upland Altify

Release Notes

Version 9.6 (Fall ’20)

Contents

Release Overview

With this release account planning is easier than ever to complete. Our new building blocks of roll up rows, account rows and division rows allow you to quickly compile account plans of all types – enterprise, portfolio, geographic portfolio plans, and so on. The flexibility offered by this new approach means you can accurately arrange your customers' business and service units into logical groups.

In the Spring '20 release, Upland Altify introduced the concept of divisions which allowed you assign opportunities and manage accounts at a more granular level. Insight maps and relationship maps for divisions facilitated a degree of account planning at the division level.

With Fall '20 we have extended this support so that account-level functionality is now available for divisions. You can now create Objectives and Actions for your divisons, and record background and research information at the division level. In addition, contacts on your relationship maps can now be assigned to multiple divisions – allowing you to capture complex relationships with key contacts. The Executive Briefing is updated to include and clearly present all additional division-level data.

Also new in Altify Account Manager, an 'Account Hub' capability whereby you can surface important key information from your Salesforce Account records in your account plans. This provides an accessible and holistic view of accounts that will inform your account planning.

For insight maps, this release delivers improved formatting for Altify Solutions that are added to your maps. This includes rich text formatting and the ability to add as many links and images as required.

For relationship maps, Suggested Target coaching is now provided in Account Manager relationship maps. The software identifies and flags contacts that you need to focus on, and provides coaching content on what your next actions should be. As part of this work, the coaching content provided in Opportunity Manager has been revisited and improved. In terms of importing contacts, a new 'On Map' filter enables you to select from a list of contacts who are currently displayed on your target account or opportunity map.

Finally, we are reintroducing Account Manager and Opportunity Manager completeness reports with this release. These reports are carefully calibrated to provide accurate completeness scoring for all your accounts and/or opportunities.

Summary of all changes

The following lists outlines all the changes introduced with Altify 9.6:

Account Manager

- Improvements to account plan structuring allows you to easily create flexible account plans that can be shaped to match a variety of buying structures.
- Improvements to the opportunity map include a new user interface and the ability to change solution for current and won opportunities. In line with the change to account structuring, you can click into a roll up row to create, search and import opportunities for any of the accounts or divisions it contains.
- Account hub allows administrators to place Account record fields in Altify account plans on the Plan Details tab.
- As part of extended support for divisions, Objectives & Actions can be created for divisions and division-level data can be recorded in Plan Details. This new data is captured in the Executive Briefing output.
- Working with objectives is easier with the removal of divisions not in the account plan and visibility of hidden accounts/divisions.
- Keep track of added account plan rows in Advanced Search, and create new divisions if required.
- Organizations with a large number of account records can improve advanced search performance with a new custom setting.
- In account plan setup, view details of divisions added to the account plan structure.
- More encrypted fields can be searched in Salesforce Shield-Enabled mode.
- When assigning an objective or action to an account, advanced searching is now available.
- Bulk importing is no longer restricted to the planned accounts if an account row represents a group of over 100 accounts or is a parent of over 100 accounts.

Watch the following **video** for a brief overview of our Account Manager enhancements.

Core Functionality

- Advance searching can now be added to the following lookup fields in CRUD dialogs: Account or Contact.

Insight Maps

- Rich text formatting (including images and hyperlinks) is now available to administrators who are creating the sections appended to a template solution.
- Improved PPT formatting means that the story provided by insights is more clearly presented.

- User actions in insight maps are now recorded in usage logs.

Relationship Maps

- Contacts can now be added to multiple divisions of an account.
- Now available in Altify Account Manager, the coaching content provided by suggested targeting is revamped with this release.
- A new filter on the Import Contacts window allows you to filter contacts so that only those who are on the selected account or opportunity map are displayed.
- A new custom setting allows you to set the number of contacts needed on a map to get credit toward an opportunity/account completeness score.
- User actions in relationship maps are now recorded in usage logs.

Reporting

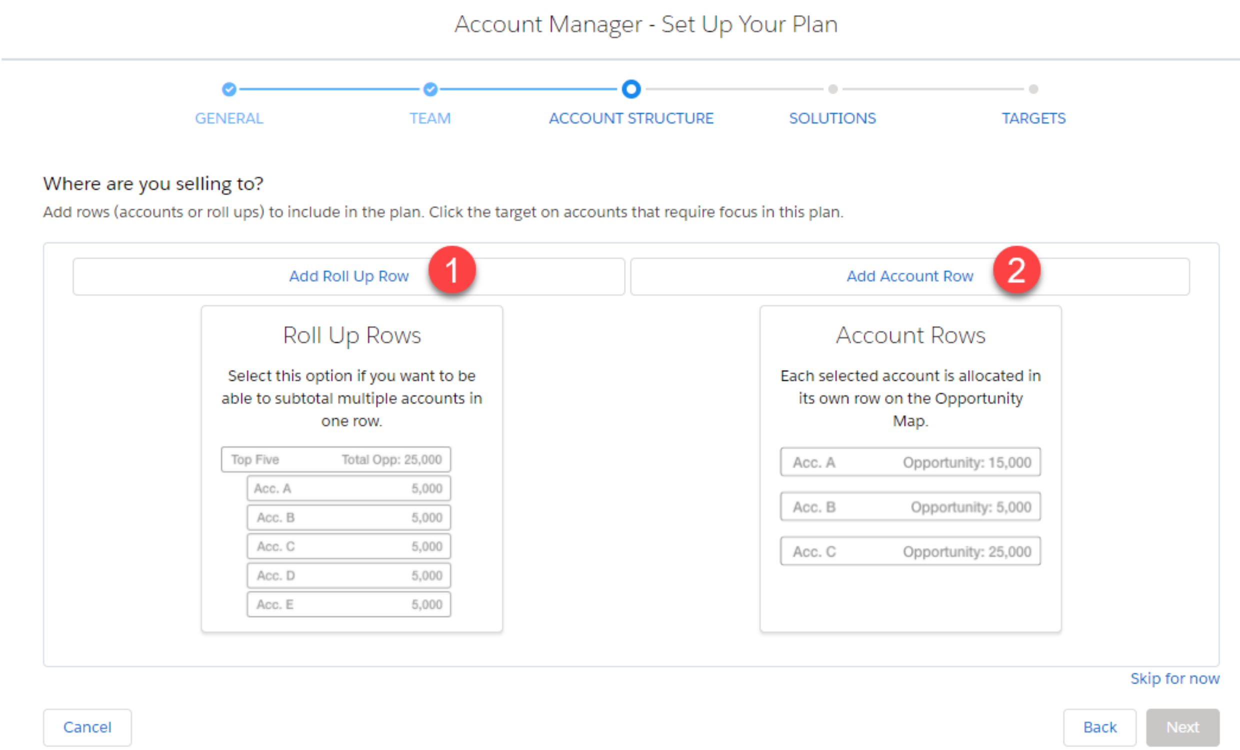
- Completeness reports are reintroduced, providing your organization with an automated score for every account and opportunity.

Account Manager

New user functionality

Improvements to account plan structuring

Account plan structuring is updated to allow greater flexibility in building account plans. You can create an enterprise or geographic type plan, using roll up rows to capture sub totals in distinct locations or business areas (**1**), or a portfolio type plan using standalone account rows (**2**).

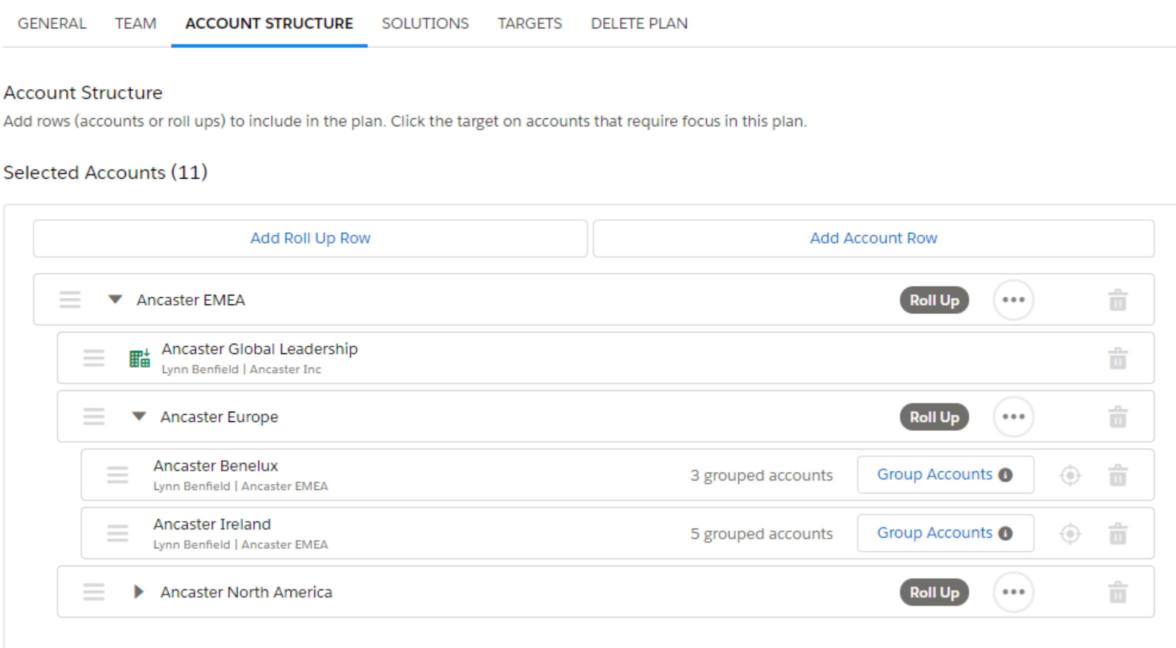


You are also free to apply both approaches in a single plan.

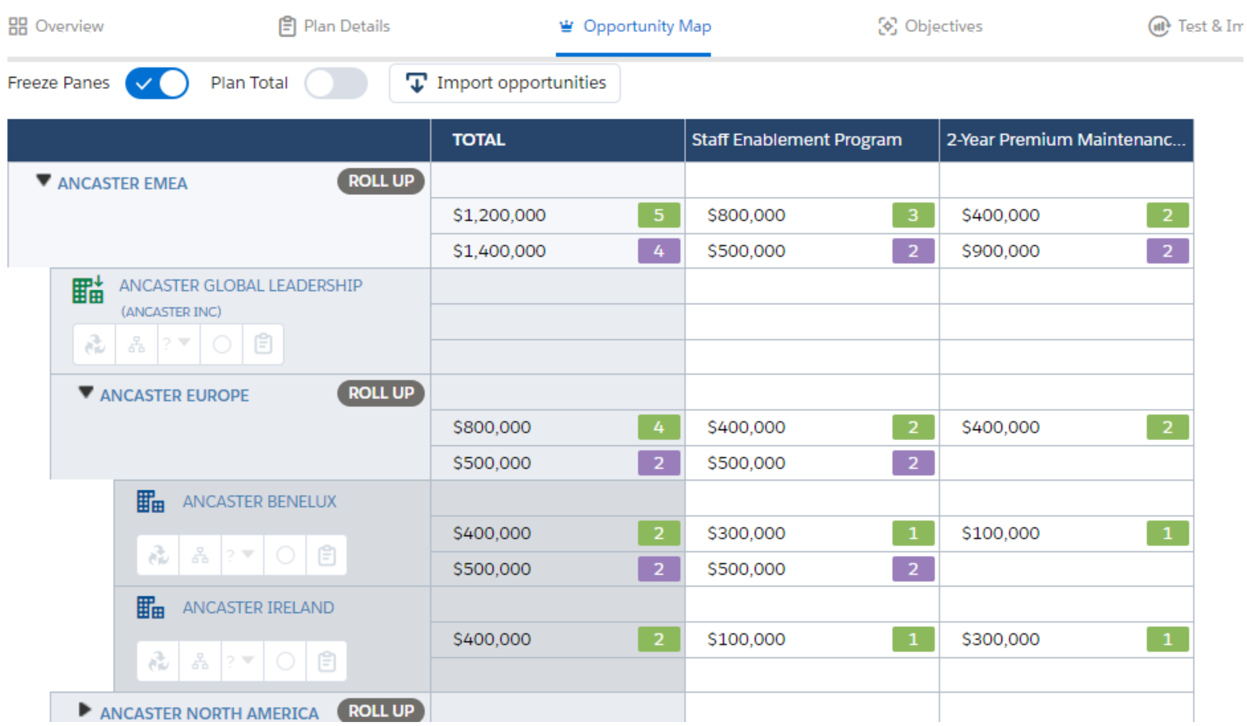
Adding roll up rows

Roll up rows allow you to sub-total the opportunities on account, division and roll up rows contained within the roll up. A roll up can contain more roll ups. A limit of three levels of roll up applies (e.g. Ancaster EMEA > Ancaster North America > Ancaster Canada).

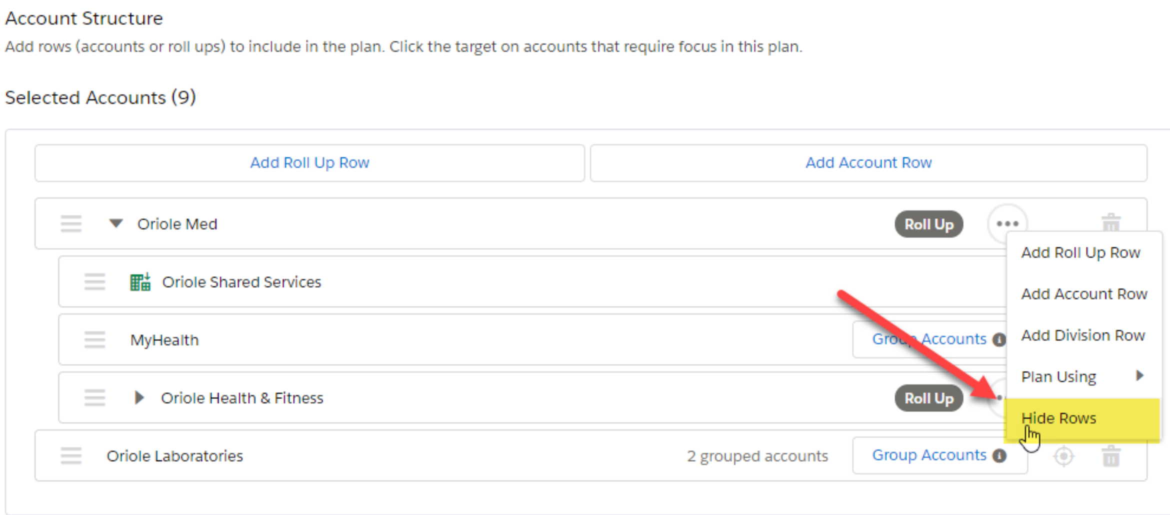
The following is an example of roll up rows added on the Account Structure tab:



And how those roll ups appear on the opportunity map:

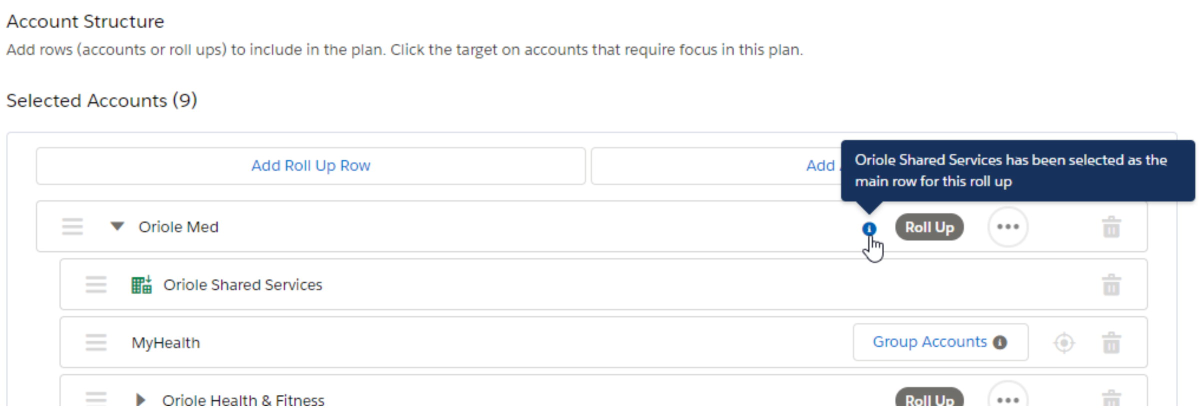


You can choose to hide the rows within a roll up – as shown below. If selected, the rows within the roll up are not displayed on the opportunity map, but it continues to provide a sub-total for the relevant accounts and divisions.

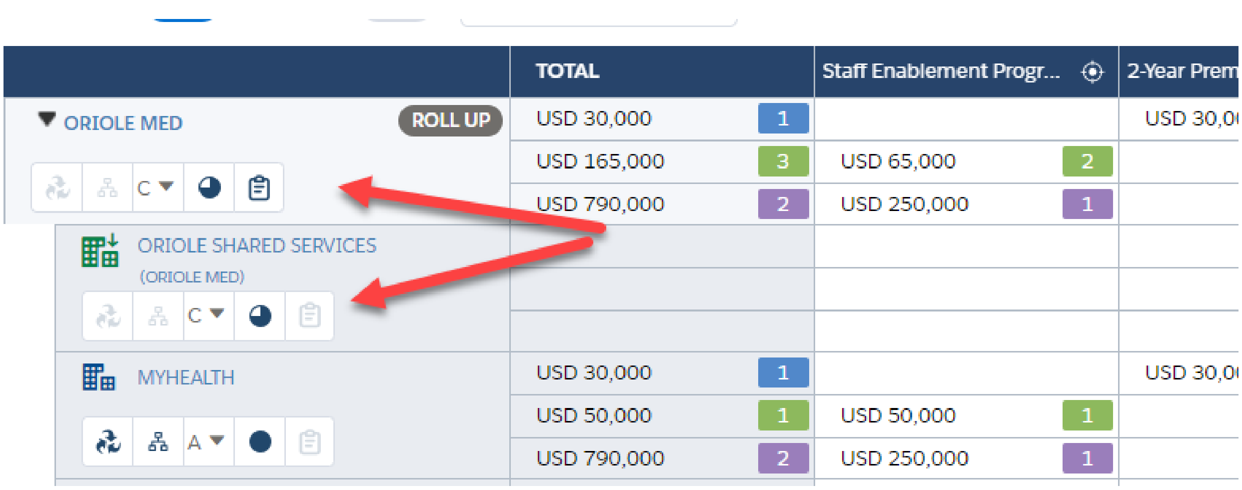


Another option on the ellipsis menu, ‘Plan Using’, allows you to select an account or division that you can plan against on the roll up row. In effect, it means that the options for the relevant account or division row on the opportunity map, highlighted below, are also shown on the roll up row.

This action is indicated on the Account Structure tab:



And below is how the options of the nominated account or division are displayed on the opportunity map:



Divisions can only be added within a roll up, and are added or created on the roll up using the ellipsis menu on the Account Structure tab (see option ‘Add Division Row’).

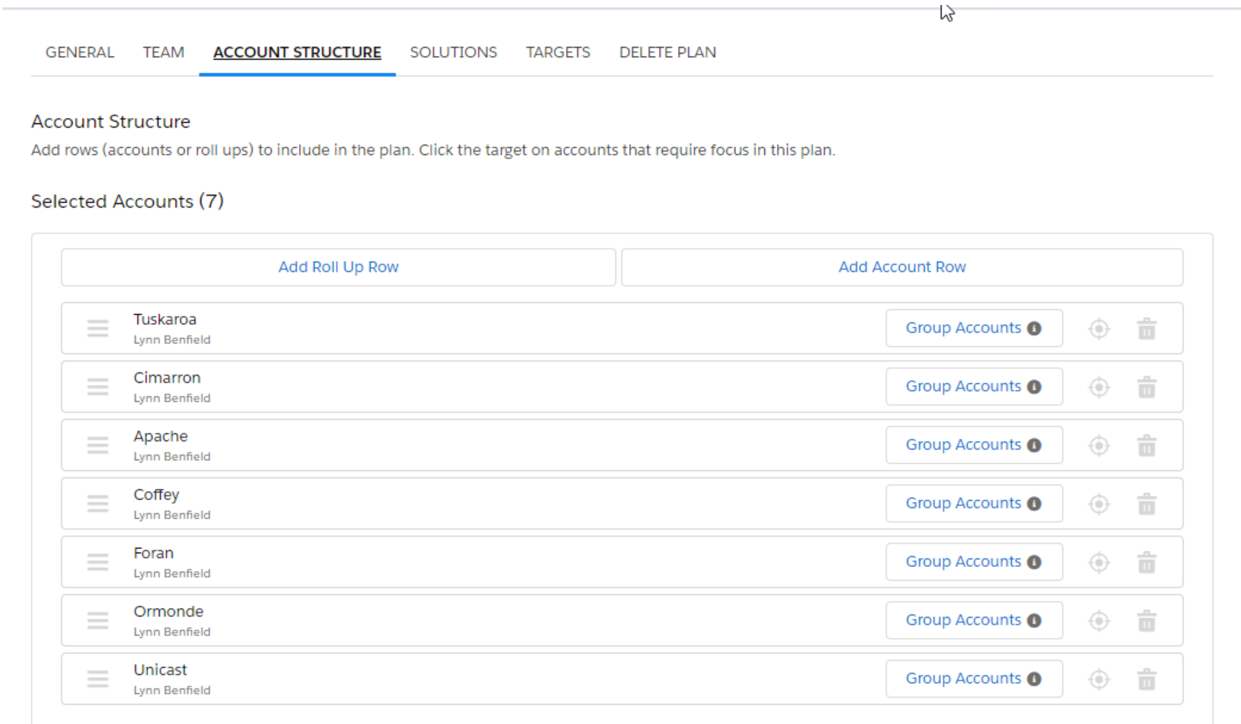
NOTE: divisions are no longer tied to account plans. If you remove a division from your account plan, it will still be available to add to another plan.

With the roll up structure, you can now add the same account or division multiple times within your account plan, so long as each instance is within a different roll up. This is useful, for instance, when an account is selling into two different service units (e.g. Finance & HR) and these service units are represented by roll up rows on the opportunity map. A row for the same account can be added to both roll ups and opportunities assigned accordingly.

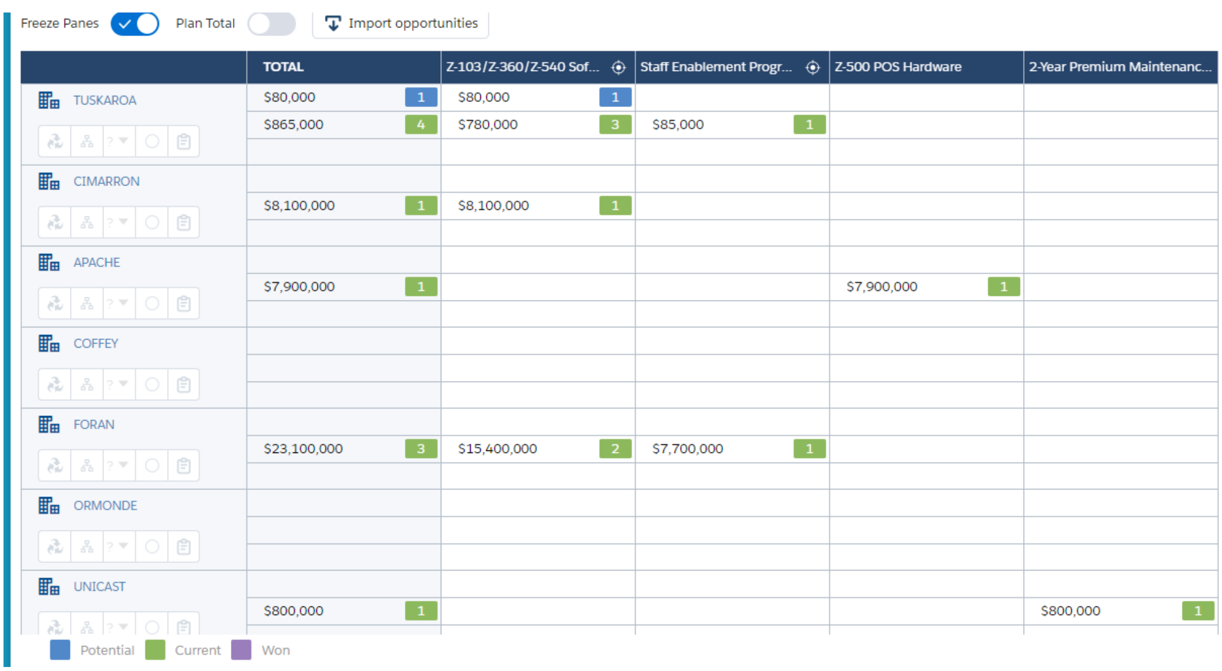
Adding standalone account rows

Adding account rows in a portfolio-type structure is simply a matter of adding individual account rows.

The following is an example of individual account rows added on the Account Structure tab.

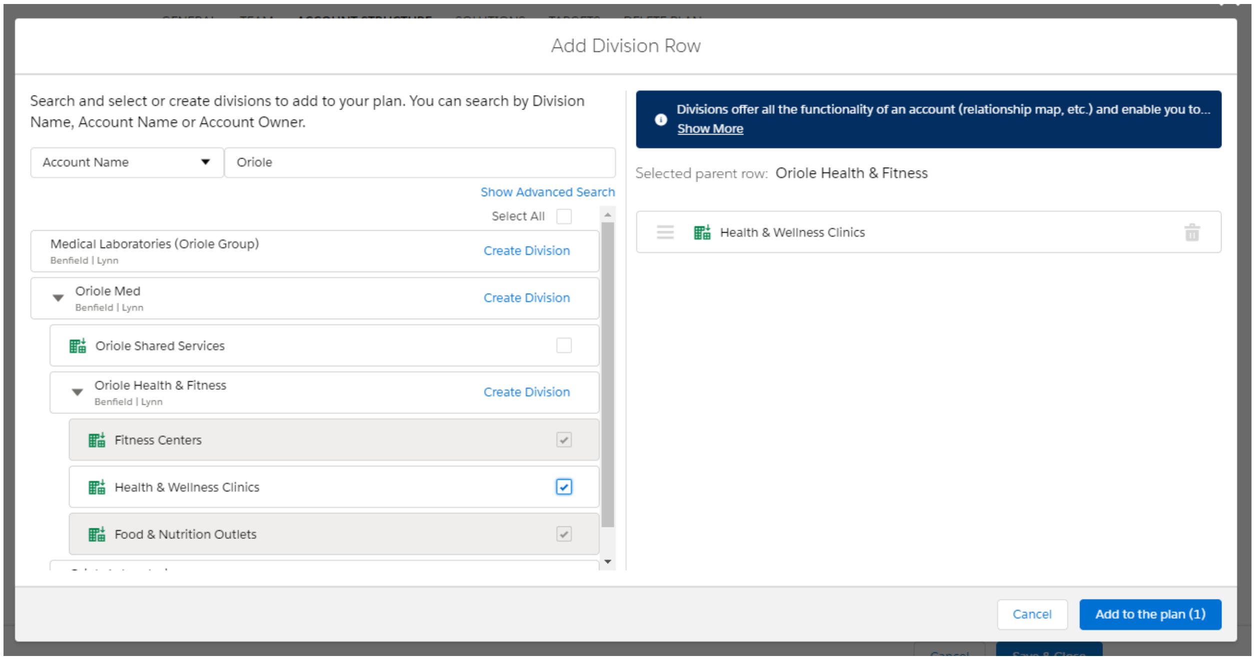


And how those individual account rows appear on an opportunity map:

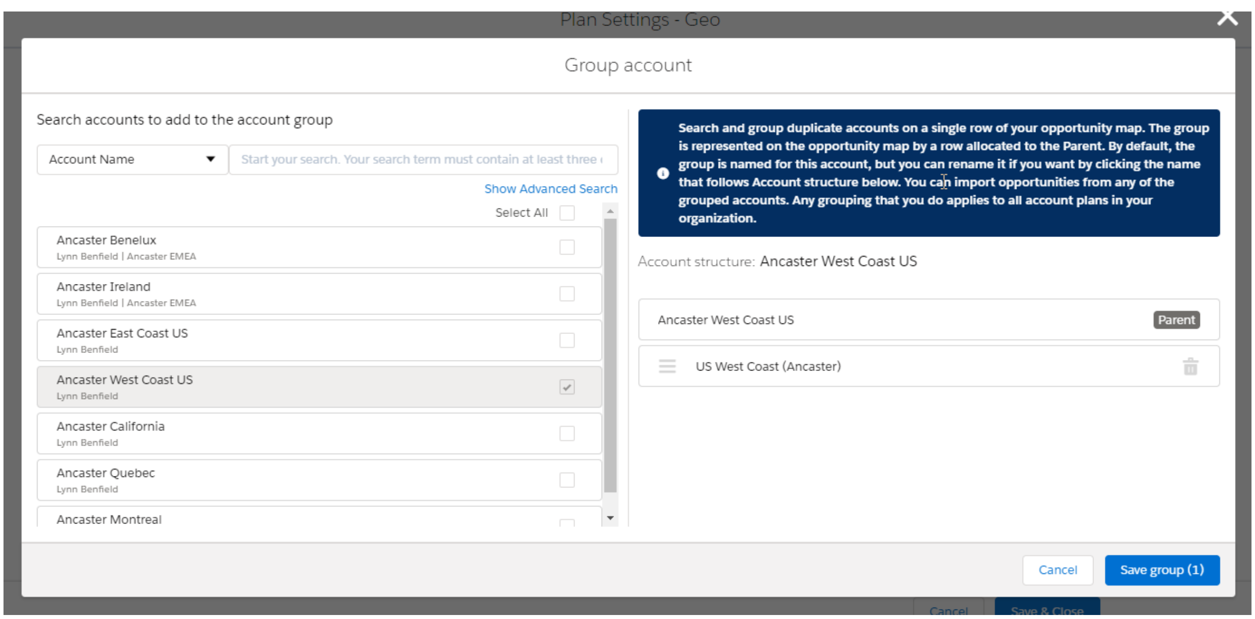


Finally, with the move of division functionality to the Add Division Row dialog, the grouping window is a cleaner experience, allowing you to focus on the grouping of duplicate accounts in your Salesforce org.

Below, is the new Add Division Row dialog, accessed from the Roll Up ellipsis menu on the Account Structure tab.

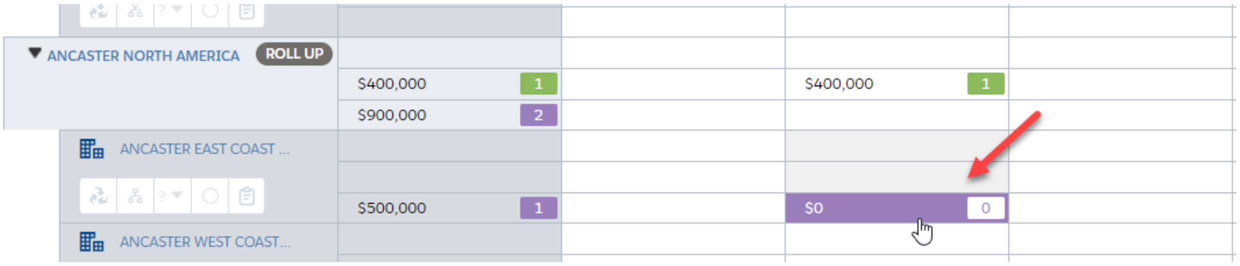


And here is the new dialog dedicated to grouping accounts on a single row of the opportunity map – accessed by clicking the Group Accounts button on the relevant account row on the Account Structure tab.

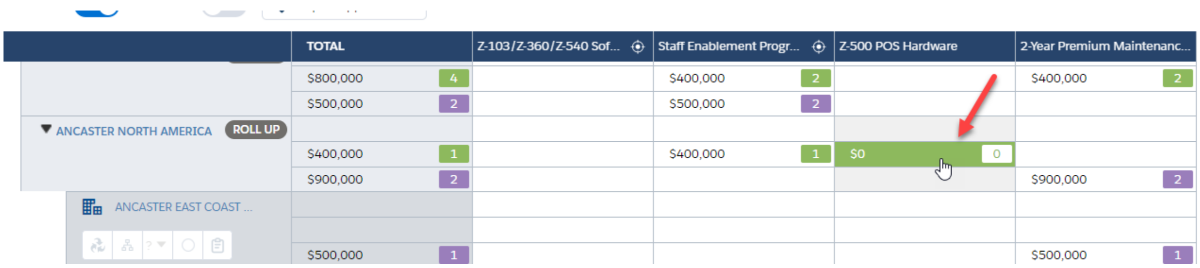


Improvements on the opportunity map

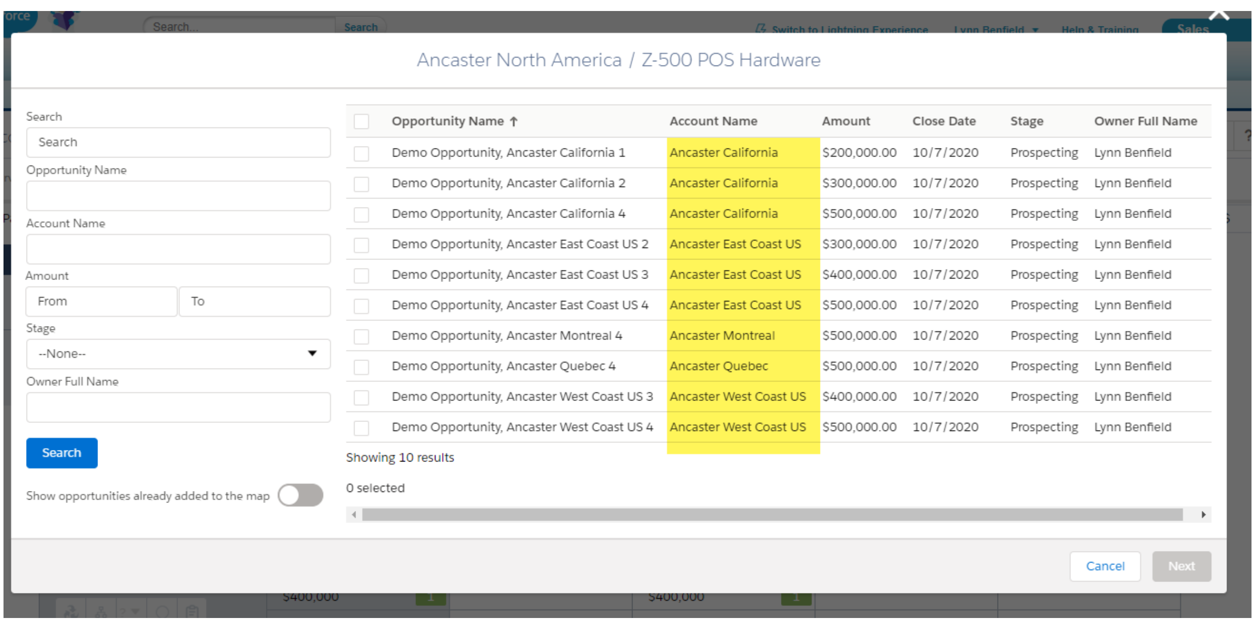
The opportunity map has a brighter and more engaging look. Part of this improvement to the user interface is that cells in the map are highlighted in the relevant color when you hover your cursor over them (purple = Won, and so on). This helps you to quickly jump to the relevant tab of the intersection.



By clicking into a roll up users can now create, search and import opportunities for any accounts and divisions within the roll up. In the example below, a user clicks into an intersection on the roll up row Ancaster North America.

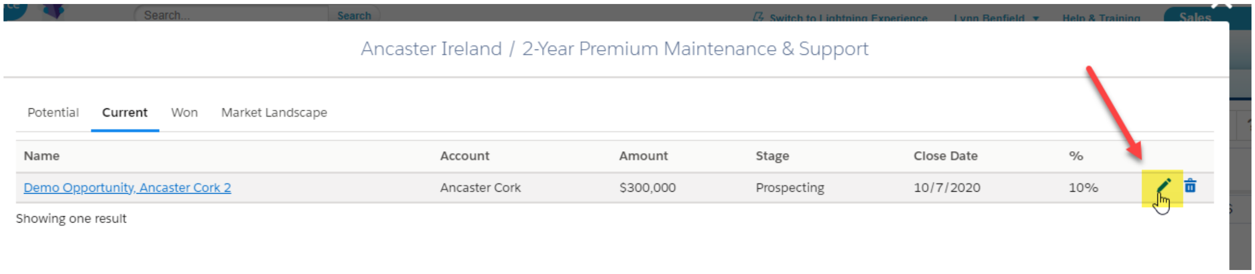


On the intersection window, the user selects the import option and sees opportunities for all the accounts within the roll up.

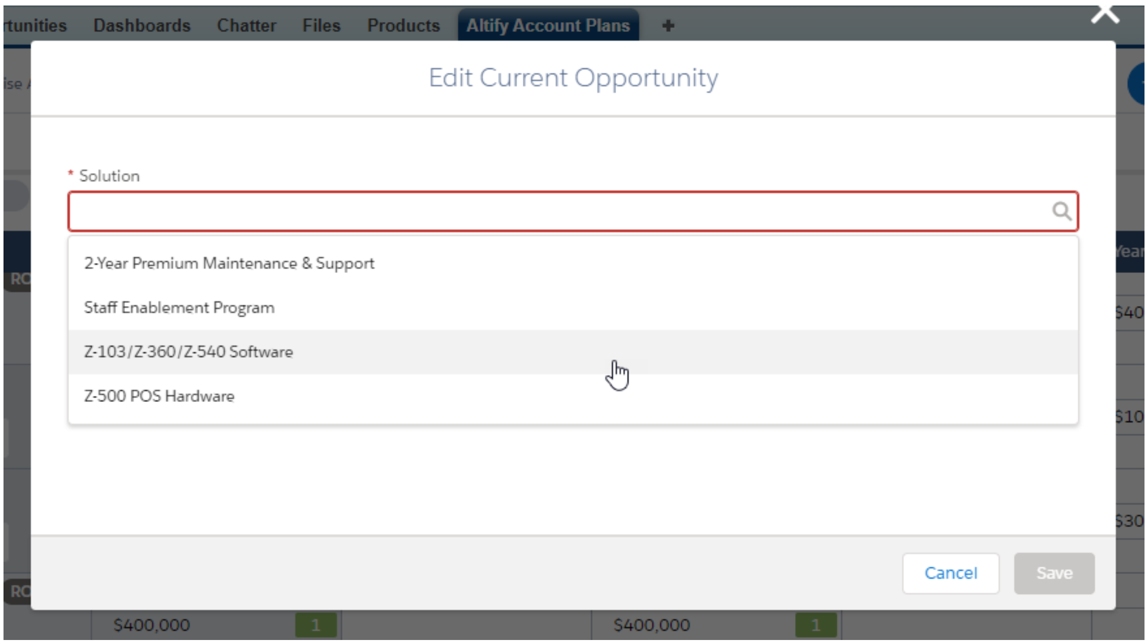


Search filters are immediately available in the left-hand column of this window (as shown in the example above). This improvement is also applied on the Bulk Import Opportunities dialog.

Also delivered with this release, you can now change the solution of a current or won opportunity on your map.



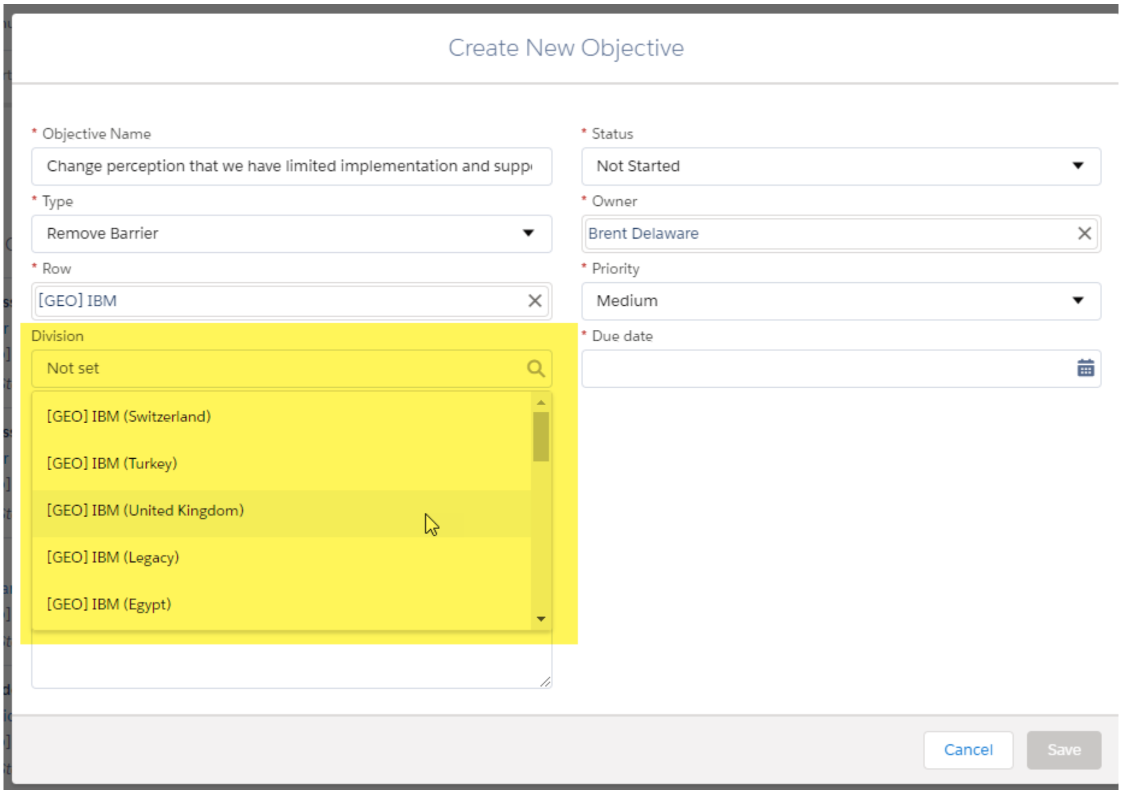
After clicking the edit icon on the intersection window (as highlighted above), the Edit Current/Won Opportunity window is displayed where you can change the solution if required.



Extended support for divisions

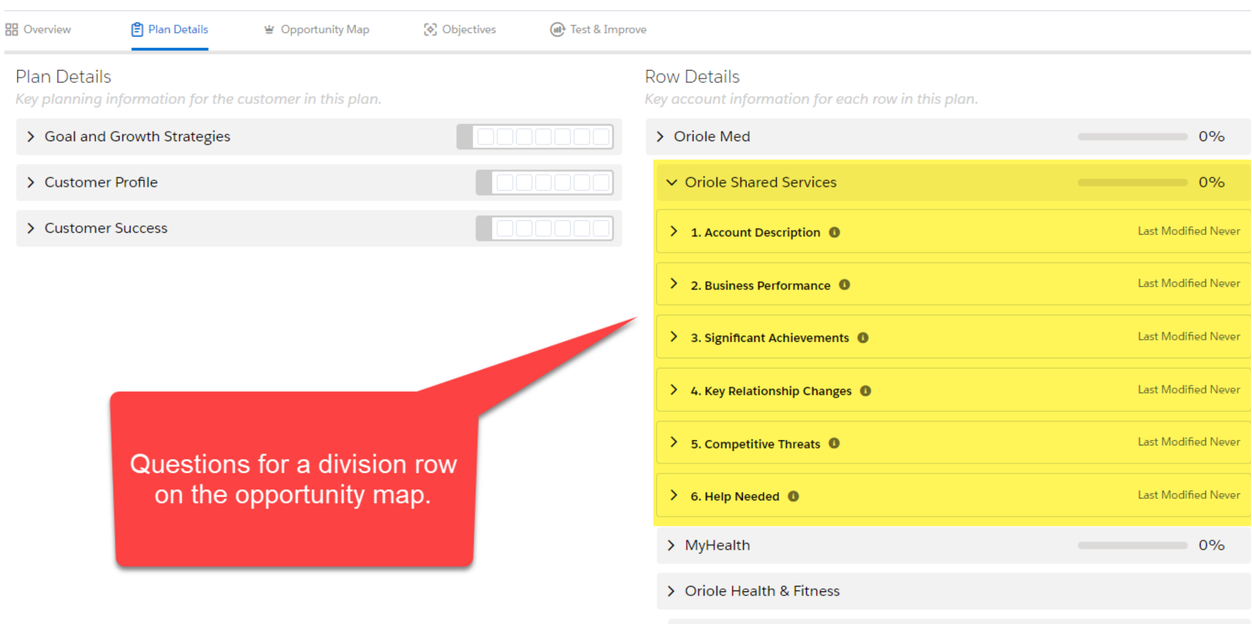
Account divisions are now supported on the Objectives and Plan Details pages in an account plan.

You can create an Objective that is associated with a specific account division row on the opportunity map.

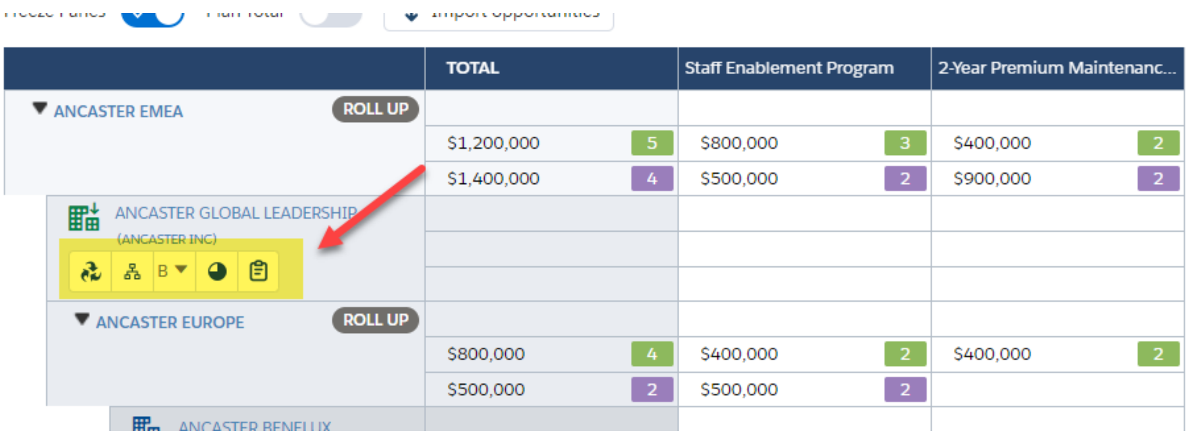


In addition, the filter option in the All Objectives workspace allows you to view Objectives associated with selected account divisions.

Account Details questions on the Plan Details page are renamed 'Row Details' questions, and are now provided for account division and account rows on your opportunity map. This allows you to record background and research information for specific divisions.



As with account rows, the additional support for divisions, including Row Details questions, Segmentation and Level of Relationship, are now available through the opportunity map:



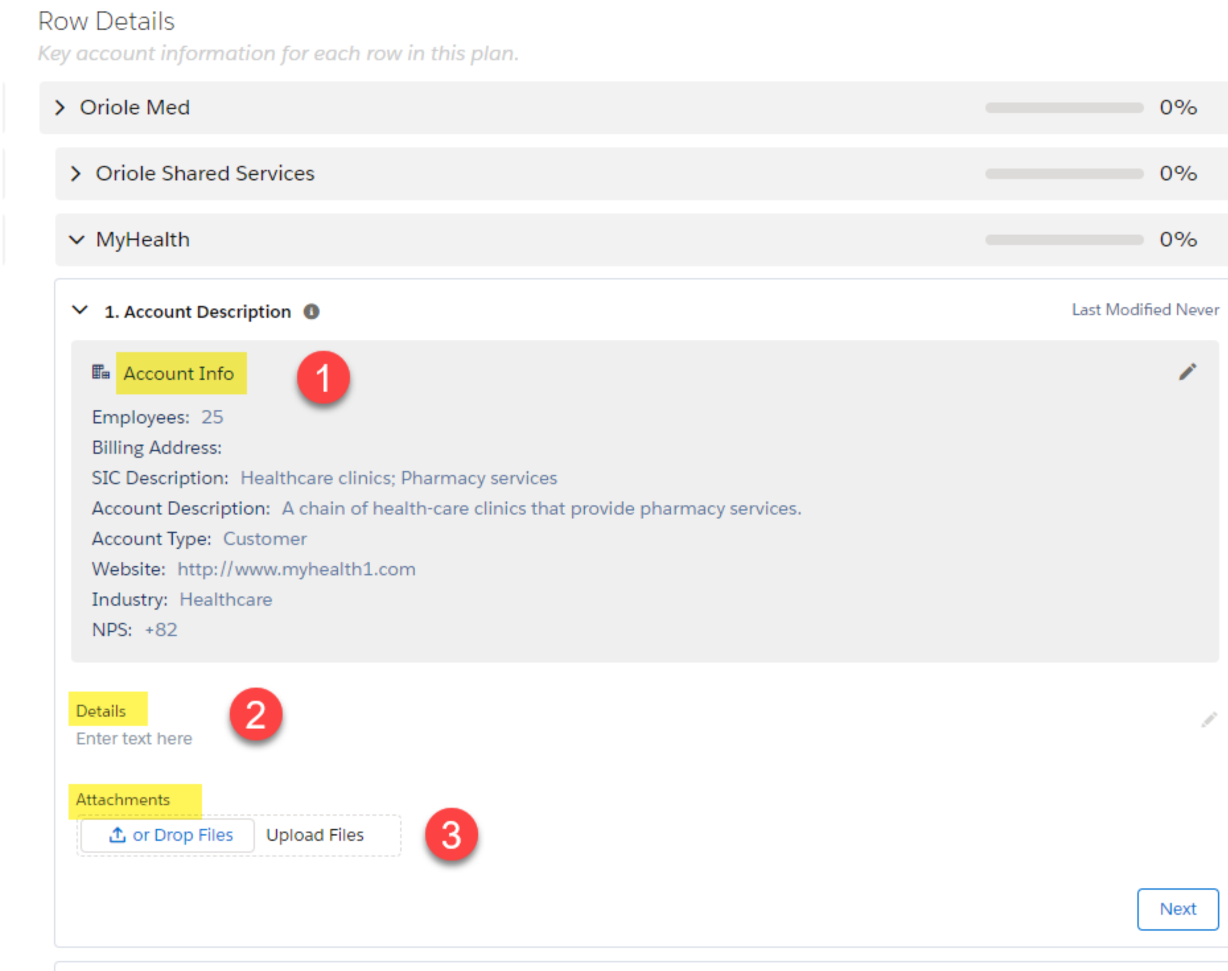
This new division-level data (Objectives & Actions, Row Details) is captured in the Executive Briefing output.

Along with these changes, you can now record multiple divisions for a single on the relationship map.

Account hub – viewing/updating account information in Altify account plans

You can now access and update fields from Account records while working in an Altify account plan. Placed in the Row Details section on the Plan Details tab by an administrator, the fields provide a greater depth of account information in your plan and eliminates the need to navigate between Salesforce and Altify, copying and pasting information back and forth.

In the example below, several Account fields have been placed under the Account Description question by an administrator.



Completeness indicators shows how much progress (0 to 100%) you've made in answering Row Details questions and researching your accounts and divisions. The indicators are informed by the number of Row Details questions that are answered and help identify information gaps in the plan. A question is now deemed complete by the system if a you do one of the following:

1 Completes all the fields in the Account Info section.

2 Enters text in the Details section.

3 Uploads an attachment.

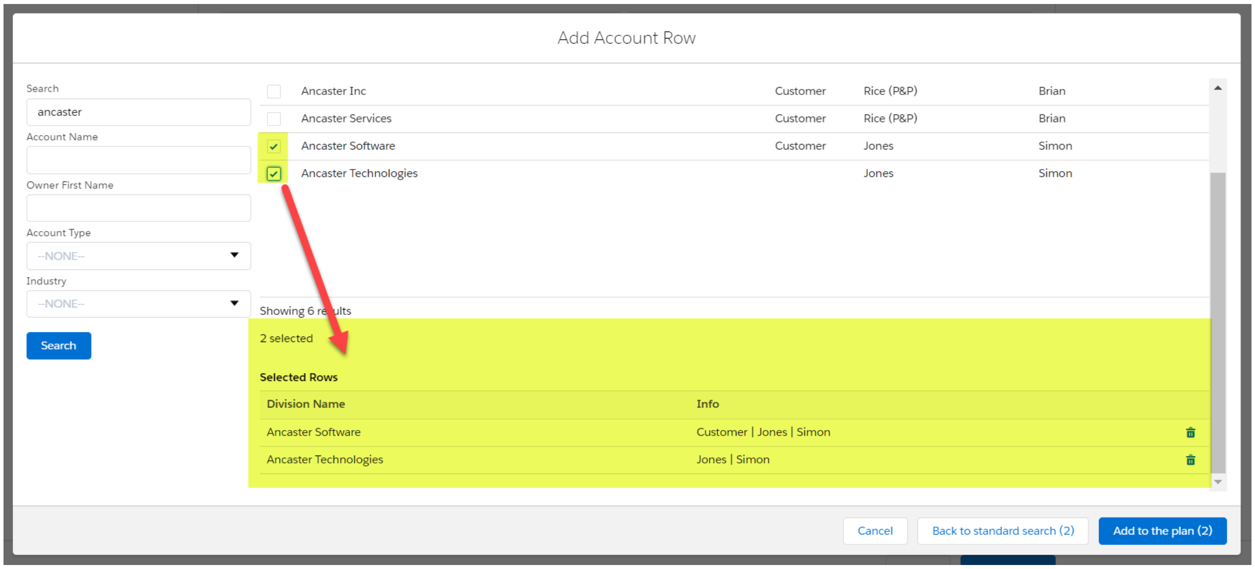
NOTE: account fields are not displayed for divisions in Row Details.

Improved filtering of objectives

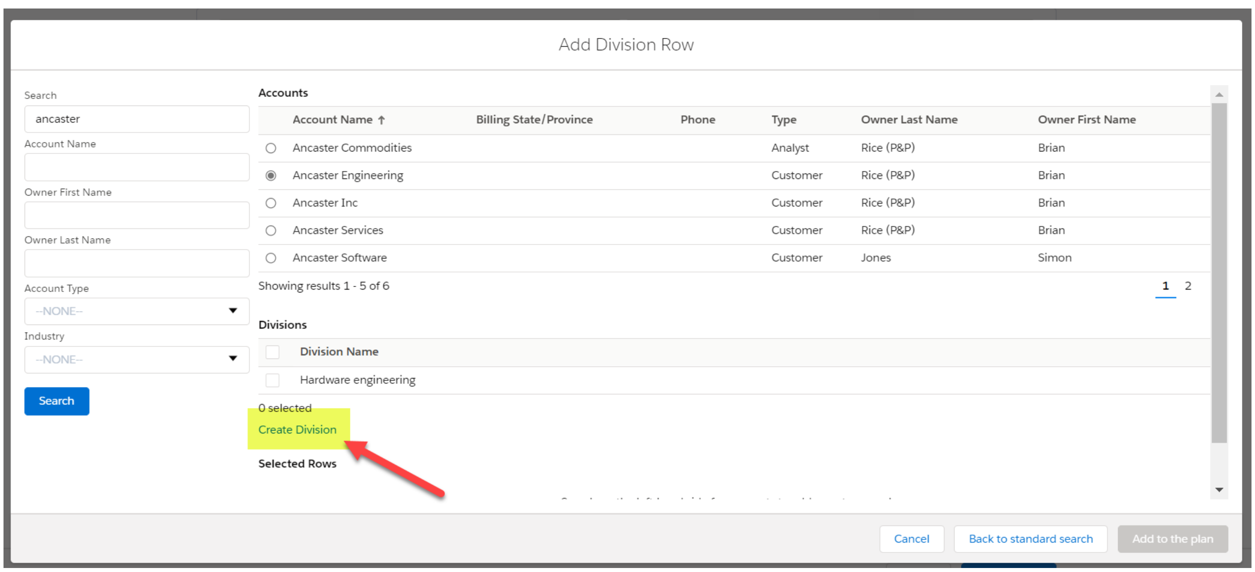
Divisions from outside the account plan are no longer shown when working with objectives. In addition, objective filtering now works with accounts and divisions that are hidden in the account plan.

Improvements to Advanced Search

A Selected Rows table allows the user to keep track of accounts they adding to their account plan while in Advanced Search.

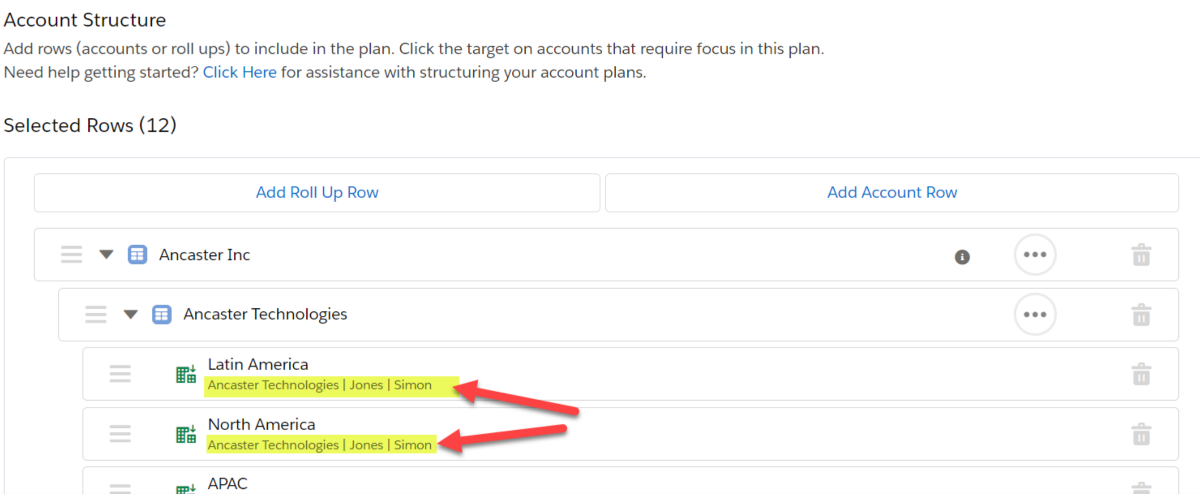


Advanced search is also now available when adding divisions to the plan (with same tracking of added rows). Users can create divisions while performing an advanced search of divisions – as highlighted below.



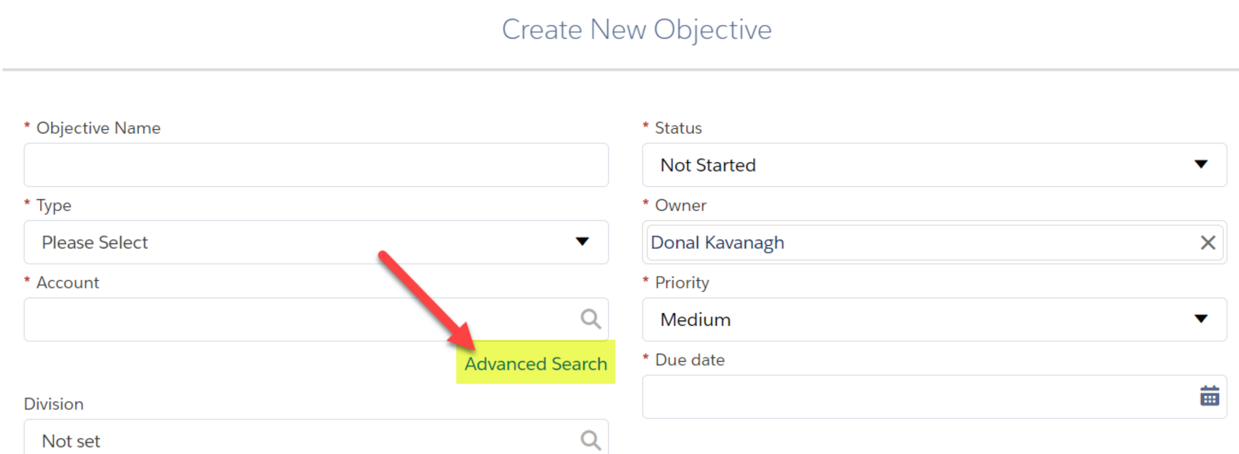
Division info in account plan settings

Information is now displayed for account divisions in the account plan settings page. This information is configured by the Altify Accounts CRUD Search (same as with account rows).



Advanced searching in Objectives

An advanced search of accounts can now be performed when creating or editing an objective or action.



Bulk import supports grouped accounts of 100+

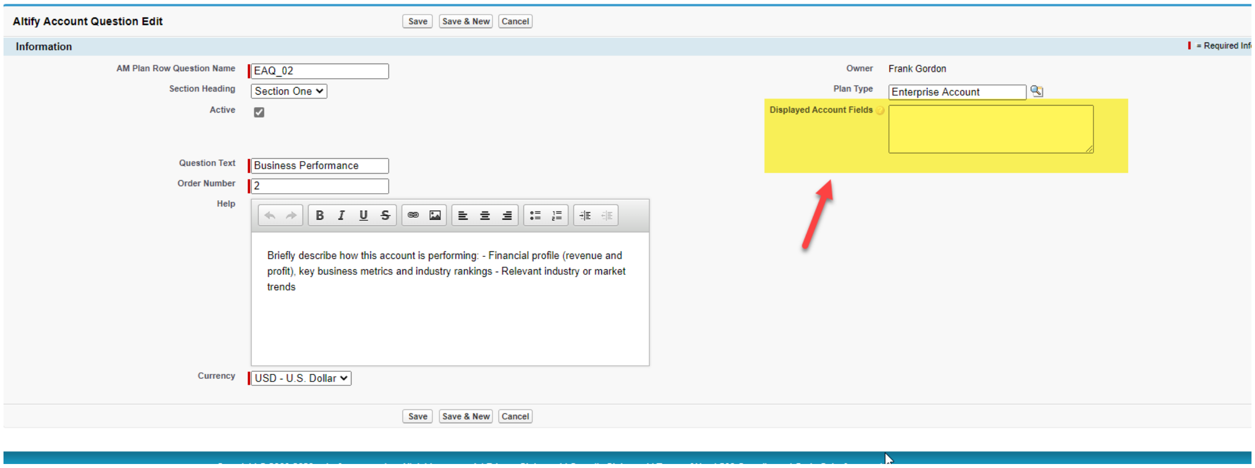
Bulk importing is no longer restricted to the planned accounts if an account row represents a group of over 100 accounts or is a parent of over 100 accounts.

New functionality to be administered

Account hub – pulling account information into Altify account plans

Administrators can include fields from the Account record in Account Details questions on the Plan Details tab.

Add these fields by entering the API names of the required Account fields (in a comma-separated list) in the text box **Displayed Account Fields** on the relevant Altify Account Question record.



Limiting wildcard searching of accounts

A new custom setting (*Disable Account search term prefix*) disables the initial wildcard in the 'wildcard/string/wildcard' search that applies by default. This is useful for customers with a very large number of account records and who are experiencing a delay when searching.

Additional fields searchable in Salesforce Shield-Enabled mode

In Salesforce Shield-Enabled mode, users can now search the Name fields of the following when they are encrypted: Altify Account Plan, Altify Account Objective, Altify Account Plan Row and Altify Account Opportunity.

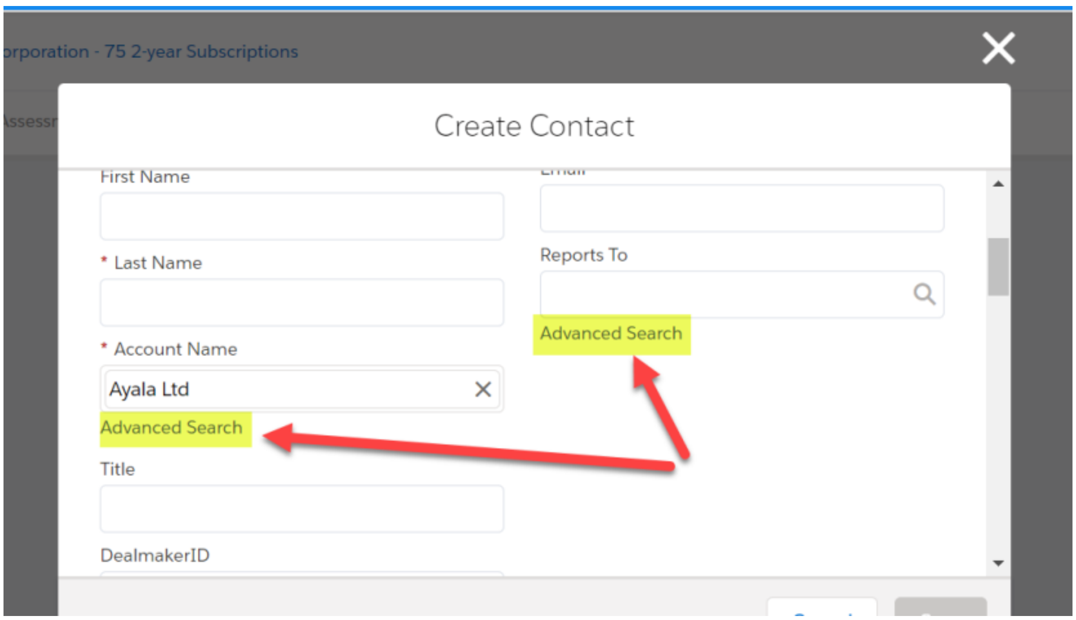
Core Functionality

New user functionality

Advanced searching for accounts or contacts in CRUD dialogs

An administrator can make advanced search available for the following lookup fields in a CRUD dialog: *Contact* and *Account*.

So, for example, an Advanced Search option is displayed for the *Account Name* and *Reports To* fields when a user is creating a new Contact on a Relationship Map (as highlighted in the example below).



New functionality to be administered

Activating advanced search of accounts and contacts in CRUD dialogs [9.6.35]

To enable advanced searching of accounts and contacts in CRUD dialogs, the checkbox for the following Altify Core Setting needs to be selected: *Enable CRUD Advanced Search*.

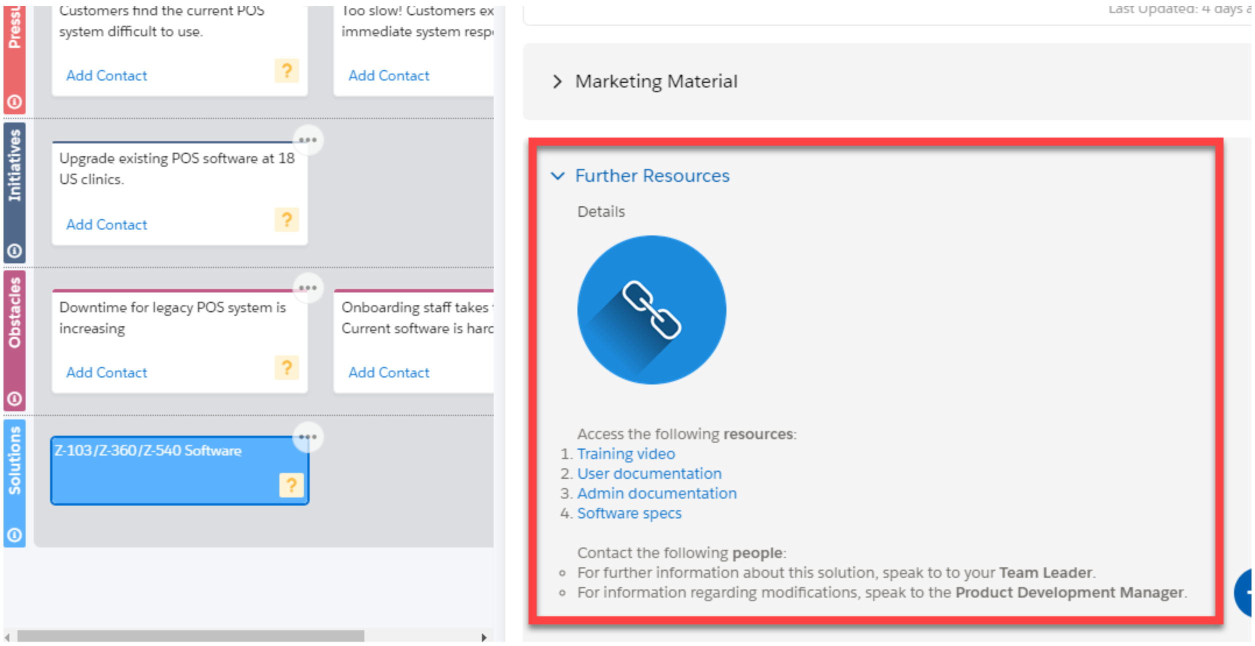
This setting only applies to dialogs for which the relevant CRUD custom setting has been enabled (*Use CRUD Add Action* and *Use CRUD Add Contact*).

Insight Maps

New user functionality

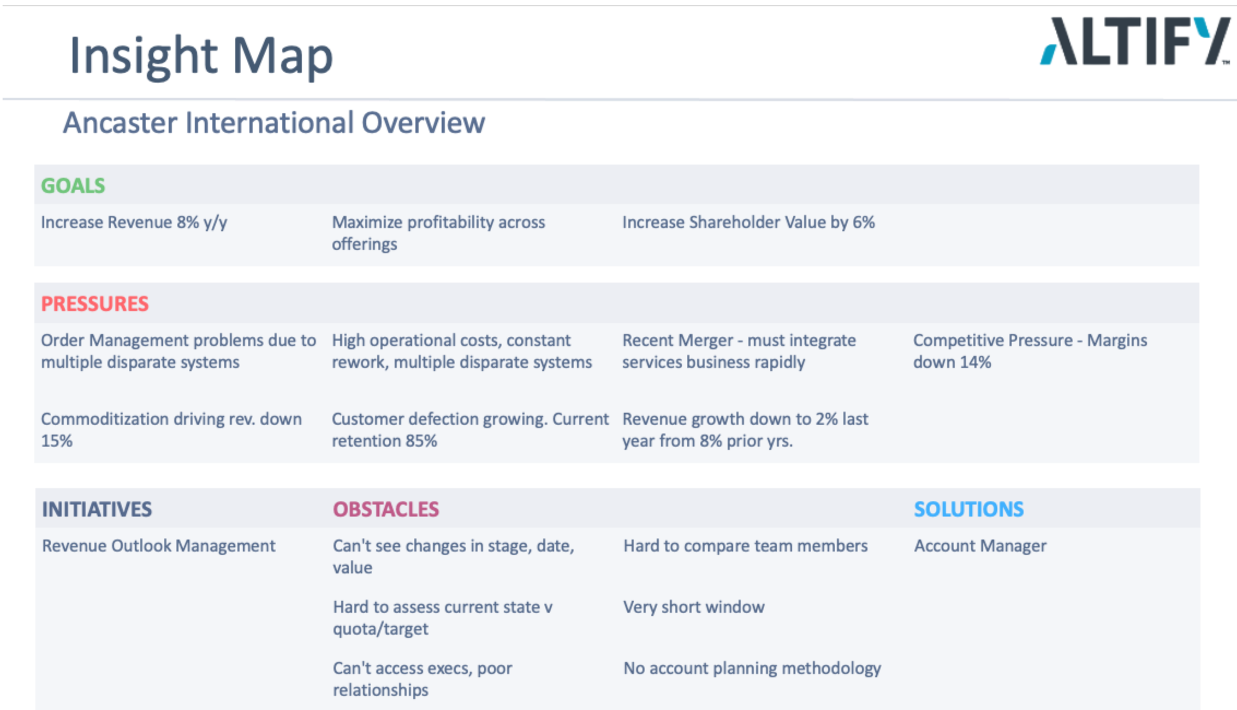
Altify Solutions – rich text formatting

Users can now access template solutions that are formatted in rich text, including images and hyperlinks.



Improved formatting of PPT exports

The narrative provided by insights is more easily presented and understood with a new format applied to the PowerPoint output – as shown in the example below.



New functionality to be administered

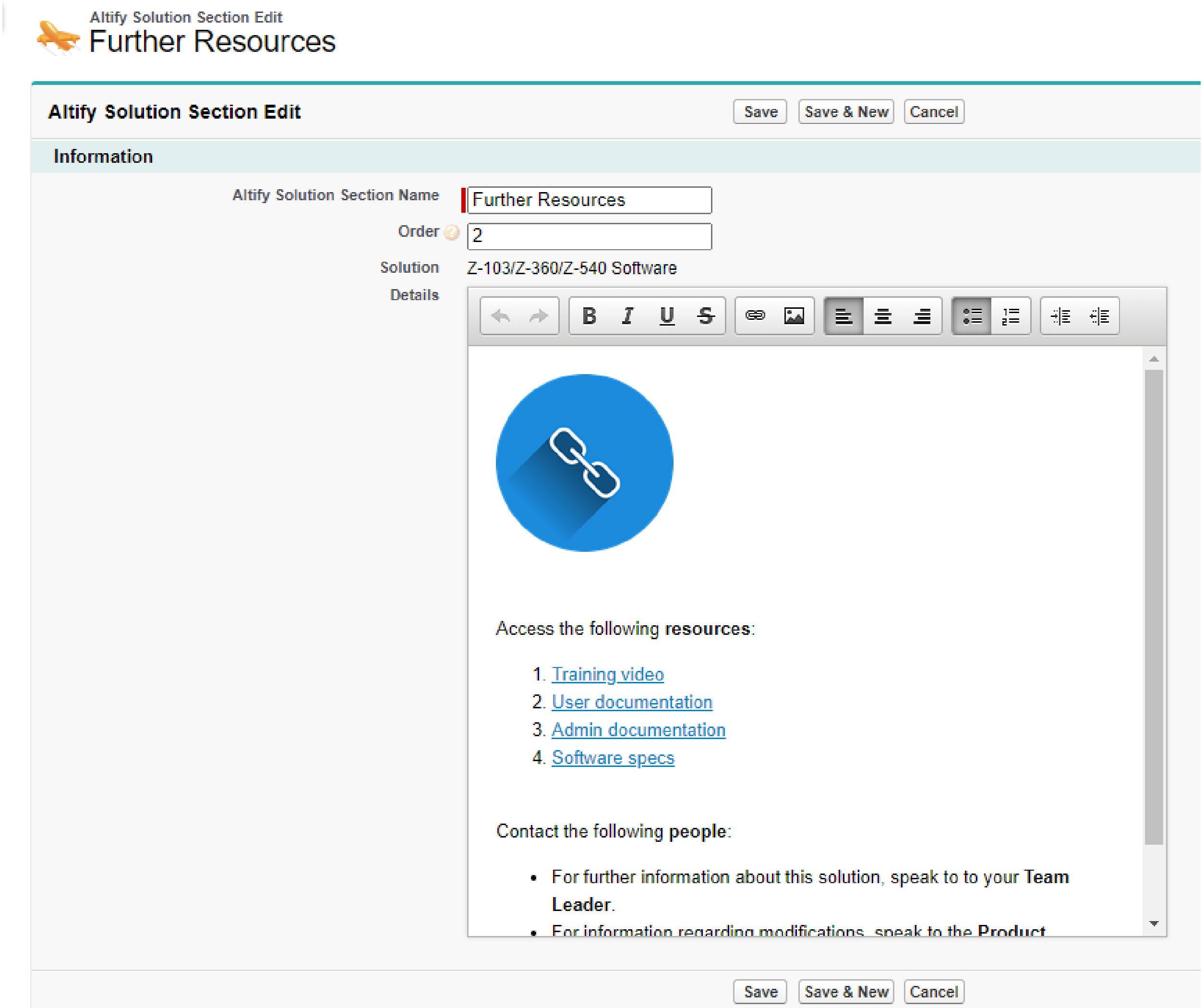
Formatting sections for Altify Solutions

On the Altify Solution Section record, a new rich text **Details** field replaces the **Details** plain text field and five hyperlink fields (**Link1** to **Link5**), all of which are deprecated.

The new Details field allows administrators to format text and include images and hyperlinks as required.

Usage logs

User actions in insight maps are now recorded in usage logs.



NOTE: for users upgrading from Spring '20, a new post-install batch job will migrate existing links to the new rich text Details field.

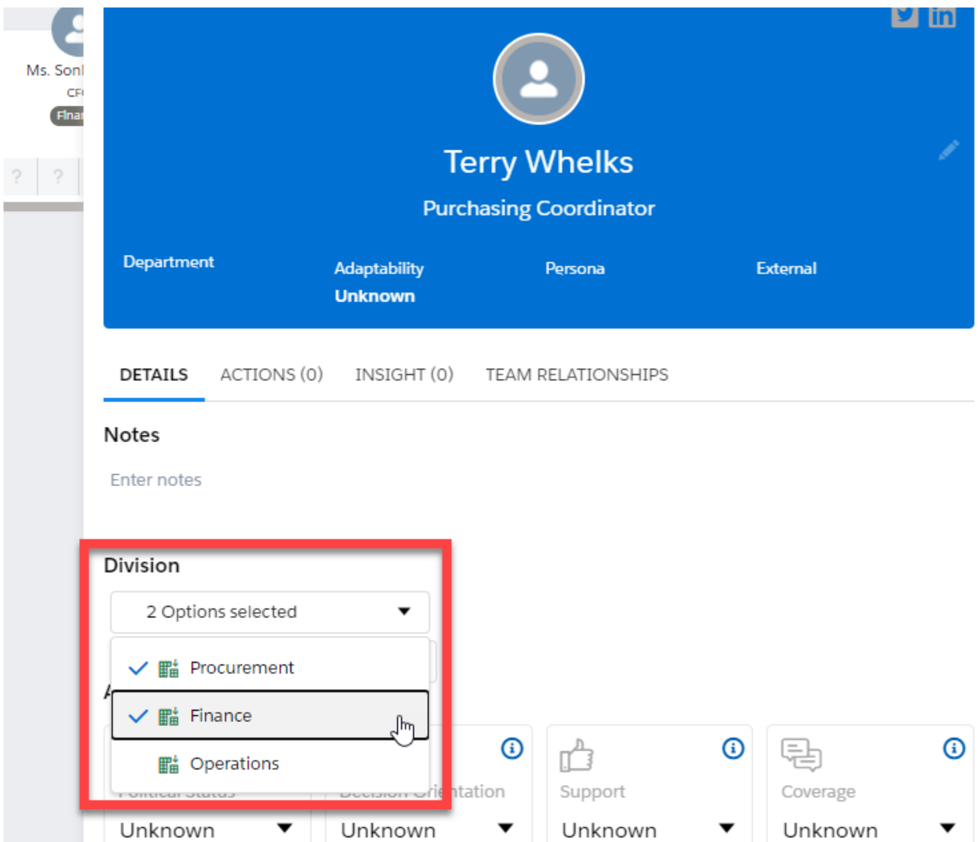
Relationship Maps

New user functionality

Adding contacts to multiple divisions

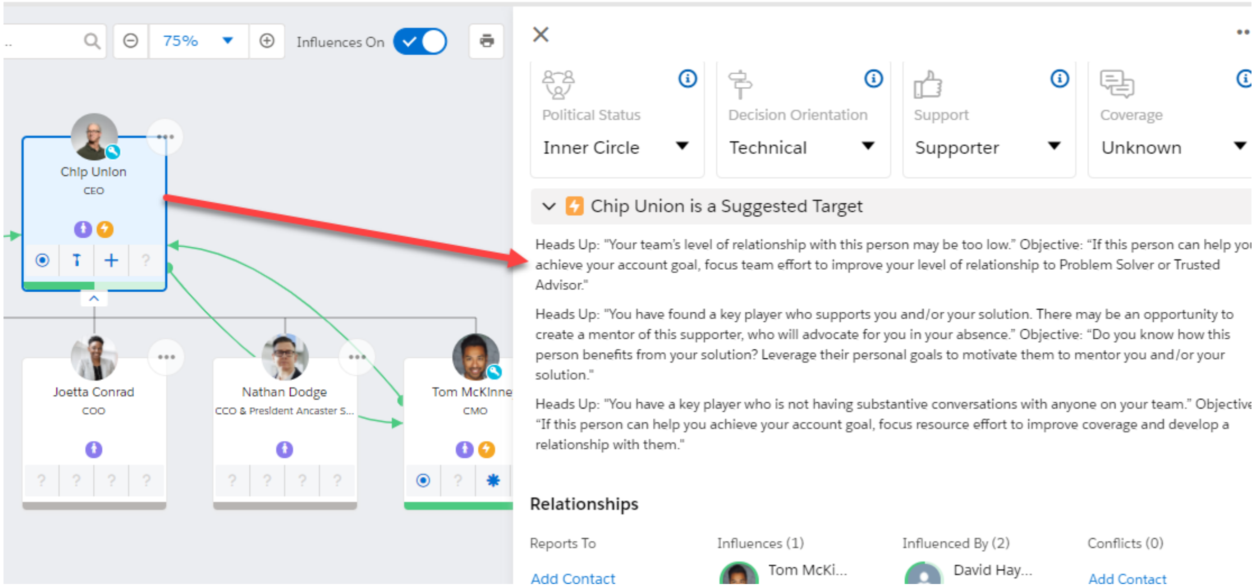
This enhancement applies to relationship maps in Account Manager only.

Contacts can now be added to multiple account divisions on a relationship map. The contact is displayed on each divisional map to which they are assigned.



Suggested targets – improved content and AM availability

Suggested targeting is now available in **Altify Account Manager** relationship maps.

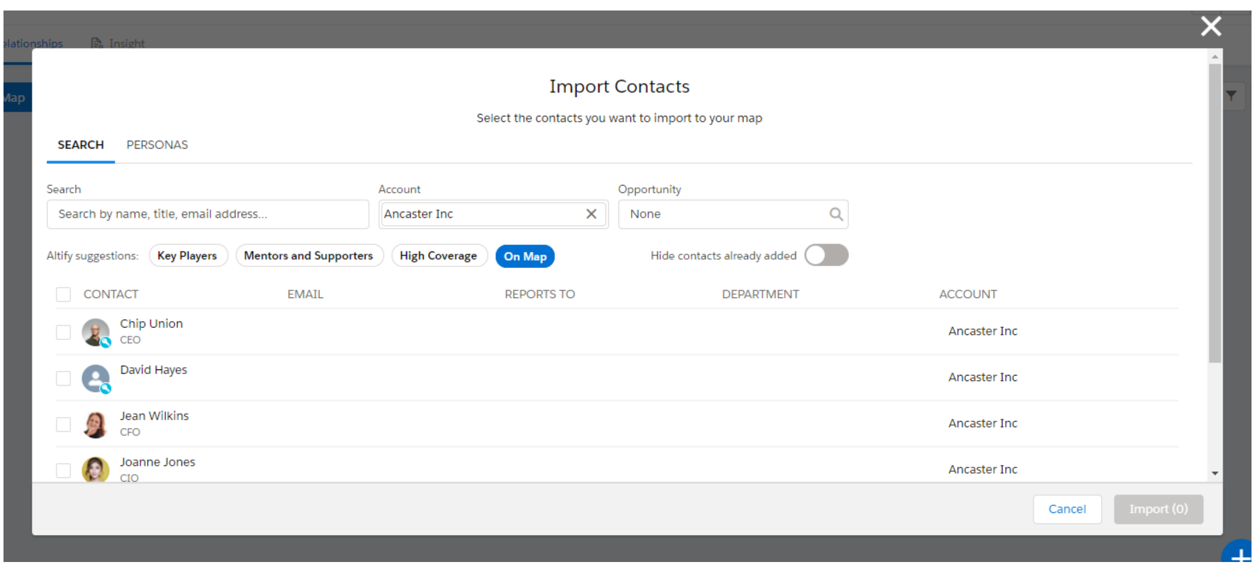


Suggested targeting automatically identifies contacts that your team needs to build a relationship with. If the contact currently selected on the map is one of those, they're flagged as a suggested target, and you get coaching in the Details panel on how to elevate your relationship with them.

In line with this change, the content for suggested targeting in **Altify Opportunity Manager** relationship maps is also revamped.

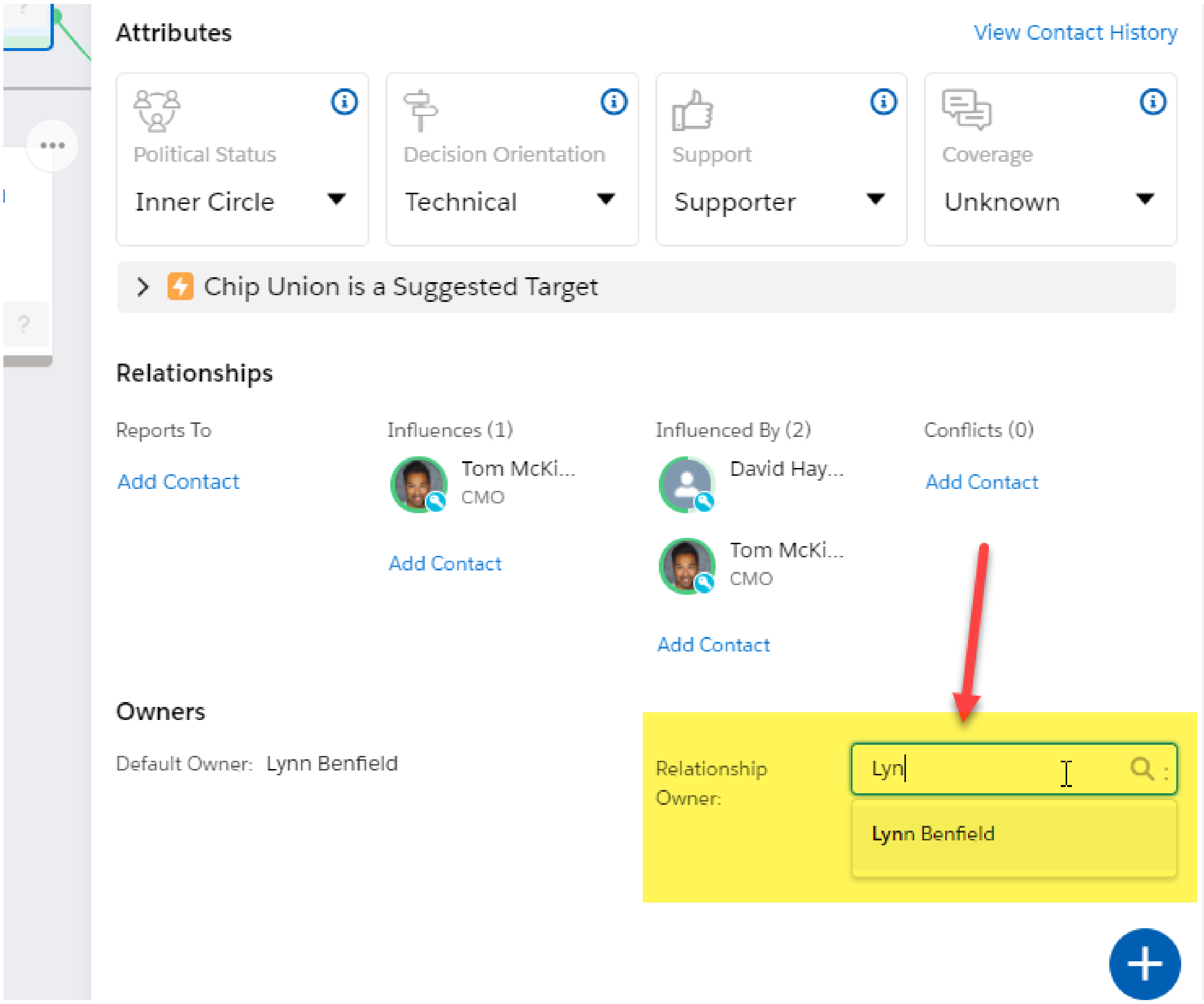
'On Map' filter for importing contacts

A new filter option on the Import Contacts window allows you to filter the displayed contacts to only show contacts that are currently on the selected account or opportunity map. This filter allows you to see all the contacts that the author of the target map deemed worthy of inclusion and to select accordingly. In the example below, the On Map option is selected and only contacts that are displayed on the Ancaster Inc account map are listed.



Restricted user searching

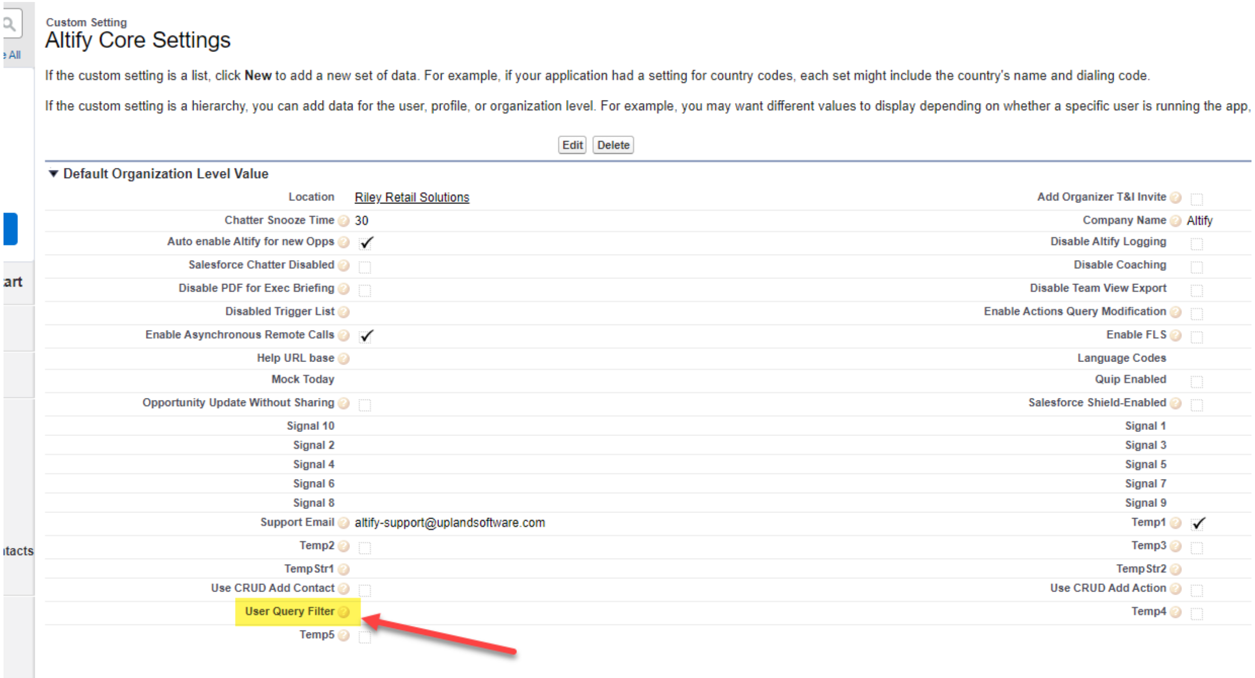
An administrator can restrict the results of user searches on a contact's information panel. The admin can limit the search to a particular type of user if required.



New functionality to be administered

Restricting user searching to a user type

An administrator can restrict the search results of a user search on the relationship map. By entering a user type in the Altify Core Setting, *User Query Filter*, only users of that user type will be displayed in the search results. For example, if you set this value to the 'Standard' user type, user types such as PowerPartner are excluded from the search results. For more information on user types, see the Salesforce api docs.



Defining Relationship Map Completion

A new Altify Core Setting (*Contacts on map for completeness*) is available to define the completeness of a relationship map.

For organizations that apply simple completeness calculations, the relationship map completeness score is derived from a count of the number of contacts that have interesting attributes (i.e. Political Status, Buying Role [OM], Decision Orientation [AM], Coverage or Status) as a percentage of a desired number of contacts (8).

This value allows you to redefine the desired number of contacts. Left blank, the default value of 8 is applied. For more information, see the relevant link below:

- Account completeness
- Opportunity completeness

Usage logs

User actions in relationship maps are now recorded in usage logs.

Reporting

Completeness Reports

Completeness reports for Opportunity Manager and Altify Manager are reintroduced with the Fall ’20 release.

- Account completeness scoring is calculated in the context of a specific plan type. The plan type determines the modules, plan row questions and solutions that are included in the calculation.
- Opportunity scoring is calculated by measuring completeness in the following areas: Assessment, Relationship Map, Insight Map, Decision Criteria, PRIME Actions and Status.