

Spring '21 Release Notes (v9.8)



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Release Overview

Significant improvements are delivered with the Spring '21 release.

With shared account questions in Altify Account Manager, users with different roles working with different account plan types can now instantly share important information relating to accounts and account divisions. This will drive efficiency and consistency in your organization's interactions with customers.

For organizations that do not engage with potential opportunities in Account Manager, a simple setting now exists to remove unused screen estate from the interface across the product and bring clear focus to the current and won opportunities that you work with. In addition, a number of small but valuable changes, such as capturing comments about competitors in the market landscape view, enhance the user experience of opportunity maps.

Sorting of prime actions is now possible in Opportunity Manager, allowing you to quickly analyze the open and completed actions for any opportunity.

In Relationship Maps, we have introduced quicklinks in contact information panels which can easily be configured to link to customized pages that provide data specific for the contact. Also, this change paves the way for Kapost users to surface customer specific content in their relationship maps. The increased number of contacts displayed when importing contacts improves usability when managing large customer accounts and opportunities.

For organizations with Altify Max, the Suggested Target content shown for contacts on the relationship map is now configurable and translatable. By editing and creating new Max insights you can customize the sales guidance that is presented to your users so that it aligns exactly with your organization's relationship management strategies.

A major step is taken toward resolving the difficulty of including non-license holding users in T&Is. A named T&I admin is notified when users without an Altify license are added to a T&I, allowing the admin to perform a quick and guided process to set up and validate the user's access.

Finally, with reporting we are providing a swathe of new scoring statistical fields to enhance your organization's reporting of account and opportunity completeness.

[Watch a video describing the key changes delivered with Spring '21.](#)

Summary of all changes

The following lists outlines all the changes introduced with Altify 9.8:

Account Manager

- [Sharing account answers](#) – share account information instantly across your account plans.
- [Accessing segmentation help](#) – direct access to segmentation guidance from relevant areas of Altify Account Manager.
- [Capturing competitor comments](#) – record additional information about competitors in the opportunity map with a new comment feature.
- [Turning off potential opportunities](#) – remove potential opportunities from specific account plan types.
- [Reading blocked intersection messages](#) – messages in blocked intersections of an opportunity map are no longer truncated.
- [Accessing Opportunity Manager](#) – users can now easily navigate from an opportunity in the opportunity map to the relevant page in Altify Opportunity Manager.

Opportunity Manager

- [Sorting actions for an opportunity](#) – sort opportunity actions according to any column heading.
- [Quicker completion of prime actions](#) – a minor change has speeded up the process of marking an action as complete.

Max

- [Translating or editing Suggested Target insights](#) – use Altify Max to translate, edit or create new contact insights on a relationship map.

Test & Improve

- [Inviting users without Altify access](#) – a new streamlined process for inviting Salesforce users, who do not yet have an Altify license, to T&Is.

Relationship Map

- [Surfacing links in contact information panels](#) – show links to useful resources in a contact's information panel, including links to customized pages with contact-specific information.
- [Hiding long salutations](#) – salutations of more than five characters hidden so that contact information is not obscured.
- [More contacts displayed when importing](#) – up to 200 contacts now displayed when importing in a relationship map.



- [Removing Opportunity filter from Import Contacts dialog](#) – simplify the Import Contacts dialog on relationship maps for accounts by removing the Opportunity filter.

Core product

- [Visual of indication of exceeded text limit](#) – users are made instantly aware when a text limit is exceeded and cannot save until they have rectified the issue.

Reporting

- [New account and opportunity completeness fields](#) – new percentage score and statistical fields are available to inform reporting.

Account Manager

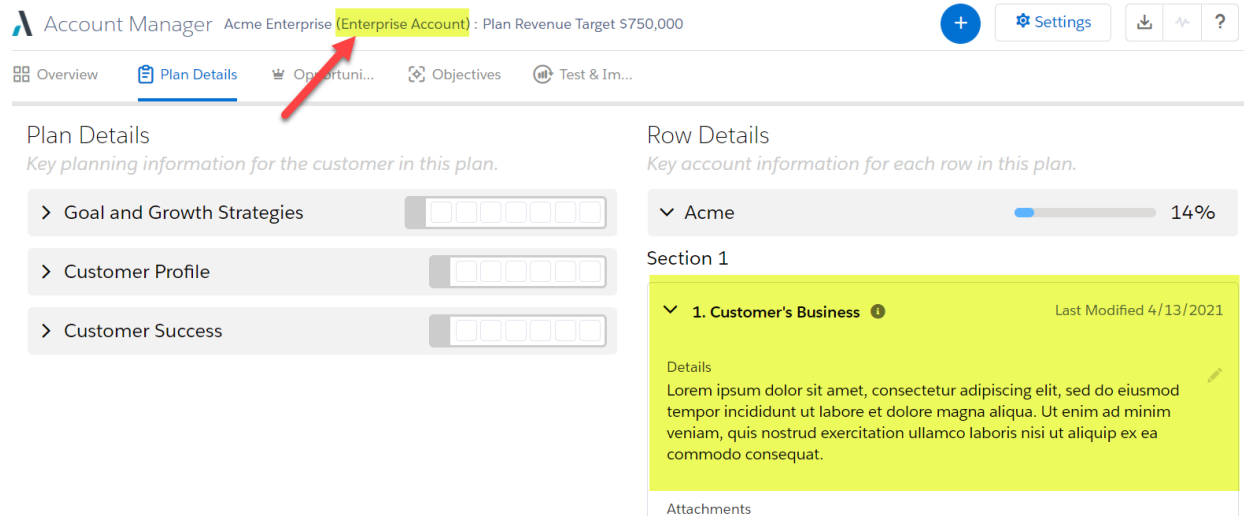
New user functionality

Sharing account answers

All members of the revenue team can now access the same important account information, and that information can be structured and displayed in ways that are appropriate for different roles.

The same Altify Account Question can now be shared among different Account Plan Types. In the example below, the account question 'Customer Business' is shared by Enterprise and Portfolio plan types.

For example, an account executive provides an answer in an enterprise account plan...



Account Manager Acme Enterprise (Enterprise Account) : Plan Revenue Target \$750,000

Overview Plan Details Opportuni... Objectives Test & Im...

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.

Acme 14%

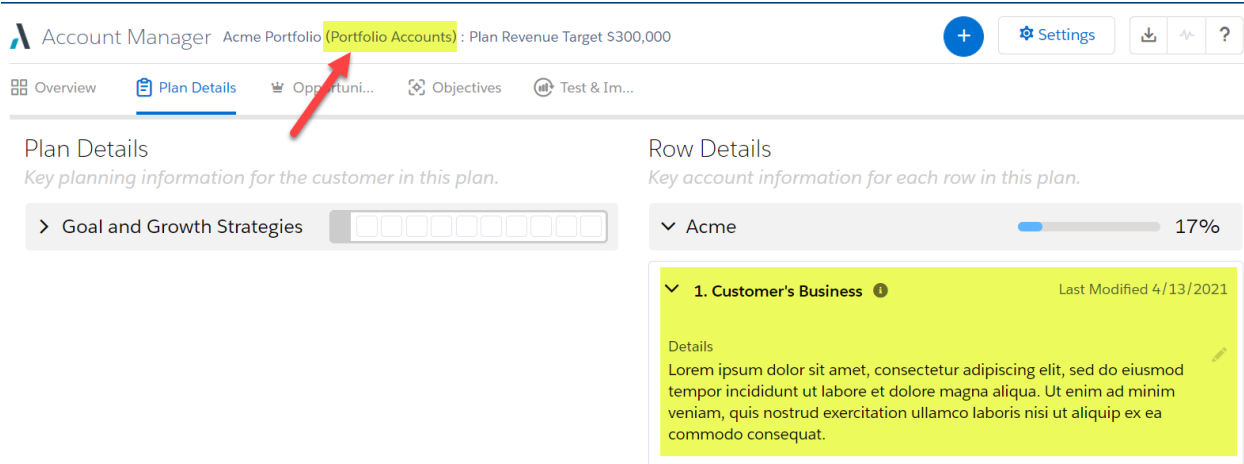
Section 1

1. Customer's Business Last Modified 4/13/2021

Details
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Attachments

The answer is automatically displayed for the same question and account when a customer success manager looks at a portfolio account..



Account Manager Acme Portfolio (Portfolio Accounts) : Plan Revenue Target \$300,000

Overview Plan Details Opportuni... Objectives Test & Im...

Plan Details
Key planning information for the customer in this plan.

- Goal and Growth Strategies

Row Details
Key account information for each row in this plan.

Acme 17%

Section 1

1. Customer's Business Last Modified 4/13/2021

Details
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Accessing segmentation guidance

Links are provided in Altify Account Manager that give direct access to a topic in the help center which explains how and why segmentation is applied to accounts and account divisions. The links are on the Account Summary launchpads on an Account record and on the Overview tab of an account plan, and in the opportunity map (as highlighted below).

Freeze Panes Plan Total ☰ 📄 Import opportunities

	TOTAL		Account Mgr		Convers
ANCASTER INC	USD 863,908.94	3	USD 409,782.44	1	USD 1
ANCASTER INC	USD 3,378,888	10			USD 5
ANCASTER INC	USD 863,908.94	3	USD 409,782.44	1	USD 1
ANCASTER INC A Segment	USD 2,700,000	3	USD 1,000,000	1	USD 1
ANCASTER INC B Segment	USD 3,704,782	10	USD 1,450,000	2	USD 1
ANCASTER INC C Segment					

Click to learn more about segmentation.

Adding comments to market landscape

Users can now add comments to intersections in the market landscape view of the opportunity map. This helps to capture additional information about competitors.

Ancaster Inc / Opportunity Mgr

Ticker	Competitor	Renews on	Share	Comments
Upland Altify		7/10/2027	3,000,000	
CRM	Salesforce	8/3/2027	4,000,000	<input type="text"/> / 4096
IBM	International Business Machines	12/27/2021	2,000,000	<input type="text"/> / 4096

Cancel Save

Viewing blocked intersection messages in full

The user inputted messages on blocked intersections are no longer truncated – as shown in the example below.

Overview Plan Details **Opportunity ...** Objectives Test & Improve

Freeze Panes Plan Total Import opportunities View: Value USD

	TOTAL	Account Mgr	Conversation Mgr	Opportunity M
ANCASTER ENGINEERING	USD 3,570,000 14		USD 500,000 3	USD 500,000
	USD 863,908.94 3	USD 409,782.44 1	USD 104,126.5 1	
ANCASTER SERVICES	USD 2,700,000 3	USD 1,000,000 1	USD 100,000 1	USD 1,600,000
	USD 3,704,782 10	USD 1,450,000 2	USD 142,000 1	USD 469,782
ANCASTER COMMODITIES	USD 4,500,000 2	USD 3,000,000 1	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec dapibus dignissim consequat placerat.	USD 1,500,000
	USD 680,000 1			USD 680,000

Access to Opportunity Manager

From the Current or Won tabs in an opportunity map intersection, a user can now click the link to go directly to the opportunity in Altify Opportunity Manager.

Ancaster Inc / Account Mgr

Potential **Current** Won Market Landscape

Name	Opportunity Manager	Account	Amount	Stage	Close Date	%
Ancaster Engineering - 200 Enterprise Licenses	Go to Opportunity Manager	Ancaster Engineering	USD 850,000	Requirements	5/27/2021	43%
Ancaster Eng - SDK 600	Go to Opportunity Manager	Ancaster Engineering	USD 600,000	Target Qualified	11/16/2021	15%
Ancaster Commodities - 250 5-year Subscriptions	Go to Opportunity Manager	Ancaster Commodities	USD 75,000	Target Selected	8/11/2021	30%
Ancaster Commodities - 120 Educational Licenses	Go to Opportunity Manager	Ancaster Commodities	USD 75,000	Target Selected	1/18/2021	30%
Ancaster Technologies - 400 Users, Premium Support - Silver	Go to Opportunity Manager	Ancaster Technologies	USD 15,000	Target Selected	5/22/2021	30%

Showing 5 results

This column is only displayed to customers with an Opportunity Manager license.

New functionality to be administered

Sharing account questions

Previously the relevant plan type was defined on the Altify Account Question record. Now a new 'join' record, the Altify Account Plan Type Question, allows you link an Altify Account Question with the Altify Account Plan Type. In this way you can make a single account question appear in multiple account plan types. On the Altify Account Plan Type Question, you can also configure how the question is displayed (in terms of order and the section) in the associated plan type.

To create an Altify Account Plan Type Question, go to the **Altify Account Plan Type Questions** tab.

le Groups Files Leads Accounts Contacts Opportunities **Altify Account Plan Type Questions** Rep

Altify Account Plan Type Question Edit
Portfolio Accounts PPAQ_1

Altify Account Plan Type Question Edit Save Save & New Cancel

Information

Sort Order

Plan Type Question Name

Account Plan Type Portfolio Accounts

Account Question

Section Heading

Save Save & New Cancel

For assistance with configuration of your account questions, go to the [online help site for admins](#).

Switching off potential opportunities

To switch off potential opportunities in all account plans of a particular type, simply enable the setting **Disable Potential Opportunities** in the relevant Altify Account Plan Type record – as shown below.

Altify Account Plan Type Customize Page | Printable View | Help for this Page

Enterprise Account Plan

[Notes & Attachments \[0\]](#) | [Altify Account Plan Questions \[5+\]](#) | [Plan Type Solutions \[0\]](#) | [Altify Account Questions \[5+\]](#) | [Content Translations \[0\]](#)

Altify Account Plan Type Detail Edit Delete Clone Sharing Clone Plan Type Export Load Report

Plan Type Name	Enterprise Account Plan	Owner	Donal Kavanagh [Change]	
Inactive	<input type="checkbox"/>	ComparisonJSONFileName		
Tab One Label		AltifyId	00Di0000000Yoh8EAC-a480H000006mSFOQAM	
Tab One Src		Disable Potential Opportunities	<input checked="" type="checkbox"/>	
Tab Two Label				
Tab Two Src				
Tab Three Label				
Tab Three Src				
Tab Name List	Overview, PlanDetails, OpportunityMap, Objectives, TestImprove			
Created By	Donal Kavanagh, 4/16/2021, 4:51 AM		Last Modified By	Donal Kavanagh, 4/19/2021, 3:40 AM

Edit Delete Clone Sharing Clone Plan Type Export Load Report

Opportunity Manager

New user functionality

Sorting actions for an opportunity

You can now sort the actions that are displayed on the Actions tab in Opportunity Manager. The actions are sortable by any column - such as Status in the example below.

Opportunity Manager New User Opp

Overview Assessment Relationships Insight **Actions** Test & Improve

Open Actions Create Action

Subject	Comments	Acti...	Co...	Due date	Ow...	Priority	Status ↑	
✓ Meet with Don to...	And check for Don's man...	Retrie...	Don F...	4/30/2021	Larry ...	Normal	Not Started	
✓ Triage unique bus...	UBV is close, but we nee...	Prove ...	Monic...	4/30/2021	Larry ...	Normal	Not Started	
✓ Confirm obstacle...	Obstacles should to favo...	Emph...	Christi...	4/21/2021	Larry ...	Normal	In Progress	

Completed Actions

Quicker completion of actions

A small change is made to speed up the process of marking actions as complete. When the user clicks the tick next to an open action, the **Status** field is automatically set to 'Completed' in the Edit Action dialog that is displayed.

Opportunity Manager Ancaster Engineering - 200 Enterprise Licenses

Process Assessment

Open Actions

Subject	Comments
✓ Determine whether Mark has ...	
✓ Get Clara's input on Insight M...	
✓ Hold a Demo for Clara on...	
✓ Leverage Mitch Brown to con...	
✓ Schedule a T&I / Plan Review	

Completed Actions

Edit Action

* Subject: Get Clara's input on Insight Map

* PRIME Action: Retrieve missing information

* Owner: Donal Kavanagh

Contact: Clara Wilson

* Status: **Completed**

Due date: 11/25/2028

Comments:

Cancel Save

Altify Max

New user functionality

Access contact insights customised for your organization

A user can now access customized or translated Suggested Target content on an AM or OM relationship map.

An example of Suggested Target content translated into French is shown below.

The screenshot displays a relationship map on the left with nodes for Corey Trevor, Thomas Bangalter, Pedro Winter, and Daniel Goldstein. The right panel shows the profile for Corey Trevor, including a blue header with 'No title', 'Department', 'Adaptability Unknown', 'Persona', and 'External'. Below this are tabs for 'DETAILS', 'ACTIONS (0)', 'INSIGHT (0)', 'TEAM RELATIONSHIPS', and 'DECISION CRITERIA (0)'. The 'Notes' section has an 'Enter notes' field. The 'Attributes' section shows four cards: 'Political Status' (Inner Circle), 'Buying Role' (Decision M...), 'Support' (Enemy), and 'Coverage' (No Contact). A highlighted yellow box contains a suggested target notification in French: 'Attention: 'Ce décideur ou approbateur ne vous assiste pas, et vous ne l'avez pas identifié toute personne qui les influence. Action: 'Vous devez découvrir qui influence cette personne et vous assurer de prouver la valeur de votre solution à toutes les personnes impliquées dans cette décision d'achat.''. A red arrow points to this box. The 'Relationships' section at the bottom shows 'Reports To', 'Influences (0)', 'Influenced By (0)', and 'Conflicts (0)'. A cursor is visible over the 'Attention' text in the highlighted box.

New functionality to be administered

Setting up editable and translatable contact insights

Contact insights, displayed as Suggested Target content on relationship maps, are now available to Altify Max customers. As with existing insight scopes, contact insights are accessible through the Knowledge Domain (as shown below).

Knowledge Domain

Opportunities
168 insights in 1 scopes

Contact Details
9 insights in 1 scopes

On clicking through, the scopes for AM and OM are displayed, where the corresponding JSON files can be uploaded. After uploading, contact insights can be created, edited and translated in the same manner as opportunity insights.

[Home](#) > [Contact Details](#) + Create Insight

All Contact Details (AM)

All contact details (AM)

[← Back](#)

Context Status On Off Priority Low Medium High Urgent

[Collapse All](#)

	Children	Status	Notify	Priority
Team's level of relationship with account key player too low Heads Up: "Your team's level of relationship with this person may be too low." Objective: "If this person can help you achieve your account goal, focus team effort to improve your level of relationship to Problem Solver or Trusted Advisor." Show Rule	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Low
Could this account key player be your mentor? Heads Up: "You have found a key player who supports you and/or your solution. There may be an opportunity to create a mentor of this supporter, who will advocate for you in your absence." Objective: "Do you know how this person benefits from your solution? Leverage their personal goals to motivate them to mentor you and/or your solution." Show Rule	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Low
Leverage this account supporter's influence Heads Up: "This Supporter influences a key player who does not yet support you." Objective: "Work with this supporter to establish what the key player most cares about and leverage their support to prove your value." Show Rule	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Low

Note: Contact insights are not included in the Max email notification system. Therefore, the **Notify** toggle (shown above) does not have any affect when activated.

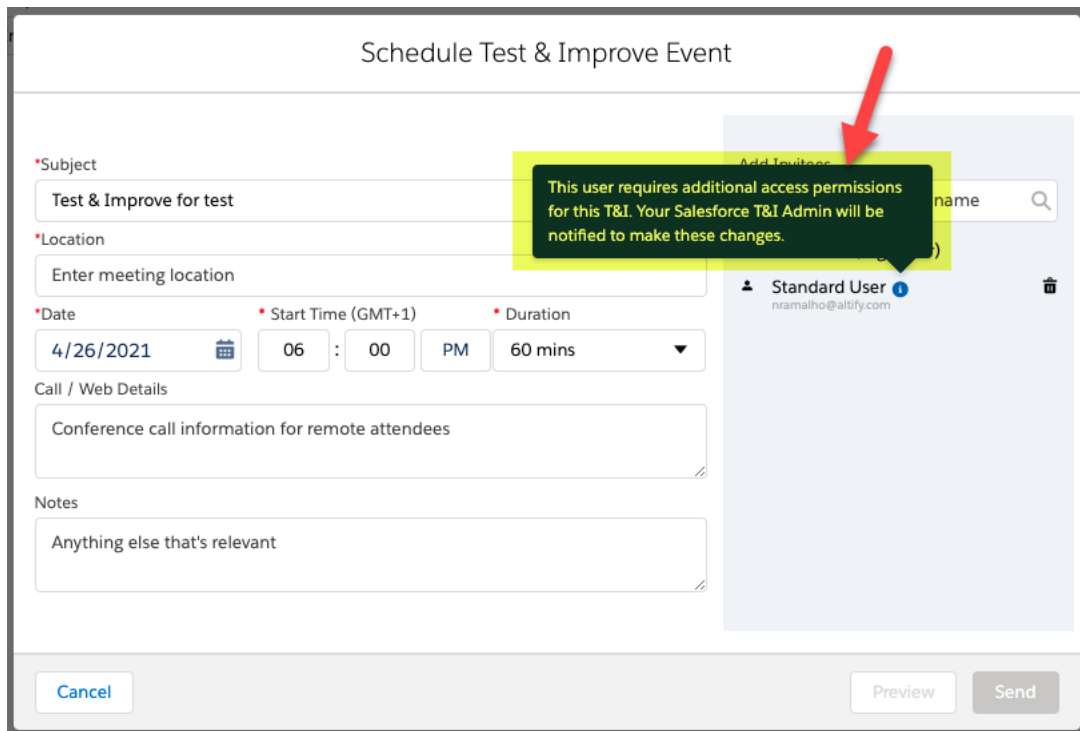
The final step is for the administrator to enable their new or edited insights in their org. This is done by activating the following Altify Core Setting: *Enable Max for Contact Insights*.

Test & Improve

New user functionality

Inviting users without Altify access

Users can add non-license holding Salesforce users to their Opportunity Manager or Account Manager T&Is without concerns regarding access. When a user who does not have an Altify license or permission set is added to a T&I, an admin is notified and guided through the quick process of setting up the user with the necessary license and permissions so that they can access the presentation.



Schedule Test & Improve Event

*Subject
Test & Improve for test

*Location
Enter meeting location

*Date
4/26/2021

* Start Time (GMT+1)
06 : 00 PM

* Duration
60 mins

Call / Web Details
Conference call information for remote attendees

Notes
Anything else that's relevant

Add Invitees

This user requires additional access permissions for this T&I. Your Salesforce T&I Admin will be notified to make these changes.

Standard User
nramalho@altify.com

Cancel Preview Send

In Account Manager, a user is automatically added to the account plan team when the T&I organizer sends the invitation. This is an additional enhancement delivered with this release.

New functionality to be administered

Setting up T&I access for non-license holders

A designated T&I administrator is responsible for organizing access when a non-license holder is added to a T&I.

The T&I admin's username is recorded in the Altify Core Setting *TANDI Admin Username*. This admin receives an email when a user without the relevant license, permission set (AM or OM) or opportunity access (OM only) is added to a T&I.

Below is an email example.

Allocate licenses for user Tony Webster (twebster@example.com)



Donal Kavanagh <dkavanagh@uplandsoftware.com>

15:50

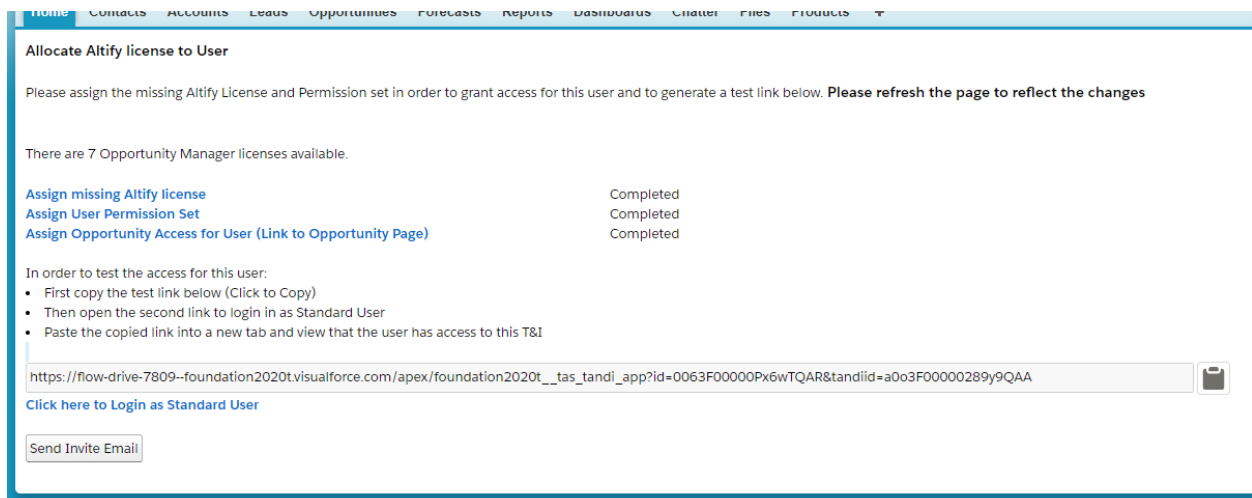


To: Donal Kavanagh

Click [here](#) to go to the admin page to allocate licenses for user Tony Webster (twebster@example.com)

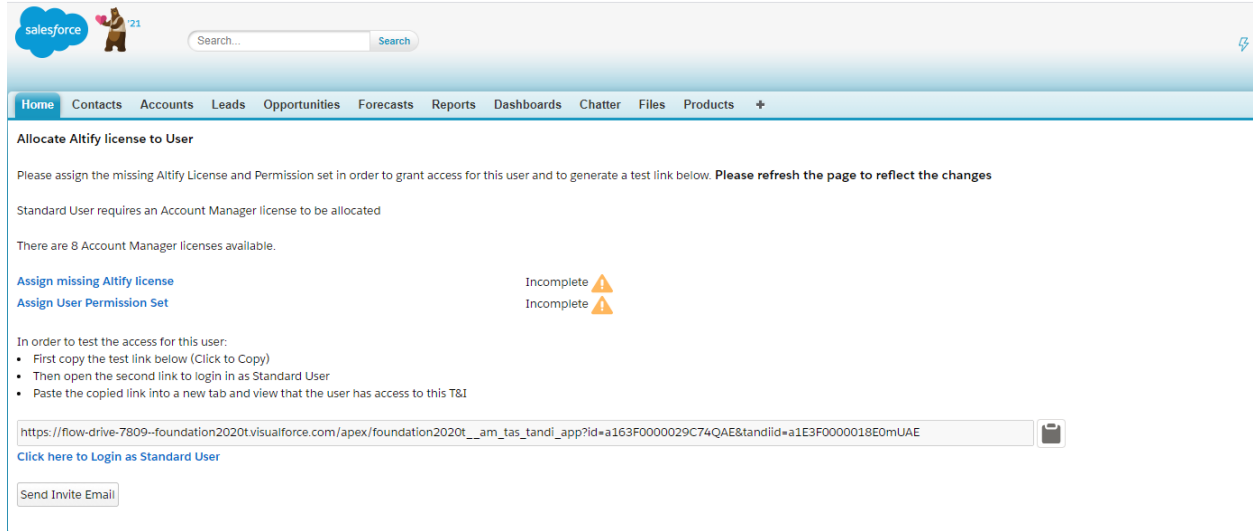
On clicking the link, the admin is brought to a Salesforce page with links to the relevant set up tasks, validation of those tasks ('Completed'), and guidance on testing the user's access to the T&I. From this page, the admin can also send an email to the invitee prompting them to test their access. This email is also received by the T&I organizer.

The following is the task page for an OM T&I.



The screenshot shows a Salesforce task page with a navigation bar at the top containing links for Home, Contacts, Accounts, Leads, Opportunities, Forecasts, Reports, Dashboards, Chatter, Files, and Products. The main heading is "Allocate Altify license to User". Below the heading is a message: "Please assign the missing Altify License and Permission set in order to grant access for this user and to generate a test link below. Please refresh the page to reflect the changes". A status message indicates "There are 7 Opportunity Manager licenses available." A table lists three tasks: "Assign missing Altify license" (Completed), "Assign User Permission Set" (Completed), and "Assign Opportunity Access for User (Link to Opportunity Page)" (Completed). Below the table, instructions are provided for testing access, including copying a test link and logging in as a Standard User. The test link is displayed in a text box: "https://flow-drive-7809--foundation2020t.visualforce.com/apex/foundation2020t__tas_tandi_app?id=0063F00000Px6wTQAR&tandiid=a0o3F00000289y9QAA". A "Click here to Login as Standard User" link is provided below the text box. At the bottom left, there is a "Send Invite Email" button.

And the following is the task page for an AM T&I.



The screenshot shows a Salesforce user management page. At the top, there is a navigation bar with tabs for Home, Contacts, Accounts, Leads, Opportunities, Forecasts, Reports, Dashboards, Chatter, Files, and Products. Below the navigation bar, the page title is "Allocate Altify license to User". The main content area contains the following text: "Please assign the missing Altify License and Permission set in order to grant access for this user and to generate a test link below. **Please refresh the page to reflect the changes**". Below this, it states "Standard User requires an Account Manager license to be allocated" and "There are 8 Account Manager licenses available." There are two blue links: "Assign missing Altify license" and "Assign User Permission Set". To the right of these links are two "Incomplete" status indicators with yellow warning triangles. Below the links, there is a list of instructions: "In order to test the access for this user: • First copy the test link below (Click to Copy) • Then open the second link to login in as Standard User • Paste the copied link into a new tab and view that the user has access to this T&I". A text box contains a long URL: "https://flow-drive-7809--foundation2020t.visualforce.com/apex/foundation2020t__am_tas_tandj_app?id=a163F0000029C74QAE&tandlid=a1E3F0000018E0mUAE". Below the text box is a "Click here to Login as Standard User" link and a "Send Invite Email" button.

For more information, see the following:

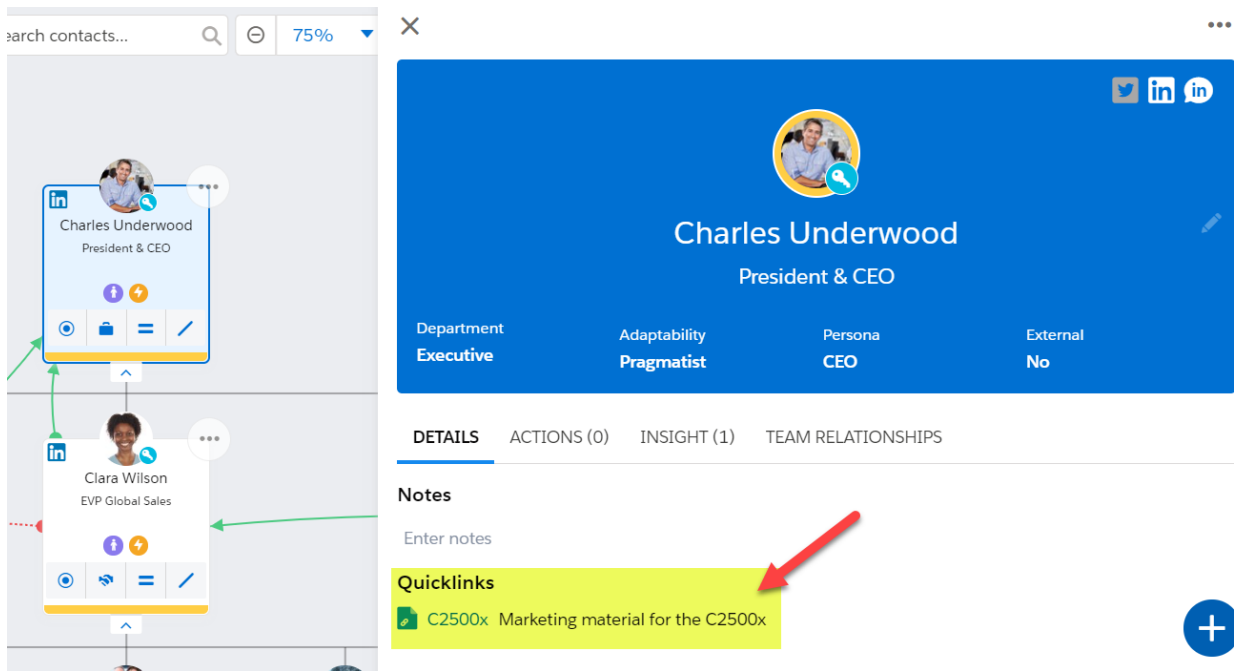
- [Allocating permissions for access in Account Manager](#)
- [Allocating permissions for access in Opportunity Manager](#)

Relationship Map

New user functionality

Access links in contacts' information panels

Users can access links to useful resources in a contact's information panel. These links can be configured so that they point to a custom page with information specific to the relevant contact.



Hiding long salutations

An issue was occurring whereby contact information was obscured when a long salutation was recorded for a contact. Now, salutations of longer than five characters are not displayed in a relationship map.

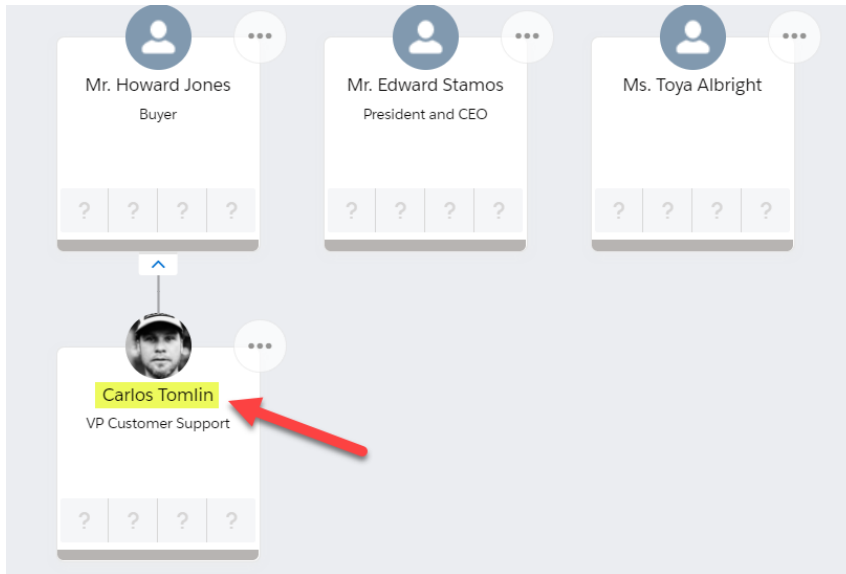
A salutation of greater than five characters...

The screenshot shows the 'Contact Edit' form. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel'. Below this is the 'Contact Information' section. The form fields are as follows:

Contact Owner	admin betaspr21	Phone	(212) 555-5555
Salutation	Monsieur	Mobile	
First Name	Carlos	Email	info@salesforce.
Last Name	Tomlin	Reports To	Howard Jones
Account Name	Acme		
Title	VP Customer Support		

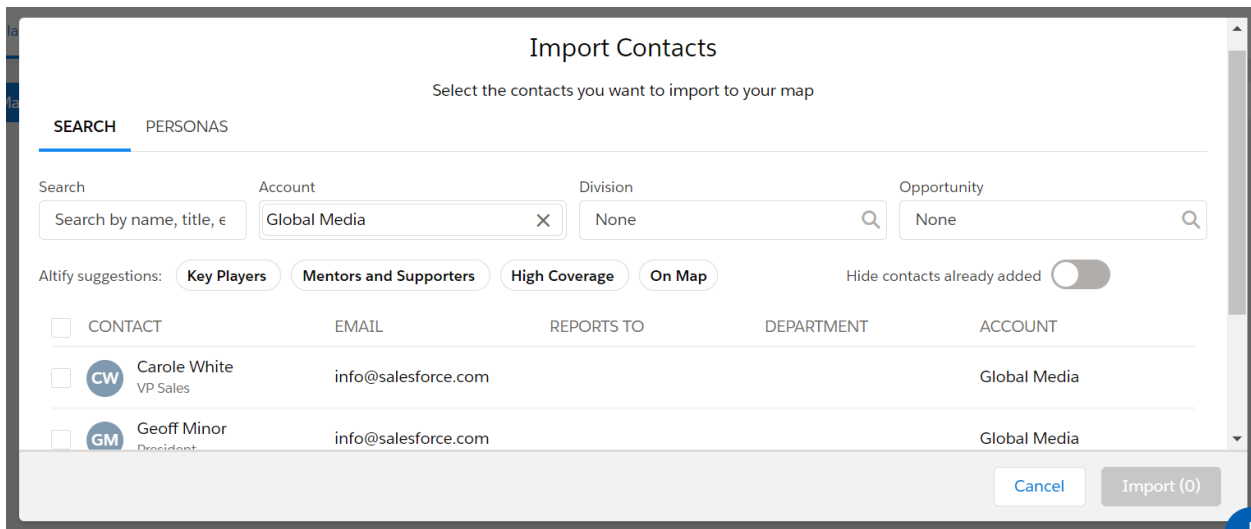
The 'Salutation' dropdown menu is highlighted in yellow and pointed to by a red arrow.

The salutation is hidden on the relationship map....



More contacts displayed when importing

The maximum number of contacts displayed when importing contacts into a relationship map is increased from 50 to 200.



New functionality to be administered

Setting up rel map quicklinks

An administrator can set up a quicklink to be displayed on every contact's information panel by creating the necessary Altify Quicklink record and setting **Relates To** to 'Contact' (as shown in the example below).

Altify Quicklink Detail

[Edit](#) [Delete](#) [Clone](#) [Sharing](#)


Quicklink Name	C2500x
Type	Link
Link	https://mycompany.com/marketing/c2500x.htm
Relates To	Contact
Description	Marketing material for the C2500x
Created By	Donal Kavanagh , 4/20/2021, 8:32 AM

[Edit](#) [Delete](#) [Clone](#) [Sharing](#)

In addition, the administrator can set up a quicklink that navigates to a custom page that references the relevant contact.


Note: the creation of custom page is a task for your own organization.

For example, the link below navigates to a custom page that displays the opportunities associated with the relevant contact on the map.

Edit Layout | Printable View | Help

Altify Quicklink Detail

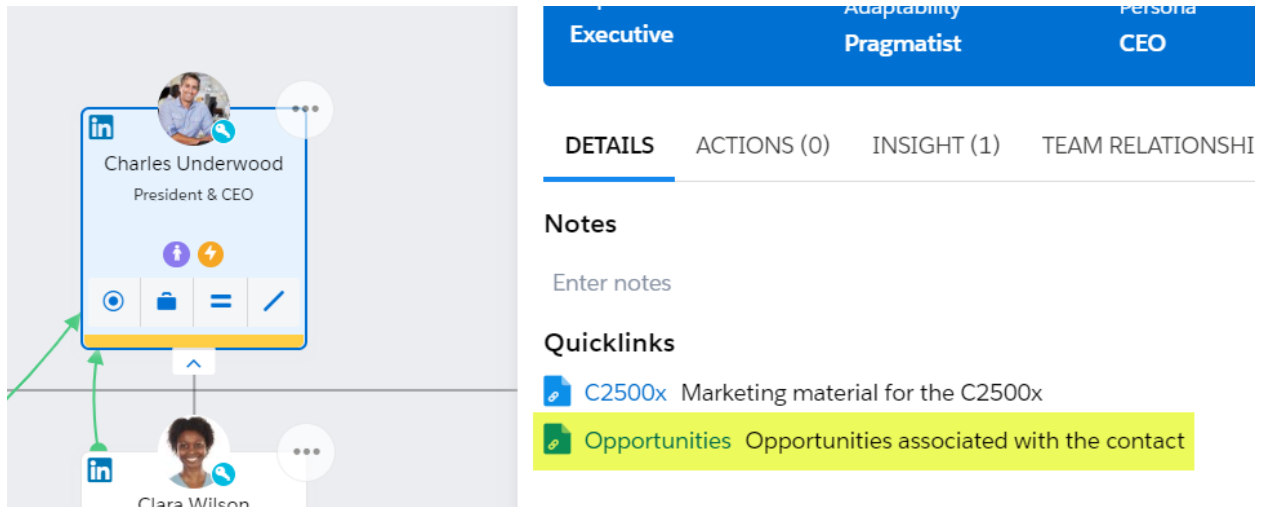
[Edit](#) [Delete](#) [Clone](#) [Sharing](#)

Quicklink Name	Contacts Opportunities	Owner	 User User [Change]
Type	Link		
Link	/apex/CustomContactPage?id=\${contactId}		
Relates To	Contact		
Description	Opportunities contact working in		
Created By	User User , 3/26/2021, 3:59 AM	Last Modified By	User User , 4/12/2021, 9:00 AM

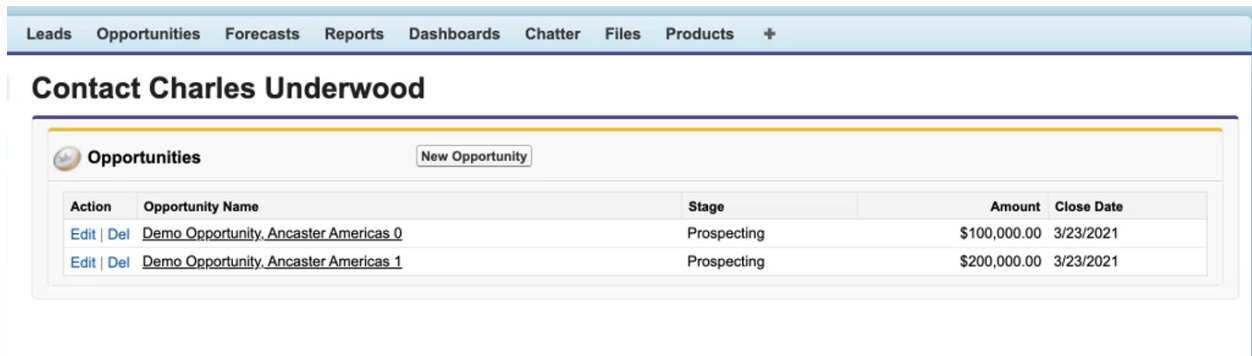
[Edit](#) [Delete](#) [Clone](#) [Sharing](#)

Note: the relevant contact is identified by the following part of the above Link: '{contactId}'.

The user clicks on a link on the contact's information panel...



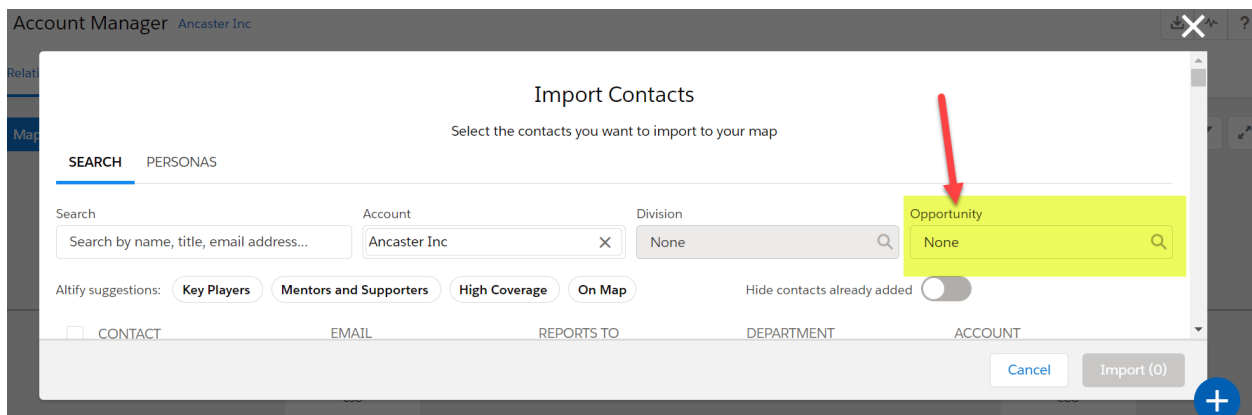
And is brought to the custom page that references the specific contact's information...



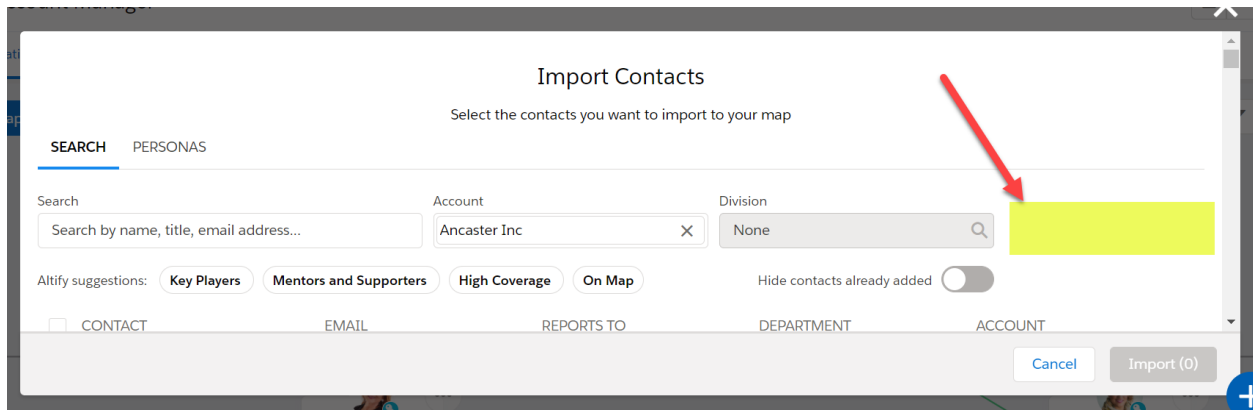
Disable Opportunity Filter on Contact Import Dialog [9.8.12]

Note: This configuration only applies to Relationship Maps for Accounts. It does not apply to Relationship Maps for Opportunities.

On account maps, an Opportunity filter (highlighted below) is displayed to help users searching for contacts to import into their map.



An administrator can remove this filter by enabling the Altify Core Setting *Disable Import Contact Opp Search* [Temp6]. The Opportunity filter is no longer displayed in the Import Contacts dialog (as shown in the example below).



Core product

New functionality to be administered

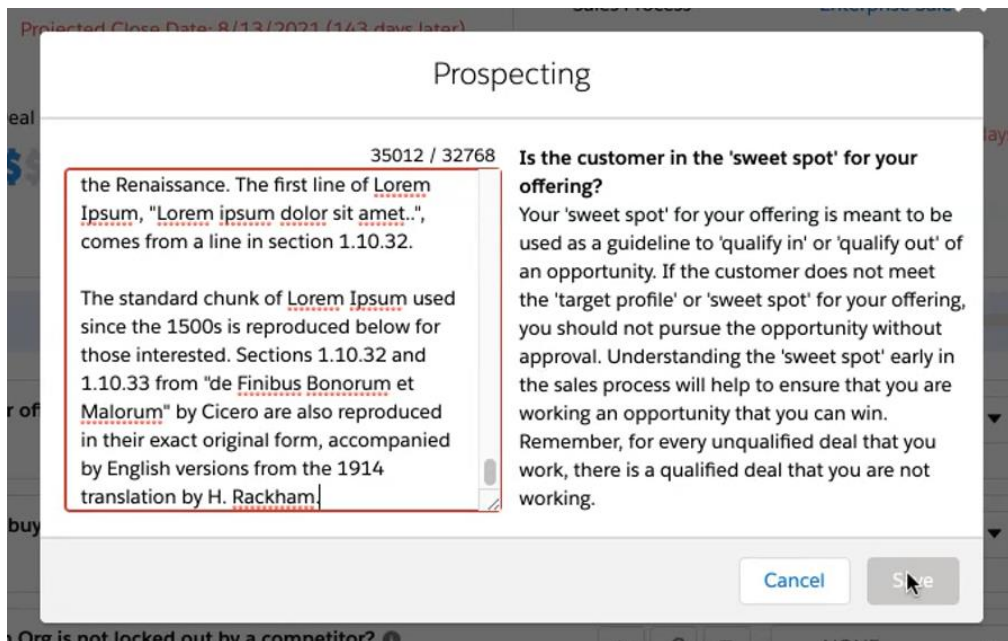
Removal of print option from insight & relationship maps [9.8.11]

A new Altify Core Setting, *Disable Print Buttons*, allows an administrator to remove the print option from the org's insight maps and relationship maps.

New user functionality

Visual indication of exceeded text limits

When a user enters text in a text field and they exceed the character limit, the text box is highlighted in red and the **Save** button is disabled (as shown in the example below).



Reporting

New completeness fields available

The following new fields are added to the Opportunity Completeness and the Account Completeness records.

Altify_Account_Completeness__c new score fields

These fields hold the percentage scores behind the corresponding RAG status fields.

- Answers Score (*Answers_Score__c*)
- Insights Score (*Insights_Score__c*)
- Most Recent Plan Answers Score (*Most_Recent_Plan_Answers_Score__c*)
- Objectives Score (*Objectives_Score__c*)
- Relationships Score (*Relationships_Score__c*)
- Whitespace Score (*Whitespace_Score__c*)

Altify_Account_Completeness__c new summary statistic fields

- Answers Last Updated (*Answers_Last_Updated__c*): the date the account answers were last updated.
- Insights Map Card Count (*Insights_Map_Card_Count__c*): a count of all insights for this account
- Insights Map Card Owned And Validated (*Insights_Map_Card_Owned_And_Validated__c*): a count of all the insights that are confirmed and have owners.
- Insights Map Last Updated (*Insights_Map_Last_Updated__c*): the date the insight map was last modified.
- Insights Map Section Count (*Insights_Map_Section_Count__c*): a count of all the insight map sections for this account.
- Objective Actions Closed Count (*Objective_Actions_Closed_Count__c*): a count of all objective actions that are closed against this account.
- Objective Actions Last Updated (*Objective_Actions_Last_Updated__c*): the most recent update date of an account objective action for this account.
- Objective Actions Open Count (*Objective_Actions_Open_Count__c*): a count of all objective actions that are open against this account.
- Objective Actions Overdue Count (*Objective_Actions_Overdue_Count__c*): a count of all objective actions that are overdue against this account.
- Objectives Closed Count (*Objectives_Closed_Count__c*): a count of all objectives that are closed against this account.
- Objectives Last Updated (*Objectives_Last_Updated__c*): the most recent update date for an account objective.

- Objectives Open Count (*Objectives_Open_Count__c*): a count of all objectives that are open against the account.
- Objectives Overdue Count (*Objectives_Overdue_Count__c*): a count of all objectives that are overdue against this account.
- Relationship Supportive Key Player¹ Count (*Relationship_Supportive_Key_Player_Count__c*): a count of all relationship map contacts who are both a key player and a supporter/mentor.
- Relationships Contact Count (*Relationships_Contact_Count__c*): a raw count of all contacts on this account's relationship map.
- Relationships Key Player Count (*Relationships_Key_Player_Count__c*): a count of all relationship map contacts who are key players.
- Relationships Map Last Updated (*Relationships_Map_Last_Updated__c*): the date a relationship map contact was last updated

Opportunity__c new score fields

These fields hold the % scores behind the corresponding RAG status fields.

- Assessment Score (*Assessment_Score__c*)
- Decision Criteria Score (*Decision_Criteria_Score__c*)
- Insights Score (*Insights_Score__c*)
- PRIME Score (*PRIME_Score__c*)
- Relationships Score (*Relationships_Score__c*)
- Strategy Score (*Strategy_Score__c*)

Opportunity__c new summary statistics fields

- Assessment Answer Count (*Assessment_Answer_Count__c*): a count of all assessment answers with Yes/No answers.
- Assessment Answer Last Updated (*Assessment_Answer_Last_Updated__c*): the date the assessment was last modified.
- Assessment Competitor Answer Count (*Assessment_Competitor_Anwser_Count__c*): a count of all competitor assessment answers with Yes/No answers.
- Assessment Competitor Count (*Assessment_Competitor_Count__c*): a count of competitors for this opportunity.
- Decision Criteria Last Updated (*Decision_Criteria_Last_Updated__c*): the date the decision criteria were last updated.
- Formal Decision Criteria Contact Count (*Formal_Decision_Criteria_Contact_Count__c*): a count of the contacts associated with formal decision criteria.

¹ A Key Player is a contact whose Political Status is Inner Circle or Political Structure.

- Formal Decision Criteria Count (*Formal_Decision_Criteria_Count__c*): a count of all the formal decision criteria identified.
- Informal Decision Criteria Contact Count (*Informal_Decision_Criteria_Contact_Count__c*): a count of the contacts associated with informal decision criteria.
- Informal Decision Criteria Count (*Informal_Decision_Criteria_Count__c*): a count of all the informal decision criteria identified.
- Insight Map Card Count (*Insight_Card_Count__c*): a count of all insights for this opportunity.
- Insight Cards Owned and Validated (*Insight_Cards_Owned_And_Validated__c*): a count of all confirmed insights with owners for this opportunity.
- Insight Map Last Updated (*Insight_Map_Last_Updated__c*): the date the insight map was last updated.
- Insight Map Section Count (*Insight_Section_Count__c*): a count of all insight map sections for this opportunity.
- PRIME Action Closed Count (*PRIME_Action_Closed_Count__c*): a count of all closed prime actions for this opportunity.
- PRIME Action Open Count (*PRIME_Action_Open_Count__c*): a count of all open prime actions for this opportunity.
- PRIME Action Overdue Count (*PRIME_Action_Overdue_Count__c*): a count of all overdue prime actions for this opportunity.
- PRIME Actions Last Updated (*PRIME_Actions_Last_Updated__c*): the date a prime action was last updated.
- Rel Map Key Roles Uncovered Count (*Rel_Map_Key_Roles_Uncovered_Count__c*): a count of all the contacts with key buying roles identified for this opportunity.
- Rel Map Supportive Key Player Count (*Rel_Map_Supportive_Key_Player_Count__c*): a count of all relationship map contacts who are both a key player and a supporter/mentor.
- Relationship Map Contact Count (*Relationship_Map_Contact_Count__c*): a raw count of all contacts on this opportunity's relationship map.
- Relationship Map Key Player Count (*Relationship_Map_Key_Player_Count__c*): a count of all contacts on this opportunity's relationship map who are key players.
- Relationship Map Last Updated (*Relationship_Map_Last_Updated__c*): the day the relationship was last updated.

Changes to completeness scoring [9.8.18]

The following changes make completeness more achievable for Altify users:

Account Manager

- Account Details questions are regarded as complete if a note or an attachment is provided. Previously, a note and an attachment were required.
- Segmentation and Level of Relationship are no longer included in the overall account completeness calculation.
- New Altify Account Manager Settings allow for custom Objective Types to be identified as Revenue, Relationships or Business Development types. This will ensure their inclusion in completeness calculations.

For more information, see the [online help for administrators](#).

Opportunity Manager

- For Relationships Status, amber is now achieved if at least one contact is both a key player and a mentor/supporter. Previously, a contact who is both an approver and a mentor/supporter was required to achieve amber status.
- For actions, all actions (and not just PRIME actions) are now included in the completeness calculation.

For more information, see the [online help for administrators](#).