Spring ’22 Release Notes (v9.9)

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Release Overview

Spring '22 (v.9.9) sees a major addition to the Altify Account Manager product with the introduction of a full suite of planning functionality at the account level. This allows end users to 'jump right in' and work all their assigned accounts without the need to create an extensive Altify Account Manager Plan.

> Note: This release includes an important change in terminology that is applied in the product and in the online help:
>
> - What was previously known as an account plan is now an Altify Account Manager Plan.
> - From 9.9, an Altify Account Plan is a plan that is applied at the level of a single account (and any divisions it may have) – read on for more information.

With Altify Account Plans, sellers can start building pipelines faster by working at the individual account level to understand people, problems, and potential revenue. Sellers can work on account details questions, set objectives and build actions to meet those objectives. On the Potentials page, sellers can easily identify whitespace, start adding and qualifying potential opportunities, and clearly track their account progress.

Who have we built this new functionality for? Below are a handful of examples of the value that is delivered by this fresh approach to account planning:

- Customers with shorter sales cycles planning accounts that do not warrant the time and effort of creating and updating enterprise or portfolio Account Manager plans.
- Customers who require a quick and simple approach that allows the rapid building of pipeline while enterprise and portfolio account management is realized in the longer term.
- Account Executives (AEs) who want to focus on a specific account or division that is already included in an enterprise or portfolio-type Account Manager plan.

Account Manager plans remain available for planning of enterprise accounts with long sales cycles, global account managers who need a high-level view of account planning, etc. Existing customers will not experience any disruption to their plans if upgrading to v9.9. If the new account plan functionality is employed, data captured at the account-level informs any Account Manager plans where the same accounts or divisions are included – and vice versa. For example, potential opportunities identified in an account plan are displayed in an opportunity map, relationship data captured in an account plan can be accessed from an Account Manager plan, an objective created in

Account Manager plan is displayed in an account plan (of the same plan type), and so on.

Also included in this release are two small, but powerful, enhancements in relationship maps: the automatic inclusion of contact details for every contact in your map, and the ability to reorder the sections on a contact's details panel.

Summary of all changes

The following lists outlines all the changes introduced with Altify 9.9:

Planning at the Account Level

- Accessing an account plan – a new launchpad provides access to all areas of the account plan and includes an option to choose the plan type.
- Potentials tab – plan revenue at the account level with potential, current and won opportunities, blocked solutions and whitespace.
- Relationships & Insights tabs – access an account's relationship map and insight map from the account plan.
- Objectives tab – plan objectives and assign actions to realize account-level strategy.
- Account Details tab – research and formulate the account strategy by answering a series of questions.
- Planning for Account Divisions – apply all the tools of account planning (Potentials, Insights, Relationships, Objectives and Account Details) at the division level.

Account Manager

- Accessing account records from an Account Manager plan – open Salesforce Account records in a new tab from the opportunity map.
- Attaching files to objectives and actions – attach a variety of file types to support objectives and actions created for your Account Manager plans and account plans.
- Toggling the 'Focused View' in Create/Edit dialogs – toggle between a selection of mandatory/key fields and a full layout when creating or editing objectives and actions.

Relationship Map

- Contact details on information panel - view every contact's email address and phone numbers in a relationship map.
- Reordering details on the information panel – reorder the details (Contact Details, Attributes, Notes, etc.) on the information panel to suit your organization's priorities.
- Setting additional Contact fields in the required order [9.8.24] - configure Contact fields that are added to relationship maps to be displayed in the required order.

Opportunity Manager

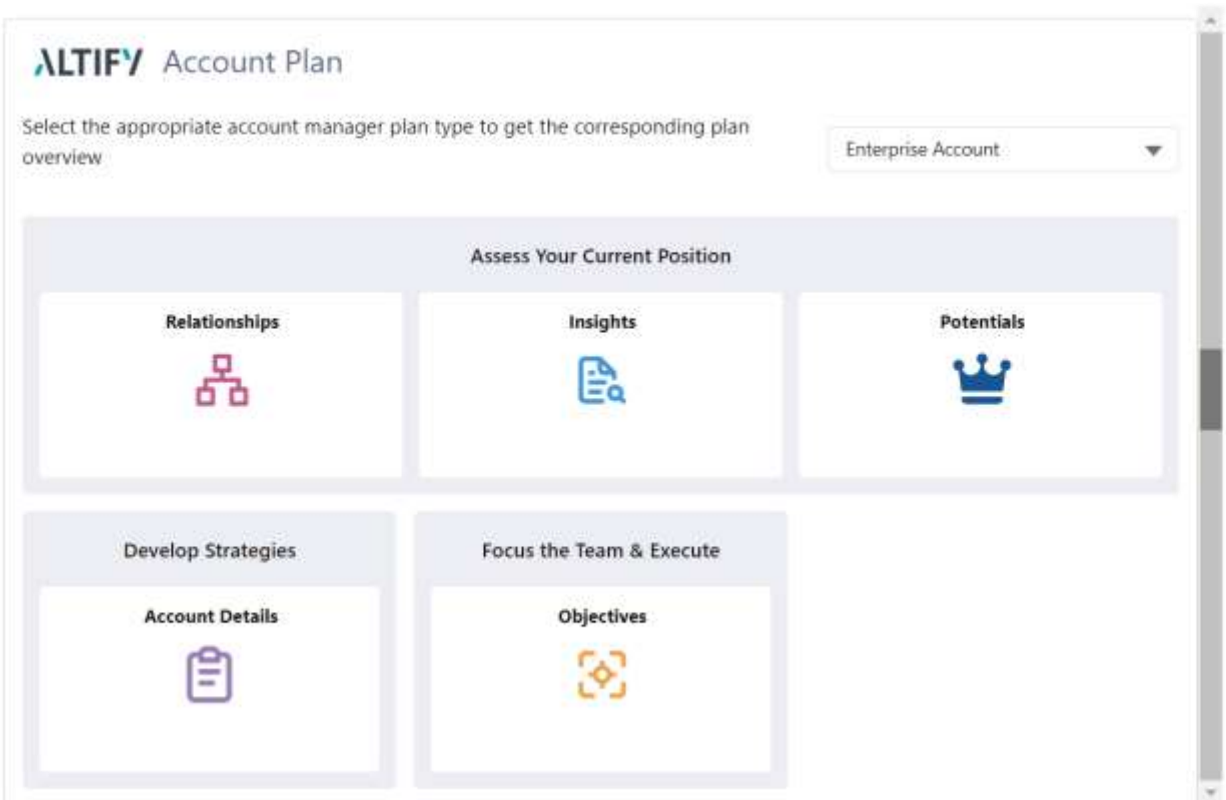
- Email notification of assigned PRIME actions – users assigned an action in Opportunity Manager are notified by email.

Planning at the Account Level

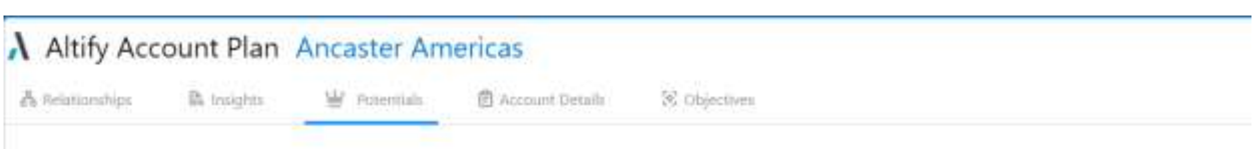
New user functionality

Accessing an account plan

As with Account Manager Plans, access to an account plan is from a launchpad on the Account record.



And once within an account plan, the plan can be navigated by clicking on the various tabs.

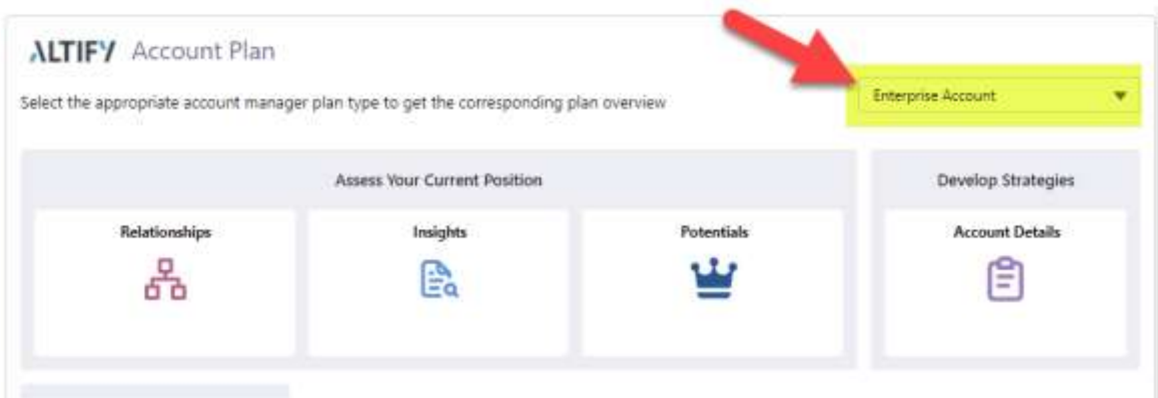


Choosing a plan type

As with Account Manager plans, choosing a plan type determines the research (Account Details) that is required of the seller and the plan functions (tabs) that are available. For account plans, it also determines which solutions that sellers can plan revenue against.

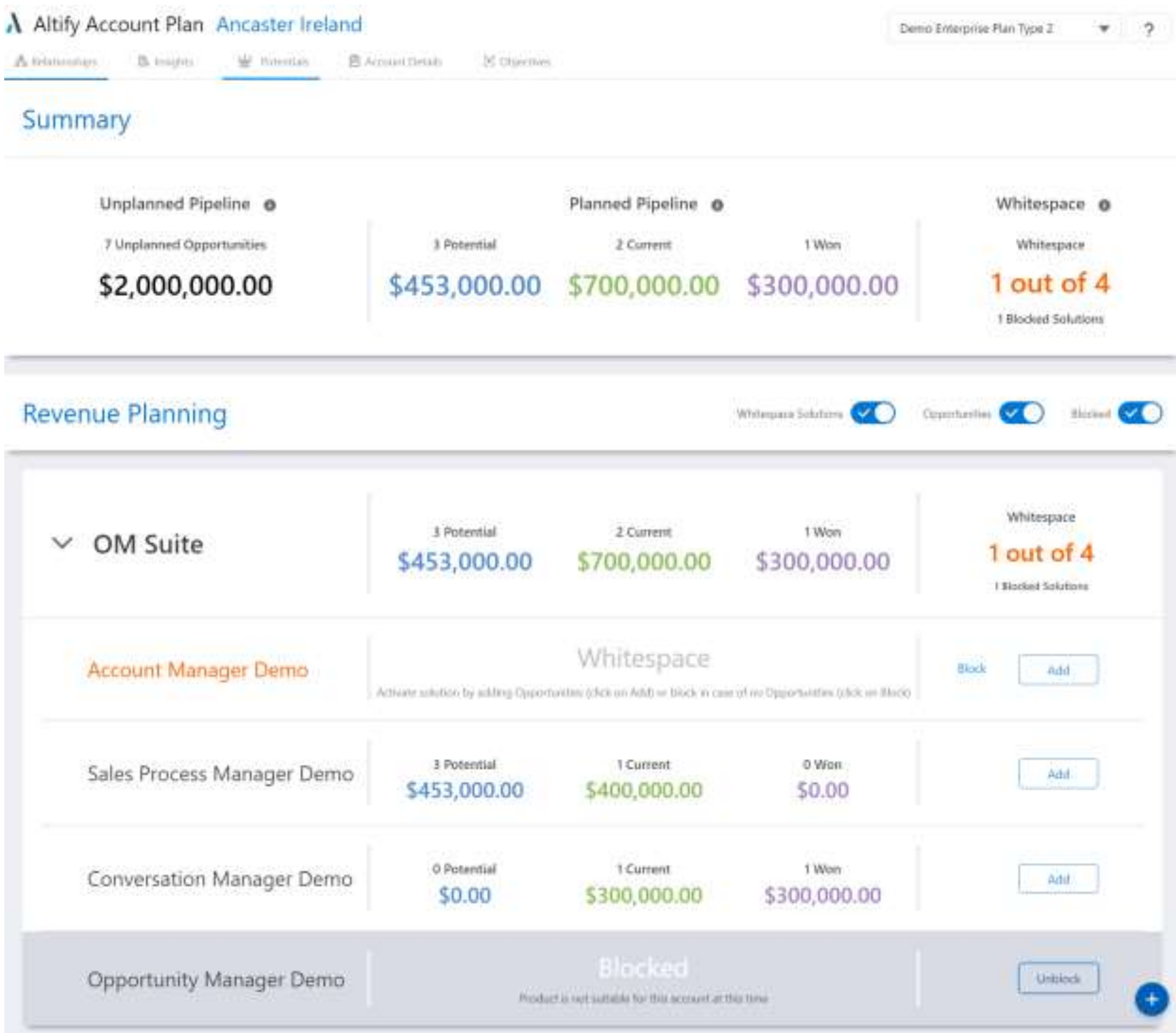
> Note:
>
> - Unlike Account Manager plans, sellers cannot manually add solutions to their account plans. All solutions are configured by the administrator at the plan type level (see Configuring solutions for account plans below).
> - Default plan types custom-built for account planning will be shortly available in a patch release. They are not available with the initial release of Altify v9.9.

The plan type of an account plan can be changed on the launchpad or from within the plan.



Potentials tab

The Potentials tab (shown below) performs a similar function to the opportunity map in an Account Manager plan.



It allows sellers to...

- Get an instant overview of planned and unplanned pipeline for the account.
- View and easily maintain a full breakdown of planned revenue - including potential, current and won opportunities for each solution family and solution that is mapped to the relevant plan type (see [Configuring solutions for account plans]).
- Identify account 'whitespace' - the unexploited territory where new revenue can be generated by developing opportunities.
- Eliminate time wasted on lost causes by blocking solutions that are not currently viable for the account.

For more information, see the [Potentials] section in the Altify online help.

Relationships & Insights tabs

Access the account's relationship map and insight map from the relevant tabs in an account plan.

For more information, see Relationship Map and Insight Map in the Altify online help.

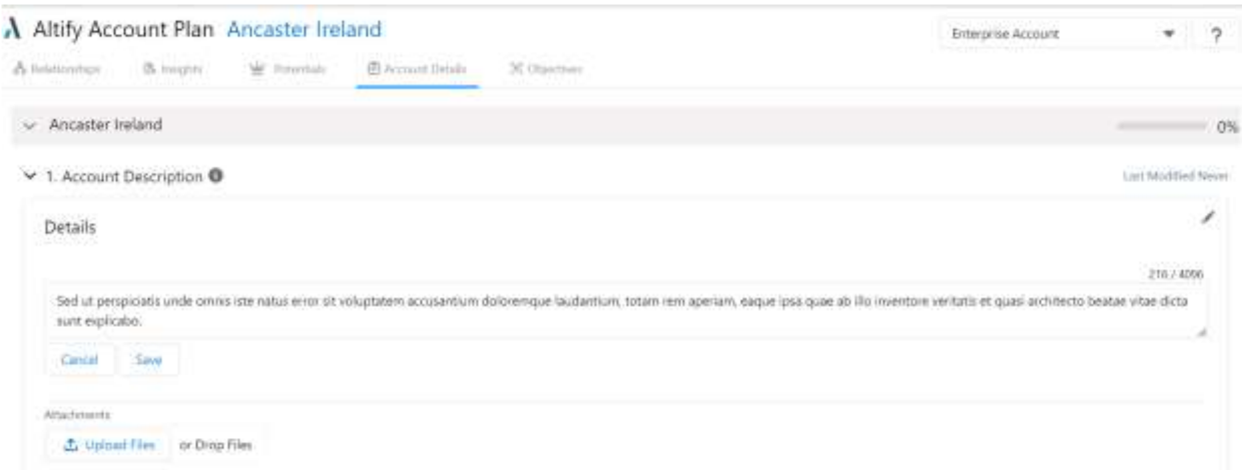
Objectives tab

Create and manage objectives and actions for the account. This page behaves in a very similar way as objectives and actions in an Account Manager plan. The main difference is that ability to filter objectives and actions by account is not provided in an account plan (as this plan focuses on a single account).

For more information, see the Objectives section in the Altify online help.

Account Details tab

Capture account data that informs the account strategy. The questions are the same as the Row Details questions in an Account Manager plan (of the same plan type), and are answered in the same way.



For more information, see the Account Details section in the Altify online help.

Planning for Account Divisions

All the tools of account planning (insight map, revenue planning, etc.) can be applied to a specific division.

To access a division from any page within an account plan, select the relevant division in the drop-down menu at the top of the page (indicated below).

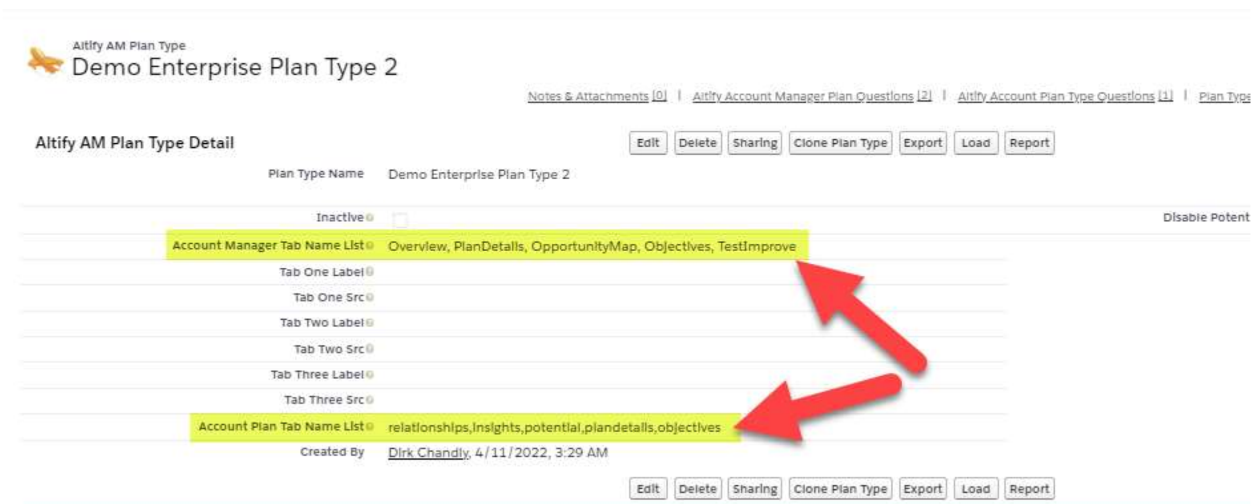
For more information, see [Planning for Account Divisions]() in the Altify online help.

New functionality to be administered

Account Manager plans and account plans are configured by the same plan type object (Altify AM Plan Type).

Configuring the tabs that are displayed in account plans

A new field is added to the Altify AM Plan Type object (previously known as Altify Account Plan Type): *Account Plan Tab Name List*. The values in this field determine the tabs (Insights, Potentials, etc.). The field *Account Manager Tab Name List* determines the tabs that are displayed in Account Manager plans of the relevant type.

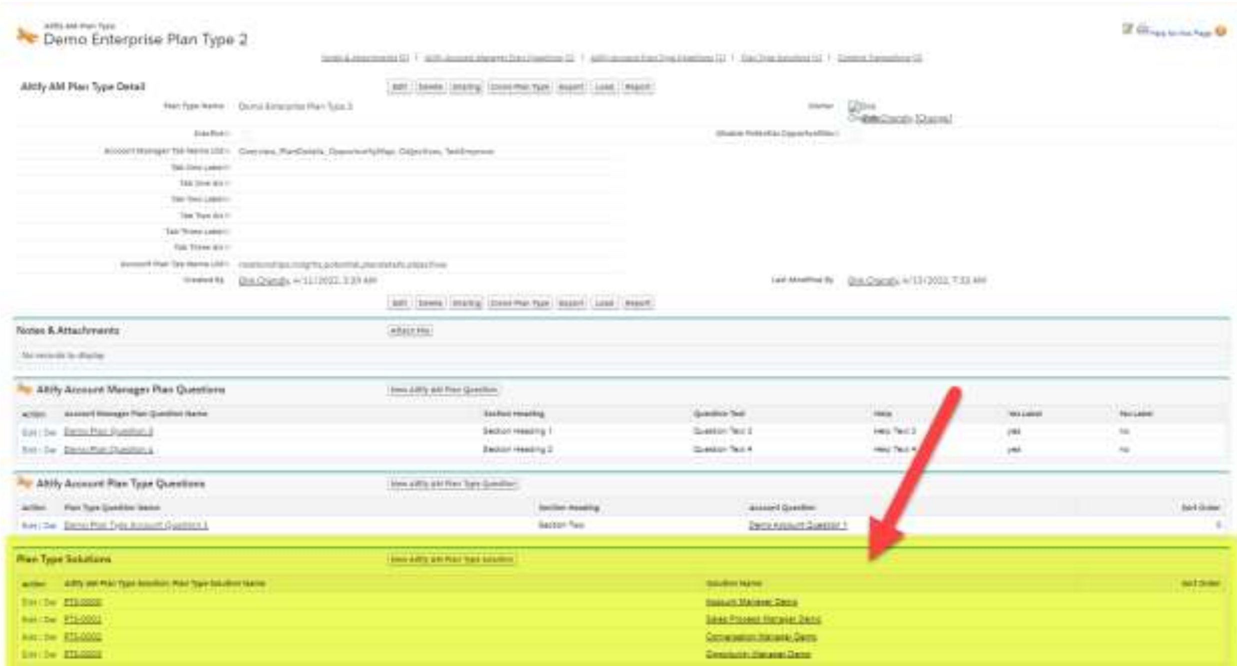


> Note: Unlike Account Manager plans, custom tabs cannot be added to account plans.

For more information, see [Updating or Creating a Plan Type]() in the Altify online help.

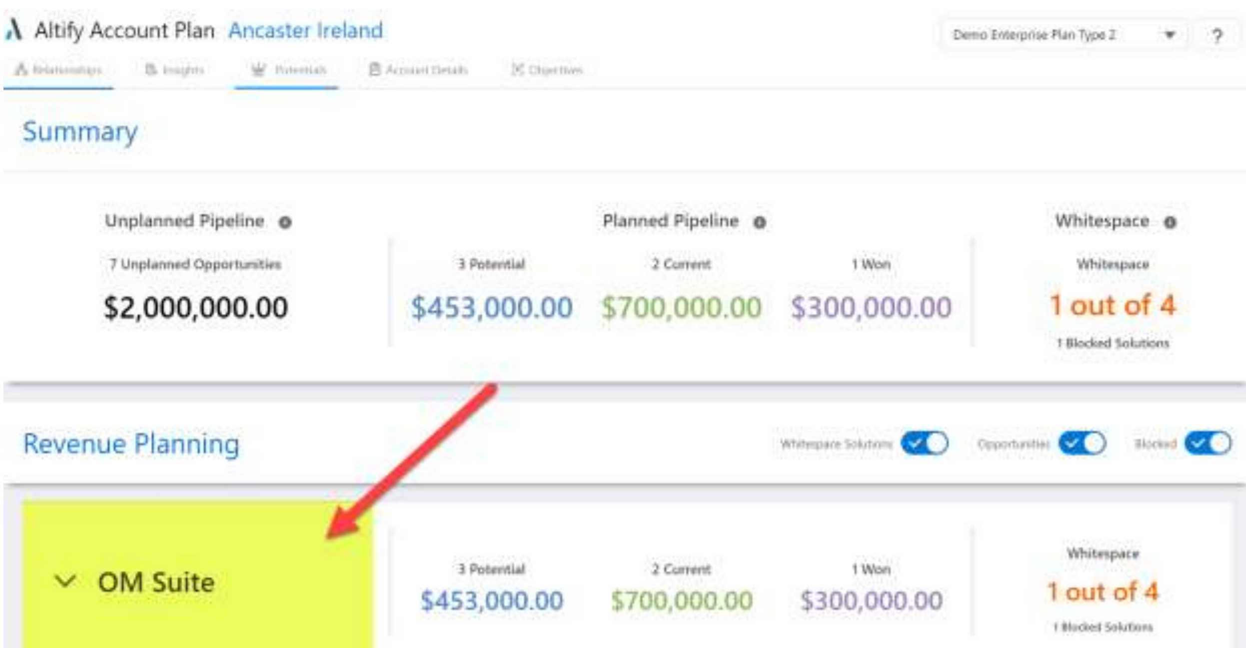
Configuring solutions for account plans

Only default solutions configured at the plan type level are available for revenue planning on the Potentials tab of an account plan. It is essential therefore, that Plan Type Solutions are added to any plan type that is to be used for planning at the account level.



For more information, see [Default Solutions for a Plan Type]() in the Altify online help.

In addition, solutions on the Potentials tab are always organized by solution family – as highlighted in the example below.



Any solutions that are not associated with a solution family are grouped under the default family 'Other' on the Potentials page. Care is required therefore, that solutions used in account planning are grouped, where possible, into a logical set of solution families. For more information, see [Solution Families]() in the Altify online help.

Configuring Account Details

Account Details questions are the same as Row Details questions in an Account Manager plan and the same configuration process applies. For more information, see Account/Row Detail Questions in the Altify online help.

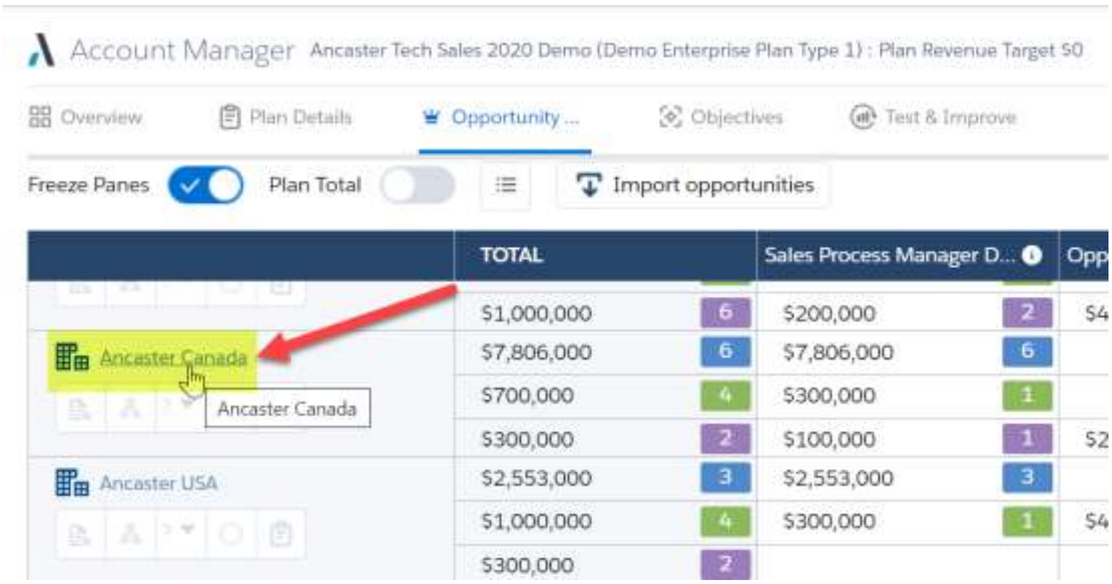
> Note: The sharing of answers continues to apply. Answers to Account Details and Row Details questions are shared across plan types (and among Account Manager plans and account plans). In any plan where the same question and account/division are displayed, the answer is automatically shared.

Account Manager

New user functionality

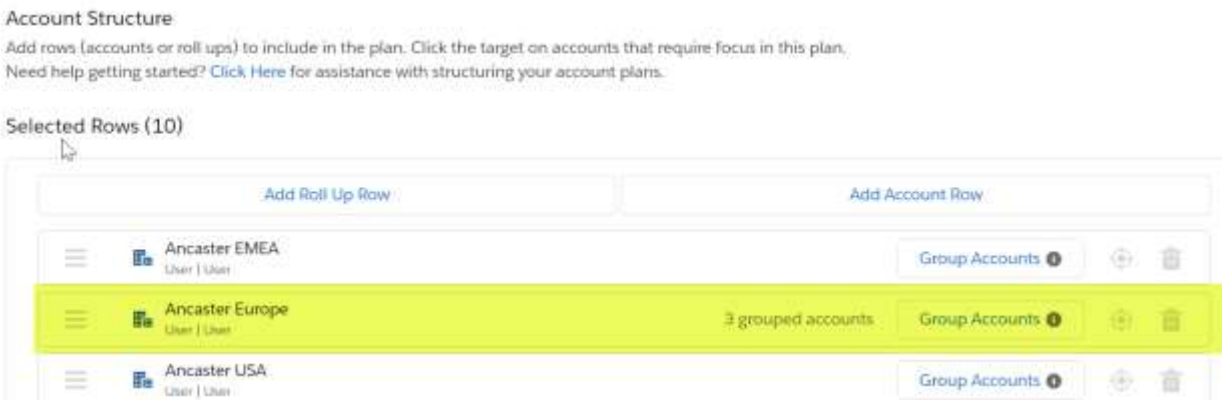
Accessing account records from an Account Manager plan

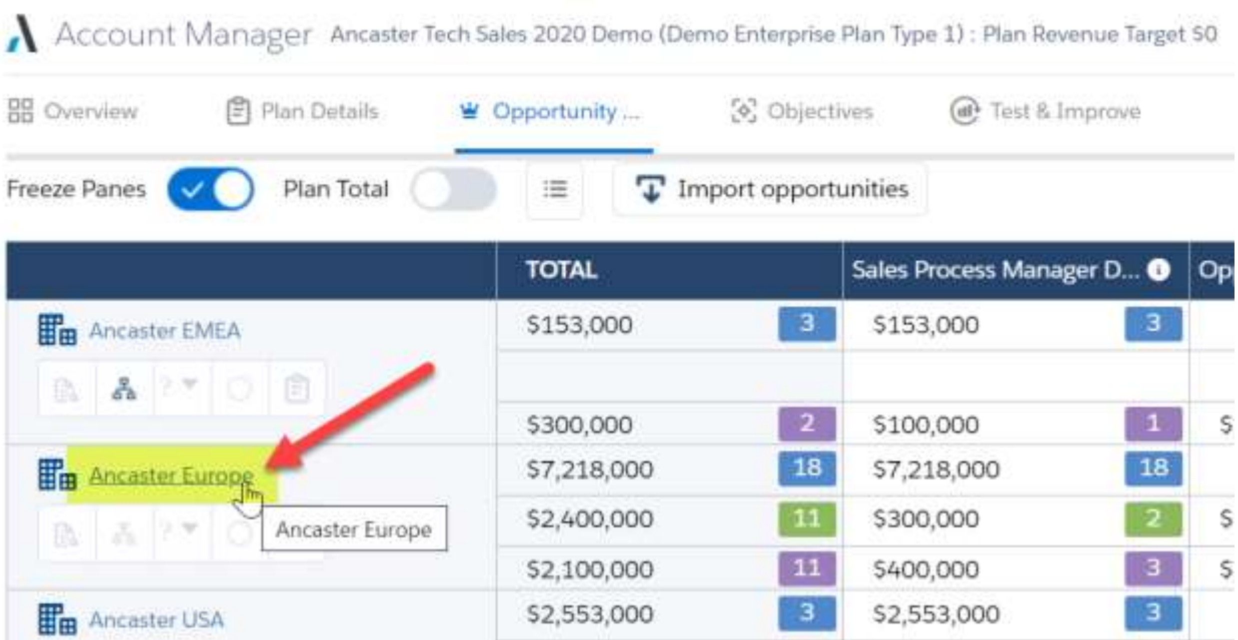
Users can click on an account in an opportunity map to open the relevant Salesforce Account record in a new tab.



For division rows, the name of the parent account row can be clicked to access the relevant account record.

For grouped account rows, clicking the displayed group name opens the parent account record.

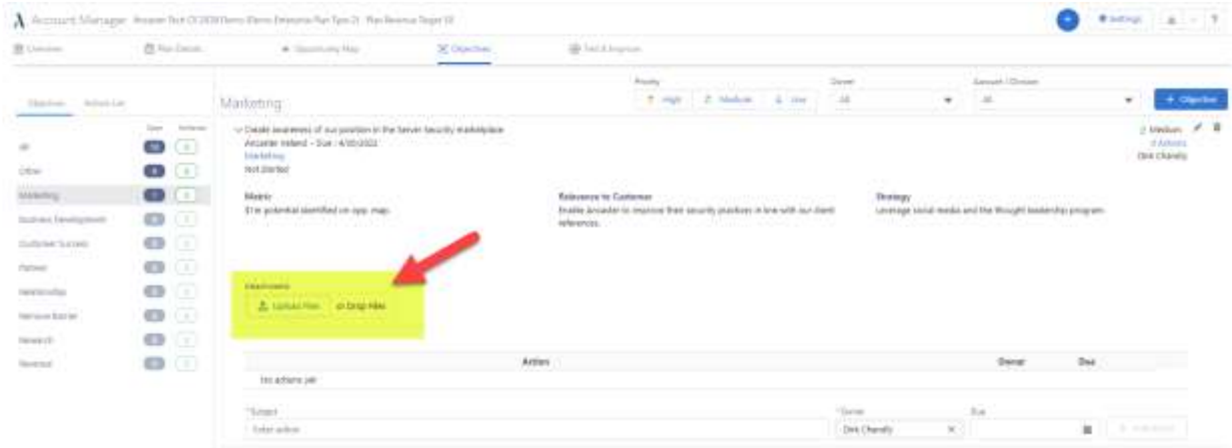




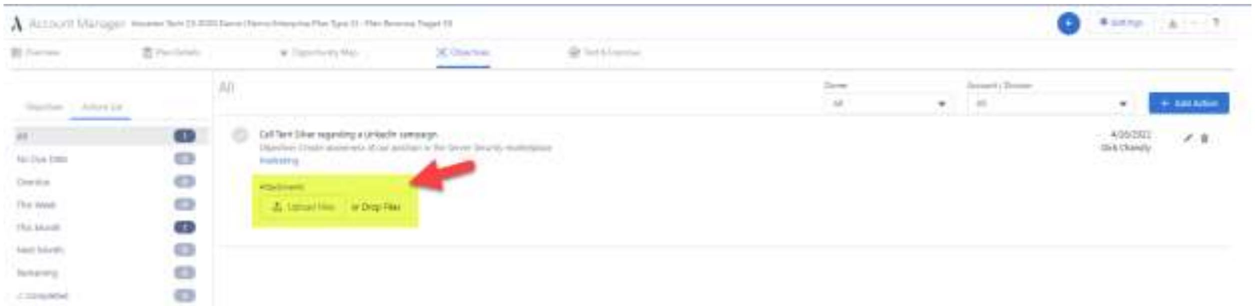
Attaching files to objectives and actions

Attach files to objectives and actions in Account Manager plans and account plans.

The Attachments option for an objective is highlighted below:

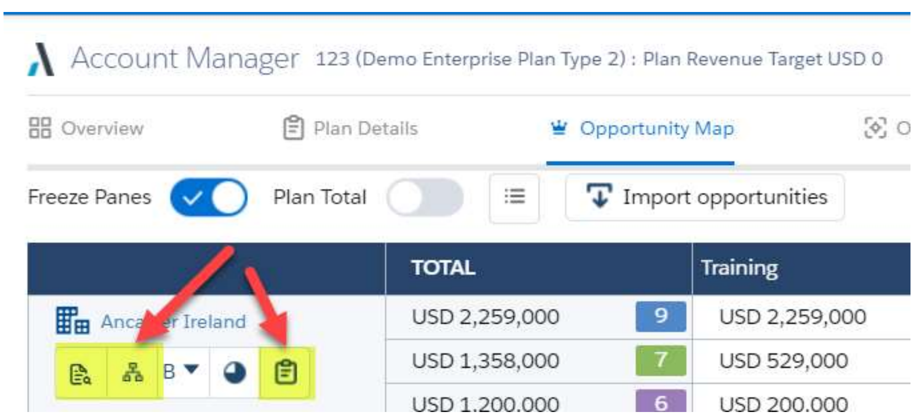


And for an action, the Attachments option is again highlighted below.



Accessing an account plan from the opportunity map

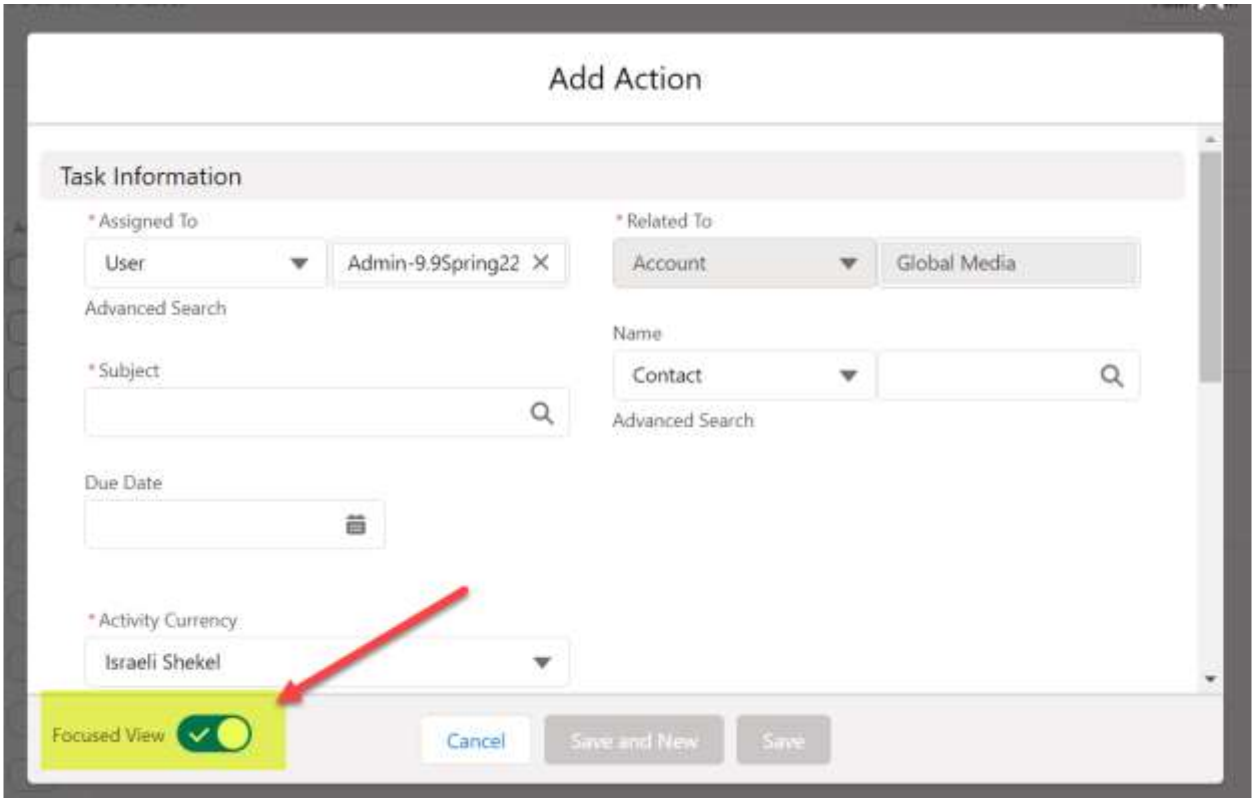
When the insight map, relationship map or account details of an account or division is accessed from an opportunity map (as highlighted below), the user is taken to the relevant tab of the account plan.



Note: The account plan that is opened automatically takes the plan type of the Account Manager plan.

Toggling the 'Focused View' in Create/Edit dialogs

A new Focused View toggle restricts the fields that are displayed when creating or editing an action or objective. When the view is enabled (as highlighted in the example below), the dialog is restricted to mandatory fields and a default selection of key fields. When the Focused View is disabled, the full CRUD layout for the dialog is displayed.



The Focused View toggle can be hidden by an Altify Administrator if required (see [Configuring the Focused View](#configuring-the-focused-view)).

> Note: The Focused View toggle is not available when creating an action from the relationship map or insight map.

New functionality to be administered

Configuring the Focused View

The *Focused View* toggle that is displayed when creating/editing objectives or actions is configured by the following Altify Core Settings:

- Use CRUD Add Action – if this setting is checked, the Focused View toggle is inactive by default when a user creates or edits an action. If it is unchecked, the Focused View is active by default when creating or editing an action.

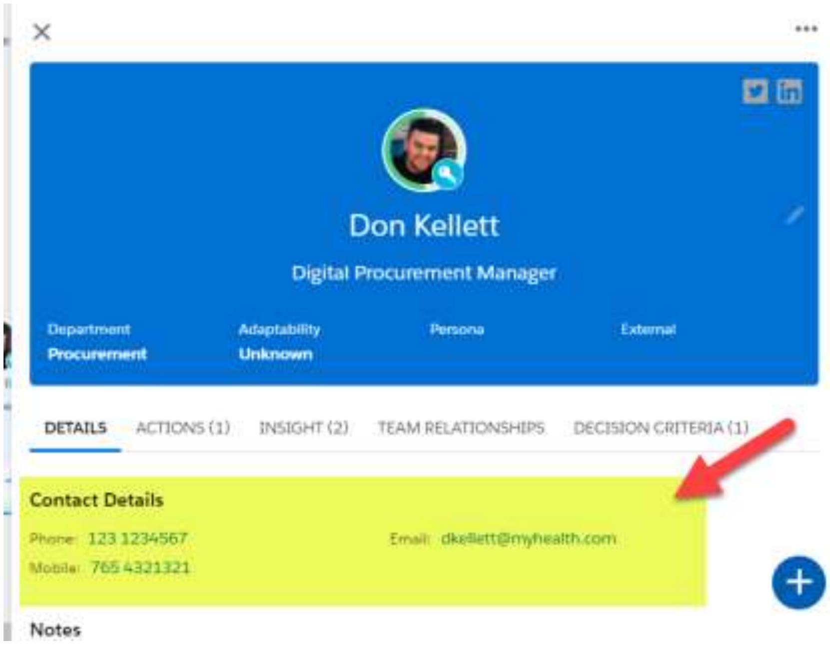
- Hide Focused View Option in CRUD Dialogs – if this setting is checked, the Focused View toggle is not displayed in dialogs for creating/editing objectives or actions.

Relationship Map

New user functionality

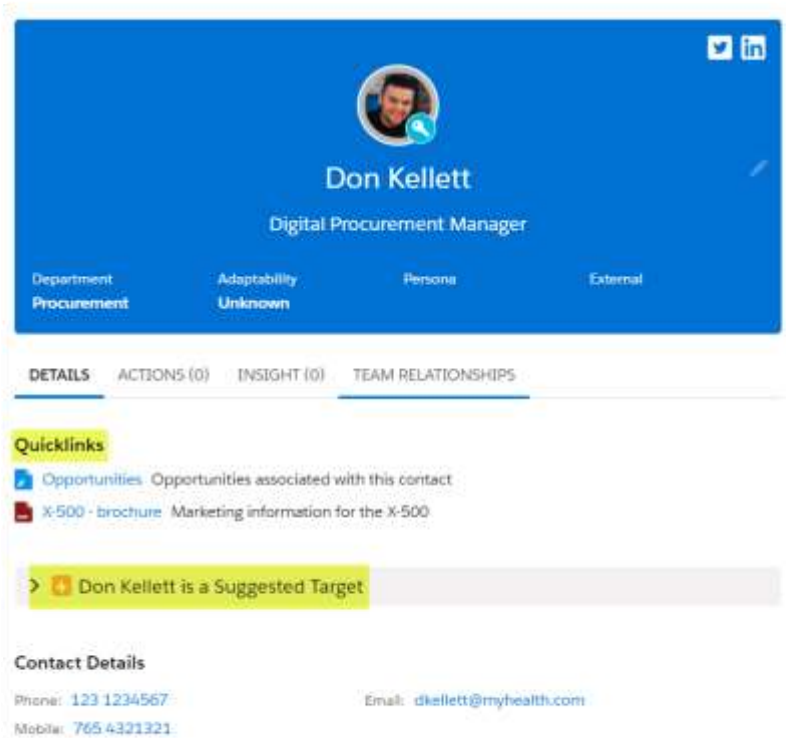
Contact details on information panel

A contact's contact details (*Phone*, *Mobile* and *Email*) are now displayed on their information panel. The values are automatically pulled from the relevant Salesforce Contact record.



Reordered details on information panel

An administrator can reorder the sections on the Details tab. In the example below, the Quicklinks and Suggested Target sections are moved to the top of the page.



New functionality to be administered

Reordering details on the information panel

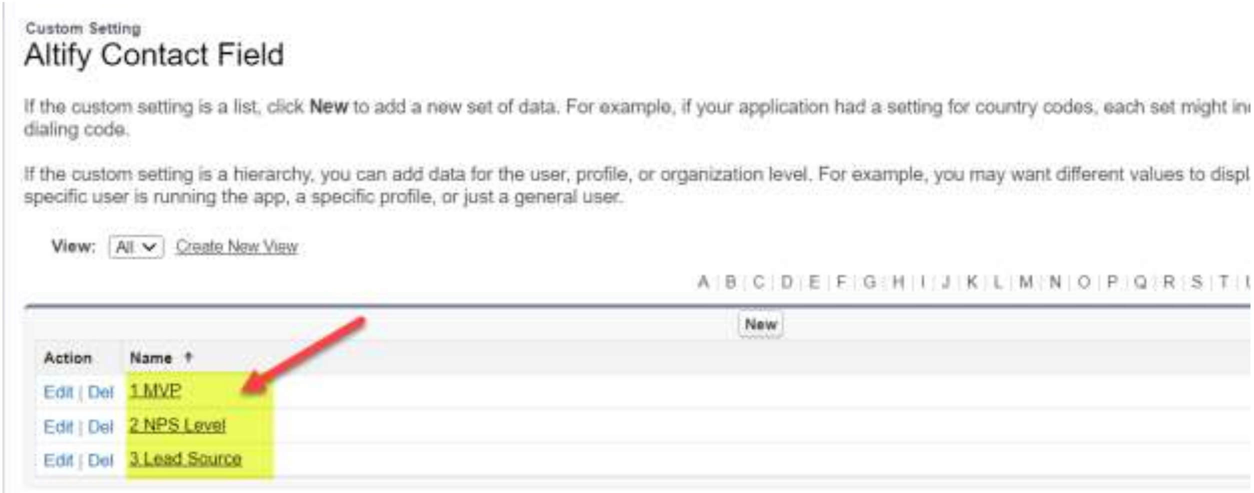
A new custom setting in Altify Relationships Settings, *Contact Details Side Panel Named Order*, enables the reordering of sections on the Details tab of the information panel in relationship maps.

For more information, see [Reordering Details on the Contact Information Panel]() in the Altify online help.

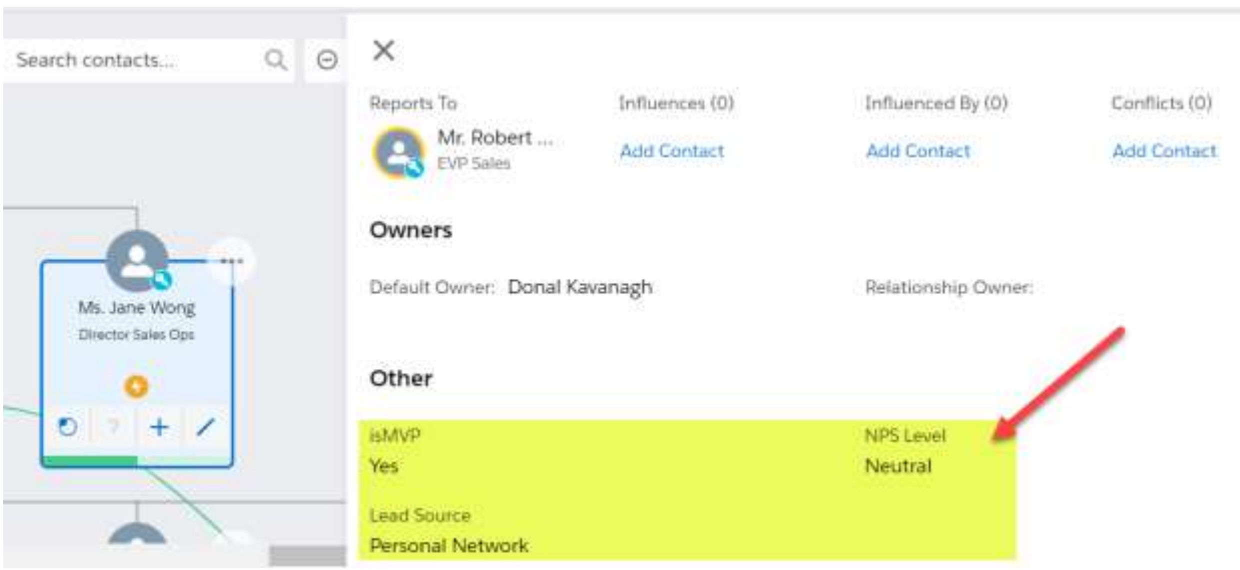
Setting additional Contact fields in the required order [9.8.24]

Additional Salesforce Contact fields (including custom fields) that are added to relationship maps can now be ordered as required by an Altify Administrator.

Sort ordering is alphanumeric and determined by the *Name* field in the *Altify Contact Field* custom setting.



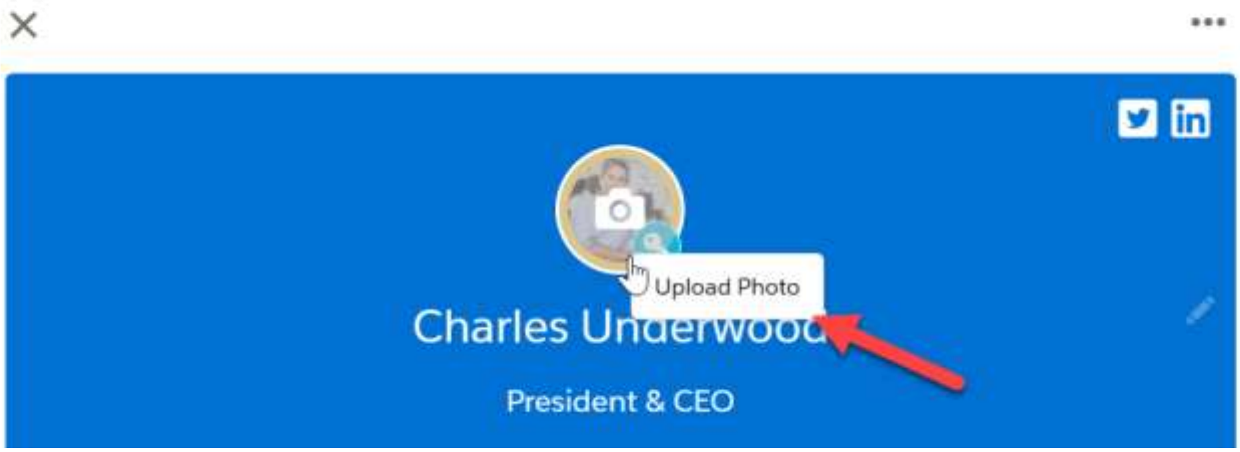
The above fields are displayed as follows:



For more information, see [Adding Extra Fields for Contacts]() in the Altify online help.

Disabling photo upload option [9.9.31]

Users can be prevented from uploading a photo to a contact on a relationship map. The upload option is displayed when a contact's photo is clicked on their details panel (as shown in the example below).



Activating the following custom setting in Altify Relationships Settings means that the Upload Photo option is not displayed when a user clicks on the photo: *Disable Upload Photo in Relationship Map*.

For more information, see [Disabling Photo Upload Option]() in the Altify online help.

New setting to address loading issues [9.9.41]

Default behavior for loading contact images is a query against the Salesforce database that excludes any documents that don't meet certain criteria. A new Altify Relationships Setting is available (*Use Programmatical Avatar Filtering*) that, when enabled, reduces the number of criteria used in the query. Instead, filtering in the code addresses the larger number of documents retrieved from the database. This setting may resolve a relationship map load failure caused by VPN or anti-virus software.

Opportunity Manager

New user functionality

Email notification of assigned PRIME actions [9.9.44]

An email is now sent to users when they are assigned an action (when the action is created or if the action is reassigned). Notifications are only sent for Actions with a defined *PRIME Action*.

New functionality to be administered

Setting up email notifications

To set up email notification of PRIME actions, the Opportunity Manager Custom Setting *Enable Prime Action Email Notifications* needs to be enabled.

Note that emails are not sent if the setting *Hide PRIME Type Column* is also enabled (as actions will not have an assigned *PRIME Action* category).