



2020R2

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Overview

This document describes new features and enhancements to the Revegy User Interface (UI) 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.

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New Features

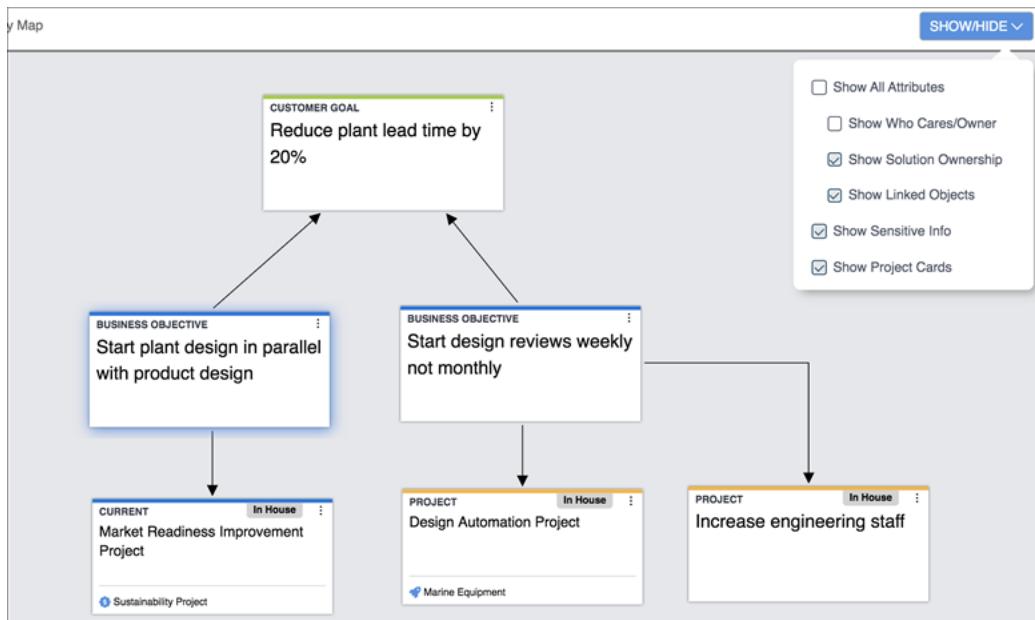
New features have been added to the Revegy user interface to improve usability and efficiency. Focus was placed on the aesthetic value of the maps and cards - both their appearance in Revegy and as exports for presentations.

 = Requires Revegy Admin configuration

Map Readability

Controlling Visibility of Attributes

Users can now **select which attributes to show or hide** on the Issue and Strategy Maps and on the face of the cards. **When exporting** the Map, the **show/hide selections are reflected**. Additionally, by hiding different attributes, **more space on the card is available**, thereby improving legibility.



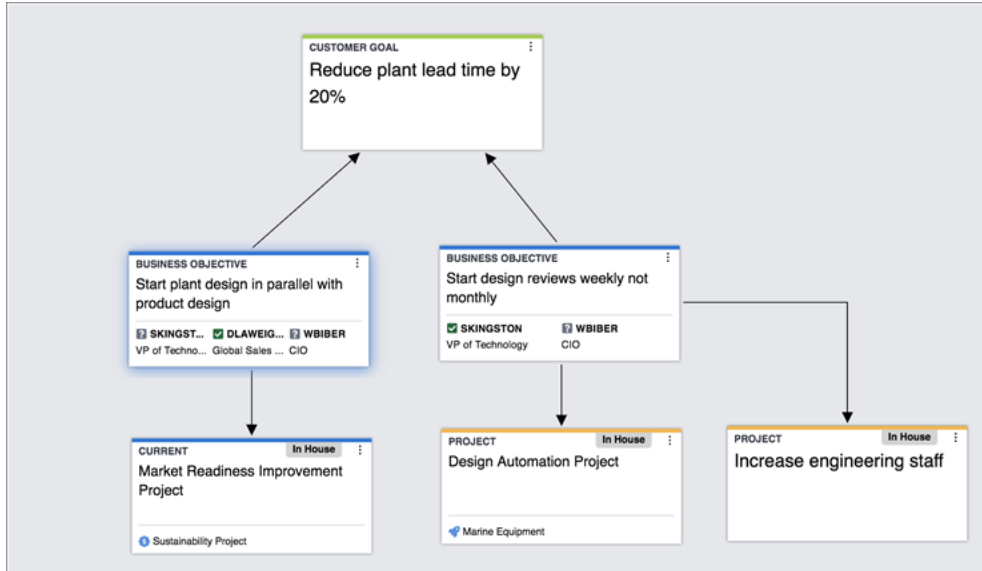
List View

In List View, the **first column is now fixed**, enabling the user to see the row subject while scrolling horizontally.

Item, Project, and Solution Cards

The **textfont**, **size**, **spacing**, and overall **layout** on the cards in the Strategy and Issue Maps have been enhanced for ease of readability. Other significant enhancements include the following:

- **Lines can be drawn to connect** Strategy Map project cards to item cards and Issue Map solution cards to item cards
- Users have been enabled to **enter up to 160 characters in the Summary field** of all cards and **up to 1000 characters in the Project Detail field**

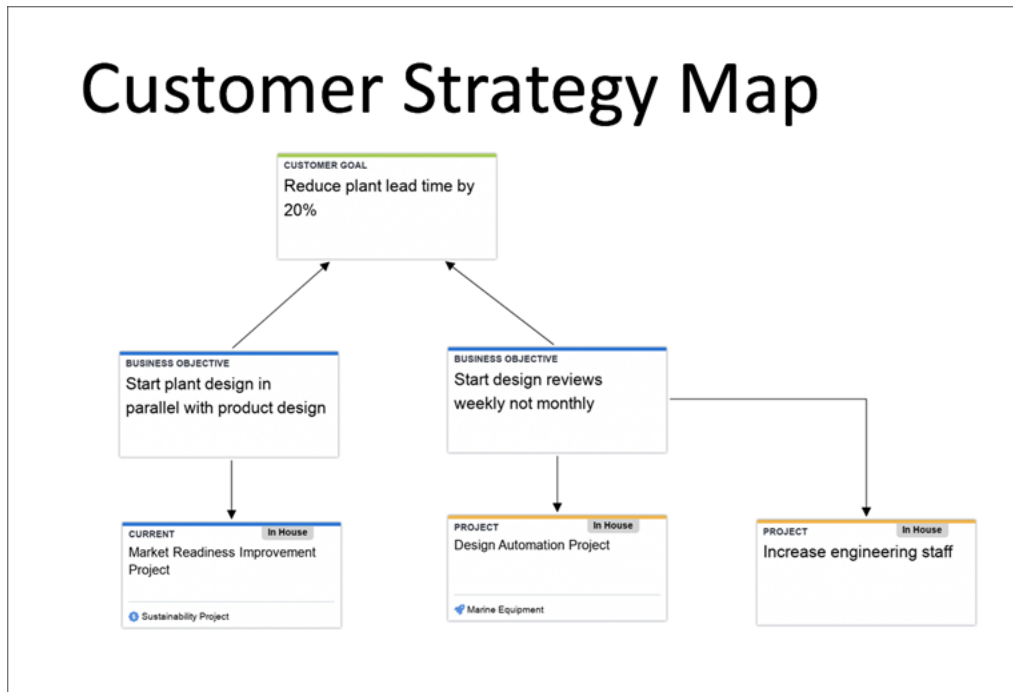


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Exporting Maps

Transparent Background


Card-based maps can now be **exported to Powerpoint with a transparent background**, enabling the Revegy map to be applied to any customized Powerpoint template. This will enhance the user experience when reviewing exports or while presenting to a sales team or customer.



Improved Resolution

The **resolution** of all map exports - Powerpoint, Image, and PDF - has been **increased by 1.8 times** the normal size. This will enhance visibility on all mediums, including presentation screens.

Show/Hide Options

 When exporting a **standard Powerpoint** or PDF, the export menu will include the **options to hide all map attributes and cards**. The same options will be available via the **custom Powerpoint** keys.

Reduced Padding

Map exports have been **resized to reduce the side padding and improve the visibility** of the export.

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Whitespace+

Buying Centers


Buying centers are divisions or departments within the client's organization where you are able to sell your products or services. When using Buying Centers, the following options are available:

- The ability to **create new Buying Centers and add existing ones from the Whitespace+ table view**
- **Buying Centers in SFDC CRM can be integrated** into Whitespace+
- Users can **import/export CSV file types** into the Buying Center object

Group Chart

 Within the Group Chart visualization, a user can **select and display a Buying Center**.

Heat Map

 Within the Heat Map visualization, a user can **select and display a Buying Center** and use a color indication to represent a calculated column.

Currency


Revegy now enables users to **see all currency fields rounded up or down without decimals** in Whitespace+ summarizations and visualizations.

Revenue Growth Ideas (RGI)

Notes

In the Hybrid Card and Table Views, truncated notes will include a **“Show More” link that will extend the notes field to show all the text.**

Reporting

 Users in need of a more complete picture of the progress of the RGI can now **view the information related to the opportunity converted from RGI in the Basic Report**. The Basic Report will include non-configuration attributes.

"Created From" Field

When an RGI is created from another object (i.e. Whitespace+, Board Story, or Strategy Map), the "Created From" field will show the name of the specific item it was linked from in parentheses.

Revenue Growth Idea

11 TOTAL IDEAS CREATED | 1,769,000 (USD) TOTAL ESTIMATED VALUE | 4 TOTAL IDEAS CONVERTED | 515,000 (USD) TOTAL AMOUNT OF CONVERTED IDEAS

Search [] + ADD NEW | SORT | FILTER | EXPAND ALL

DISCOVER	OPPORTUNITY SIZE	EXPECTED CLOSE YEAR	PRODUCT OFFERING	TASKS
Upgrade to Partner License	USD 250,000	2021	Auto Scaling	0 Tasks Due
STATUS *	Discover		CONFIDENCE LEVEL *	Confident
NAME *	Upgrade to Partner License		NOTES	
OPPORTUNITY SIZE	USD 250,000		LINK	
EXPECTED CLOSE QUARTER *	Q3		LINK	
EXPECTED CLOSE YEAR *	2021		LAST UPDATED	06.11.2020 03:51 PM
PRODUCT OFFERING	Auto Scaling		UPDATED BY	Karaleise Wahrmann
ASSIGNED TO	Sarah Ibrahim		CONVERT	
CREATED FROM	Customer Strategy Map (increase engineering staff)			
EXPECTED CLOSED DATE	09.30.2021			

Show Additional Fields

Task Lists

Suggested Tasks

Users are now able to select and add any task at any time from a suggested list of tasks. The Suggested Tasks list is also available for CRM-integrated tasks.

Suggested Tasks

+ ADD ALL TASKS x | SHOW/HIDE v

- Proposal +
- Procurement +
- Security +

SUBJECT	START DATE	DUE DATE ^	ASSIGNED TO	STATUS	COMMENTS
Setup demo with project team	06.11.2020	06.11.2020	Anne Kimsey	In Progress	
Meet with client on strategy alignment	06.11.2020	06.11.2020	Anne Kimsey	Waiting on Someone	Eise
POC	06.11.2020	06.11.2020	Karaleise Wahrmann	Not Started	

Exporting

Users can now **designate tasks within their drop lists as "sensitive"**, thereby **preventing them from appearing on** PDF or standard Powerpoint **exports**.

Auto Scroll

After adding a task to the Task list, **Revegy will automatically scroll to where the task was added**, allowing the user to work from that entry.

Default Tasks

While **integrated with Salesforce**, users can still **see default tasks in a Task List**.

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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.

Internal Action Plan (GOA)

Improved User Experience (UE)

The following enhancements will improve the user experience:

- **Objects are listed alphabetically** making them easier to locate during custom report creations
- When scrolling vertically in GOA, the **header pane remains frozen**
- **GOA auto-saves** whenever the user exits a row
- Goal, Objectives, and Tasks can be **saved individually in real-time**


Opportunity Profile

Required Fields

A **red asterisk** will now indicate a required field within the **opportunity profile**.

Generic Maps

Dependent Drop-Down Field Types

 Revegy has enabled **dependent drop-down field types**. The values shown in this field will be dependent on the values selected in another field.

C4C Integration

Configurable Endpoints

To view additional information available in C4C, **users can now configure specific endpoints** for multi-column tables (MCTs) **and pull additional endpoints** for two-column tables (2CTs).

General

Exporting

HTML reports now **export special/unicode characters correctly to Excel**.

Two-Column Tables (2CT)

Selections made in the 2CT checkbox field in Revegy will be visible in the multi-select picklist field in Salesforce CRM, and vice versa.

Fonts User Interface (UI)

Adjustments were made to the padding and text in various text fields and headers, and to the **text color** in the Coaching Messages. These enhancements improved the overall consistency and readability of the text within Revegy.

Admin

Whitespace+

Admins can now perform the following:

- **Configure Buying Centers in the Whitespace+ configuration**, enabling Buying Centers to display on the front end
- Configure a 'Use Data Source' field; this will **enable the end-user to populate a Buying Center with the Data Source field**
- **Import/Export the Buying Center object** across all accounts

Powerpoint Templates

Admins have the capability to **view, add, delete, and replace** Powerpoint templates and **control access** to them.

Backup/Importing Data

Visualizations can now be included in data transfers between two tenants in two different environments (i.e. **Sandbox to Production**).

Generic Maps

Within the generic maps config, admins can **create a dependent drop list field type**. The values shown in this field will be dependent on the values selected in another field.

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Resolved Issues

The following issues have been fixed in Revegy:

- When a user gets an email notification of an updated Task, the hyperlink within the email body functions properly
- No longer getting duplicate Contact Cards on Maps
- When parent levels are marked as 'hidden', Task headers are not visible
- Tasks with a Client Contact will not generate an error on the task's Object ID
- Checkbox exports correctly in PPT
- The initial view (playbook, plan, etc) displays as intended
- Revegy does not generate an error when an Admin Profile is added to a newly created user
- Japanese characters export properly in Excel
- Users do not need to be in the same admin group to view a user in the Portfolio module
- Calculated columns in a Plan object display an accurate total in the Total row
- Modifications to the name of an RGI after it has been integrated into the GOA are reflected in the GOA
- Pictures on Relationship Map cards display properly
- Contacts designated as Account Managers in Revegy display as Owners in Dynamics
- Deleting all data in a Plan object field will yield a 'null' value in the CRM
- When running an export from the Import / Export area in New Admin, the Date Created and Date Converted fields are formatted properly
- When importing Contacts from the People tab, Revegy does not generate an error
- A plan can be saved without generating script error occurs
- Users can import multi-select fields via RGI import
- Revegy validates proper formatting for phone numbers
- No errors are generated when exporting a PPT with the number of rows listed in the key
All RGIs integrated into the GOA are properly displayed
- The picklist will not become corrupted if more than one RGI is added to the same ambition during the same sequence
- The Dependent dropdown is working properly in RGI
- In C4C, the MCT Date column filter is working properly
- Users can see default tasks in a task list when CRM task integration is enabled
- RGI details are visible when double-clicking on a closed RGI from the GOA
- When exporting the List View of the Relationship Map to CSV, the data exports properly
- Users can access Revegy via Safari or Edge browsers without getting a timestamp error
- Users can add tasks from RGI without getting an error message
- When exporting to a Custom PPT with a template that contains a color picker, the exported PPT opens properly
- Users can add multiple client contacts without getting a 'client contact is invalid' error
- When integration is disabled, the user will not get integration-related errors

- Users can rename and save a call plan without getting an error message
- When importing MCT with 50+ rows from C4C, Revegy calculates the column totals correctly
- New and default tasks will not auto-assign to a user and the due date will default to 7 days from the current day
- When pushing to SFDC, an error message now alerts the user if the character limit has been exceeded
- When exporting the List View of the Generic Whitespace Map to CSV, the data exports properly

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