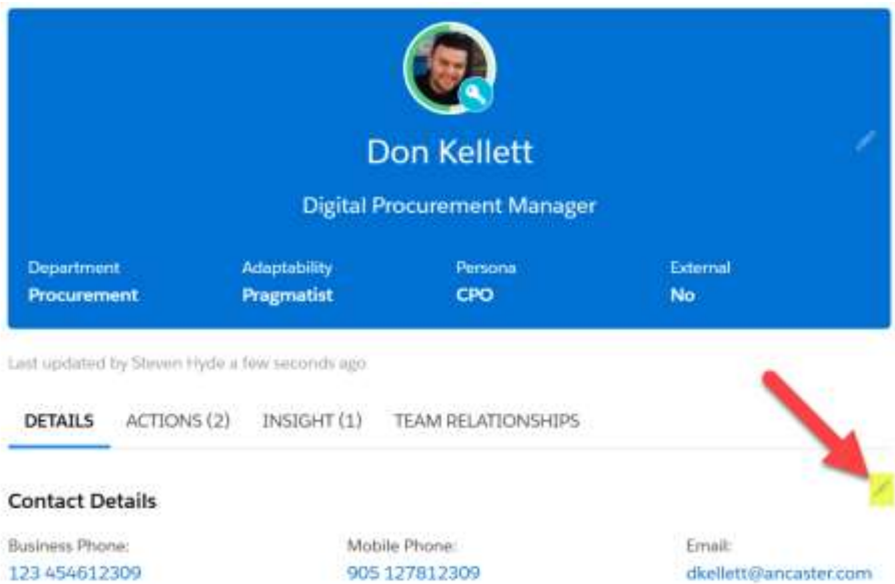
Relationship Map

New user functionality

Editing contact details in a relationship map

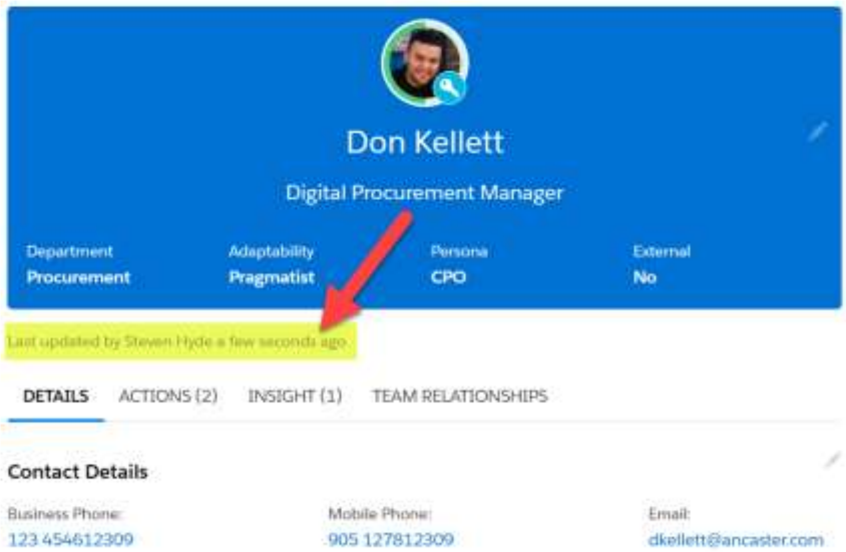
Contact details (*Phone*, *Mobile* and *Email*) can be edited in an account or opportunity relationship map by clicking the pencil icon on the relevant contact's information panel (as highlighted below).



Validation rules configured in Salesforce are respected, so contact details fields in the relationship map are mandatory if they are marked as such on the Salesforce Contact record.

Viewing a contact's 'last updated' data

A 'Last updated…' stamp (highlighted below) captures when the relationship map contact was last updated and by whom. This change gives confidence to users as to the relevance and provenance of relationship map data.



The stamp is automatically updated when a field value on one of the following objects is changed:

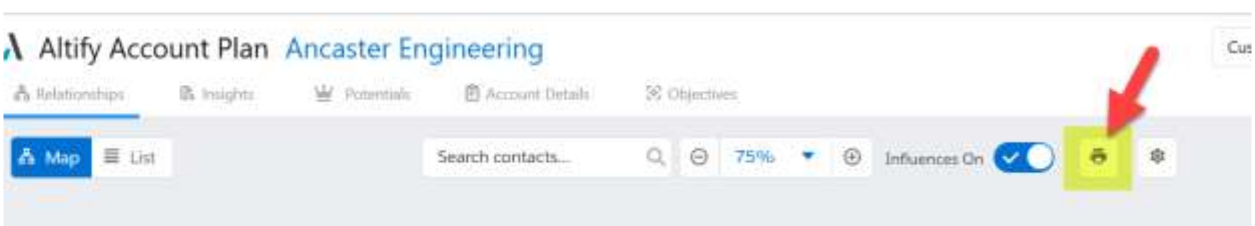
- Salesforce Contact
- Altify Contact
- Altify Contact Map Details
- Altify Contact Influence

In effect, this means that the 'Last updated' stamp is updated when data in the heading panel, Details tab (apart from Quicklinks, Division, Suggested Target and custom-added fields in the Others section), or Team Relationships tab is changed.

Deprecated functionality

Print option

The relationship map print option, highlighted below in a 9.9 Salesforce org, is removed from all Altify relationship maps (for accounts and opportunities).



This is discontinued as the printing of what is effectively an infinite canvas cannot be successfully validated for customers.

As a result of this change, the custom setting *Disable Print Buttons*, in Altify Relationships Settings only applies to the disabling of insight map printing.

Insight Map

New user functionality

The following changes give confidence to users as to the relevance and provenance of insight map data.

Viewing an insight's 'last updated' data

A 'Last updated…' stamp captures when the insight was last updated and by whom.

Viewing an insight's 'created by' data

A 'Created by…' stamp captures when the insight was created and by whom.

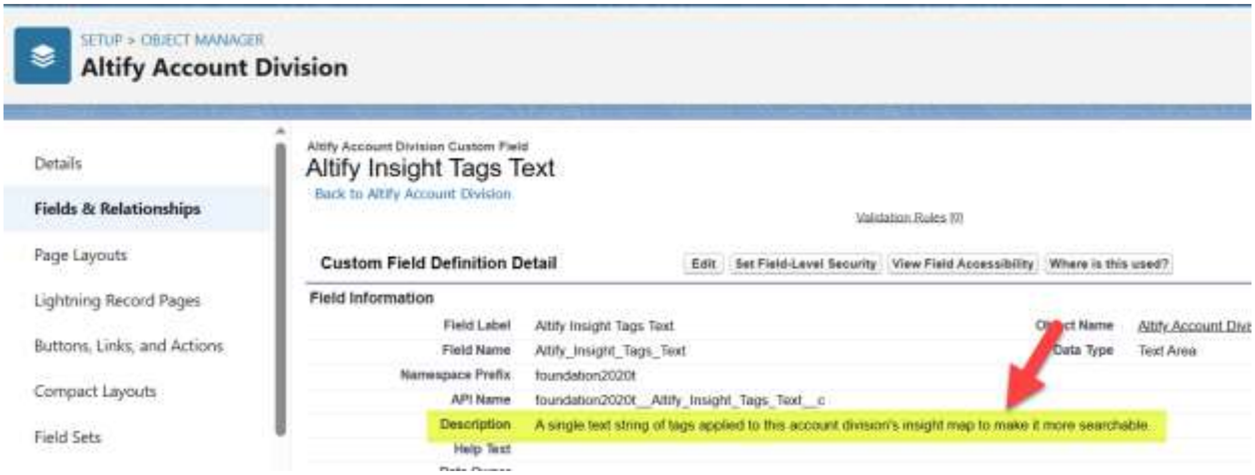
Viewing an insight's 'confirmed by' data

A 'Confirmed by…' stamp captures when the insight was created and by whom. This information can also be accessed by hovering the cursor over the confirmed check box in the insight card.

Reporting

Altify field descriptions

All Altify field descriptions are reviewed and updated to give you greater context when building your reports.



Completeness scores for account relationship maps and insight maps

The Altify Account Completeness batch job computes scores for various aspects of account planning, including relationship maps and insight maps. Up to now, these scores were only calculated for accounts that were part of account plans or Account Manager plans.

With the 9.10 release, completeness scores for account-level relationship maps and insight maps are computed by the batch job even if the associated account is not in a plan. An additional completeness record with a null plan type will be created for these accounts.

So, apart from providing additional data to customers with Account Manager, this enhancement enables customers with either Relationship Map only or Altify Insights licenses to report on completeness scores for account-level relationship maps and insight maps, which was not possible previously.

For more information, see Completeness Scoring (for Relationship Map Only and Altify Insights) in the online help.

To accompany this enhancement, in-depth guidance is available on creating reports on the completeness of relationship maps and insight maps (for accounts and opportunities).

Opportunity Manager

Batch job for reparenting opportunity data (9.10.7)

If an opportunity that was worked in Altify is moved from one account to another, previously added relationship map contacts will no longer be displayed on the opportunity's relationship map and insights will be missing from the insight map.

A new hidden batch job (*Reparent Opportunity Account Records*) restores all such data to the relationship and insight maps of every opportunity that has been reparented to another account. Any contacts or insights that were added to the opportunity since the reparenting are retained and displayed alongside the restored data.

For more information, please contact Altify Support.