Revegy Spring 2019 Release Notes

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Overview

This document describes new features and enhancements to the Revegy user interface and Administration Module.

Note: New features and enhancements that need to be configured in Revegy Admin will be indicated with an Admin Config ( ) icon. Otherwise, no configuration is necessary to start using the function.

Note: There are no functional or visual changes to the Revegy Enterprise version 3.7 Flash application.

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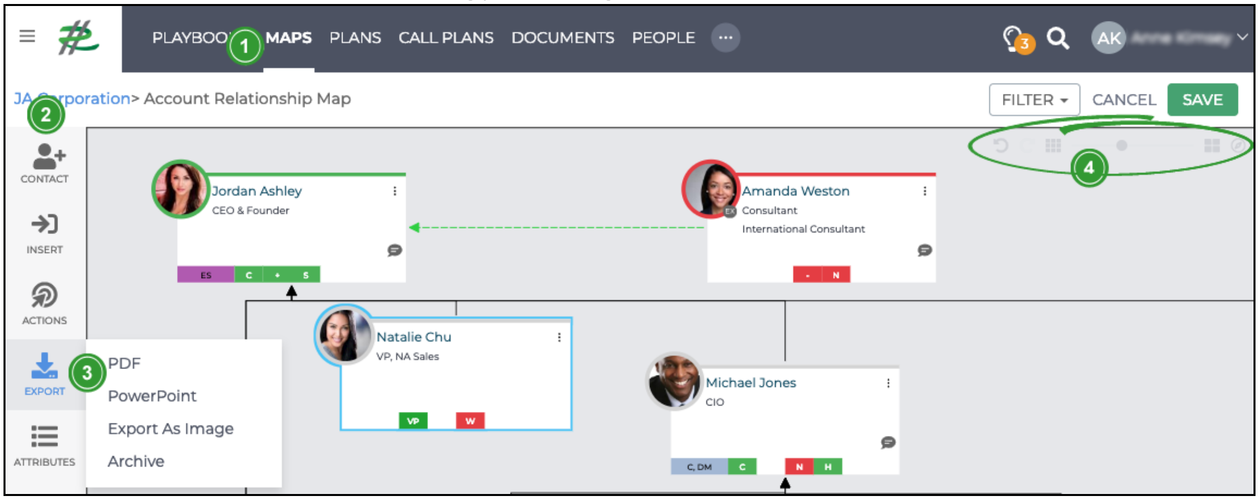
New Features

New features have been added to the Revegy user interface to improve usability and efficiency.
= Requires Revegy Admin configuration

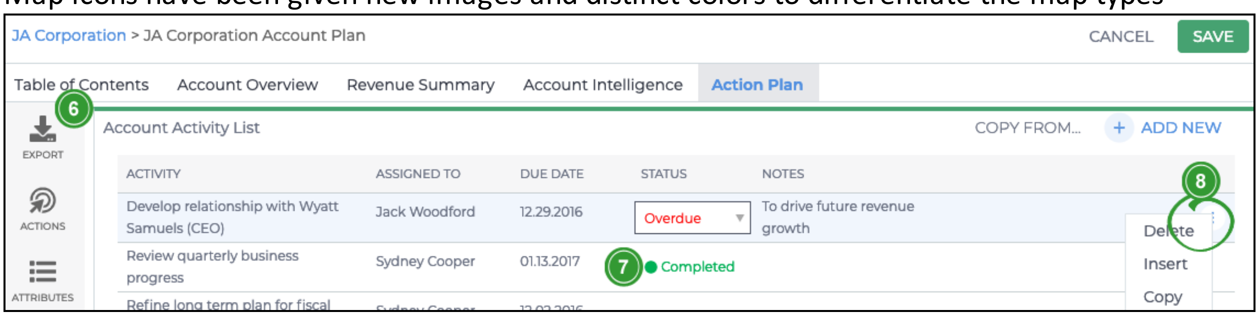
New User Interface (UI)

Revegy's user interface has been refreshed. All of Revegy's prior functionality has been retained, but its packaging has been given a modernized look and feel. The new design includes streamlined visualization and standardization of iconography, fonts, and color usage throughout the platform. Revegy's clutter-free dashboards help users know where to focus their attention. Navigation feels more intuitive with fewer options to click on up front. The 3 dot "More Options" icon, used for accessing additional functions, gives the interface a cleaner look.

The following represents the biggest changes to the UI. It may not be a comprehensive list of all the thoughtful modifications included in Revegy's redesign:



1. The top navbar indicates where you currently are by displaying the menu item in bold and underlined
2. The left navbar in Maps, Plans, and Playbooks contain new icons and rearrangement of functions for improved organization
3. In Maps, the options "PowerPoint" and "PDF" replace "Export" and "Print"
4. In Maps, zoom, map legend, and undo/redo actions have been moved from the left navbar to the top right corner of the map for quicker access
5. Map icons have been given new images and distinct colors to differentiate the map types



6. In Plans, the item currently being edited now has a thin green bar above it and a drop shadow box to visually show it is in edit mode
7. Throughout tables, fully colored fields have been replaced by a color indicator dot and colored font
8. In tables, actions have been moved to a vertical 3 dot "More Options" menu, which only appears upon hover
9. In Playbooks, zoom has been moved from the left navbar onto the screen for quicker access
10. In Playbooks, a progress bar has been added at the top to indicate level of completeness. The overall look has been changed from cards to a flatter design. Instead of having cards of different color types, now only the top border of the card has color. Items that have been completed have a light font. The check box has a green check mark. Stage cards have a darker top border and a lighter card color.

Multi-Currency

Currency can be set for each individual account or opportunity. The currency type selected for the account or opportunity can differ from the parent company's currency selection. For reporting purposes, currency fields will be calculated and summarized in relation to the parent account's currency. This way, Revegy users can make apples-to-apples comparisons across accounts or opportunities in reporting. Currency fields are also important in plans. They can be found in many-column tables and are typically used to capture opportunities for an Opportunity Summary Analysis at the account level. Currently, multi-currency integration is only available for Salesforce.

New Task List Features

Revegy continues to overhaul Task Lists, which began in the Winter 2018 release. Thoughtful features include new visual cues, improved customization, and automation.

Task Indicator Dot

A colored dot that represents a task's status has been added to tasks. The task indicator is useful for calling the user's attention to items of most importance. Examples of task status could be: Assigned, Not Started, In Progress, Complete, Overdue, etc. Revegy Admin can configure the dot's color (for example, using red for overdue tasks).

Customizing Task Columns

Revegy Admin can configure the order and size of columns, as well as which columns appear in a task list. This allows for specific configuration of tasks that is separate from configuring columns in a Configurable Actions (GOA/GOSPA) plan object.

Disable Detail Dialog

In order to improve the inline editing experience, Revegy Admin now has the option to disable detail dialog in plan object configuration. When disabled, clicking "New Task" adds a new row to the bottom of the task list.

Auto-filling User in Task Assignments

When creating a new task, the "Assigned To" field is automatically populated with the name of the current (logged in) user. This feature is applicable to default task lists, as well as task lists created from scratch.

View Change Logs from Maps or Plans

With large account and opportunity teams, collaboration is key. The ability to see who has made the latest changes in a map or plan can help teams work better together. With transparency in mind, Revegy has added the ability to access the change log directly from a map or plan. When the map or plan is open, users can select “View Change Log” from the actions icon in the left side navbar. The change log shows the user and date changes were made during a specified period of time.

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Enhancements

This release includes enhancements to the Revegy user interface to improve ease of use and allow quicker access to Revegy tools.

Improved Efficiency

Improved Delivery when Printing/Exporting from Revegy

If printing or exporting a map, plan, playbook, or call plan takes longer than 30 seconds to process, those materials will be sent as an email instead. This enables users to get more productivity out of Revegy, instead of waiting on data processing. This improvement expands upon the auto-email functionality first introduced in the Winter 2018 release notes for printing plans only.

One Error Notification per Error Type

When performing actions that generate the same error message, only one error message box will be displayed, instead of generating multiple error boxes of the same error that must be closed individually. This reduces message redundancy.

Improved Usability

Custom Columns in Configurable Actions Plan Objects

Revegy Admin can configure order and size of columns, as well as which columns appear in a configurable actions (GOA/GOSPA) plan object.

Links included in Task Notification Emails

Task notification emails have been improved to include a link to the relevant task, so the user can go directly to the task that needs attention.

Hyperlinks on Comment Cards

Typing a website and saving it in a comment card will automatically turn it into a hyperlink that will open in a new tab when clicked.

Editing Team Members (in Revegy standalone)

The process to begin editing team members from a contact map, team map, or plan object has been simplified. It now takes fewer clicks to start editing a teammate's information.

Editing Multiple White Space Cards

All fields on a White Space card are available for editing when attempting to edit multiple white space cards at a time.

Additional Reporting Features

Activity Reports

Users can pull an activity report based on change log data by using the Reporting feature in Revegy. This report can show the total number of updates made, who made the last update and when it was made, the total number of times all associated maps were updated, and the total number of times all associated plan objects were updated for an account or opportunity.

Grids & Scorecards Reports

Data from grids and scorecards can now be used in Reporting. For scorecards, the report displays all categories/questions for each response in one single section. Therefore, each scorecard has one section. The Total row (ie. the report summary) displays the score or score label without the color indicator.

Inactive Users in Reports

When creating a new report or editing an existing report, it is now possible to include inactive users from the list of users.

Improved Custom PowerPoint Templates

Map Grids in PowerPoint

Revegy users can export the grid view of a map into a custom PowerPoint template.

Multiple Charts/Graphs to a slide

It is possible to export multiple AnyChart images to a single PowerPoint slide without overflowing. This allows users to see several graphs and charts at once.

Option to Print Chart Legends

Chart Legends can be selected for print inclusion when exporting to a custom PowerPoint template.

Export Opportunity Summary Analysis (OSA) to PowerPoint

When exporting a plan, users can export the OSA to a custom PowerPoint template.

Symbols from Revegy to PowerPoint

Arrows and circles exported from Revegy plan objects are visible in custom PowerPoint templates.

Export Configurable Actions Plan Objects to PowerPoint

When set up by Revegy Admin, users can choose to export all but the lowest level of activities from a configurable actions (GOA/GOSPA) plan object into a custom PowerPoint template. Excluding the lowest level tasks allows Revegy users to focus on the big picture without getting lost in details.

CRM Integration

Launch Revegy in a Separate Tab in Salesforce

If enabled by Revegy Admin, it is possible to open Revegy in a separate tab from Salesforce (SFDC), instead of launching Revegy in a new window. This capability was previously available in other CRMs and has now been brought to SFDC.

Pull Child Opportunities into Configurable Actions from Salesforce

Revegy's configurable actions (GOA/GOSPA) plan objects can display child opportunities that originate from an opportunities list in Salesforce. This improvement decreases the amount of time spent inputting data into configurable actions plan objects by hand.

Create an Opportunity Summary Analysis with C4C

Create an Opportunity Summary Analysis from C4C data. An opportunity summary analysis is a custom plan object that pulls data from a many-column table in order to build an easily digestible snapshot of opportunities. An opportunity summary analysis is useful for finding gaps in revenue goals when viewed as a table or bar chart.

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