upland

Spring '24 Altify Insights Release Notes (v9.12)

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Release Overview

Altify Insights 9.12 is the culmination of an Angular rewrite that first began in Altify 9.9. The rewrite lays a foundation of improved design and high performance that will strengthen future releases. The project provided the opportunity to take a fresh look at the design of Altify and many improvements have been implemented across the product as a result. This document captures the most significant enhancements.

For accounts, a new consolidated launchpad provides the latest data on the account's insights and relationship map contacts, and a detailed overview its key players.

Also for accounts, a new Division Manager tool allows the creation, edit and deletion of account divisions within Altify Insights (previously, this functionality was less widely accessible to users).

Numerous small design improvements are also implemented in Altify Insights.

Finally, the rewrite process also provided an opportunity to revamp Altify's dialogs for consistency of design and to simplify their configurability.

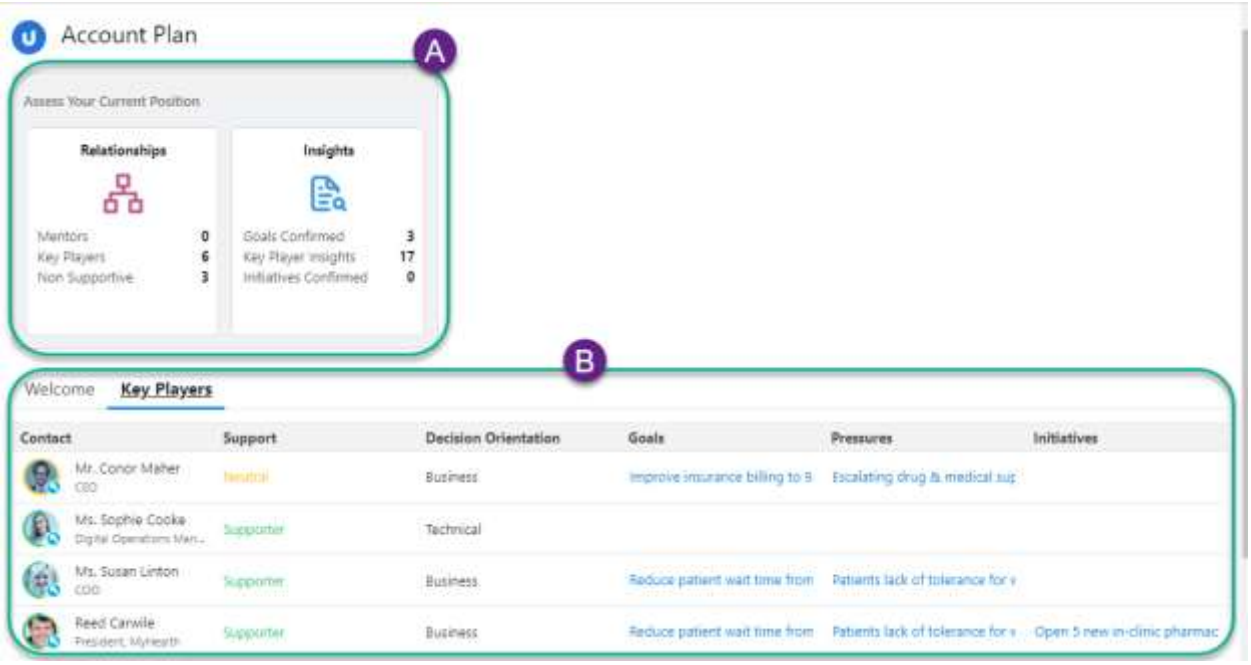
Altify Rewrite

A major project to rewrite Altify is now completed. Primarily, this was to satisfy compliance. In January 2022, Google ended their support for the Angular JS used by Altify. A rewrite was necessary to complete the move to the Angular framework within an allowed timeframe. However, apart from compliance, there are a number of benefits to Altify customers:

- A significant improvement in performance.
- Consistent design of dialogs simplifies their configurability and improves user experience.
- Finer-grained logging of Altify usage will inform next steps in terms of new reporting functionality and product enhancements.
- Seamless responsiveness allows for smoother navigation and avoids the need for page refreshing .
- The rewrite project also offered the opportunity to revisit Altify's look and feel. Design changes in terms of color, spacing, button and text placement, icons, user notifications, navigation and more have been applied across the product to improve consistency and user experience. The more significant changes are described in the following pages.

New Altify Insights Launchpad

A new, consolidated launchpad combines the tiles used to access Altify Insights (see A below), and the summary of key player information (B). Previously, this functionality was divided across two separate launchpads.



In addition, the Relationships and Insights tiles now include more useful and actionable data.

Accommodating the updated Altify Insights launchpad

The following tasks need to be performed by an administrator to accommodate the new launchpad.

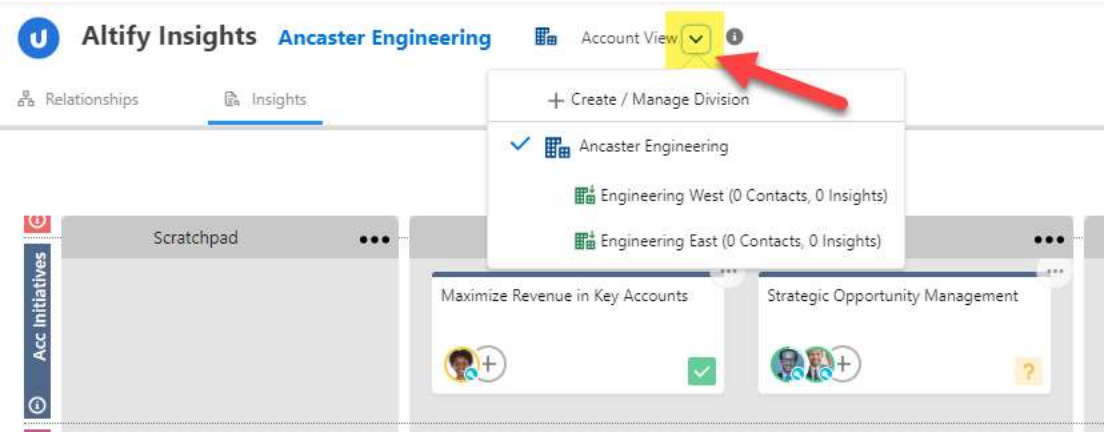
- The area assigned to the Altify Insights launchpad needs to be expanded to accomodate the new Key Players tab.
- Removal of the superfluous Altify Account Summary Launchpad on the Account page layout.

Please refer to the Upgrade Guide for assistance with these tasks.

Reorganization of Division Manager

Previous to 9.12, new divisions were created on the Altify Account Summary Launchpad.

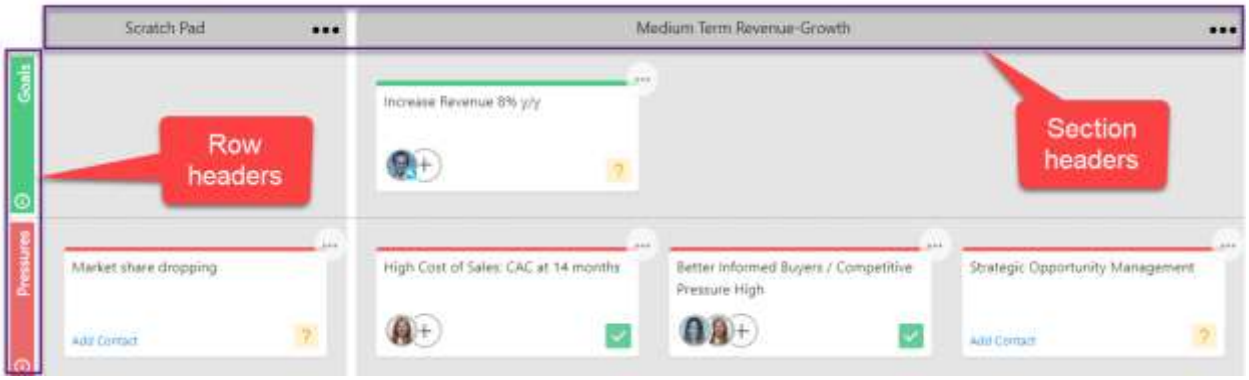
Division management is now removed from the launchpad (simplifying its display in the process) and added to the pages of an account plan: Relationships and Insights. A drop-down of options (as highlighted in the example below) allows the access, creation, renaming and deletion of account divisions as required.



Insight Map

Fixed row and section headers

When scrolling horizontally/vertically in an insight map, the row/section headers (indicated below) are fixed in position for easy reference to an insight's type and section.



Note: The section headers are partially fixed and lose their 'stickiness' after a certain amount of vertical scrolling.

Full screen mode [account insight maps]

A full screen option is now available in account insight maps (was already available for opportunity insight maps).

Altify Dialogs

A rewrite of all Altify's dialogs (which began in Altify v9.9) is now complete. A consistent design is now implemented across all dialogs and, where applicable, all Altify dialogs now respect the customer's page layout in the corresponding standard object.

Simplified configuration of Altify Contact and Action dialogs

In v9.10, Altify Contact and Action dialogs (create and edit) were configured by the following three settings in *Altify Core Settings*:

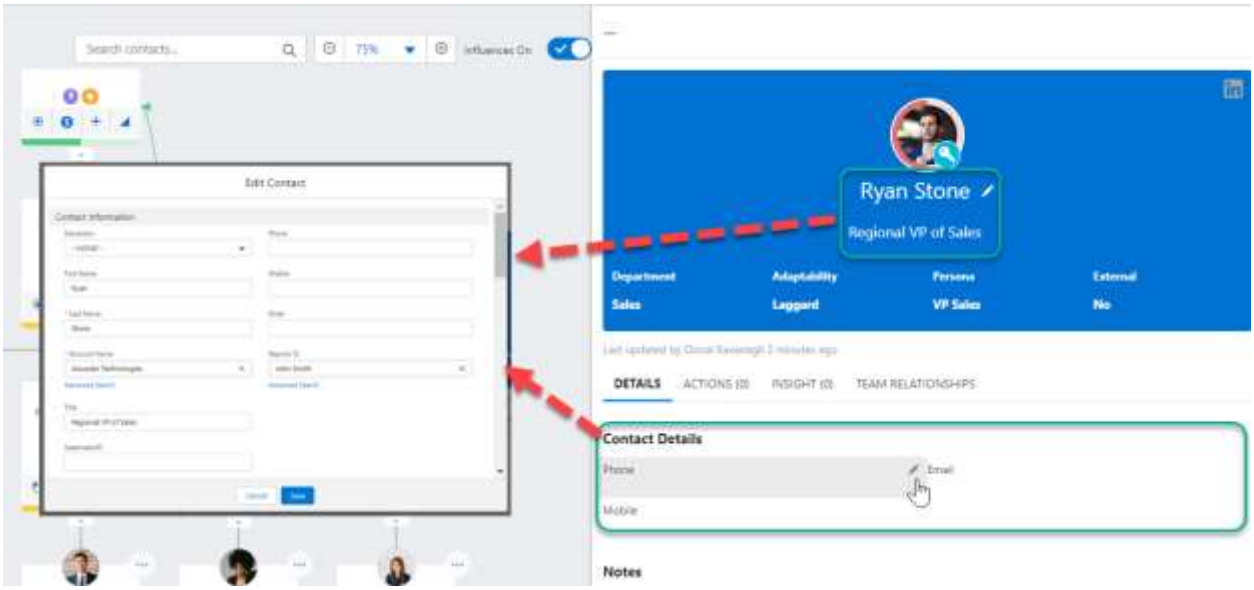
- Use CRUD Add Contact
- Use CRUD Add Action
- Hide Focused View Option in CRUD Dialogs

Hide Focused View Option in CRUD Dialogs is now deprecated. In v9.12, just two settings are required to configure Altify Contact and Action dialogs. These relabeled settings are as follows:

- *Contact dialogs respect page layout* (formerly *Use CRUD Add Contact*): if enabled, create/edit Contact dialogs in Altify reflect the page layout of Contact records in Salesforce and also display specific fields required by Altify. If disabled, create/edit Contact dialogs in Altify only show mandatory fields from the Contact page layout in Salesforce and the Altify required fields.
- *Action dialogs respect page layout* (formerly *Use CRUD Add Action*): if enabled, create/edit Action dialogs in Altify reflect the page layout of Task records in Salesforce and also display a specific field required by Altify (PRIME Action in Opportunity Manager and Altify Objective in Account Manager). If disabled, create/edit Action dialogs in Altify only show mandatory fields from the Task page layout in Salesforce and the Altify required field.

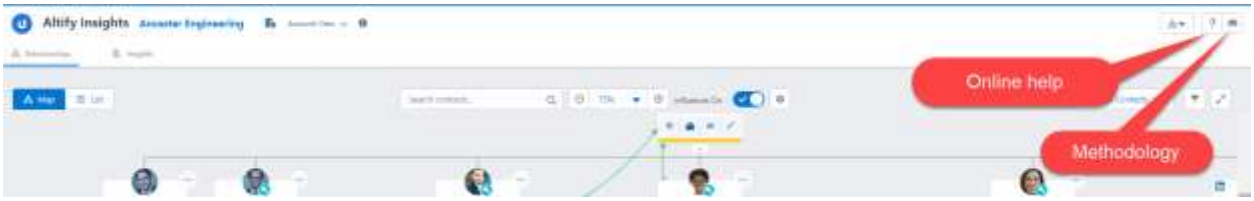
An enhancement delivered with v9.12 is that record types of Tasks and Contacts are now respected when the above settings are disabled. Previously, record types were only respected when the above settings were enabled.

Note: if the setting *Contact dialogs respect page layout* is enabled, an Altify Contact dialog that respects the Salesforce Contact page layout is now displayed if a contact's name, title, role or contact details are edited in a relationship map – as shown in the example below. Previously, this scenario involved inline editing.


Search contacts...
75%
Influencer On
Edit Contact
Ryan Stone
Regional VP of Sales
Department
Sales
Adaptability
Laggard
Persona
VP Sales
External
No
DETAILS
ACTIONS (0)
INSIGHT (0)
TEAM RELATIONSHIPS
Contact Details
Phone
Email
Mobile
Notes

Dedicated Online Help and Methodology

Altify Insights now includes a dedicated online help site created for the product.

Also available on the same site, methodology content to help you make the most of account relationship maps and insight maps, and opportunity relationship maps and insight maps.

Click the relevant link to access the online help or methodology for your current location in Altify Insights: