Fall '24 Release Notes (v9.13)

October, 2024

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Release Overview

Get ready to turbocharge your productivity with our latest ‘data automation’ enhancements, designed to make your sellers’ lives as easier and more efficient than ever before! Imagine slashing the time you spend on administrative tasks and freeing up more moments to focus on what truly matters—building relationships and closing deals.

With these powerful updates to the relationship map, you’ll find that everything you need is right at your fingertips. No more endless clicking to search for or add contacts—these crucial features, along with Altify’s smart contact suggestions, are now front and center, saving you precious time and effort.

But that’s not all—assembling your relationship map has never been quicker. Now, when you import contacts, a single additional click brings in all their vital attributes, such as Political Status or Support for your solutions, as well as their managers. It’s like having a turbo boost for your contact management! The ability to import an entire map from an account to an opportunity or in the other direction will also reduce time on task for sellers.

In v9.13, we’ve completely transformed the Objectives & Actions page within Account Manager plans and Account Plans. The sleek new design, featuring an interactive donut chart and a streamlined interface, helps you stay on top of your daily actions with ease. Whether you’re figuring out what to tackle today or planning your next move, everything is laid out for maximum clarity and efficiency.

And for managers, the List View offers a quick, comprehensive glance at all key objectives and actions, while an upgraded filter tool lets you dive deeper into the details with pinpoint accuracy. Now, managing your team’s progress is as effortless as it gets.

With these enhancements, your selling teams will spend less time on admin and more time driving success. Let’s get to work!

Summary of Changes

The following lists all enhancements introduced with Altify 9.13:

Relationship Map

- Manage Contacts - side panel replaces dialogs – new sliding panel provides easier access to adding/removing contact functionality.
- Importing contacts from a specific map – find and add contacts from a specifc account or opportunity relationship map.
- Importing contact attributes from a specific map – option to include contact attributes from the map that contacts are imported from.
- Drag and drop contacts into relationship map – drag and drop one or multiple contacts into a relationship map.
- Automatically importing the managers of added contacts – option to automatically import the contacts that your selected contacts report to.
- Importing the latest attributes of added contacts – option to include mostly recently assigned attributes when adding contacts to a map.
- Advanced searching of contacts to add to map – advanced search available for adding contacts to map, including customizable search criteria and result columns.
- Persona – number of suggested contacts indicated – number of contacts suggested by Altify for each persona is now displayed in the persona menu.
- New flow for assigning a placeholder persona to a new contact – placeholder is automatically removed when replacing with a new contact.
- Viewing recently added contacts – new toggle to highlight contacts who are recently added to the relationship map.
- Reordered contact information panel – sections of *Details* tab reordered

Objectives & Actions

- Interactive donut charts for objectives and actions – new, clickable donut charts enable greater interaction with objective and action workload.
- New and updated views of objective and action data – decluttered and relabeled views of objectives and actions, including a new list view for quick scanning.
- New filter design – includes new filter options and finer grained search results.

Account Manager

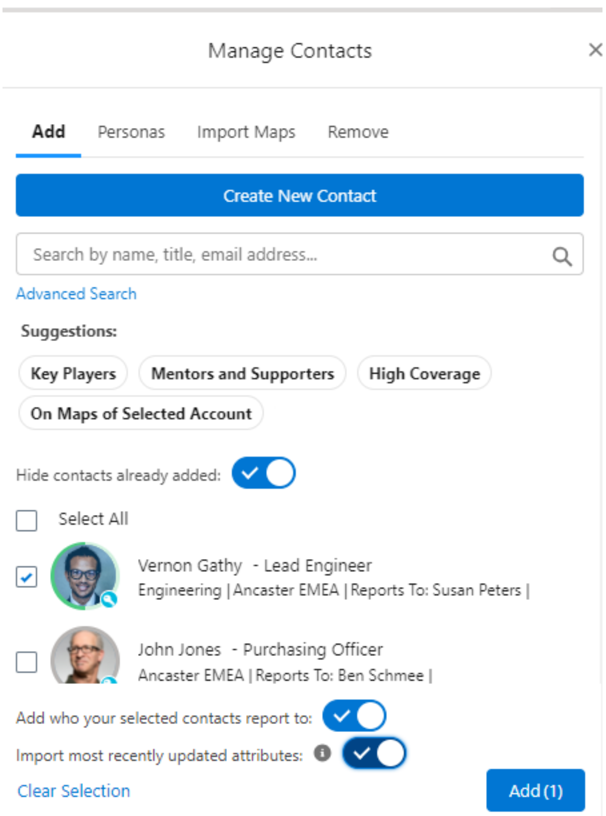
- Plan roles for Account Manager plan team members – surface plan roles in Account Manager plan settings for additional categorization of plan team members.

Relationship Map

New user functionality

Manage Contacts – side panel replaces dialogs

A new side panel (shown below) provides access to functionality around adding and removing contacts in the relationship map.



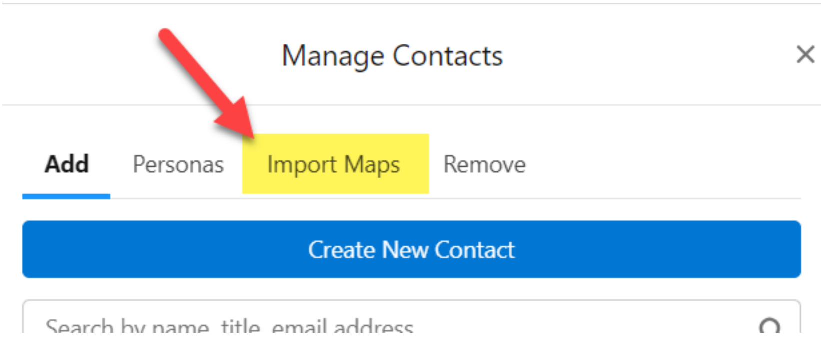
Two significant benefits of this design (in comparison with pre v9.13, when this functionality was accessed via dialogs) are as follows:

- Visibility of and access to the relationship map while adding and removing contacts.
- Access to adding and removing contacts with fewer clicks.

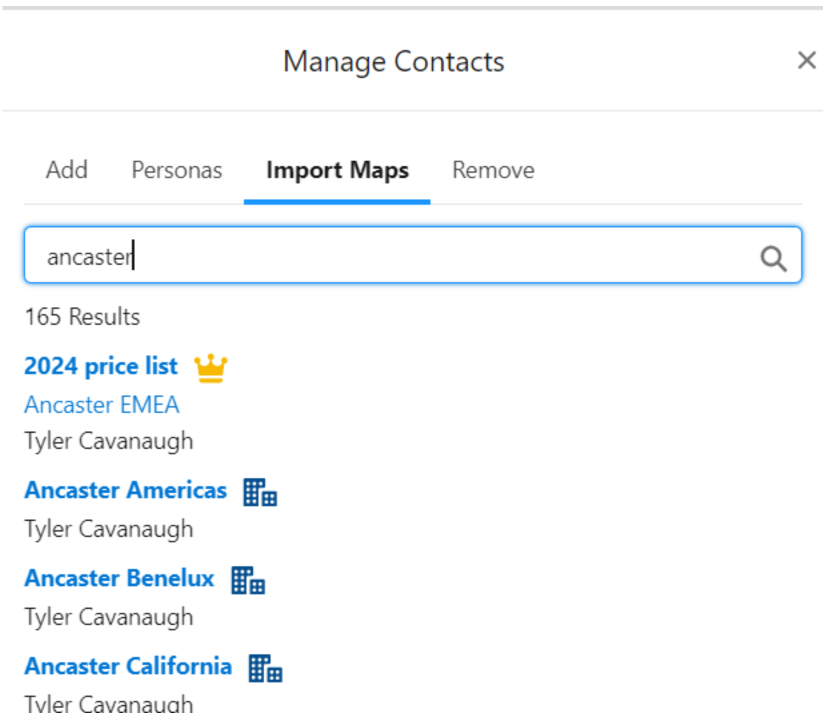
Other improvements delivered as part of this new panel are outlined in the following sections.

Importing contacts from a specific map

An *Import Maps* tab (shown below) on the new *Manage Contacts* panel enables searching for and importing the contacts of a specific account or opportunity relationship map.



Searching for relationship maps (as shown below), results are marked with the relevant Salesforce icon (for opportunities and for accounts).



When a relationship map in the search results is selected, all contacts on that map are listed and available for selection.

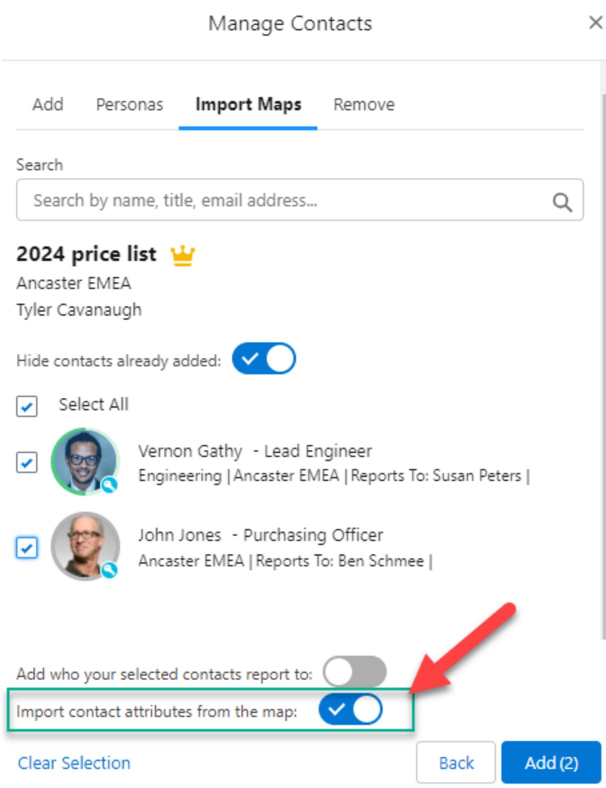
Contacts are added by drag and drop (which is new in v9.13) or by selecting them and clicking **Add**.

Also new in v9.13, the following data automation toggles that save considerable time are also available when adding contacts from a specific map:

- Include the managers of added contacts
- Include the attributes of added contacts

Importing contact attributes from a specific map

When [adding contacts from a specific relationship map](), the toggle *Import contact attributes from the map* (if enabled, as shown in the example shown below) pulls in each added contact's attribute values from the source map.

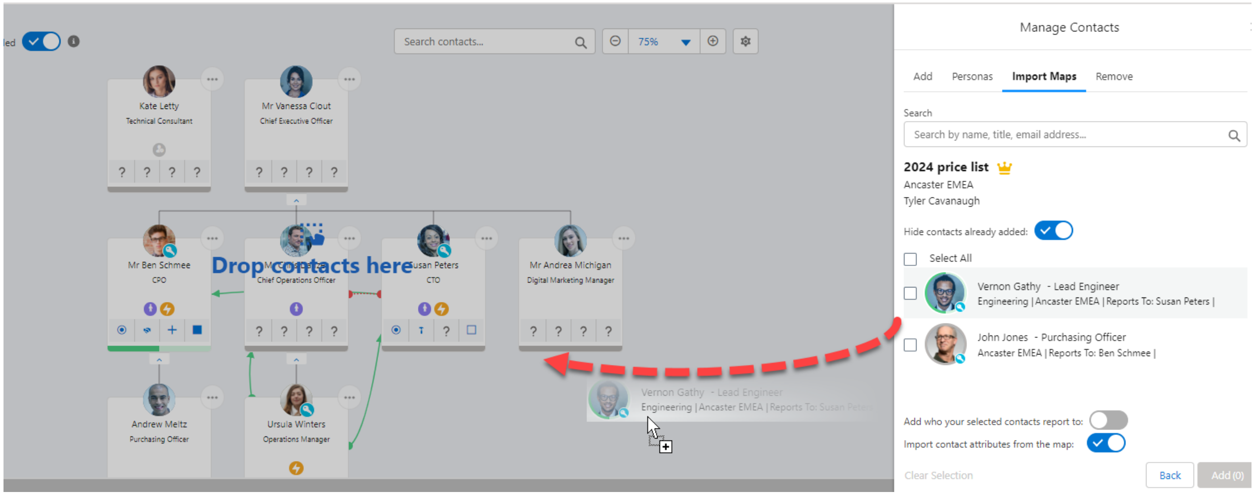


If this toggle is not enabled, the attributes of all added contacts automatically default to 'Unknown'.

Note: the attribute *Decision Orientation* (on account relationship maps only) is not included in this functionality and is always set to 'Unknown' when a contact is added to an account relationship map.

Drag and drop contacts into relationship map

Listed on the *Add*, *Personas* or *Import Maps* tab can be dragged and dropped into the relationship map – as shown in the example below:

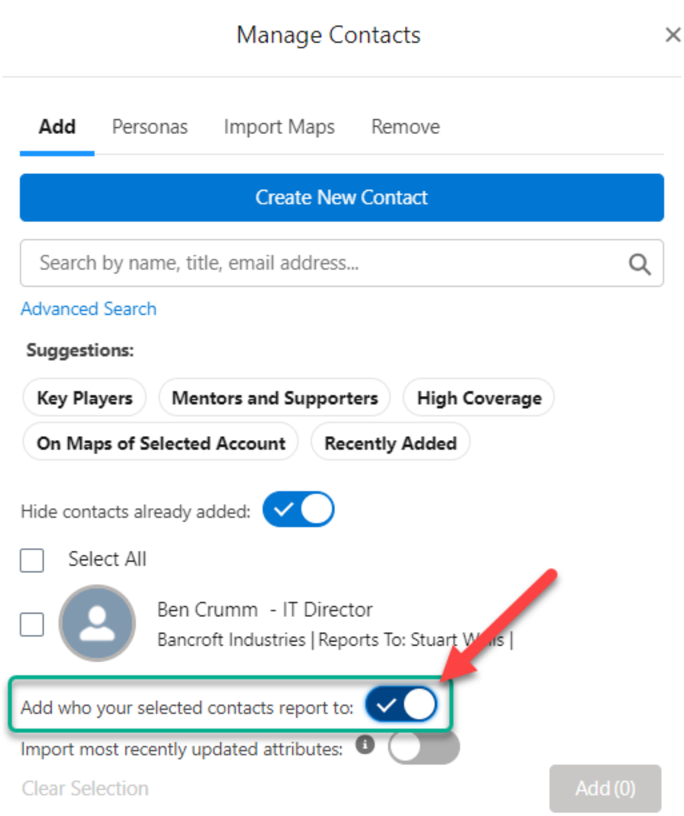


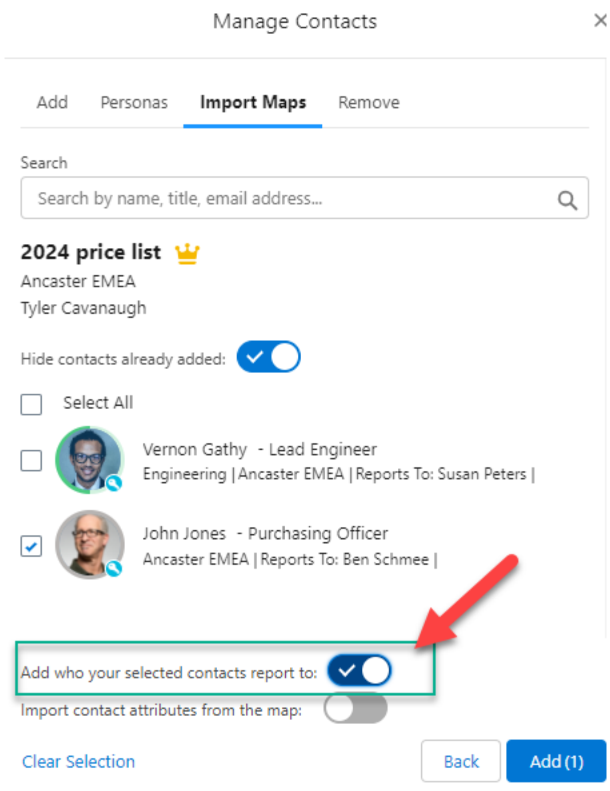
Select the relevant contacts in advance to drag and drop multiple contacts.

The toggles to automatically include each added contact's manager, latest attributes or attributes from a specific map also apply when adding contacts via drag and drop.

Automatically importing the managers of added contacts

A new toggle option (*Add who your selected contacts report to* – enabled in the example shown below) is displayed on the on the *Add*, *Personas* or *Import Maps* tabs.

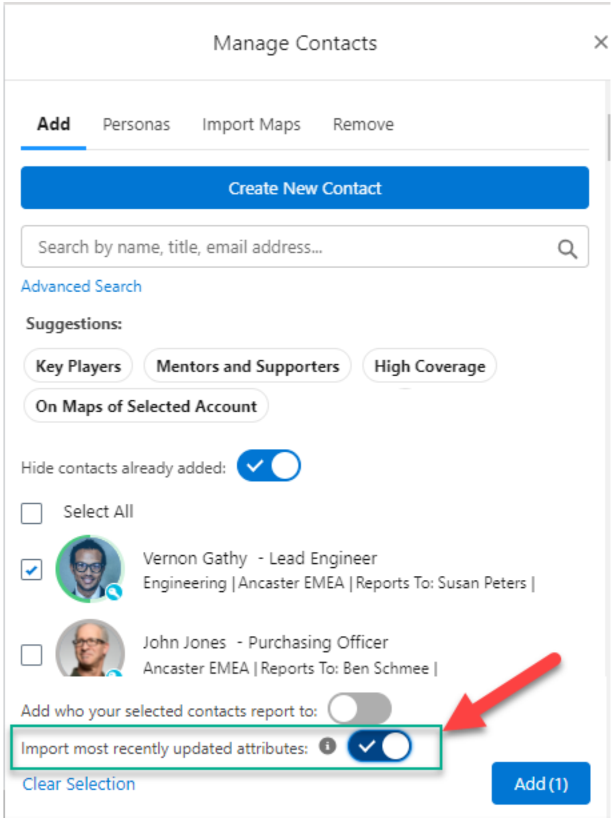




If this toggle is enabled, the contacts who your added contacts report to are automatically added to the map also.

Importing the latest attributes of added contacts

When adding contacts via the *Add* or *Personas* tabs, their latest attributes (Political Status, Support, etc.) can also be pulled into the relationship map. To do this, the toggle *Import most recently updated attributes* needs to be enabled (as indicated in the example below) prior to adding the contacts.



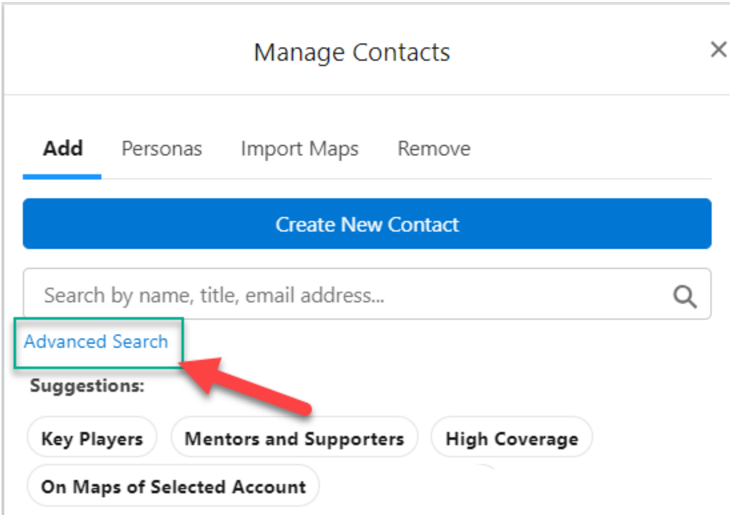
If this toggle is not enabled, the attributes of all added contacts automatically default to 'Unknown'.

Note: the attribute *Decision Attribute* (on account relationship maps only) is not included in this functionality and is always set to 'Unknown' when a contact is added to an account relationship map.

For a breakdown of how Altify identifies a contact's latest attributes – see [How are most recently updated attributes identified?] in the Altify online help.

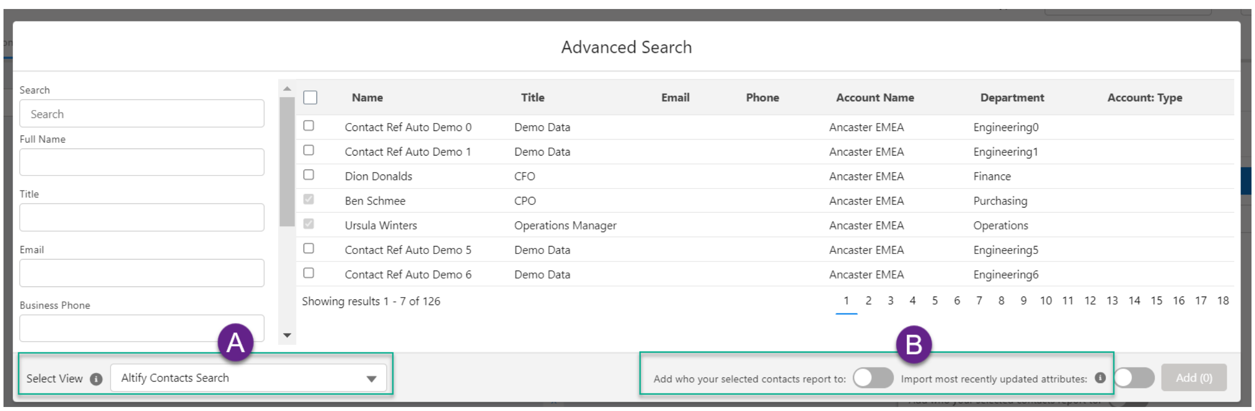
Advanced searching of contacts to add to map

When searching for contacts on the *Add* tab of the *Manage Contacts* panel, an **Advanced Search** option is now available – as indicated in the example below:



This increases the ease with which the appropriate contacts can be identified and added to a relationship map.

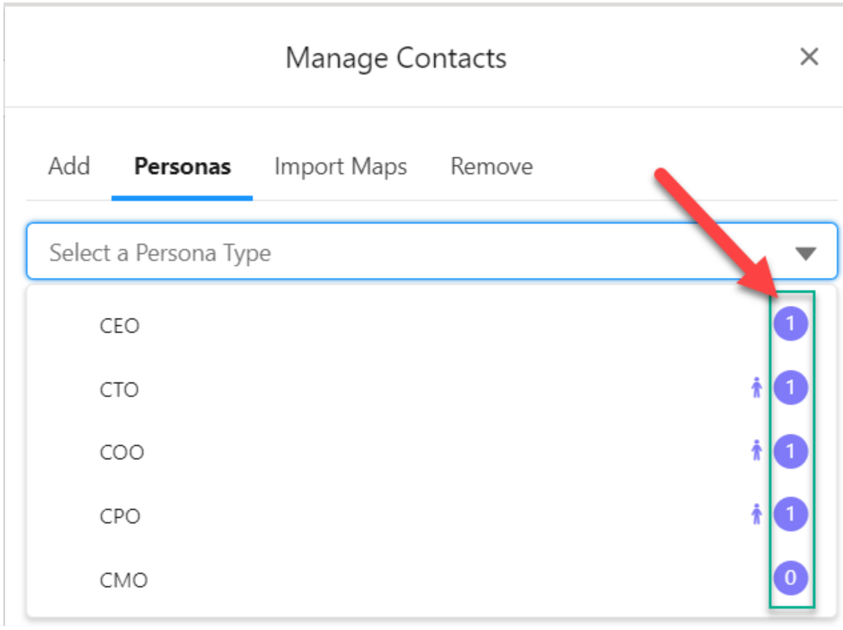
In the *Advanced Search* dialog, a Salesforce Contact List View can be selected (see **A** below). Each view determines the search criteria available and the columns displayed for the search results. An administrator can [specify a list view that is diplayed by default]() when searching for contacts to add to a relationship map



In addition, the toggles *[Add who your selected contacts report to]()* and *[Import most recently updated attributes]()* are applicable when adding contacts via the *Advanced Search* dialog selected (see **B** above).

Persona – number of suggested contacts indicated

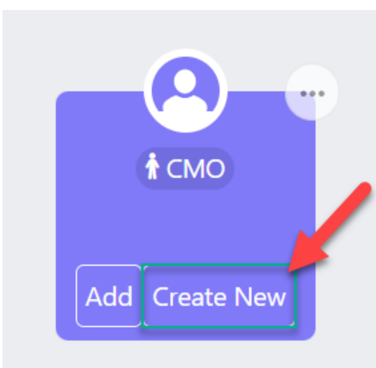
When adding personas to a relationship map, it's no longer necessary to click a persona to see the number of suggested contacts available. The number of suggested contacts for each persona is indicated as shown in the example below.



(This icon replaces the green tick as an indication that a contact with the persona has been added to the map).

New flow for assigning a placeholder persona to a new contact

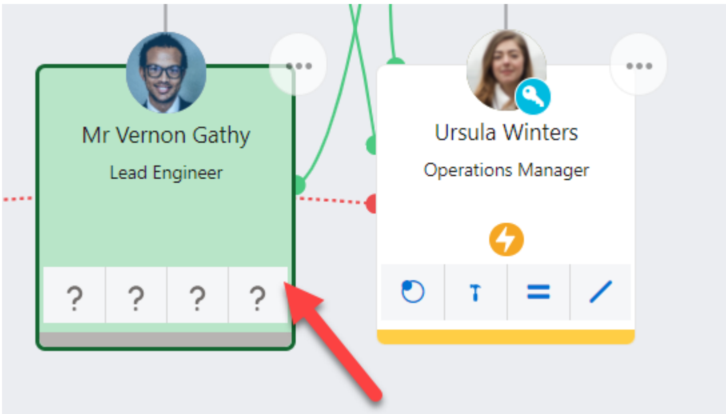
A new time-saving flow is applied when creating a new contact who will be assigned a persona that is currently added as a placeholder (as indicated in the example below).



On clicking Create New and creating the new contact, they are automatically assigned the persona ('CMO' in the above example) and the placeholder card disappears from the relationship map.

Viewing recently added contacts

When enabled, a new toggle (*Recently Added*) on the relationship map (including the List View) highlights in green the contacts who have been added to the map in the last 24 hours.



The time frame can be updated by your administrator - so that new contacts remain highlighted for a period specified by your organization.

Reordered contact information panel

The default order of sections on the Details tab of the contact information panel are rearranged to give greater prominence to contact attributes.

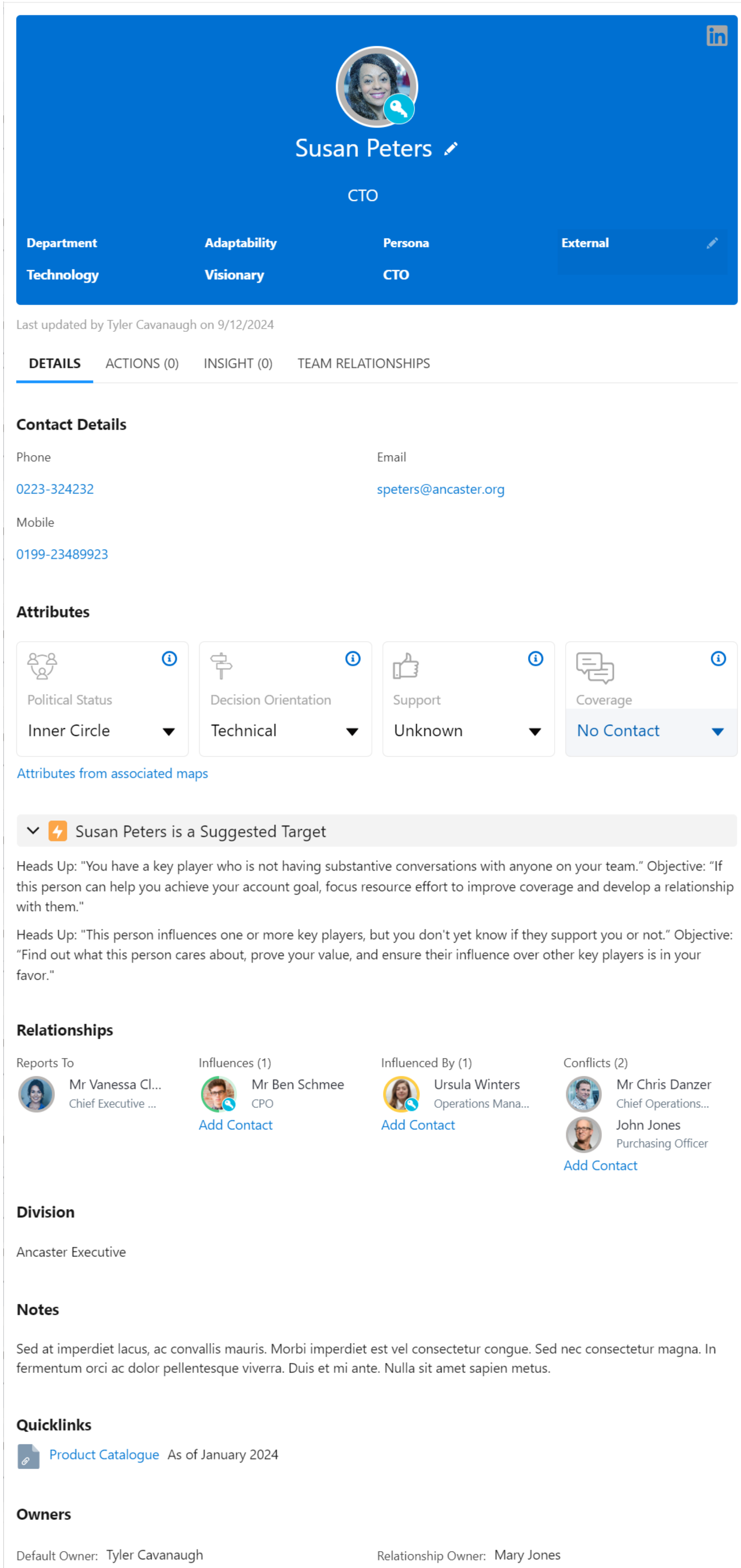
Before v9.12, the sections were ordered as follows:

Contact Details, Notes, Quicklinks, Division, Attributes, Suggested Target content, Relationships, Owner, Other

With v9.13, the sections are ordered as follows:

Contact Details, Attributes, Suggested Target content, Relationships, Division, Notes, Quicklinks, Owner, Other

The new order of sections is shown below from a v9.13 account relationship map.

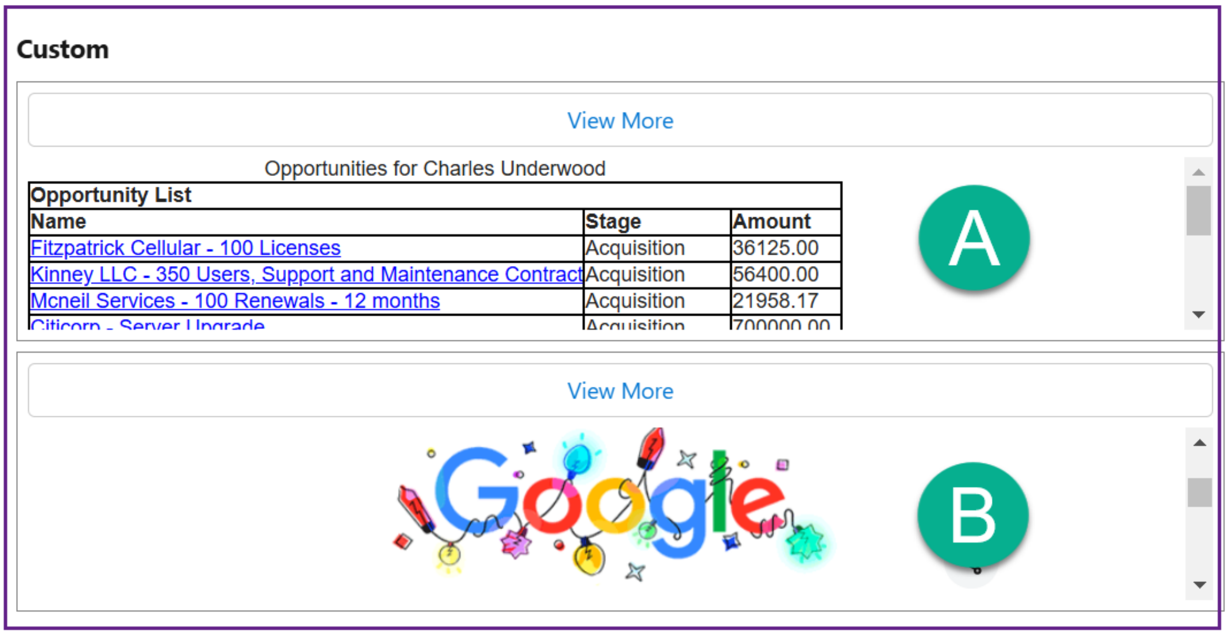

Susan Peters
CTO
Department
Technology
Adaptability
Visionary
Persona
CTO
External
Last updated by Tyler Cavanaugh on 9/12/2024
DETAILS
ACTIONS (0)
INSIGHT (0)
TEAM RELATIONSHIPS
Contact Details
Phone
0223-324232
Email
speters@ancaster.org
Mobile
0199-23489923
Attributes
Political Status
Inner Circle
Decision Orientation
Technical
Support
Unknown
Coverage
No Contact
Attributes from associated maps
Susan Peters is a Suggested Target
Heads Up: "You have a key player who is not having substantive conversations with anyone on your team." Objective: "If this person can help you achieve your account goal, focus resource effort to improve coverage and develop a relationship with them."
Heads Up: "This person influences one or more key players, but you don't yet know if they support you or not." Objective: "Find out what this person cares about, prove your value, and ensure their influence over other key players is in your favor."
Relationships
Reports To
Mr Vanessa Cl...
Chief Executive ...
Influences (1)
Mr Ben Schmee
CPO
Add Contact
Influenced By (1)
Ursula Winters
Operations Mana...
Add Contact
Conflicts (2)
Mr Chris Danzer
Chief Operations...
John Jones
Purchasing Officer
Add Contact
Division
Ancaster Executive
Notes
Sed at imperdiet lacus, ac convallis mauris. Morbi imperdiet est vel consectetur congue. Sed nec consectetur magna. In fermentum orci ac dolor pellentesque viverra. Duis et mi ante. Nulla sit amet sapien metus.
Quicklinks
Product Catalogue
As of January 2024
Owners
Default Owner: Tyler Cavanaugh
Relationship Owner: Mary Jones

Note: The hyperlink *View Contact History* is relabeled to the more accurate *Attributes from associated maps* and moved to just below the Attributes tiles from v9.13.

Viewing contact custom data (v9.13.7)

Administrators can add a *Custom* section to the *Details* tab on the Contact Information Panel. It can accommodate up to five Visualforce pages or external websites (these are also configured by an administrator).

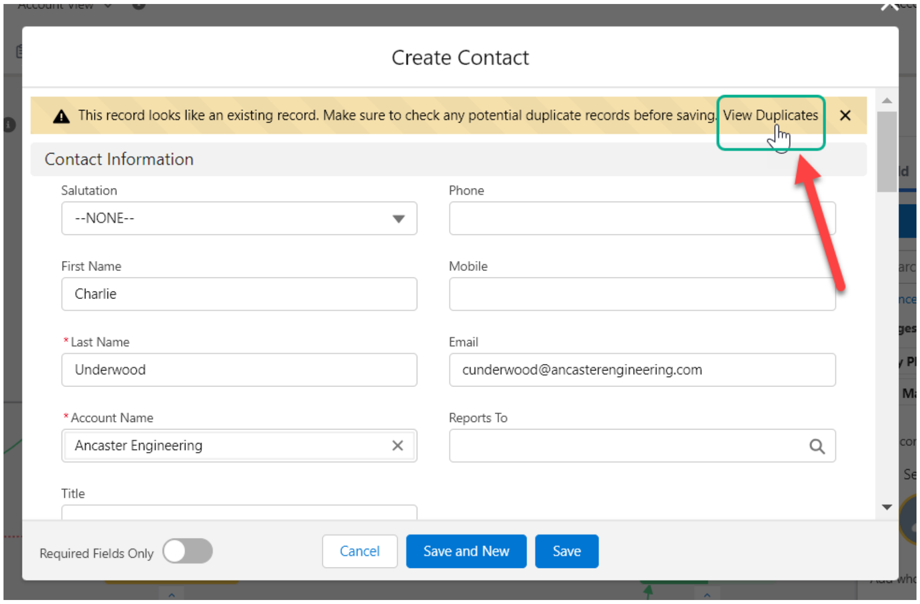
In the example shown below, two panels are added to the Custom section: a Visualforce page that displays opportunities associated with the contact (see A indicated below) and a link to an external site (see B).



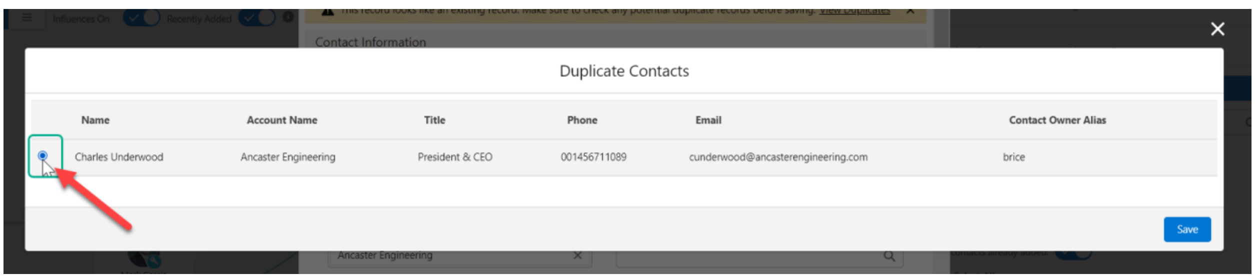
Improved handling of duplicate contacts (v9.13.11)

Altify relationship maps now handle duplicate contacts in the same way as in the Salesforce org.

View a list of duplicate contacts (if any are flagged by the org's matching and duplicate rules) when creating a new contact on a relationship map – as indicated in the example below.



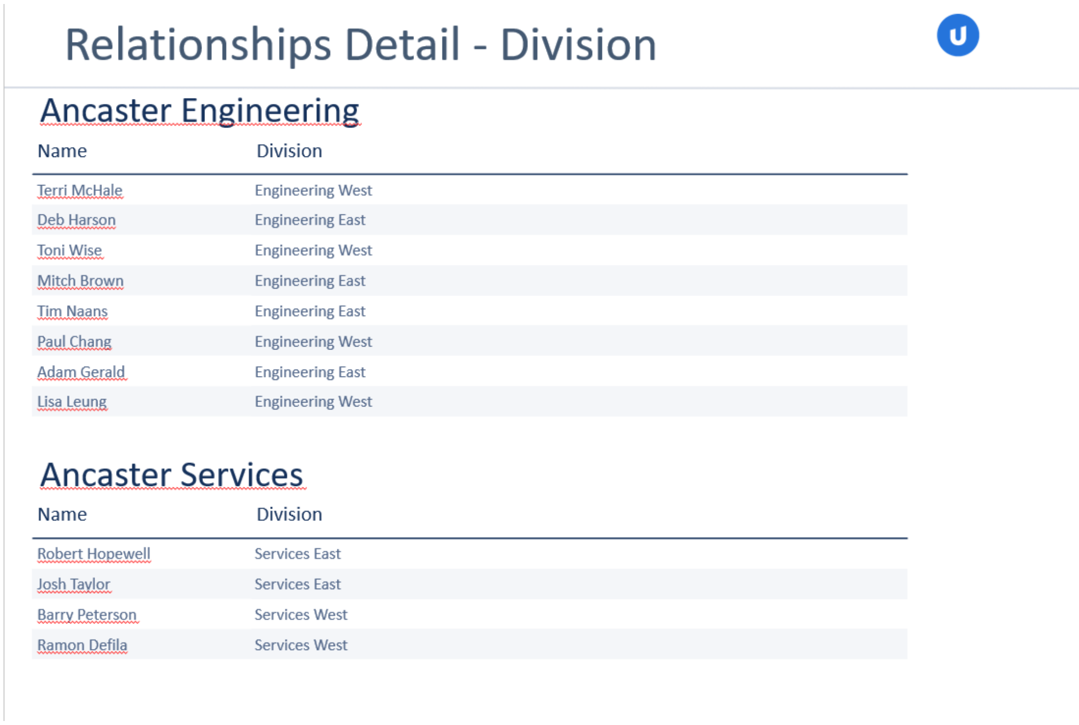
Select the duplicate contact to add to the map instead of the new contact (as indicated below), or close the list and proceed with saving and adding the new contact (if the duplicate rule allows users to save a duplicate record).



Altify also respects matching and duplicate rules in the same way when editing a contact.

Clearer display of division data in exported account relationship maps (v9.13.11)

A new table is included in the PowerPoint exports of account relationship map data. It list the contacts who are assigned to each account division (for each account in the Account Manager plan) – as shown in the example below:



Relationships Detail - Division

Ancaster Engineering

Name	Division
Terri McHale	Engineering West
Deb Harson	Engineering East
Toni Wise	Engineering West
Mitch Brown	Engineering East
Tim Naans	Engineering East
Paul Chang	Engineering West
Adam Gerald	Engineering East
Lisa Leung	Engineering West

Ancaster Services

Name	Division
Robert Hopewell	Services East
Josh Taylor	Services East
Barry Peterson	Services West
Ramon Defila	Services West

New functionality to be administered

Specifying a default list view for advanced search

The following *Altify Core Setting* determines the Salesforce Contact List View that is displayed by default in the relationship map advanced search feature: *Contact Search View*.

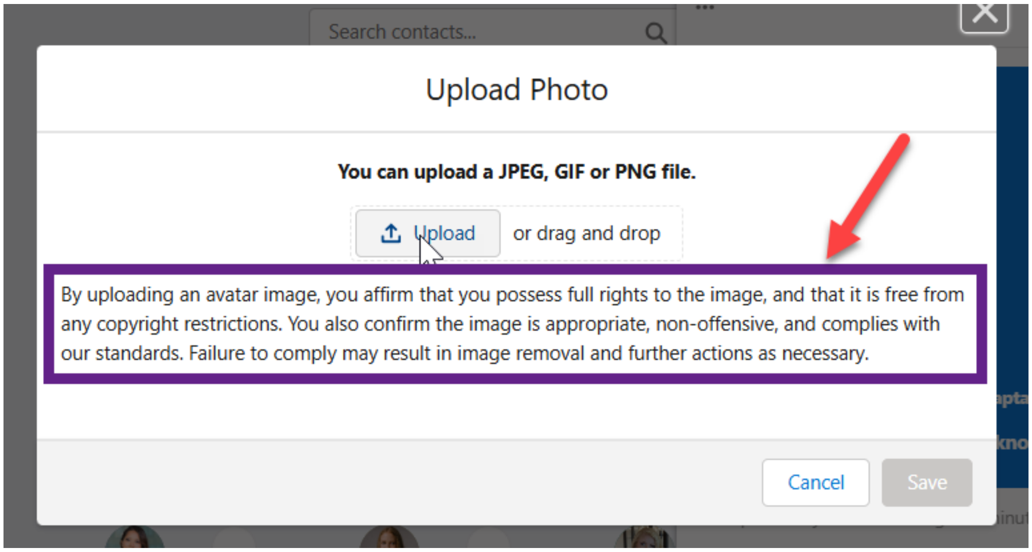
Updating the time frame for recently added contacts

The following *Altify Relationship Setting* determines the length of time that a new contact remains highlighted in your org's relationship maps: *Recently Added Timeframe*.

This setting accommodates decimalization, e.g. '2.5' for two and a half days (60 hours).

Adding a contact photo disclaimer (v9.13.5)

A new *Altify Relationship Setting*, 'Enable Photo Upload Disclaimer', displays a disclaimer regarding image copyright and standards to users who are uploading a contact's photo – as indicated in the example below. The disclaimer can be edited as required.



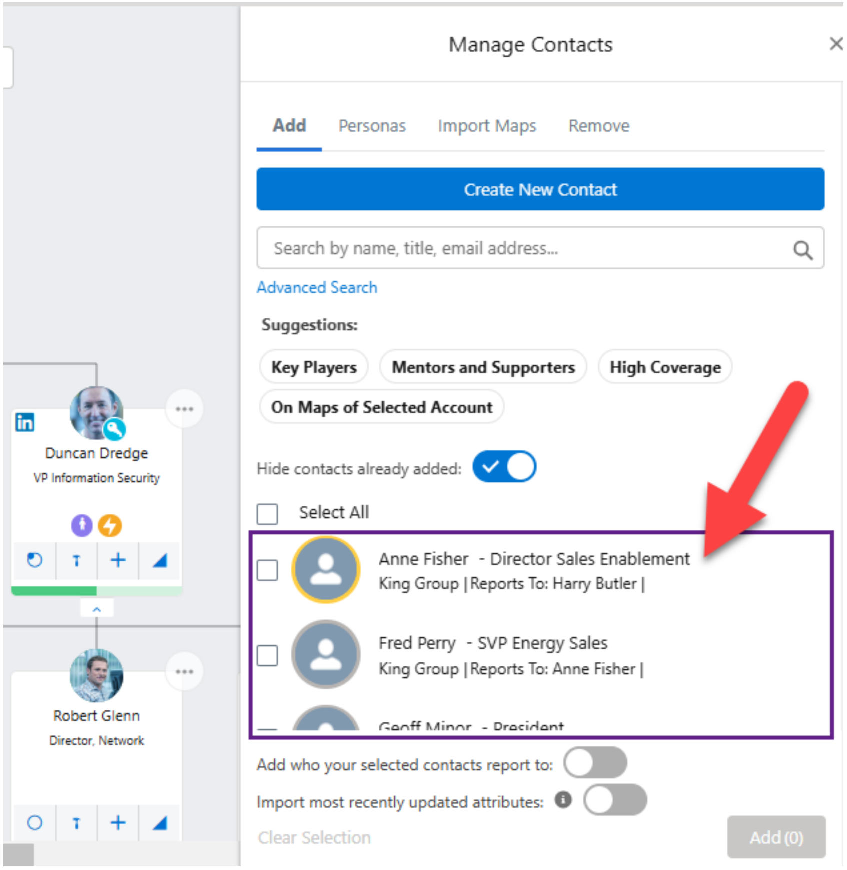
For more information, see Adding a Photo Disclaimer in the online help.

Adding custom panels to Contact Information Panel (v9.13.7)

Add up to five custom panels to the *Details* tab of the Contact Information Panel. For guidance on configuration, see Adding Custom Panels to the Contact Information Panel in the online help.

Hiding inactive contacts (v9.13.7)

If an organization uses a check box custom field on the standard Contact object to identify 'inactive' contacts, these contacts can be hidden from end users when they are adding contacts to their relationship maps. For example, hidden contacts will not appear in the list of suggested contacts indicated below.



For guidance on configuration, see [Hiding Inactive Contacts on Relationship Maps]() in the online help.

Deprecated functionality

Onboarding videos

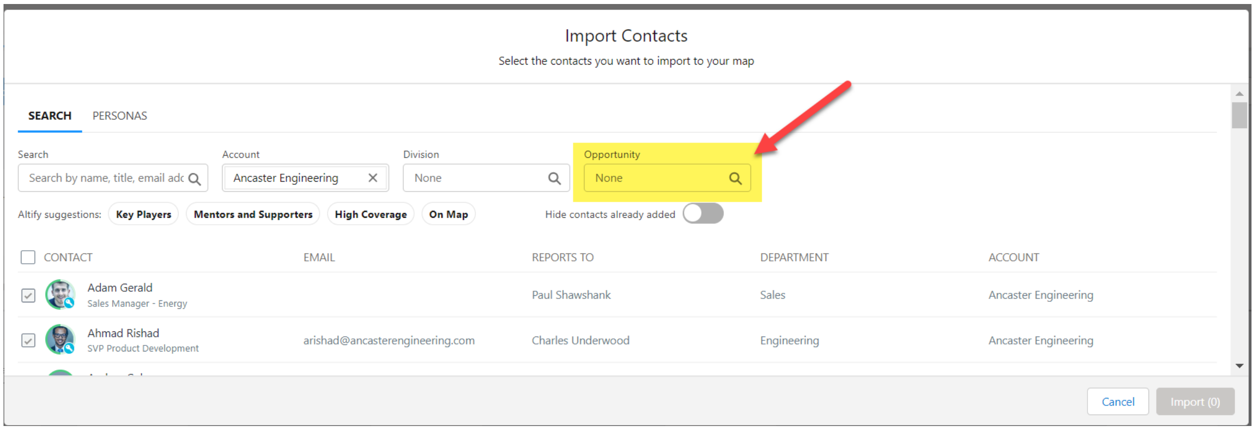
With the introduction of the new Manage Contact functionality – including intuitive new designs and easier access to add contact options – there is no longer a requirement for onboarding video. This video was shown when a relationship map was accessed for the first time.

For that reason the following *Altify Relationship Settings*, which supported the provision of alternative onboarding videos , are now deprecated:

- Onboarding URL 1
- Onboarding URL 2
- Onboarding URL 3

Hiding opportunity filter for contact import

Prior to v9.13, administrators could hide the opportunity filter (highlighted below in v9.12) on the *Import Contacts* dialog for account relationship maps.



The *Import Contacts* dialog is no longer displayed in Altify v9.13 and an opportunity filter is not applied in the new *Manage Contacts* panel. The following *Altify Relationship Setting* is therefore deprecated: *Disable Import Contact Opp Search*.

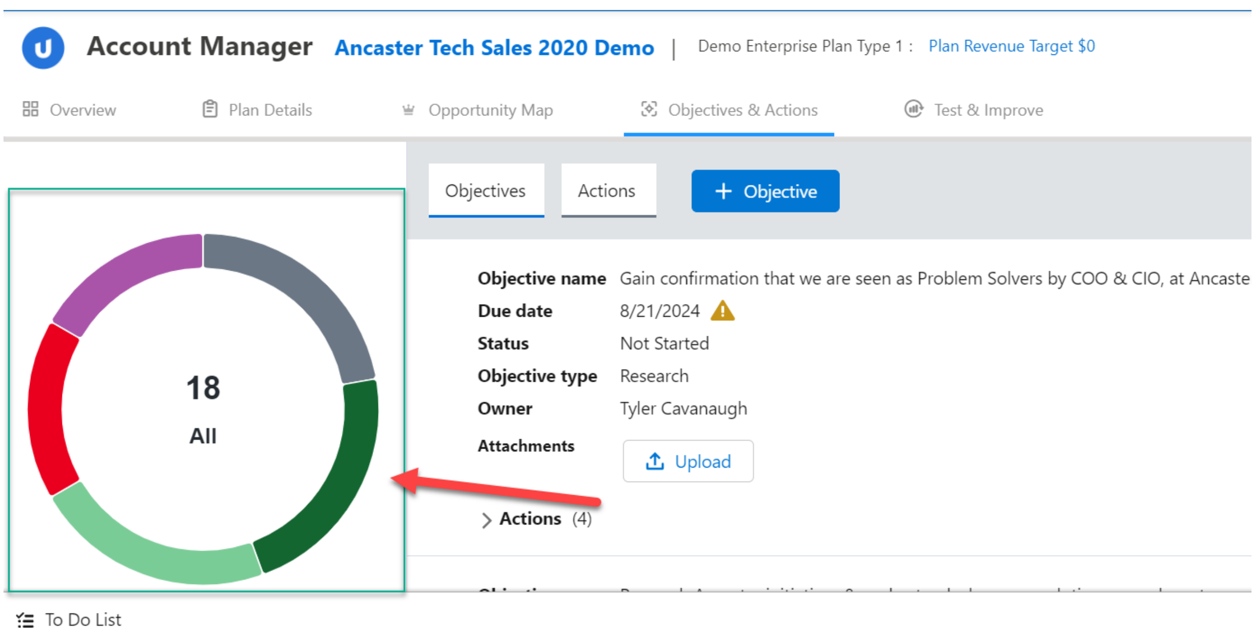
Objectives & Actions [Account Manager]

The following changes apply to Objectives & Actions pages in Account Manager plans and account plans – except where noted.

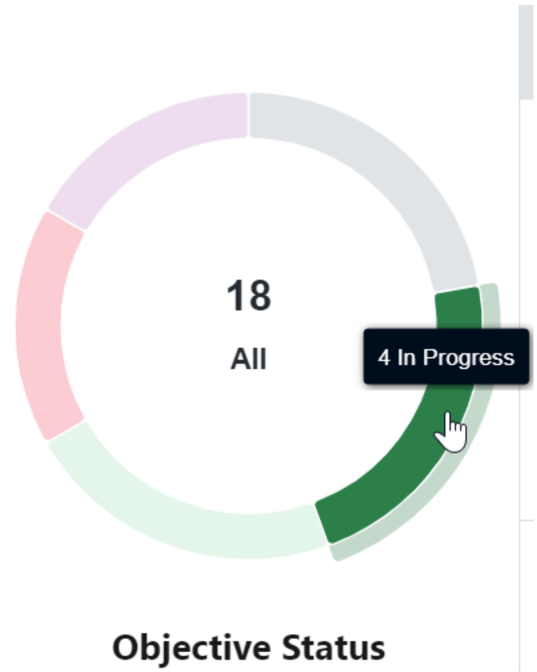
New user functionality

Interactive donut charts for objectives and actions

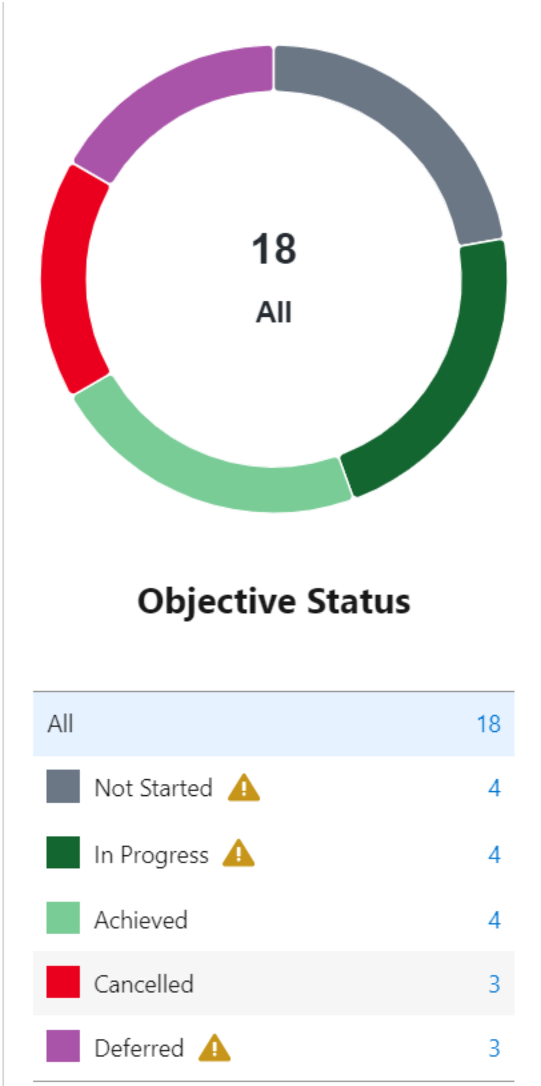
Objective statuses are prioritized on the Objectives screen with a new clickable donut chart (shown below). Previously, this area listed totals of objectives by objective type (which are now accessed by selecting a filter option). By switching focus to status, an emphasis is placed on the current workload and productivity (e.g. 'What are we working on?', 'What hasn't started yet?').



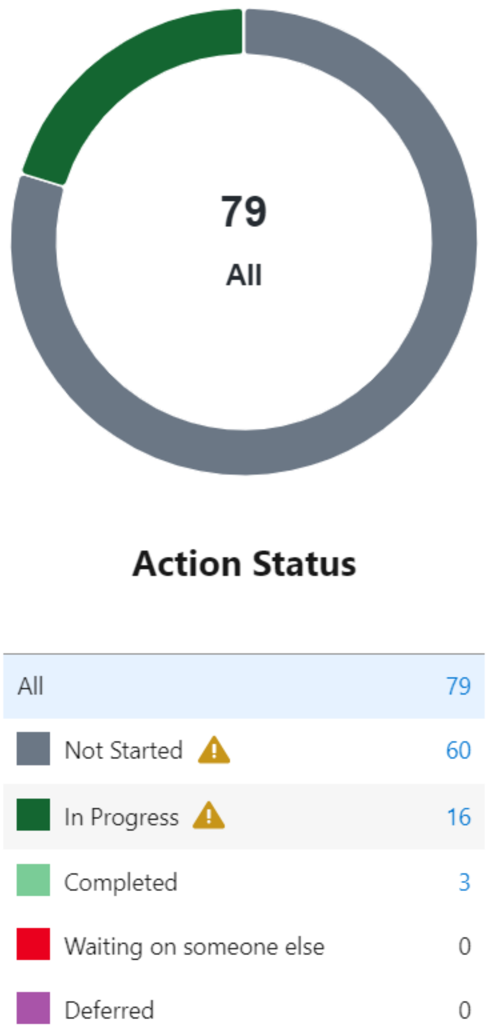
Hover over a segment to view the number of objectives with that current status (as shown in the example below – '4 In Progress'), and click the donut segment to view those objectives in the right-hand pane.



A panel below the donut chart (indicated in the example below) provides the color legend for its segments, clickable totals for each objective status and an overdue icon (⚠) that indicates the presence of one or more overdue objectives with the corresponding status.

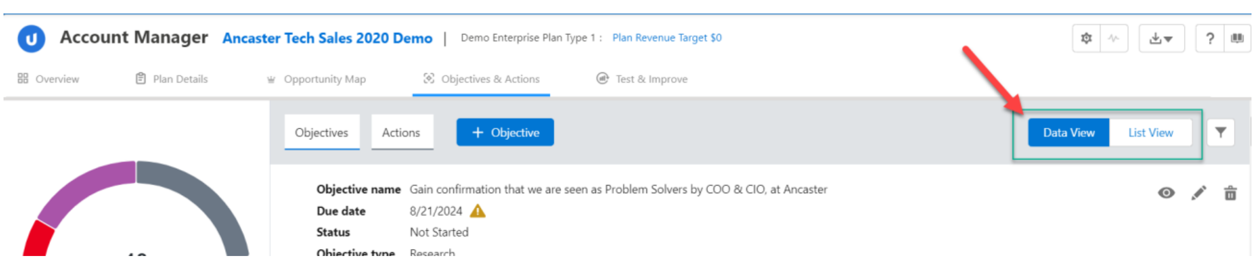


An interactive donut chart and legend is also provided on the Actions screen (as shown in the example below). To maintain a consistent approach, it also groups actions by their status.

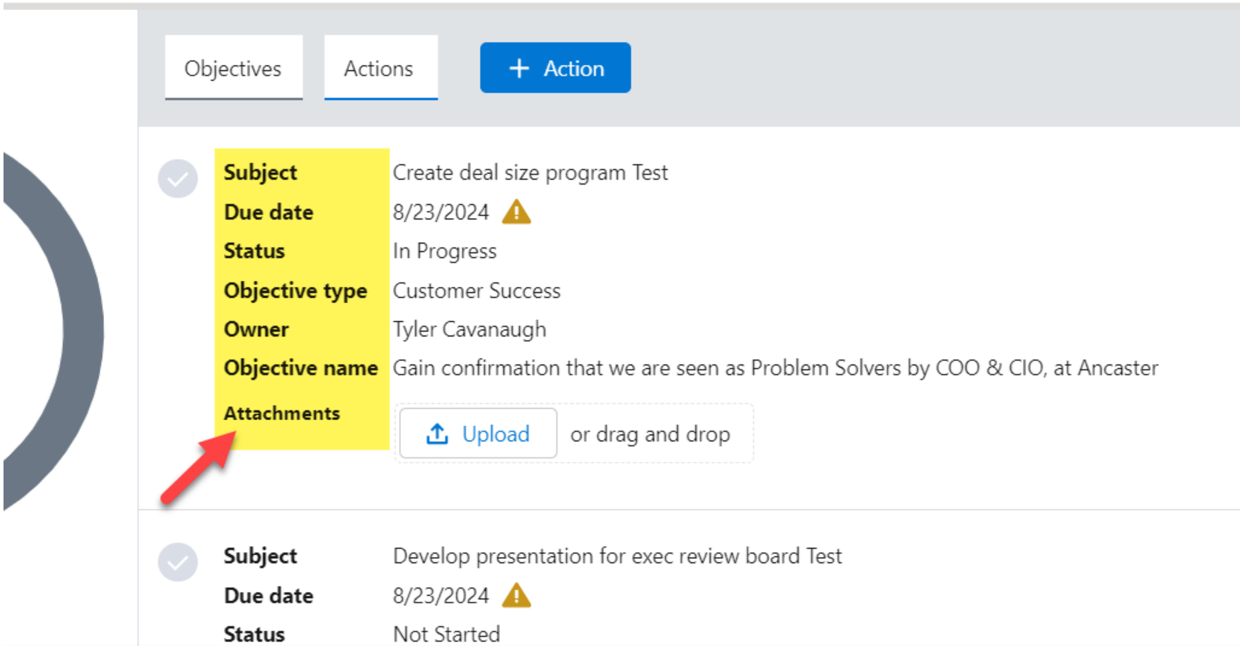


New and updated views of objective and action data

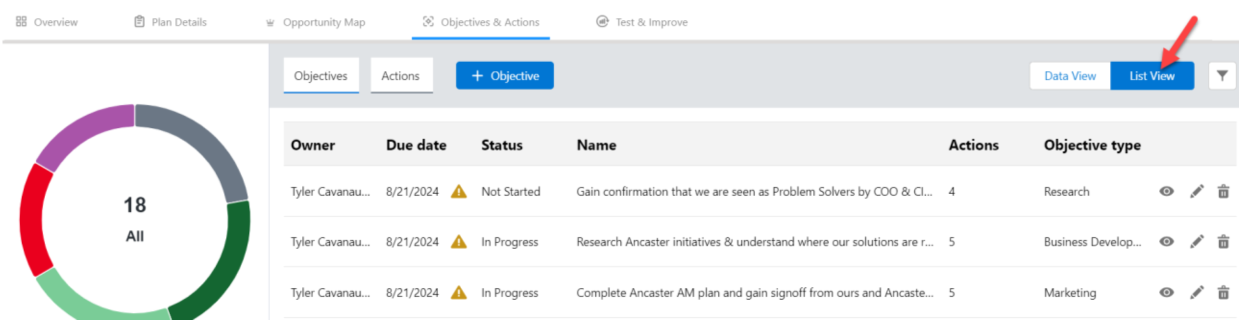
Two view options are now available for objectives and actions. The *Data View* and the *List View* are accessed via the top menu on either screen (as shown on the Objectives screen in the example below).



The *Data View* is an updated version of the pre-existing view of objectives and actions. The addition of field labels (*Due date*, *Owner*, etc. – highlighted in the example below) significantly increases user comprehension.



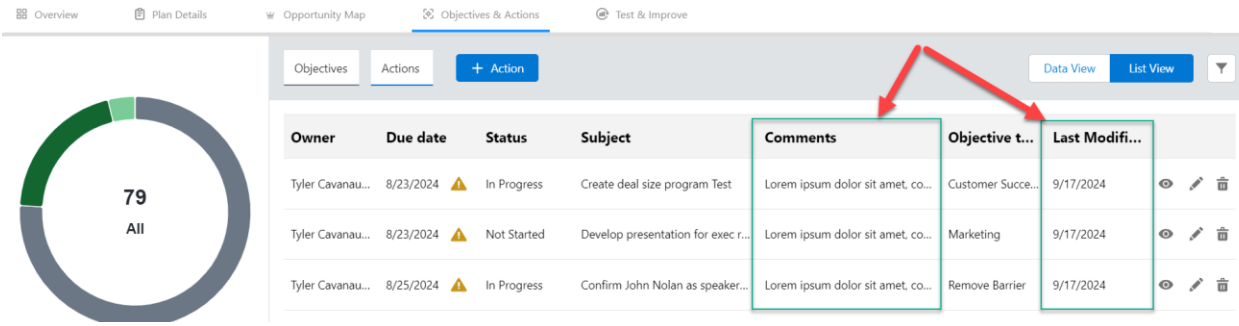
List views provide a fresh perspective on objectives and actions. The *List View* (shown below on the Objectives screen) is a tabular format that is particularly convenient for managers looking to quickly scan an Account Manager plan's key objective and action data.



The list view allows you to sort objective and action data by clicking the relevant column heading (sorting was delivered in v9.13.9).

On both Objectives *Data View* and *List View*, a clickable **View Objective** icon ( ) allows the viewing of all the objective information (without having to access the edit mode).

On the Actions *List View*, the *Comment* and *Last Modified* columns (indicated below) bring valuable contextual information to the forefront.

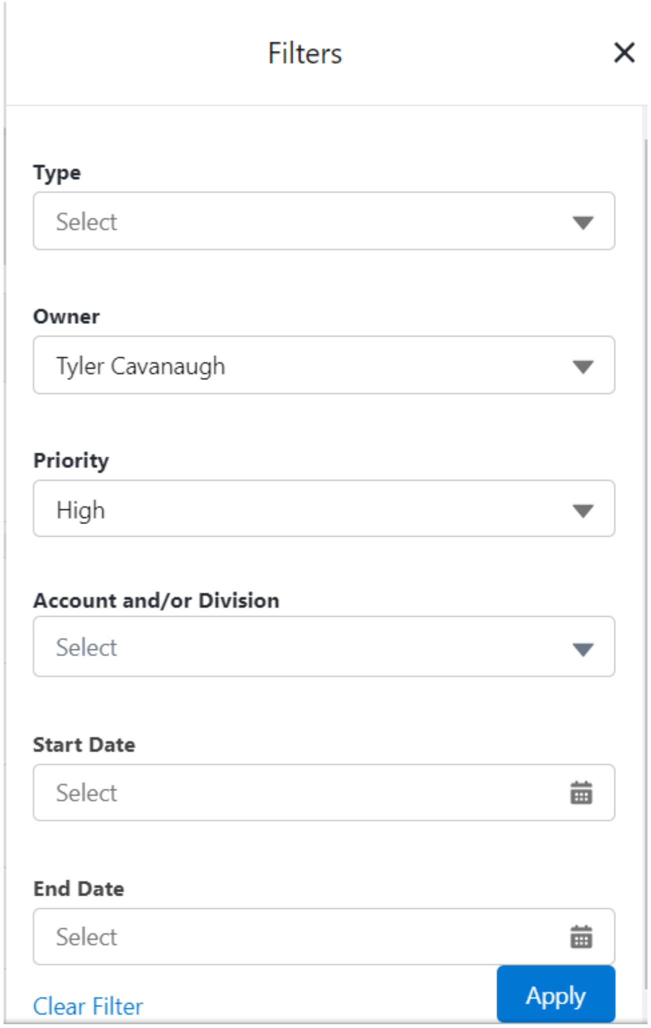


New filter design

A new filtering process for objectives and actions declutters the respective screens, provides more fine-grained filter results, and brings Objectives & Actions in line with filtering in other areas of Altify.

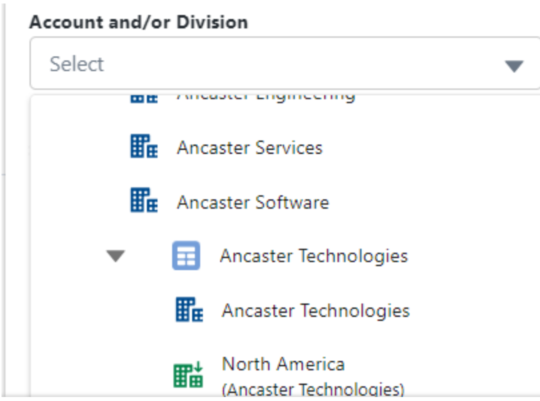
Previous to v9.13, filter options were listed along the top menu. Access is now provided by a filer icon ( ) in the top menu.

Clicking on the icon opens a menu of multi-select filters - as shown in the example below where objectives with a specific owner and priority will be displayed in the filter results.



Start Date and *End Date* (also shown in the image above) provide new a filter option whereby objectives with a due date within the defined period are shown in the filter results.

In addition, in Account Manager plans, roll up rows can now be selected when filtering objectives by accounts and divisions. In the example shown below, when the roll up row 'Oriole Health & Fitness' is selected, the accounts and divisions within the roll up are automatically selected.

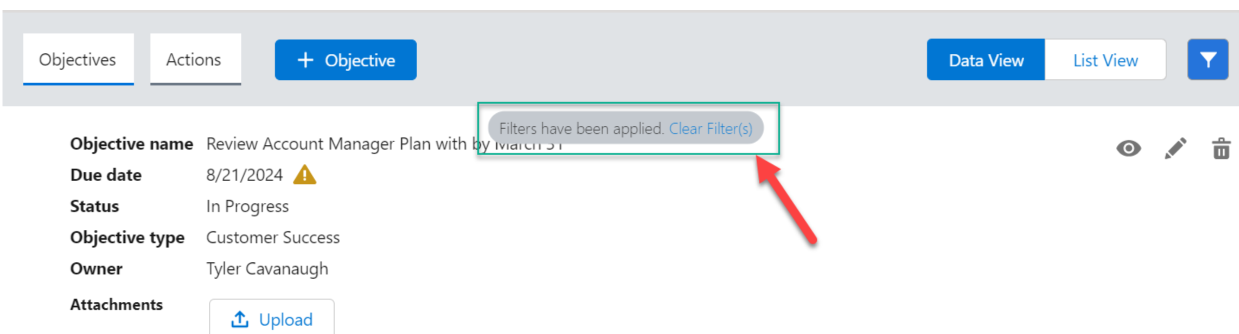


Any of the accounts or divisions can be deselected if they are clicked individually. Another enhancement in v9.13 is that accounts and divisions in the filter options are distinguished by their respective Salesforce icons (for divisions and for accounts).

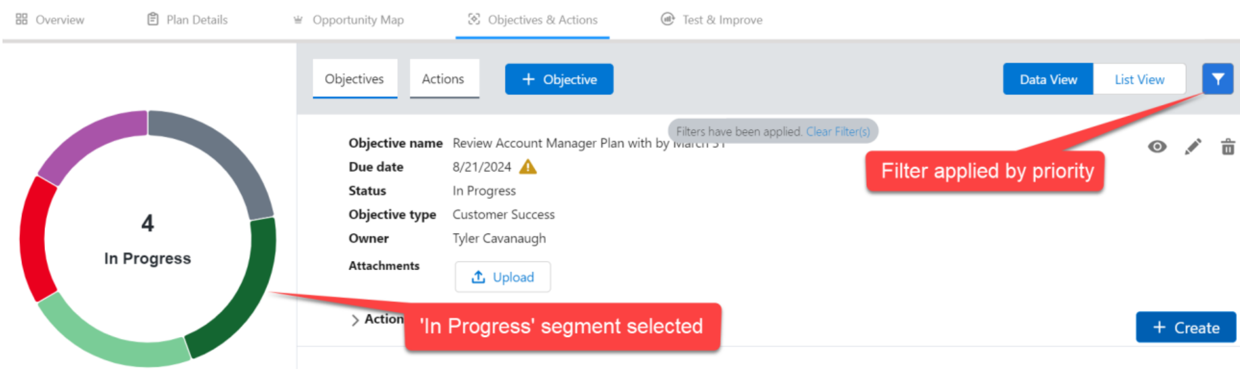
Note: the *Account and/or Division* filter option is not displayed in account plans (as all objectives are associated with the relevant account).

On the Actions screen, the *Start Date* and *End Date* filters are also available to filter actions by their due date. In addition, an *Objective* filter is also now available (whereby actions associated with one or more selected objectives can be displayed in the filter results).

The filter icon is displayed in an enabled mode ( ) when a filter is applied on the Objectives or Actions screen. This is also conveyed by an on-screen message, with an option to clear the filer – as shown in the example below.

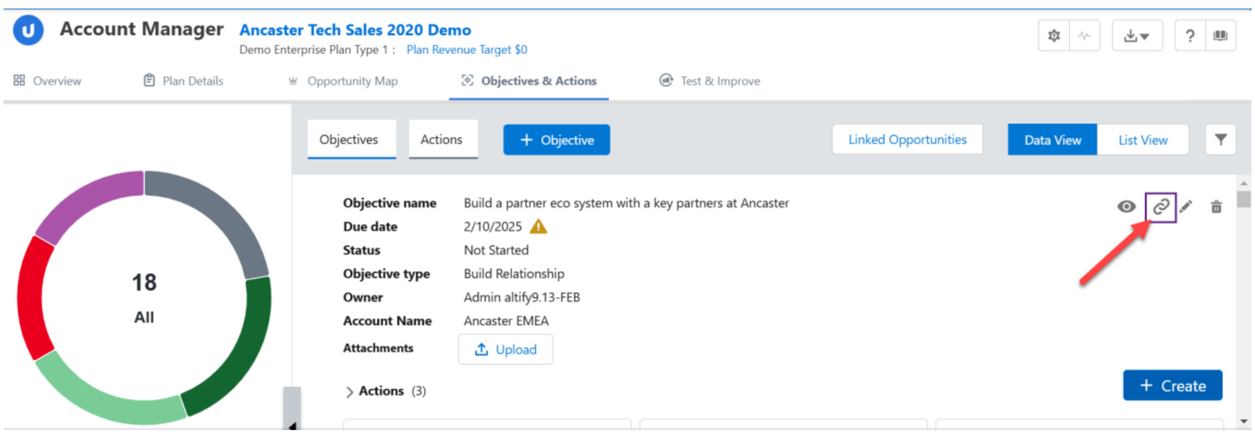


Note: donut charts and applied filters work in conjunction. For example, in the example shown below, the five objectives that are in progress are further filtered to only display the two that in progress and owned by 'Lynn Benfield'.

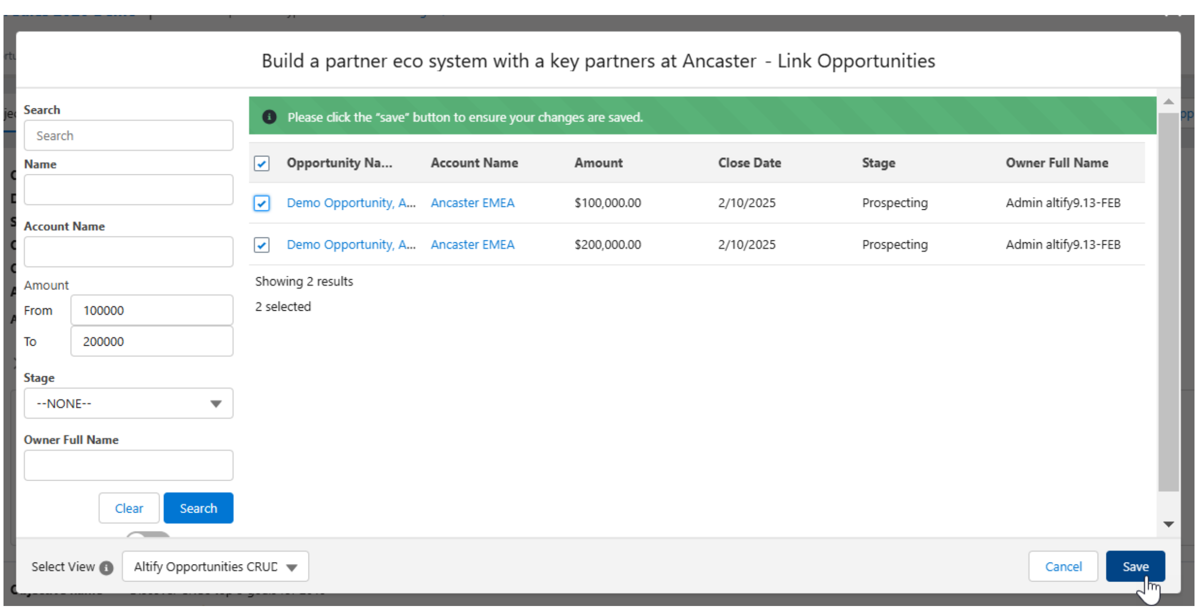


Objective-Opportunity linking (v9.13.11)

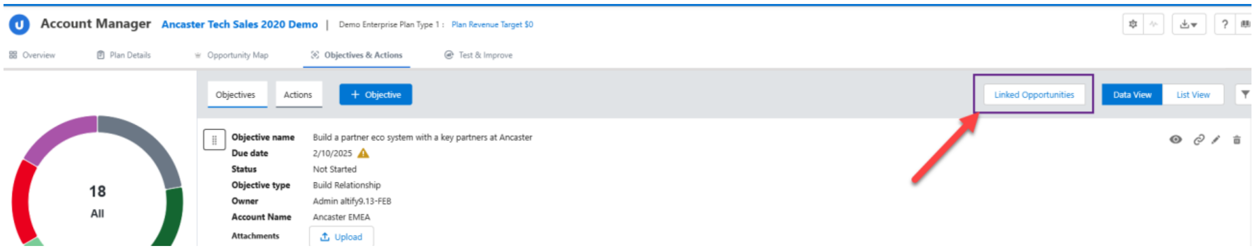
Link objectives to current opportunities belonging to the same account. This can be performed in account plans or Account Manager plans, via the icon indicated below.



Use an advanced search feature to find the relevant opportunity (or opportunities) to link to the objective – as shown in the example below.



A Linked Opportunities button (indicated below) enables a review of all opportunities currently linked to the account plan or Account Manager plan.



New functionality to be administered

Enable objective-opportunity linking

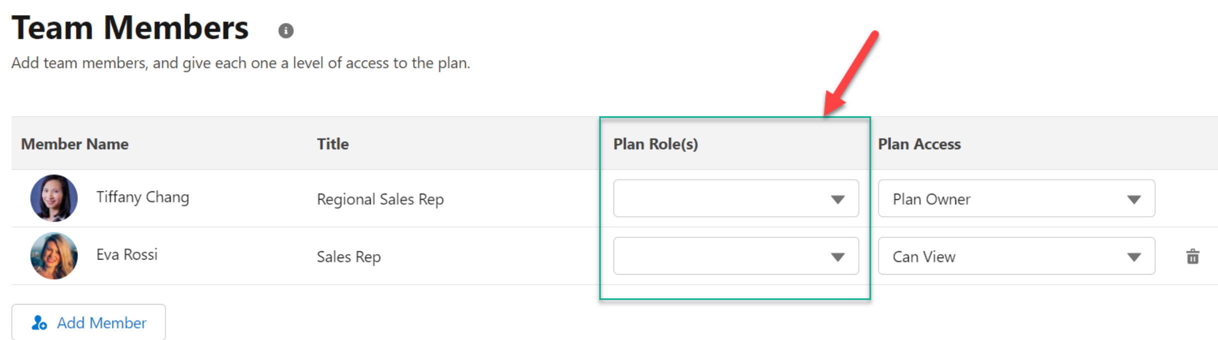
Objective-opportunity linking is not enabled by default. It is enabled by an Altify Account Manager Setting (*Enables Objective-Opportunity Linking*).

Account Manager Plan Setup

New user functionality

Plan roles for Account Manager plan team members

Assign plan roles to your Account Manager plan team members – as shown in the example below:



New functionality to be administered

Enable Account Manager plan team member roles

The Plan Role(s) option is not displayed by default. It is enabled by an Account Manager custom setting (*Enable Plan Role(s)*). In addition, plan role options need to be created by an administrator. For more information, see Enabling Roles for Plan Team Members in the online help.

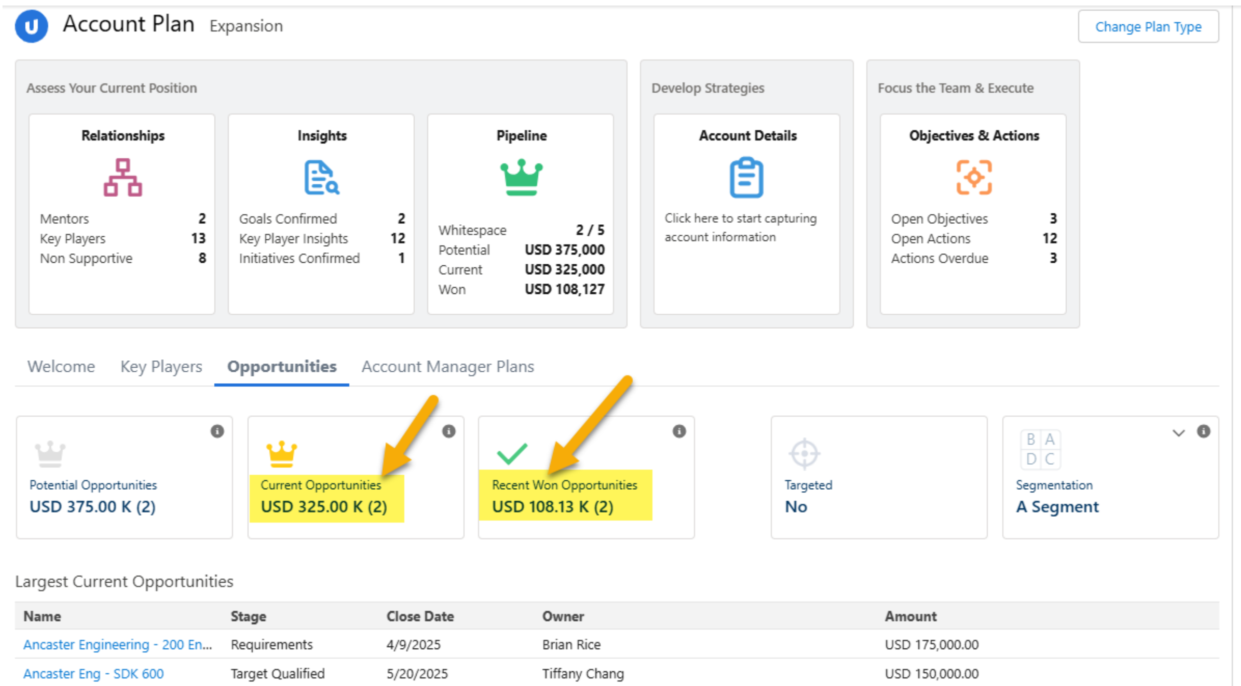
Account Planning

New user functionality

Simplification of launchpad data (v9.13.9)

Slight changes to how data is calculated improve the usability and clarity of the Account Plan launchpad.

The amount totals highlighted below no longer include unplanned opportunities (that is, opportunities that are not associated with an Altify Solution).



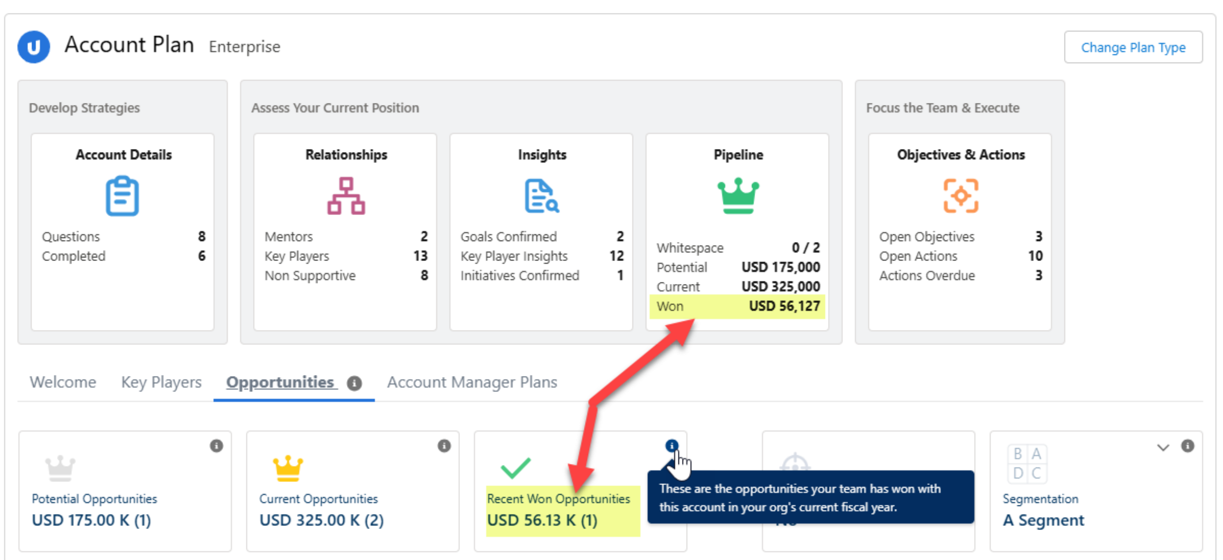
With this change the launchpad opportunity amounts are fully representative of the the selected plan type, and the Pipeline tile and the tiles on the Opportunities tab will no longer display conflicting amounts.

In addition, and to further the aim of a launchpad that tells a consistent story, the Largest Current Opportunities on the launchpad no longer include unplanned opportunities.

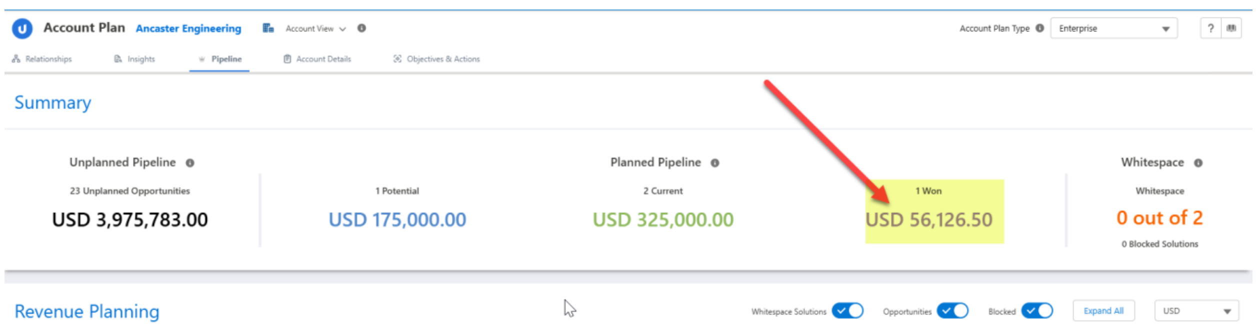
Change to won opportunity date range (v9.13.12)

The date range for won opportunities in account plans is changed from ‘current and previous financial quarter’ to ‘current fiscal year’. This entails the following changes:

- Won opportunity totals (as indicated below) on the Account Plan launchpad reflect the new date range.



- Likewise on the Pipeline page, the won opportunity amount is derived from the current financial year.



- When importing won opportunities on to the Pipeline page, only opportunities won in the current financial year are displayed on the page.

Salesforce Shield

Additional fields supported by Altify (v9.13.9)

Altify supports the searching of a limited number of fields when they are encrypted using Salesforce Shield. The following fields are now added to that number:

Activity (Task & Event)	Case	Email Message
Subject	Subject	Text Body
Description	Description	HTML Body
		Headers
		Subject
		From Name
		From Address
		To Address
		CC Address
		BCC Address

For more information on Altify and Salesforce Shield field encryption, see the following in the online help:

- Salesforce Shield-Enabled Mode [Opportunity Manager]
- Salesforce Shield-Enabled Mode [Account Manager]