



# Spring '24 Release Notes (v9.12)

June, 2024



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# Release Overview

Altify 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.

In Account Manager, a new consolidated launchpad provides the latest data on the **account's** opportunities, key contacts and more. It also provides access to the various features of the associated account plan and any Account Manager plans that include the account.

Two other enhancements in account management deliver convenience and save valuable time. A Salesforce Opportunity record can now be created on the opportunity map and pipeline pages. This means that opportunities can be created and imported into plans without leaving Altify Account Manager. For account plans, a new Division Manager tool allows the creation, edit and deletion of account divisions on any page of the plan (previously, this functionality was less widely accessible to users).

Numerous small design improvements are also implemented in Account Manager. This also applies to Opportunity Manager (on the Assessment page in particular), Sales Process Manager, TeamView and Insight Maps.

The efficiency of Test & Improves (for opportunities and Account Manager plans) is improved with a newly designed Summary page. New comment filters and the ability of attendees to pin their comments provide a decluttered space from which to clearly plan next steps and actions arising from the T&I.

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

# Summary of Changes

The following lists all enhancements introduced with Altify 9.12:

## Altify Rewrite

- Understand the need for and benefits of the completed [rewrite project](#).

## Opportunity Manager

- [Assessment UI Improvements](#): design improvements to improve the user experience.
- [Email notifications for non-PRIME actions](#): email notifications now available for customers that do not apply PRIME methodology.

## Account Manager

- [New Account Manager launchpad](#): new launchpad comfortably consolidates the functionality of three existing launchpads and offers more high level data for account planners.
- [Snapshots of Account Manager plan progress](#): a simple new reporting suggestion that uses three new fields to provide a quick overview of Account Manager plans.
- [Reorganization of division manager](#): create, edit or delete account divisions from any page in an account plan.
- [Optional search criteria in opportunity import](#): access opportunity list views to improve searching when selecting opportunities to import to opportunity map.
- [Creating and adding a Salesforce Opportunity](#): create and add opportunities to add to a plan from within Altify Account Manager.
- [New design for adding market and competitor data](#): newly designed dialog for an intuitive experience when building market data in an opportunity map.
- [View the opportunity map legend while planning](#): easy access to UI guidance on the opportunity map.
- [Simplification of opportunity map dialogs](#): decluttered dialogs allow for a streamlined experience whether adding opportunities, blocking whitespace or adding market data.
- [Opportunity map toast messages and tooltips](#): new toast messages and tooltips to aid user understanding and confirm actions.
- [Solution family collapse/expand in account plans](#): option to declutter Pipeline page for easy access to summary data.

## Insight Map

- [Fixed row and section headers](#): improved navigation of insight maps.
- [Full screen mode \[Account Manager\]](#): design consistency with the implementation of a full screen option in all account insight maps.

## Test & Improve

- [Pinned comments](#): attendees pin their comments for priority treatment.
- [Filter by comment type](#): filter comments on the newly designed summary page to declutter and prioritize.
- [UI improvements to Feeds panel and Summary page](#): improved design of the Feeds tab make it easier to mark a question as answered, create an action or delete a comment.
- [Restricted deletion permission](#): new behavior means that only the person who commented may delete the comment.

## Sales Process Manager

- [Sales Process UI improvements](#): design improvements have decluttered the user interface and aided user understanding.

## TeamView

- [TeamView UI improvements](#): an intuitive new design for creating and applying filters and additional info displayed for team members when editing a team.

## Altify Dialogs

- [Simplified configuration of Altify Contact and Action dialogs](#): consistent design implemented for all Altify dialogs and a simplified configuration of Action and Contact dialogs.

# 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.

# Opportunity Manager

## New user functionality

### Assessment UI improvements

The following small improvements are made to the assessment user interface:

- The title and type of Quicklinks (highlighted in the image below) added to an assessment question are now immediately apparent to the user (they were previously accessed via a dialog).

8. Unique Business Value ⓘ  
Has a key player confirmed that your solution delivers business value in a way that uniquely differentiates you from the competition?

Yes [dropdown] Unknown [dropdown]

Notes [edit icon]

Quicklinks

X500 brochure Testimonials and product specifications

- The area for adding Notes (indicated in the image below) is now more apparent. Previously, this area was only displayed once notes had been added via a clickable icon. In addition, added notes are truncated and Show More/Show Less controls reduce the amount of scrolling required on the page.

8. Unique Business Value ⓘ  
Has a key player confirmed that your solution delivers business value in a way that uniquely differentiates you from the competition?

Yes [dropdown] Unknown [dropdown]

Notes [edit icon]

Quicklinks

X500 brochure Testimonials and product specifications

- A new options menu (shown below) means that competitors can be removed from an assessment without having to open the Edit



competitor dialog.

The screenshot shows a web interface for managing competitors. At the top, there is a blue button labeled '+ Add Competitor'. Below it is a table with columns for 'Upland Altify' and 'RedQuest'. The first row has a green checkmark in the 'Upland Altify' column and a green checkmark in the 'RedQuest' column. The second row has a green checkmark in the 'Upland Altify' column and a yellow question mark in the 'RedQuest' column. A context menu is open over the table, showing 'Edit' and 'Delete' options. A red arrow points to the context menu.

- A new message warns when a duplicate competitor is being added to the assessment.

The screenshot shows a dialog box titled 'Create Altify Opportunity Competitor'. It has a search bar for 'Competitor Name (max length 40 characters)' with the text 'RedQuest' entered. Below the search bar, there is a yellow warning message: 'RedQuest (Competitor is already added to this assessment)'. The 'Currency' dropdown is set to 'U.S. Dollar'. At the bottom, there are three buttons: 'Cancel', 'Save and New', and 'Save'. A red dashed arrow points from the '+ Add Competitor' button in the background to the search bar in the dialog box.

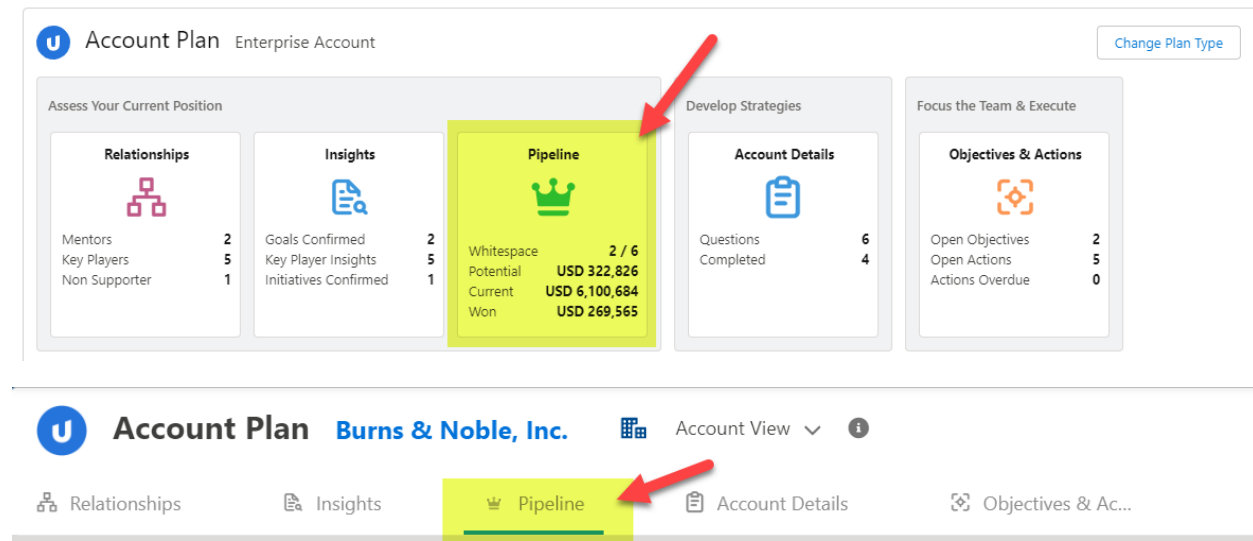
## Email notifications for non-PRIME actions

In organizations where email notification of assigned actions are enabled, and where PRIME action methodology is not implemented (i.e. the custom setting *Hide PRIME Type Column* is enabled), users are now notified by email when they are assigned an action. Previously, email notifications were limited to PRIME actions only.

# Account Manager

## Note on Terminology

What was known as 'Potentials' in an account plan is now 'Pipeline' in v9.12 – as shown in below in the Account Plan launchpad and within an account plan.



## New user functionality

### New Account Manager launchpad

Every aspect of Altify Account Manager can now be accessed from the Account Plan launchpad. The launchpad features the following major enhancements:

Firstly, much more top level data is now available to users (as highlighted in the example shown below), indicating where action might currently be required for the relevant account. For example, the number of contacts who have been identified as key players is shown on the Relationships tile, and the number of overdue actions is flagged on the Objectives & Actions tile.

**Account Plan** Enterprise Account Manager Plan Change Plan Type

**Assess Your Current Position**

- Relationships**
  - Mentors: 0
  - Key Players: 6
  - Non Supporter: 3
- Insights**
  - Goals Confirmed: 3
  - Key Player Insights: 17
  - Initiatives Confirmed: 0
- Pipeline**
  - Whitespace: 0 / 2
  - Potential: USD 44,000
  - Current: USD 680,000
  - Won: USD 790,000

**Develop Strategies**

- Account Details**
  - Questions: 8
  - Completed: 1

**Focus the Team & Execute**

- Objectives & Actions**
  - Open Objectives: 4
  - Open Actions: 7
  - Actions Overdue: 1

**Welcome** | Key Players | Opportunities | AM plans

Welcome to your Altify Account Plan.

Click on a tile above to access the relevant feature.

Click a tab to view the following account info:

**Key Players:** their role, main concerns and level of support for you.

**Opportunities:** an overview of the opportunity pipeline.

**AM plans:** the Account Manager plans that include this account.

Secondly, the Account Plan launchpad also incorporates tabs (highlighted in the example shown below) that display data and access points that were previously available on two other launchpads. This enhancement improves access to important account information and saves valuable real estate on the Account record.

**Account Plan** Enterprise Account Manager Plan Change Plan Type

**Assess Your Current Position**

- Relationships**
  - Mentors: 0
  - Key Players: 6
  - Non Supporter: 3
- Insights**
  - Goals Confirmed: 3
  - Key Player Insights: 17
  - Initiatives Confirmed: 0
- Pipeline**
  - Whitespace: 0 / 2
  - Potential: USD 44,000
  - Current: USD 680,000
  - Won: USD 790,000

**Develop Strategies**

- Account Details**
  - Questions: 8
  - Completed: 1

**Focus the Team & Execute**

- Objectives & Actions**
  - Open Objectives: 4
  - Open Actions: 7
  - Actions Overdue: 1

**Welcome** | Key Players | **Opportunities** | AM plans

**Potential Opportunities**  
USD 44.00 K (1)

**Current Opportunities**  
USD 680.00 K (6)

**Won Opportunities**  
USD 790.00 K (2)

**Targeted**  
Yes

**Segmentation**  
A Segment

**Largest Current Opportunities**

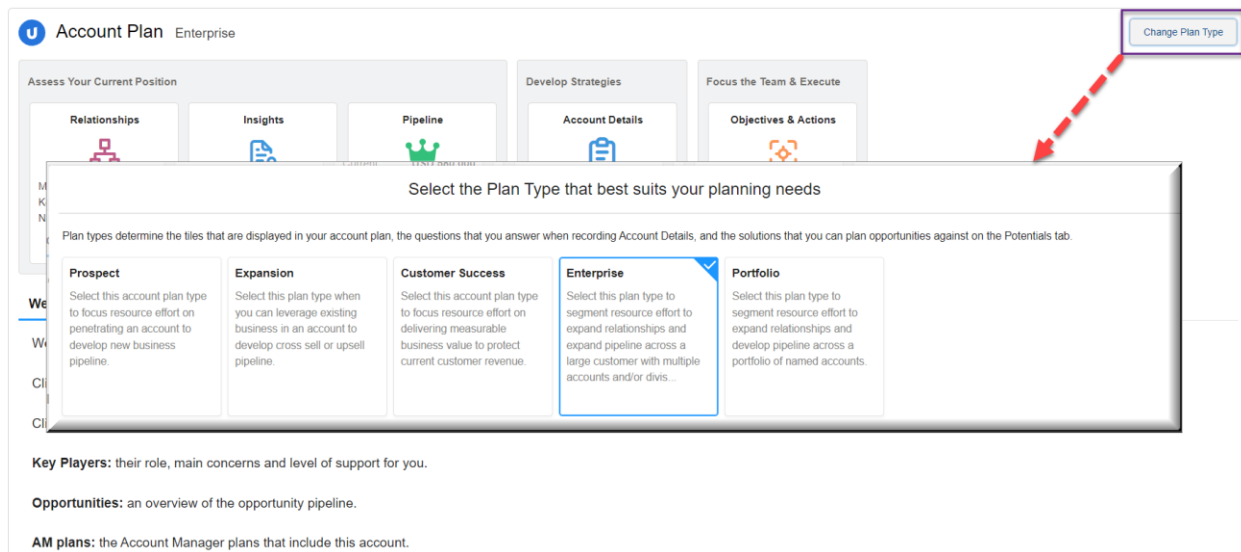
Name	Stage	Close Date	Owner	Amount
MyHealth 150 POS Software Upgrades oppo...	Requirements	5/22/2024	Jane Anderson	USD 280,000
MyHealth 150 POS Software Upgrades	Requirements	5/22/2024	Lynn Benfield	USD 280,000

The Opportunities tab displays opportunity information and the Key Players displays relationship information (both previously accessed via the Altify Summary Launchpad). Account Manager plan information is displayed on the Account Manager Plans tab (previously accessed via the Altify Account Manager Plans launchpad).

Note: on the Opportunities tab, the Current Opportunities total, Won Opportunities total and listed Largest Current Opportunities are no longer restricted to opportunities that are added to an Account Manager plan (as was the case in previous versions of

Altify). Altify now looks at all the account's current and won opportunities when generating this data.

A third improvement to the Altify Account Plan launchpad involves the selection of the plan type. In previous versions, a plan type was selected via a drop-down menu on the launchpad and no information displayed for the various plan types. Now, clicking on the Change Plan Type button (highlighted below) opens a plan type selection dialog with descriptions for each option (if they have been added by your administrator).



## Snapshots of Account Manager plan progress

New fields added to the Altify Account Manager Plan object (*Potential Snapshot*, *Current Snapshot* and *Won Snapshot*) provide the latest totals of potential, current and won opportunities included in a plan.

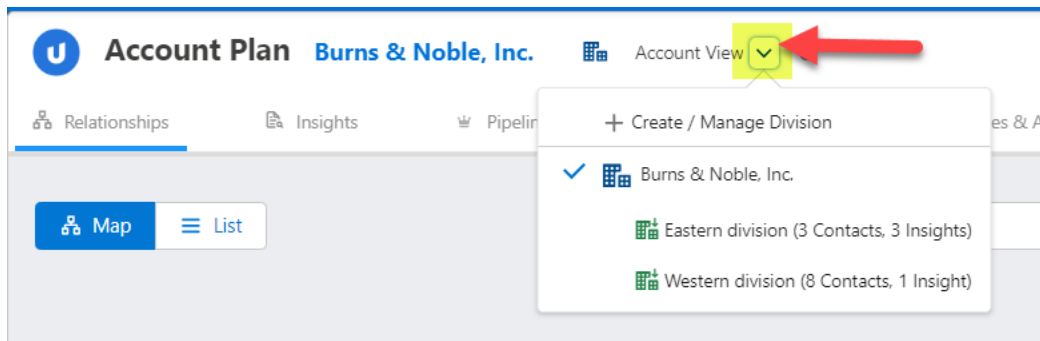
These values can be brought into view by creating or updating a Salesforce list view on the Altify Account Manager Plans page. Pictured below is a suggested view. It uses the following fields: *Plan Name*, *Plan Type*, *Potential Snapshot*, *Current Snapshot*, *Won Snapshot*, *Revenue Target*, *Min Plan Start Date* and *Max Plan End Date*.

Altify Account Manager Plans								
Snapshots								
7 Items • Sorted by Plan Name • Filtered by My altify account manager plans • Updated a few seconds ago								
<input type="checkbox"/>	Plan Name ↑	Plan Type	Potential Snapshot	Current Snapshot	Won Snapshot	Revenue Target	Min Plan Start...	Max Plan End ...
1	<input type="checkbox"/> Ancaster Portfolio Plan	Portfolio Account Manager Plan				USD 5,000,000.00	3/22/2024	4/21/2026
2	<input type="checkbox"/> Market Views	Market View Account Manager Plan	USD 8,900,000.00	USD 10,479,582.00	USD 1,363,908.94	USD 5,000,000.00	9/22/2030	7/23/2031
3	<input type="checkbox"/> NAM Riley Solutions Plan 2021	Portfolio Account Manager Plan	USD 1,000,000.00			USD 1,000,000.00	5/22/2024	6/21/2025
4	<input type="checkbox"/> New Business Plan	Customer Acquisition Account Plan	USD 700,000.00	USD 2,438,700.00	USD 0.00	USD 8,620,000.00	11/23/2023	11/22/2027
5	<input type="checkbox"/> Oriole Group - FY21 Account Plan	Enterprise Account Manager Plan	USD 0.00	USD 0.00	USD 0.00	USD 1,500,000.00	5/22/2024	12/22/2025
6	<input type="checkbox"/> Riley Retail Solutions Portfolio Plan 2025	Customer Acquisition Account Plan	USD 0.00	USD 0.00	USD 0.00	USD 4,000,000.00	5/22/2024	5/21/2025
7	<input type="checkbox"/> Tom Sweetman Customer Success Plan Type	Customer Success Account Plan				USD 1,000,000.00	11/23/2023	11/22/2027

## Reorganization of division manager

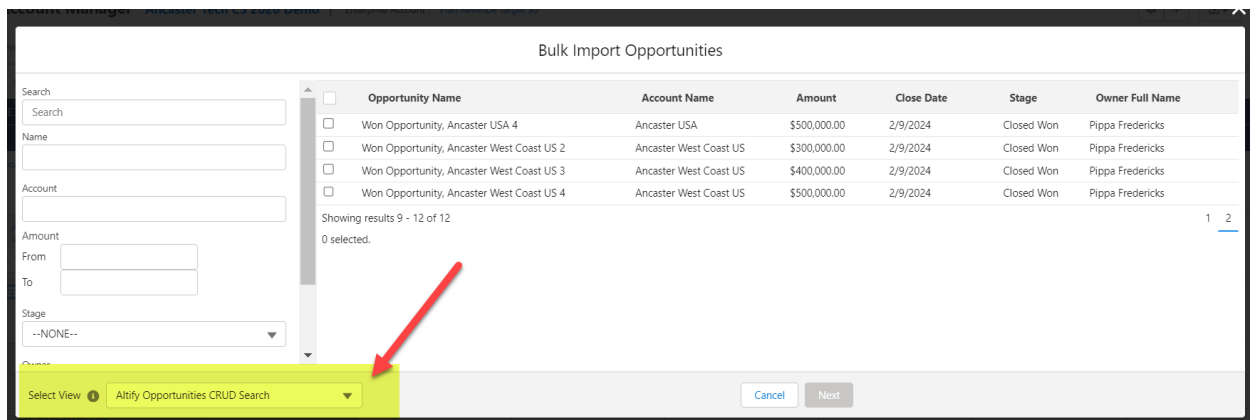
Previous to 9.12, new divisions were created on the Altify Summary Launchpad, on the Overview page of an Account Manager plan, and on the Account Structure page in Plan Settings.

Division management is now removed from the launchpad and AM plan overview (simplifying those displays in the process) and added to the various pages of an account plan: Relationships, Insights, Pipeline, Account Details and Objectives & Actions. A drop-down of options (as highlighted in the example below) allows the access, creation, renaming and deletion of account divisions as required.



## Optional search criteria in opportunity import

When importing current or won opportunities to the opportunity map, a Select View drop-down menu is now available (as highlighted below).



The search criteria in the *Bulk Import Opportunities* dialog are determined by a Salesforce List View of opportunities. With this new menu, alternative list views, and thereby alternative sets of search criteria, can be selected and applied to the search for opportunities.

This option was already available for importing opportunities to an account plan and is now available for Account Manager plans.

## Creating and adding a Salesforce Opportunity

A Salesforce opportunity (current or won) can now be created and added to an opportunity map without having to leave Account Manager.

The New Opportunity button is located above the opportunity map.

The screenshot shows the Account Manager interface for 'Ancaster Tech CS 2020 Demo'. The 'Opportunity Map' tab is active. Above the map, there are buttons for 'Import opportunities' and 'New Opportunity'. The 'New Opportunity' button is highlighted in yellow, and a red arrow points to it. Below the buttons, there is a table with columns for 'COLLAPSE ALL', 'TOTAL', 'OM SUITE', and 'SERVICES'. The table contains data for 'Ancaster East Coast US' and 'Ancaster West Coast US'.

COLLAPSE ALL	TOTAL	OM SUITE	SERVICES
Ancaster East Coast US	EUR 2,624,760	EUR 2,624,760	Account Manager Demo
	EUR 276,000	EUR 184,000	
	EUR 552,000	EUR 276,000	EUR 92,000
Ancaster West Coast US	EUR 2,900,760	EUR 2,900,760	
	EUR 276,000	EUR 92,000	EUR 184,000

A new SF opportunity can also be created via an intersection dialog – as highlighted below:

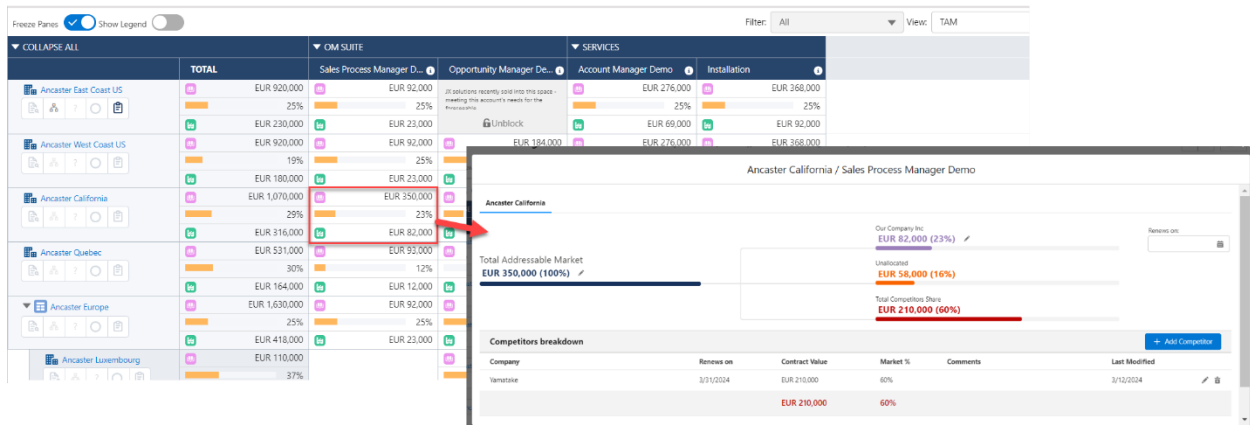
The screenshot shows the 'Ancaster West Coast US / Opportunity Manager Demo' dialog. It has tabs for 'Potential', 'Current', and 'Won'. The 'Current' tab is active, showing a table with columns: Name, Opportunity Manager, Account, Amount, Stage, Close Date, and %. There is one row of data. At the bottom right, there are buttons for 'Import opportunities', 'New Opportunity', and 'Close'. The 'New Opportunity' button is highlighted in yellow, and a red arrow points to it.

Name	Opportunity Manager	Account	Amount	Stage	Close Date	%
Demo Opportunity, Ancas...	Open in OM	Ancaster West Coast US	USD 100,000 (EUR 92,000)	Prospecting	3/11/2024	10%

Creating a new opportunity involves completing the same fields as a user would when creating an opportunity in their Salesforce org, and selecting the row and column where they want it to appear on the opportunity map.

## New design for adding market and competitor data

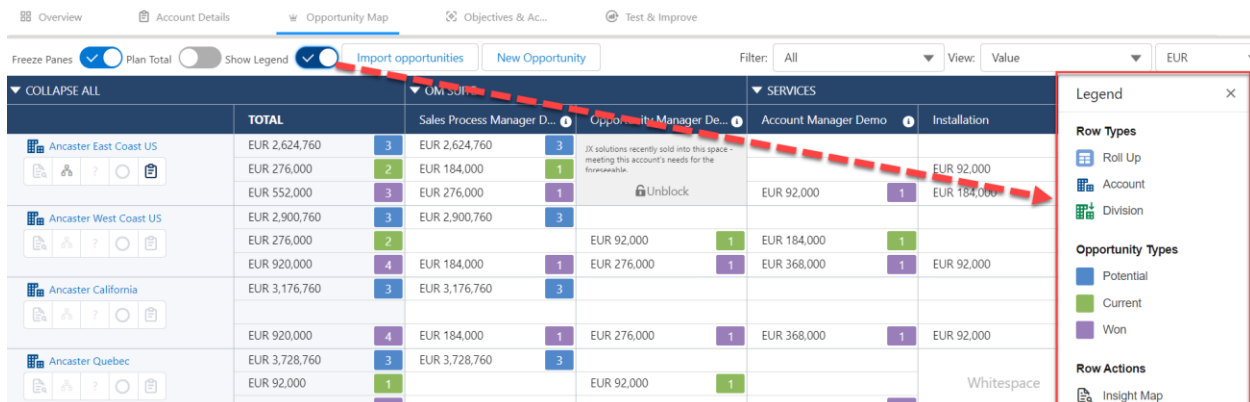
The user experience of adding market and competitor data to an opportunity map is improved with a new user interface – as shown in the example below:



A modernized UI, and the addition of tooltips, encourages the user to build their market data in a logical and intuitive fashion. The new dialog also includes a *Last Modified* date stamp for competitor data.

View the opportunity map legend while planning

A Show Legend toggle on the opportunity map allows the user to keep the legend open for reference while planning on the map.

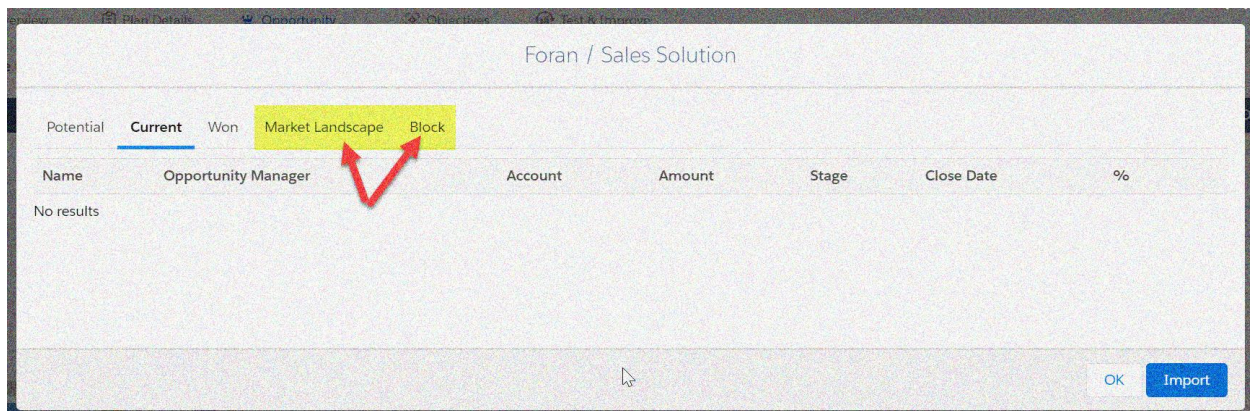


Previously, the legend was displayed in a hover message that could not remain open while performing tasks on the opportunity map.

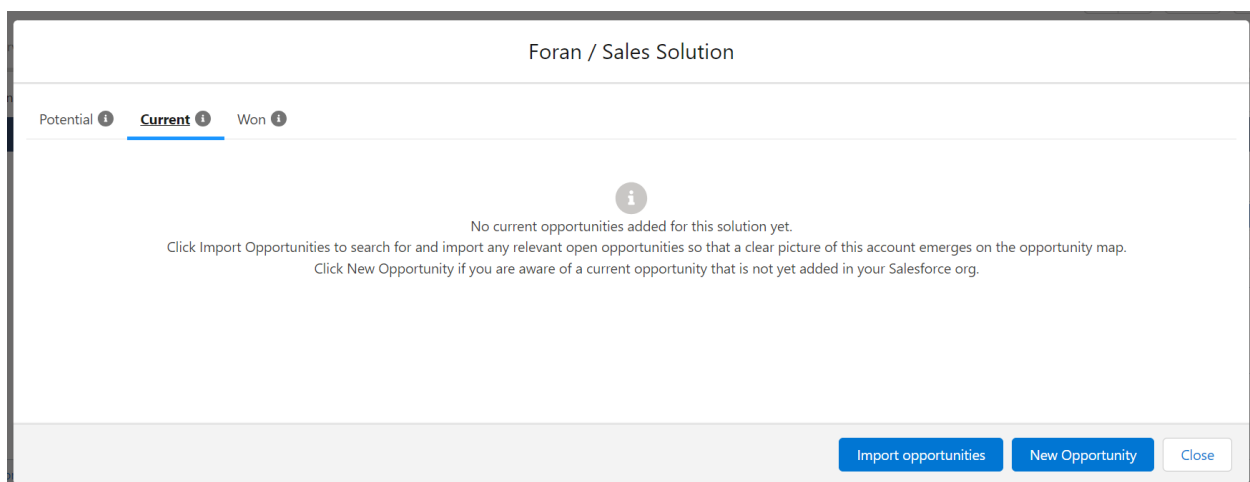
Simplification of opportunity map dialogs

The blocking and unblocking of whitespace was previously a function on the intersection dialog (along with importing, editing and removing opportunities).

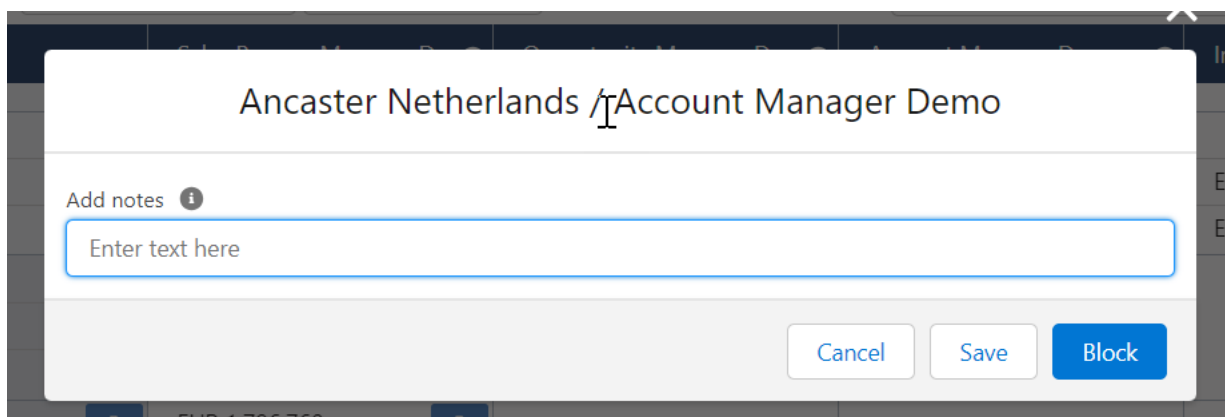
Similarly, access to market landscape and competitor data was also through tabs on the same dialog. These features are highlighted in the image below from Altify 9.10:



And here is the same dialog with a cleaner design (and new guidance text) in 9.12:



The decluttered user experience is achieved with new dialogs dedicated to market landscape data (as described [above](#)), and the blocking of intersections – as shown below:



The dedicated dialog for blocking/unblocking is facilitated by a new blocking option that is displayed in whitespaces on an opportunity map:



	TOTAL	Sales Process Manager D...	Opportunity
	EUR 92,000	1	
▼ Ancaster Europe	EUR 5,395,800	15	
	EUR 2,208,000	11	EUR 644,000
	EUR 2,116,000	10	EUR 460,000
Ancaster Luxembourg			Whi
Ancaster Netherlands	EUR 1,796,760	3	
	EUR 92,000	1	EUR 92,000

The +Add and Block options are displayed when the cursor is placed over a whitespace intersection.

## Opportunity map toast messages and tooltips

User experience of the opportunity map is improved with the addition of a wide variety of tooltips (e.g. Row and Solution columns in bulk import dialog – pictured below) and toast messages that confirm a successful action (e.g. when a new opportunity is created and added to the map – also pictured below).

New tooltips in *Bulk Import Opportunities* dialog...

Bulk Import Opportunities

Opportunity

Opportunity Name

Account Name

Amount

Close Date

Stage

Owner Full Name

Solution

Row

Demo Opportunity, Ancaster Luxembourg 4

Ancaster Luxembourg

USD 500,000.00 (EUR 460,000.00)

3/31/2024

Prospecting

Admin altify9.12-MAR

Sales Process Manager Demo

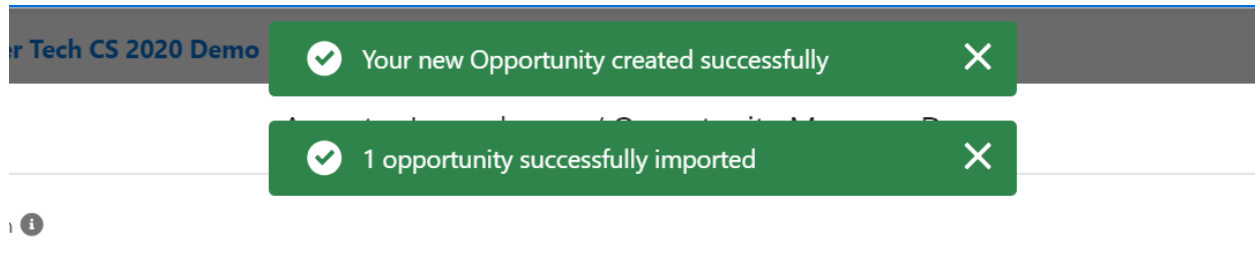
Select the row where the opportunity will be added. Options are available if the relevant account appears more than once in the opportunity map, or if it has account divisions in the map.

Cancel

Back

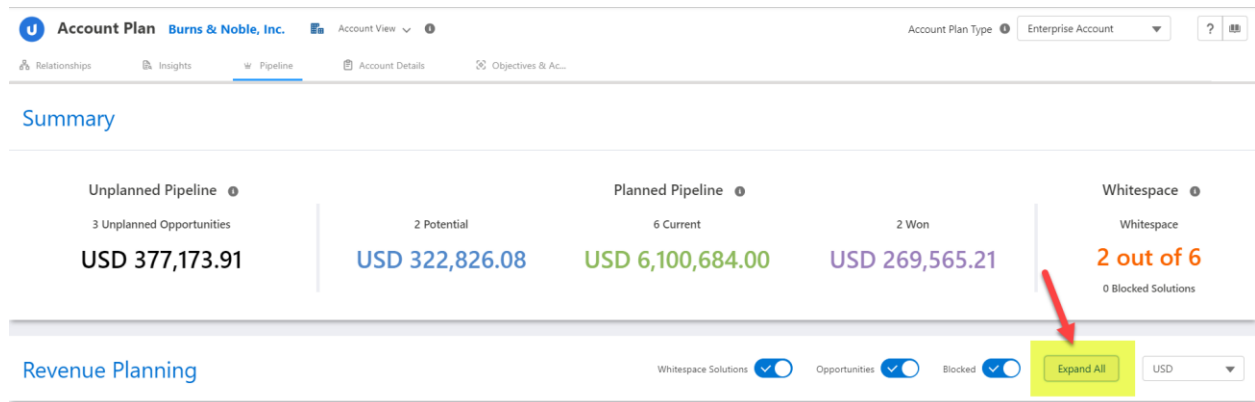
Import

New toast messages confirming the creation and import of an opportunity (using the [New Opportunity](#) function):



## Solution family collapse/expand in account plans

A new Expand All/Collapse All button on the Pipeline page mirrors the existing function on the opportunity map – allowing the user to expand or collapse all solution families on the page.



## New functionality to be administered

### Accommodating the updated Account Plan launchpad

The following tasks need to be performed by an administrator to accommodate the [new launchpad](#).

- The area assigned to the Altify Account Manager launchpad (labeled 'Altify Account Plan' in the UI) needs to be expanded to accommodate the new tabs.
- Removal of superfluous launchpads on the Account page layout.
- Descriptions need to be added to Altify AM Plan Types for display in the [plan type selection dialog](#). This includes the default plan types shipped with Altify and plan types that have been created by a customer.

Please refer to the [Upgrade Guide](#) for assistance with these tasks.

## Resolving conflicts arising from SF hierarchy vs Altify account grouping (v9.12.16)

A new Altify Account Manager Setting, *Use SF Hierarchy Precedence*, avoids unexpected behavior when there is a data conflict between Salesforce account hierarchy configuration and Altify account grouping.

If enabled, Altify assigns opportunities to account rows according to the Salesforce hierarchy. If disabled, Altify assigns opportunities to account rows according to account grouping that has been implemented by a user.

For more information, see [Prioritizing Salesforce Hierarchy or Altify Account Grouping](#) in the online help.

## Removing ability to create new opportunities (v9.12.17)

A new Altify Account Manager Setting, *Disable Opp Creation in Account Manager*, hides the ability to create new opportunities in Account Manager plans and account plans. This includes scenarios where potential opportunities are qualified and converted to current opportunities.

For more information, see [Disabling Opportunity Creation](#) in the online help.

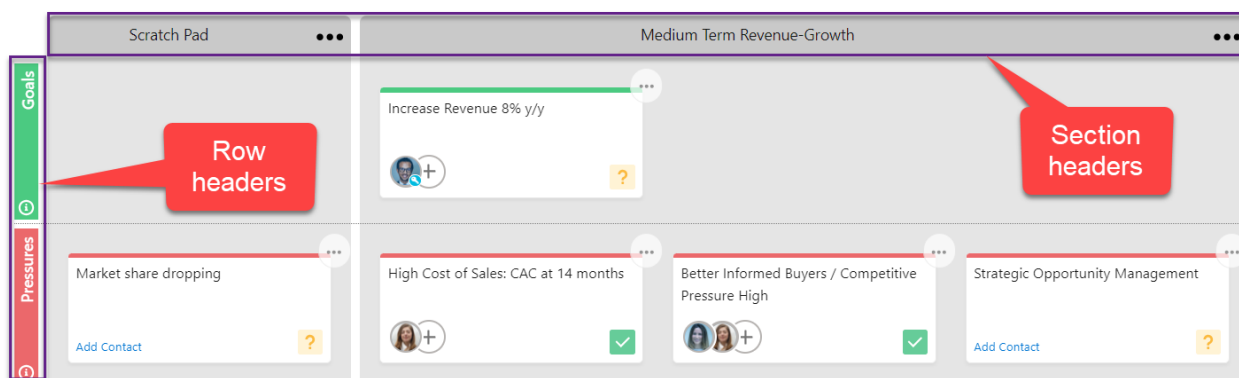
# Insight Map

## New user functionality

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

### Fixed row and section headers

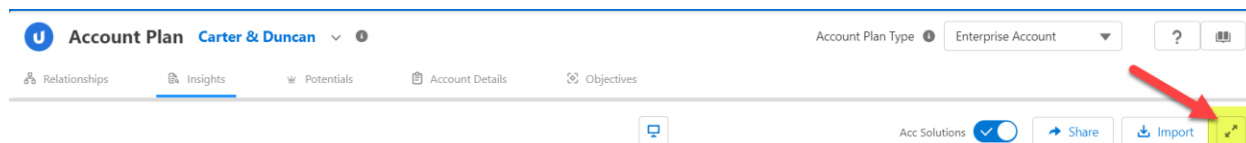
When scrolling horizontally/vertically in an insight map, the row/section headers (indicated below) are fixed in position for easy reference to an insight's type and section.



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

### Full screen mode [Account Manager]

A full screen option is available when accessing an account's insight map from within an account plan.



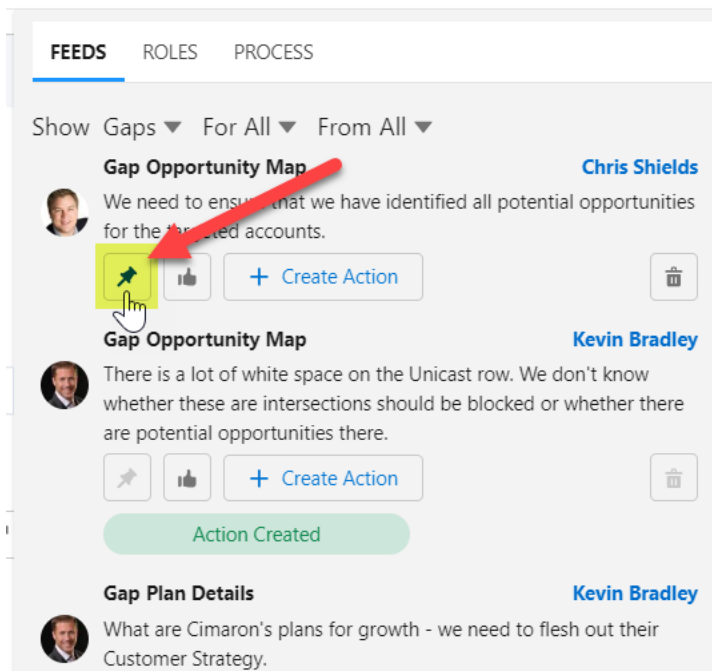
# Test & Improve

## New user functionality

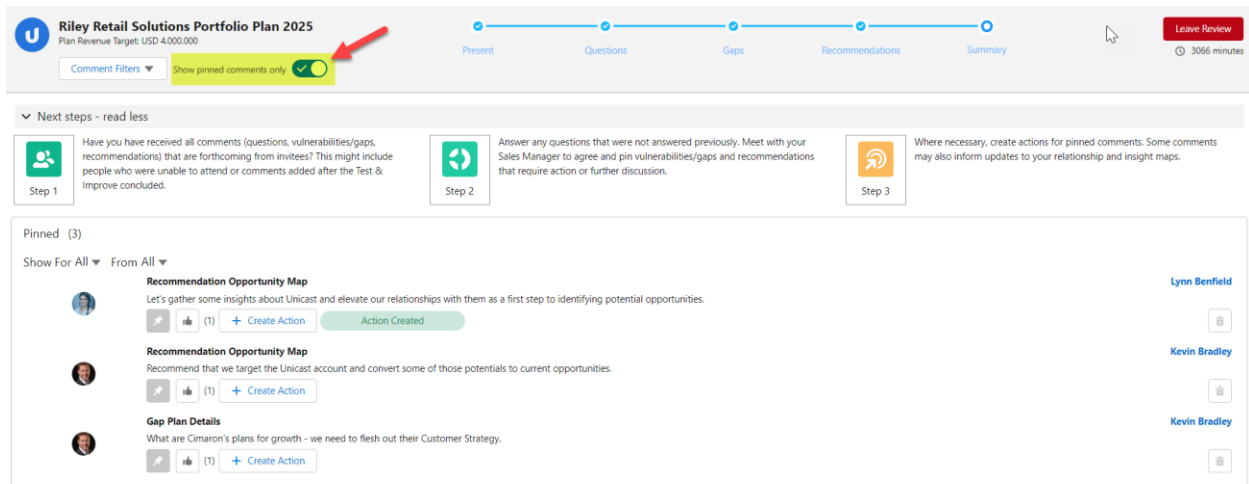
### Pinned comments

Comments (gaps/vulnerabilities and recommendations) in a Test & Improve can now be pinned. This allows important comments that require further discussion or action to be flagged on the Summary page of the Test & Improve – speeding up the process of identifying actions that need to be taken following the event.

A comment can be pinned in the Feeds panel (as shown in the example below) and on the Summary page.

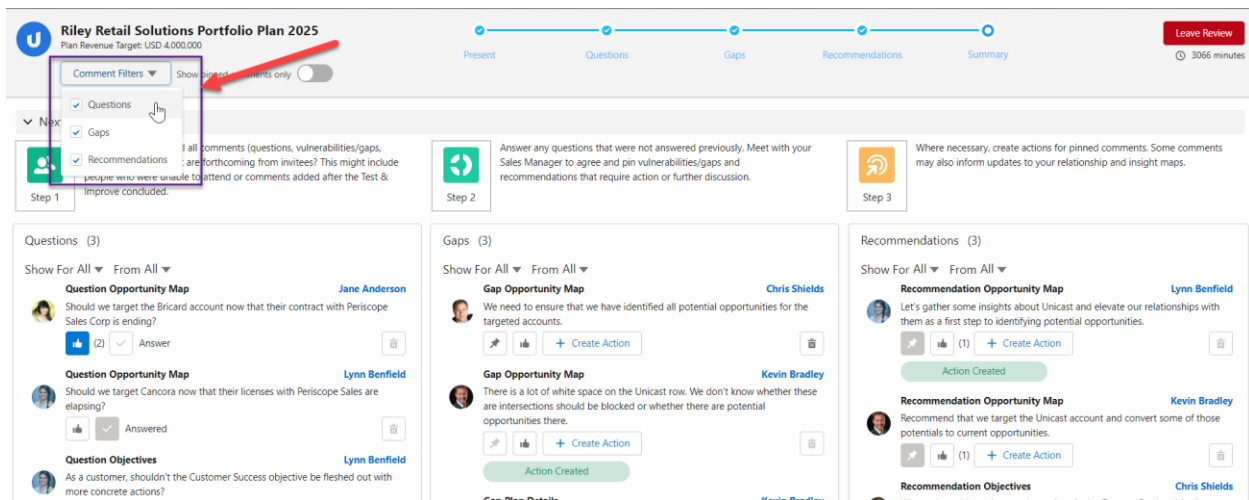


On the Summary page, a new toggle (Show pinned comments only - highlighted below) filters the comments to only show pinned gaps/vulnerabilities and recommendations.



## Filter by comment type

Another new filter option on the Summary page allows the filtering of comments by type (question, gap/vulnerability and recommendation) – as indicated on the new Summary page shown below.

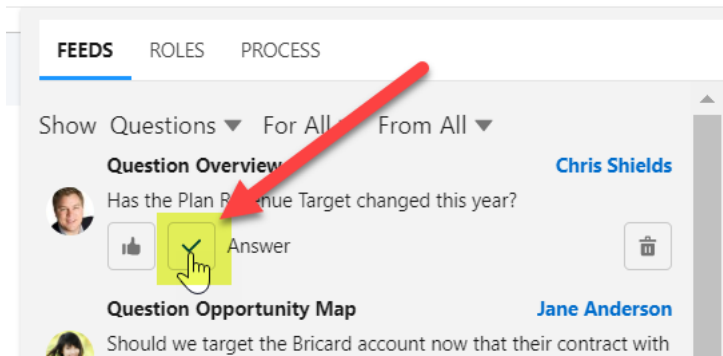


This change supports a more focused analysis of the contributions of the event reviewers.

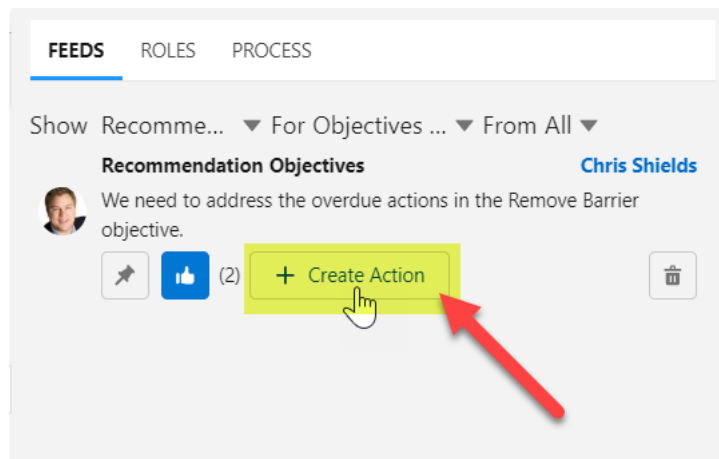
## UI improvements to Feeds panel and Summary page

Actions that were previously only accessible via a drop-down menu – marking a question as answered, creating an action, deleting a comment - are now directly accessed via the Feed interface. For example:

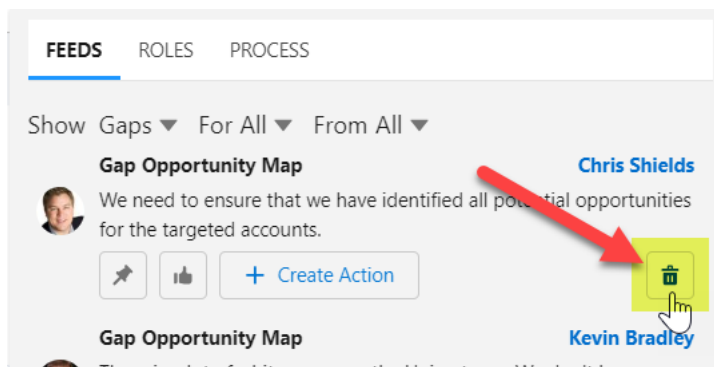
Marking a question as answered in the Questions feed:



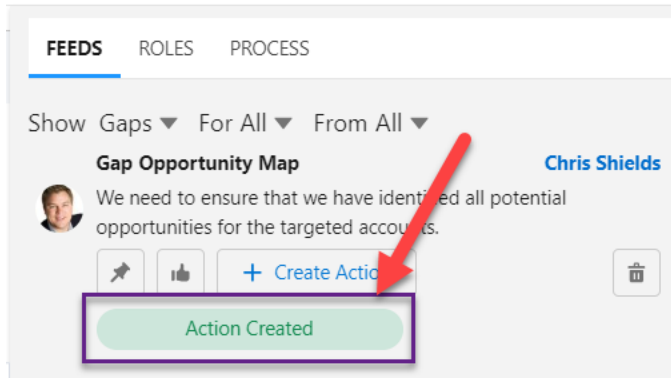
Creating an action in the Recommendations feed:



Deleting a gap/vulnerability:



In addition, a green pill with the text 'Action Created' is displayed when an action is created for the comment.



All the above, including the options to like or pin a comment, are also visible and directly accessed on the Summary page. These changes improve the efficiency of running a Test and Improve and analysing its outcomes.

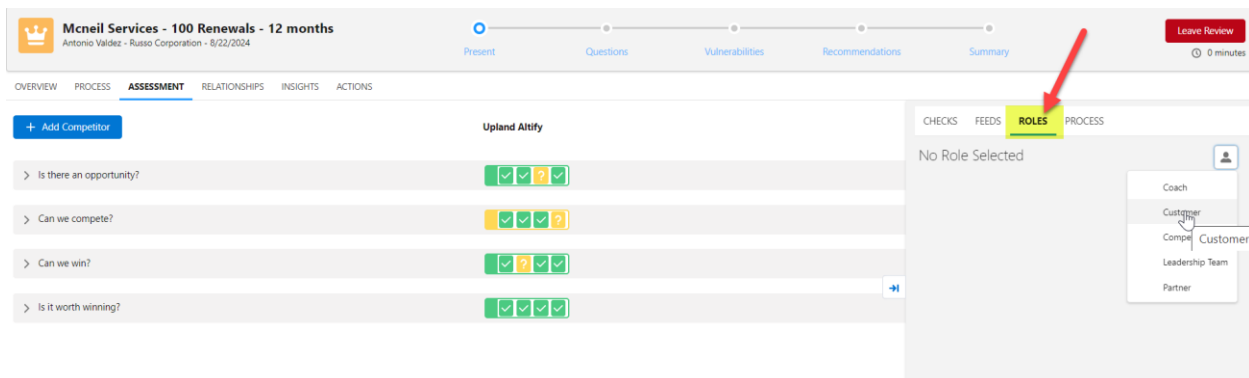
### Restricted deletion permission

Prior to 9.12, any user could delete any other attendee's **Test & Improve** comment. Now, only the user who posted the comment can delete it. Pinning means that deletion is no longer required for decluttering a Test & Improve. In addition, deletion of a comment without the commenter's agreement or knowledge is no longer an option.

## New functionality to be administered

### Hiding of the Roles tab

A *Roles* tab in Test & Improve (as shown in the example below) allows attendees to access guidance for personas they can be assigned for the event (customer, competitor, etc.).



The roles and guidance support Altify's recommended format for a Test & Improve. Should an organization prefer to adhere to their own format, and the roles are not applicable, the relevant tab can be hidden in Test & Improves.



Enabling the custom setting *Hide Roles within Test and Improve* hides the Roles tab (in *Altify Opportunity Manager Settings* for opportunity Test & Improves and in *Altify Account Manager Settings* for AM plan Test & Improves).

# Sales Process Manager

## New user functionality

### Sales Process UI improvements

Among several user interface improvements, simplifying the display of a sales process, are the following:

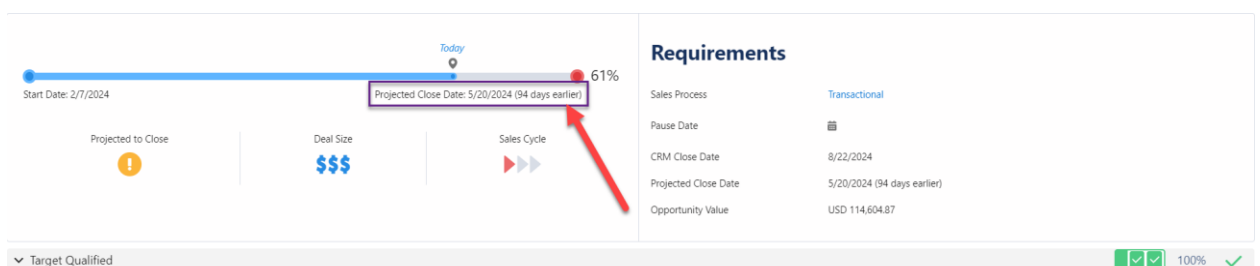
- The stage progress bar (shown below in Altify 9.10) is removed from the interface.



In 9.12, as shown below, the screen is less cluttered, and progress is still conveyed by the stage progress percentage and the color of the box that contains the answer icons.



- Previously, the text under the timeline in the sales process overview section was always displayed in red. Now, it is only displayed in red when the Projected Close Date is later than the Close Date on the SF opportunity record. In this way, attention is drawn to the misaligned close dates. Otherwise, the text is displayed in black, as shown below.



- Options to add and edit notes (see A below), and upload or access attachments (B) in a sales process qualifier are now more apparent in the interface.

▼ Target Qualified

100%

Is the customer in the 'sweet spot' for your offering? ⓘ

Yes

Attachments

Upload

or drag and drop

28\_informalseal.jpg

Last Modified: 4/26/2024

Notes

A

>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

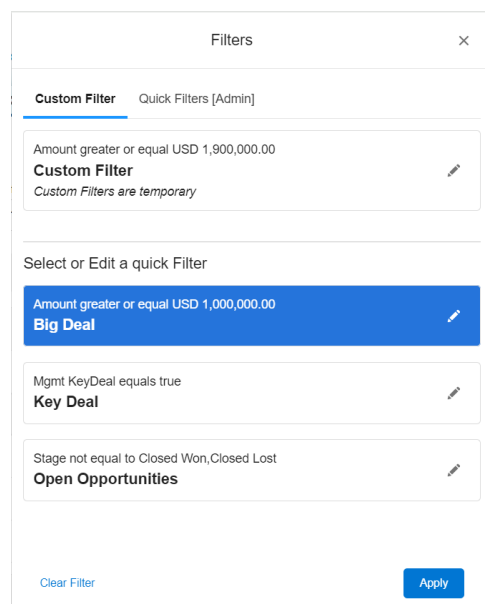
# TeamView

## New user functionality

### Improvements to user interface

The TeamView page features a number of design tweaks to improve user experience. Among the more significant changes are the following:

- The Filter feature has a new look and feel to improve user experience and understanding of temporary custom filters and reusable quick filters created by administrators.



- On the Edit Team dialog, accessed via Team Settings, team members' *Role* and *Profile* is now displayed – as highlighted in the example below.



# 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.

## New functionality to be administered

### 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%

Influences On☒

1

2

3

4

5

Edit Contact

Contact Information

Salutation

--NONE--

First Name

Ryan

\* Last Name

Stone

\* Account Name

Anacaster Technologies

Title

Regional VP of Sales

Phone

Mobile

Email

Reports To

John Smith

DealmakerID

Cancel

Save

</