



Release Notes

Version 9.6 (Fall '20)

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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 divisions, 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).

Account Manager - Set Up Your Plan

GENERAL TEAM ACCOUNT STRUCTURE SOLUTIONS TARGETS

Where are you selling to?
Add rows (accounts or roll ups) to include in the plan. Click the target on accounts that require focus in this plan.

Add Roll Up Row 1

Roll Up Rows

Select this option if you want to be able to subtotal multiple accounts in one row.

Top Five	Total Opp: 25,000
Acc. A	5,000
Acc. B	5,000
Acc. C	5,000
Acc. D	5,000
Acc. E	5,000

Add Account Row 2

Account Rows

Each selected account is allocated in its own row on the Opportunity Map.

Acc. A	Opportunity: 15,000
Acc. B	Opportunity: 5,000
Acc. C	Opportunity: 25,000

Skip for now

Cancel Back Next

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:

GENERAL TEAM **ACCOUNT STRUCTURE** SOLUTIONS TARGETS DELETE PLAN

Account Structure

Add rows (accounts or roll ups) to include in the plan. Click the target on accounts that require focus in this plan.

Selected Accounts (11)

Add Roll Up Row

Add Account Row

▼ Ancaster EMEA

Roll Up

...

Ancaster Global Leadership

Lynn Benfield | Ancaster Inc

▼ Ancaster Europe

Roll Up

...

Ancaster Benelux

Lynn Benfield | Ancaster EMEA

3 grouped accounts

Group Accounts

Ancaster Ireland

Lynn Benfield | Ancaster EMEA

5 grouped accounts

Group Accounts

▶ Ancaster North America

Roll Up

...

And how those roll ups appear on the opportunity map:

Overview

Plan Details

Opportunity Map

Objectives

Test & Im

Freeze Panes

Plan Total

Import opportunities

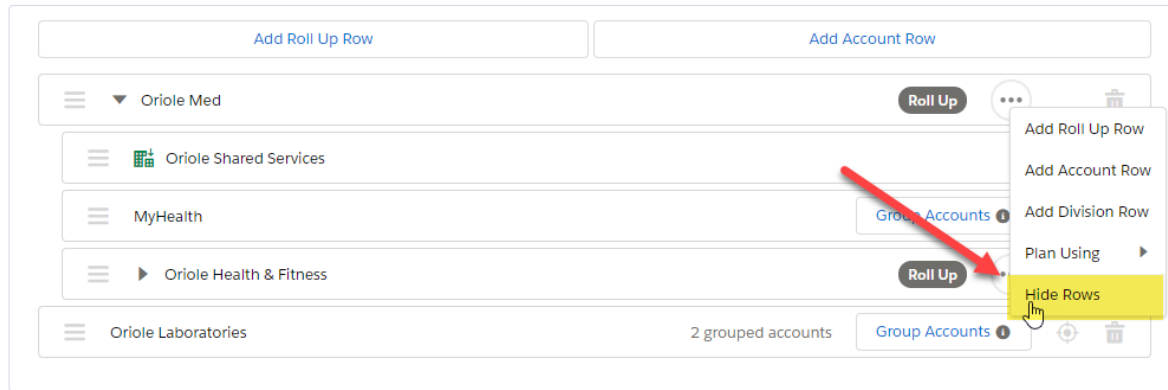
	TOTAL		Staff Enablement Program		2-Year Premium Maintenan...	
▼ ANCASTER EMEA		ROLL UP				
	\$1,200,000	5	\$800,000	3	\$400,000	2
	\$1,400,000	4	\$500,000	2	\$900,000	2
<div> <div></div> <div>ANCASTER GLOBAL LEADERSHIP</div> <div>(ANCASTER INC)</div> </div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>						
▼ ANCASTER EUROPE		ROLL UP				
	\$800,000	4	\$400,000	2	\$400,000	2
	\$500,000	2	\$500,000	2		
<div> <div></div> <div>ANCASTER BENELUX</div> </div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>	\$400,000	2	\$300,000	1	\$100,000	1
	\$500,000	2	\$500,000	2		
<div> <div></div> <div>ANCASTER IRELAND</div> </div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>	\$400,000	2	\$100,000	1	\$300,000	1
▶ ANCASTER NORTH AMERICA		ROLL UP				

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.

Account Structure

Add rows (accounts or roll ups) to include in the plan. Click the target on accounts that require focus in this plan.

Selected Accounts (9)



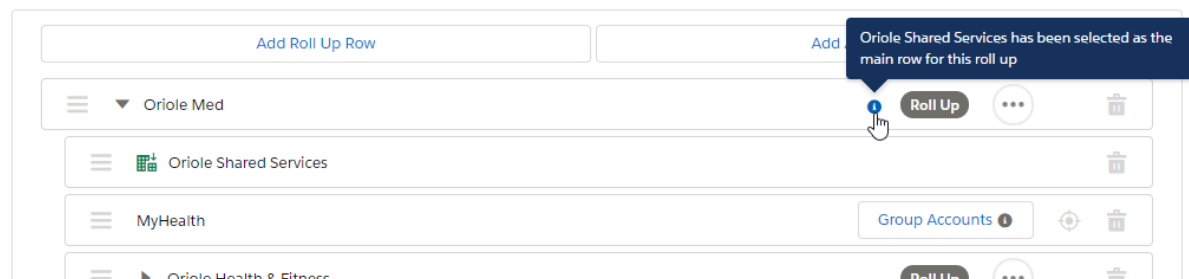
Another option on the ellipsis menu, 'Plan Using', allows you to select an account or division that you can plan against on the roll up row. In effect, it means that the options for the relevant account or division row on the opportunity map, highlighted below, are also shown on the roll up row.

This action is indicated on the Account Structure tab:

Account Structure

Add rows (accounts or roll ups) to include in the plan. Click the target on accounts that require focus in this plan.

Selected Accounts (9)



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

	TOTAL		Staff Enablement Progr...	2-Year Prem
▼ ORIOLE MED	ROLL UP	USD 30,000	1	USD 30,000
		USD 165,000	3	USD 65,000
		USD 790,000	2	USD 250,000
ORIOLE SHARED SERVICES (ORIOLE MED)				
MYHEALTH		USD 30,000	1	USD 30,000
		USD 50,000	1	USD 50,000
		USD 790,000	2	USD 250,000

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.

GENERAL TEAM **ACCOUNT STRUCTURE** SOLUTIONS TARGETS DELETE PLAN

Account Structure

Add rows (accounts or roll ups) to include in the plan. Click the target on accounts that require focus in this plan.

Selected Accounts (7)

Add Roll Up Row		Add Account Row	
	Tuskaroa Lynn Benfield	Group Accounts ⓘ	
	Cimarron Lynn Benfield	Group Accounts ⓘ	
	Apache Lynn Benfield	Group Accounts ⓘ	
	Coffey Lynn Benfield	Group Accounts ⓘ	
	Foran Lynn Benfield	Group Accounts ⓘ	
	Ormonde Lynn Benfield	Group Accounts ⓘ	
	Unicast Lynn Benfield	Group Accounts ⓘ	

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

Freeze Panes ☒ Plan Total ☐ Import opportunities

	TOTAL	Z-103/Z-360/Z-540 Sof...	Staff Enablement Progr...	Z-500 POS Hardware	2-Year Premium Maintenanc...
TUSKARO	\$80,000 1	\$80,000 1			
	\$865,000 4	\$780,000 3	\$85,000 1		
CIMARRON	\$8,100,000 1	\$8,100,000 1			
APACHE	\$7,900,000 1			\$7,900,000 1	
COFFEY					
FORAN	\$23,100,000 3	\$15,400,000 2	\$7,700,000 1		
ORMONDE					
UNICAST	\$800,000 1				\$800,000 1

Potential Current Won

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.

Add Division Row

Search and select or create divisions to add to your plan. You can search by Division Name, Account Name or Account Owner.

Account Name

[Show Advanced Search](#)

Select All ☐

Medical Laboratories (Oriole Group) Benfield Lynn	Create Division
▼ Oriole Med Benfield Lynn	Create Division
<div> <div></div> <div>Oriole Shared Services</div> </div> <input type="checkbox"/>	
<div> <div></div> <div>Oriole Health & Fitness</div> </div> <input type="checkbox"/>	Create Division
<div> <div></div> <div>Fitness Centers</div> </div> <input checked="" type="checkbox"/>	
<div> <div></div> <div>Health & Wellness Clinics</div> </div> <input checked="" type="checkbox"/>	
<div> <div></div> <div>Food & Nutrition Outlets</div> </div> <input checked="" type="checkbox"/>	

Selected parent row: Oriole Health & Fitness

Health & Wellness Clinics

[Cancel](#) [Add to the plan \(1\)](#)

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.

Plan Settings - Geo

Group account

Search accounts to add to the account group

Account Name

[Show Advanced Search](#)

Select All ☐

Ancaster Benelux Lynn Benfield Ancaster EMEA	<input type="checkbox"/>
Ancaster Ireland Lynn Benfield Ancaster EMEA	<input type="checkbox"/>
Ancaster East Coast US Lynn Benfield	<input type="checkbox"/>
Ancaster West Coast US Lynn Benfield	<input checked="" type="checkbox"/>
Ancaster California Lynn Benfield	<input type="checkbox"/>
Ancaster Quebec Lynn Benfield	<input type="checkbox"/>
Ancaster Montreal	<input type="checkbox"/>

Search and group duplicate accounts on a single row of your opportunity map. The group is represented on the opportunity map by a row allocated to the Parent. By default, the group is named for this account, but you can rename it if you want by clicking the name that follows Account structure below. You can import opportunities from any of the grouped accounts. Any grouping that you do applies to all account plans in your organization.

Account structure: Ancaster West Coast US

Ancaster West Coast US

Parent

US West Coast (Ancaster)

[Cancel](#) [Save group \(1\)](#)

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.

▼ ANCASTER NORTH AMERICA ROLL UP				
	\$400,000	1		\$400,000 1
	\$900,000	2		
ANCASTER EAST COAST ...				
	\$500,000	1	\$0	0
ANCASTER WEST COAST...				

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.

TOTAL	Z-103/Z-360/Z-540 Sof...	Staff Enablement Progr...	Z-500 POS Hardware	2-Year Premium Maintenanc...
\$800,000 4		\$400,000 2		\$400,000 2
\$500,000 2		\$500,000 2		
▼ ANCASTER NORTH AMERICA ROLL UP				
\$400,000 1		\$400,000 1	\$0 0	
\$900,000 2				\$900,000 2
ANCASTER EAST COAST ...				
\$500,000 1				\$500,000 1

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

Search

Search

Search

Opportunity Name

Account Name

Amount

From

To

Stage

--None--

Owner Full Name

Search

Show opportunities already added to the map

Opportunity Name ↑

Demo Opportunity, Ancaster California 1

Demo Opportunity, Ancaster California 2

Demo Opportunity, Ancaster California 4

Demo Opportunity, Ancaster East Coast US 2

Demo Opportunity, Ancaster East Coast US 3

Demo Opportunity, Ancaster East Coast US 4

Demo Opportunity, Ancaster Montreal 4

Demo Opportunity, Ancaster Quebec 4

Demo Opportunity, Ancaster West Coast US 3

Demo Opportunity, Ancaster West Coast US 4

Account Name

Ancaster California

Ancaster California

Ancaster California

Ancaster East Coast US

Ancaster East Coast US

Ancaster East Coast US

Ancaster Montreal

Ancaster Quebec

Ancaster West Coast US

Ancaster West Coast US

Amount

\$200,000.00

\$300,000.00

\$500,000.00

\$300,000.00

\$400,000.00

\$500,000.00

\$500,000.00

\$500,000.00

\$500,000.00

\$400,000.00

\$500,000.00

Close Date

10/7/2020

10/7/2020

10/7/2020

10/7/2020

10/7/2020

10/7/2020

10/7/2020

10/7/2020

10/7/2020

10/7/2020

Stage

Prospecting

Prospecting

Prospecting

Prospecting

Prospecting

Prospecting

Prospecting

Prospecting

Prospecting

Prospecting

Owner Full Name

Lynn Benfield

Lynn Benfield

Lynn Benfield

Lynn Benfield

Lynn Benfield

Lynn Benfield

Lynn Benfield

Lynn Benfield

Lynn Benfield

Lynn Benfield

Showing 10 results

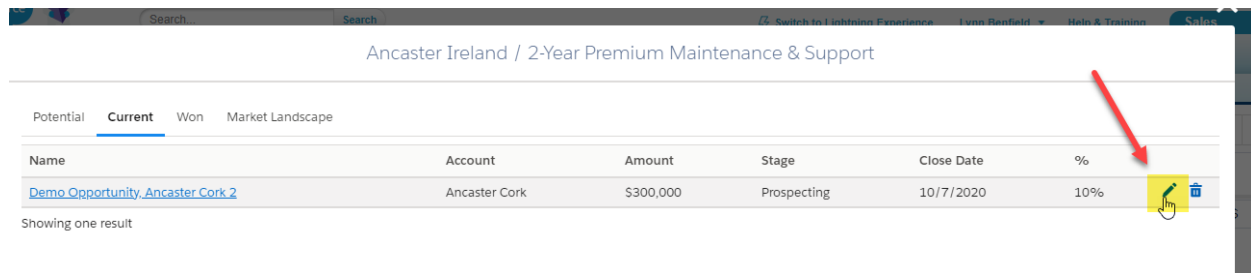
0 selected

Cancel

Next


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.



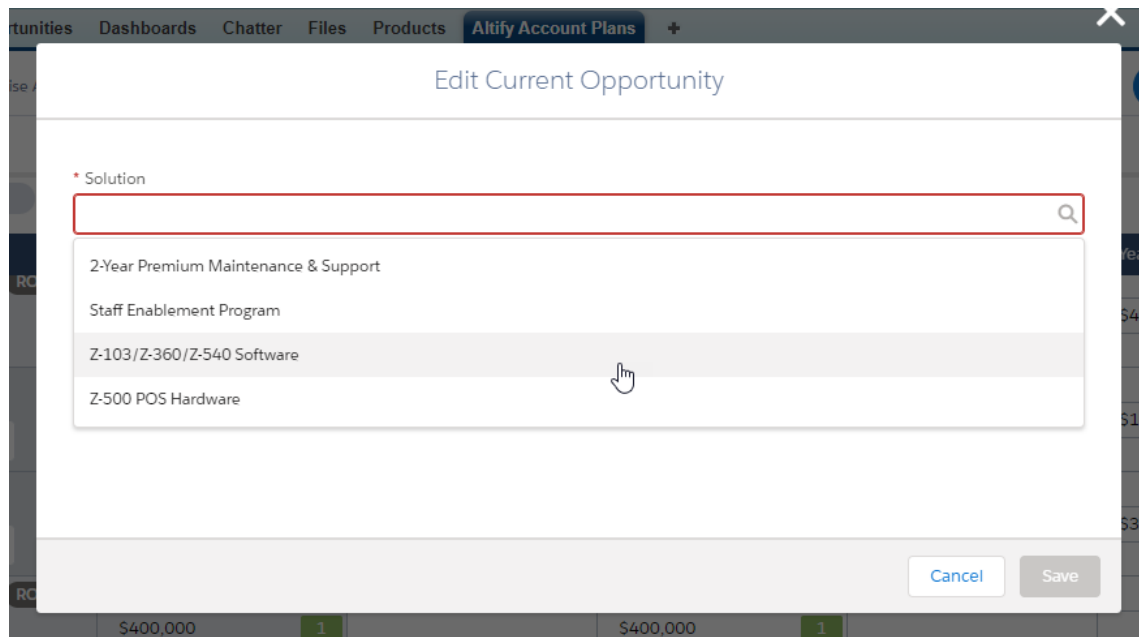
Ancaster Ireland / 2-Year Premium Maintenance & Support

Potential **Current** Won Market Landscape

Name	Account	Amount	Stage	Close Date	%	
Demo Opportunity_Ancaster Cork 2	Ancaster Cork	\$300,000	Prospecting	10/7/2020	10%	

Showing one result

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.



Edit Current Opportunity

* Solution

2-Year Premium Maintenance & Support

Staff Enablement Program

Z-103/Z-360/Z-540 Software

Z-500 POS Hardware

Cancel Save

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.

Create New Objective

Objective Name

Change perception that we have limited implementation and supp

Type

Remove Barrier

Row

[GEO] IBM

Division

Not set

[GEO] IBM (Switzerland)
[GEO] IBM (Turkey)
[GEO] IBM (United Kingdom)
[GEO] IBM (Legacy)
[GEO] IBM (Egypt)

Status

Not Started

Owner

Brent Delaware

Priority

Medium

Due date

Cancel

Save

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.

Overview

Plan Details

Opportunity Map

Objectives

Test & Improve

Plan Details

Key planning information for the customer in this plan.

Goal and Growth Strategies

Customer Profile

Customer Success

Row Details

Key account information for each row in this plan.

Oriole Med

0%

Oriole Shared Services

0%

1. Account Description

2. Business Performance

3. Significant Achievements

4. Key Relationship Changes

5. Competitive Threats

6. Help Needed

MyHealth

0%

Oriole Health & Fitness

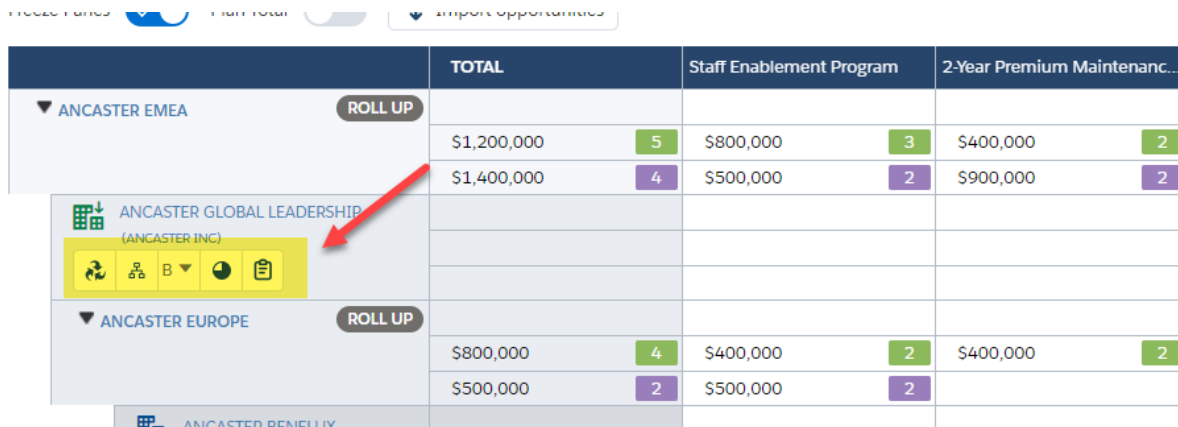
0%

Questions for a division row on the opportunity map.

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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:



	TOTAL		Staff Enablement Program		2-Year Premium Maintenanc...	
▼ ANCASTER EMEA						
	\$1,200,000	5	\$800,000	3	\$400,000	2
	\$1,400,000	4	\$500,000	2	\$900,000	2
ANCASTER GLOBAL LEADERSHIP (ANCASTER INC)						
▼ ANCASTER EUROPE						
	\$800,000	4	\$400,000	2	\$400,000	2
	\$500,000	2	\$500,000	2		
ANCASTER BENEFIT						

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.

Row Details

Key account information for each row in this plan.

> Oriole Med
0%

> Oriole Shared Services
0%

▼ MyHealth
0%

1. Account Description ⓘ
Last Modified Never

Account Info
1

Employees: 25
Billing Address:
SIC Description: Healthcare clinics; Pharmacy services
Account Description: A chain of health-care clinics that provide pharmacy services.
Account Type: Customer
Website: http://www.myhealth1.com
Industry: Healthcare
NPS: +82

Details
2

Enter text here

Attachments
3

or Drop Files Upload Files

Next

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.

The screenshot shows the 'Add Account Row' interface. On the left, there are search filters: Search (ancaster), Account Name, Owner First Name, Account Type (NONE), and Industry (NONE). A 'Search' button is at the bottom left. The main area displays a table of search results. Two rows are selected, indicated by checkboxes and a red arrow pointing to the '2 selected' status. The selected rows are highlighted in yellow. Below the search results, there is a 'Selected Rows' table with columns 'Division Name' and 'Info'. The selected rows are 'Ancaster Software' and 'Ancaster Technologies'. At the bottom right, there are buttons: 'Cancel', 'Back to standard search (2)', and 'Add to the plan (2)'.

Search	Account Name	Owner First Name	Account Type	Industry
ancaster	Ancaster Inc			
	Ancaster Services			
	Ancaster Software			
	Ancaster Technologies			

Division Name	Info
Ancaster Software	Customer Jones Simon
Ancaster Technologies	Jones Simon

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.

The screenshot shows the 'Add Division Row' interface. On the left, there are search filters: Search (ancaster), Account Name, Owner First Name, Owner Last Name, Account Type (NONE), and Industry (NONE). A 'Search' button is at the bottom left. The main area displays a table of search results. Below the search results, there is a 'Divisions' section with a 'Create Division' button highlighted in yellow. At the bottom right, there are buttons: 'Cancel', 'Back to standard search', and 'Add to the plan'.

Search	Account Name	Owner First Name	Owner Last Name	Account Type	Industry
ancaster	Ancaster Commodities				
	Ancaster Engineering				
	Ancaster Inc				
	Ancaster Services				
	Ancaster Software				

Division Name	Info

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).

Account Structure

Add rows (accounts or roll ups) to include in the plan. Click the target on accounts that require focus in this plan. Need help getting started? [Click Here](#) for assistance with structuring your account plans.

Selected Rows (12)

Advanced searching in Objectives

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

Create New Objective

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.

The screenshot shows the 'Altify Account Question Edit' interface. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel'. Below this is the 'Information' tab. The form contains several fields: 'AM Plan Row Question Name' with the value 'EAQ_02', 'Section Heading' with a dropdown menu showing 'Section One', an 'Active' checkbox that is checked, 'Question Text' with the value 'Business Performance', 'Order Number' with the value '2', and 'Currency' with a dropdown menu showing 'USD - U.S. Dollar'. A red arrow points to the 'Displayed Account Fields' section, which is highlighted in yellow. The interface also shows 'Owner' as 'Frank Gordon' and 'Plan Type' as 'Enterprise Account'. At the bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'.

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.

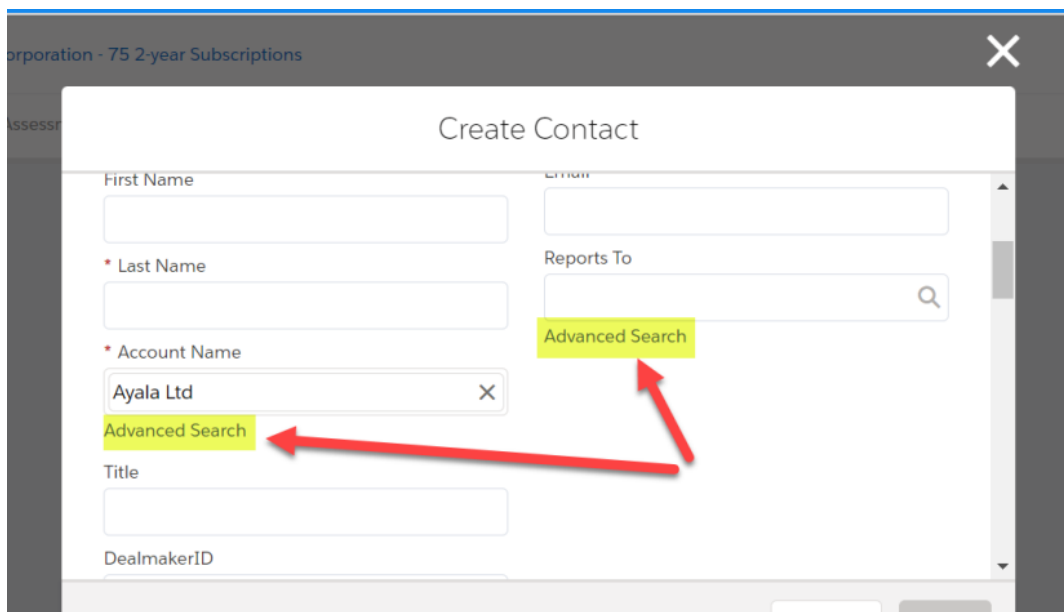
Core Functionality

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).

A screenshot of a web application window titled "Create Contact". The dialog contains several input fields: "First Name", "Last Name" (marked with a red asterisk), "Account Name" (marked with a red asterisk and containing "Ayala Ltd"), "Title", and "DealmakerID". There are also two lookup fields: "Reports To" and "Email". Both the "Account Name" and "Reports To" fields have a yellow "Advanced Search" button next to them. Two red arrows point from these buttons towards the center of the dialog. The background shows a dark header with "Corporation - 75 2-year Subscriptions" and a close button (X).

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.

The screenshot displays the Altify Solutions interface. On the left, a sidebar lists categories: Press, Initiatives, Obstacles, and Solutions. The main area shows a list of solutions, each with a title, a description, and an 'Add Contact' button. The 'Solutions' category is selected, showing a solution titled 'Z-103/Z-360/Z-540 Software'. On the right, a detailed view of this solution is shown, featuring a blue circular icon with a white chain link. The text in the detailed view includes 'Access the following resources:' followed by a list of links: '1. Training video', '2. User documentation', '3. Admin documentation', and '4. Software specs'. Below this, it says 'Contact the following people:' followed by two bullet points: 'For further information about this solution, speak to your Team Leader.' and 'For information regarding modifications, speak to the Product Development Manager.'

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.

Insight Map



Ancaster International Overview

GOALS			
Increase Revenue 8% y/y	Maximize profitability across offerings	Increase Shareholder Value by 6%	
PRESSURES			
Order Management problems due to multiple disparate systems	High operational costs, constant rework, multiple disparate systems	Recent Merger - must integrate services business rapidly	Competitive Pressure - Margins down 14%
Commoditization driving rev. down 15%	Customer defection growing. Current retention 85%	Revenue growth down to 2% last year from 8% prior yrs.	
INITIATIVES	OBSTACLES	SOLUTIONS	
Revenue Outlook Management	Can't see changes in stage, date, value	Hard to compare team members	Account Manager
	Hard to assess current state v quota/target	Very short window	
	Can't access execs, poor relationships	No account planning methodology	

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.

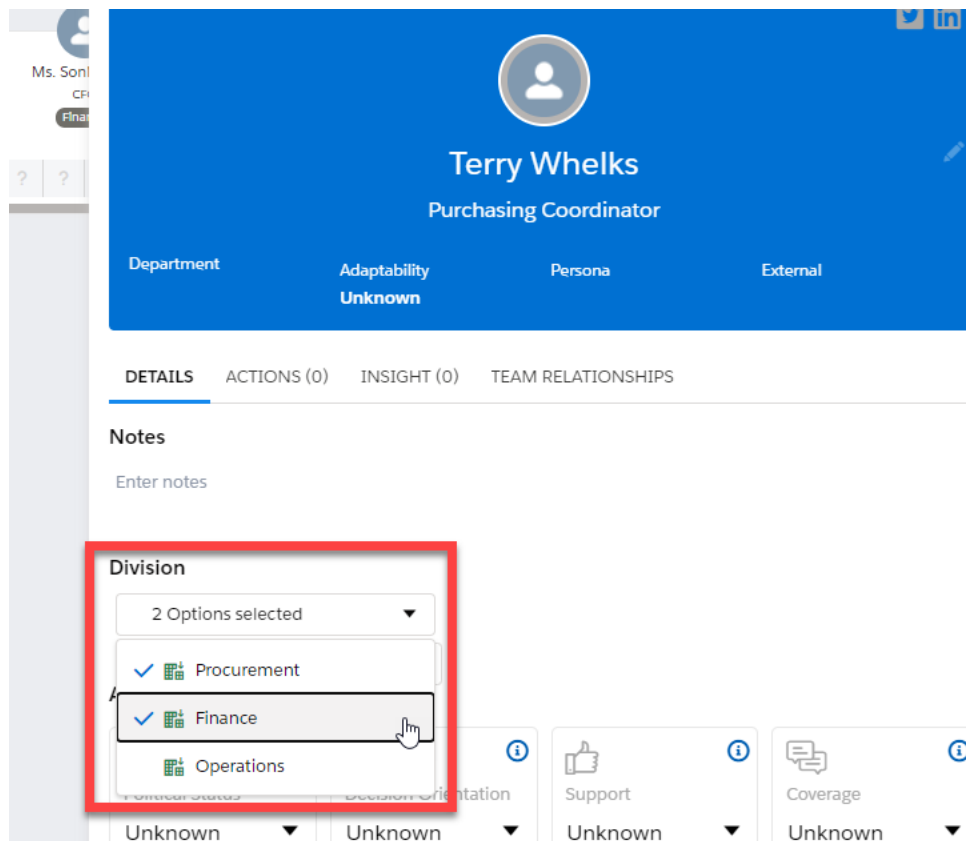
Relationship Maps

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.

The screenshot displays the Altify Opportunity Manager interface. On the left, a relationship map shows a central node for 'Chip Union CEO' with arrows pointing to other nodes: 'Joetta Conrad COO', 'Nathan Dodge CCO & President Ancaster S...', and 'Tom McKinnon CMO'. A red arrow points from the 'Chip Union CEO' node to the details panel on the right. The details panel for 'Chip Union' includes filters for Political Status (Inner Circle), Decision Orientation (Technical), Support (Supporter), and Coverage (Unknown). It also features a 'Suggested Target' section with three coaching points: 'Your team's level of relationship with this person may be too low.', 'You have found a key player who supports you and/or your solution.', and 'You have a key player who is not having substantive conversations with anyone on your team.' Below this, the 'Relationships' section shows 'Reports To' (Add Contact), 'Influences (1)' (Tom McKinnon), 'Influenced By (2)' (David Hayes), and 'Conflicts (0)' (Add Contact).

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.

The screenshot shows the 'Import Contacts' window in Altify Opportunity Manager. The window has a search bar and a 'PERSONAS' tab. Below the search bar, there are filters for 'Account' (Ancaster Inc) and 'Opportunity' (None). A section titled 'Altify suggestions:' includes buttons for 'Key Players', 'Mentors and Supporters', 'High Coverage', and 'On Map' (which is selected). A toggle for 'Hide contacts already added' is also present. The main area displays a list of contacts with columns for CONTACT, EMAIL, REPORTS TO, DEPARTMENT, and ACCOUNT. The contacts listed are: Chip Union CEO, David Hayes, Jean Wilkins CFO, and Joanne Jones CIO, all associated with the 'Ancaster Inc' account. At the bottom right, there are 'Cancel' and 'Import (0)' buttons.

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.

Attributes View Contact History

- Political Status: Inner Circle
- Decision Orientation: Technical
- Support: Supporter
- Coverage: Unknown

> ⚡ Chip Union is a Suggested Target

Relationships

- Reports To: [Add Contact](#)
- Influences (1): Tom McKi... CMO [Add Contact](#)
- Influenced By (2): David Hay... [Add Contact](#), Tom McKi... CMO [Add Contact](#)
- Conflicts (0): [Add Contact](#)

Owners

Default Owner: Lynn Benfield

Relationship Owner: [Lynn Benfield](#)

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](#).

Custom Setting

Altify Core Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app.

EditDelete

▼ Default Organization Level Value

Location	Riley Retail Solutions	Add Organizer T&I Invite	<input type="checkbox"/>
Chatter Snooze Time	30	Company Name	Altify
Auto enable Altify for new Opps	<input checked="" type="checkbox"/>	Disable Altify Logging	<input type="checkbox"/>
Salesforce Chatter Disabled	<input type="checkbox"/>	Disable Coaching	<input type="checkbox"/>
Disable PDF for Exec Briefing	<input type="checkbox"/>	Disable Team View Export	<input type="checkbox"/>
Disabled Trigger List	<input type="checkbox"/>	Enable Actions Query Modification	<input type="checkbox"/>
Enable Asynchronous Remote Calls	<input checked="" type="checkbox"/>	Enable FLS	<input type="checkbox"/>
Help URL base		Language Codes	
Mock Today		Quip Enabled	<input type="checkbox"/>
Opportunity Update Without Sharing	<input type="checkbox"/>	Salesforce Shield-Enabled	<input type="checkbox"/>
Signal 10		Signal 1	
Signal 2		Signal 3	
Signal 4		Signal 5	
Signal 6		Signal 7	
Signal 8		Signal 9	
Support Email	altify-support@uplandsoftware.com	Temp1	<input checked="" type="checkbox"/>
Temp2	<input type="checkbox"/>	Temp3	<input type="checkbox"/>
TempStr1	<input type="checkbox"/>	TempStr2	<input type="checkbox"/>
Use CRUD Add Contact	<input type="checkbox"/>	Use CRUD Add Action	<input type="checkbox"/>
User Query Filter	<input type="checkbox"/>	Temp4	<input type="checkbox"/>
Temp5	<input type="checkbox"/>		

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.