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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.
= Requires Revegy Admin configuration

Revenue Growth Ideas

Revenue Growth Ideas (RGI) helps key account managers capture new ideas they have to grow revenue in their key accounts.

The account team can view the ideas in Revegy, track progress, and manage tasks related to the ideas. When utilized properly, the RGI tool will help account teams convert ideas into opportunities. In conjunction with this new feature, please note some of the many options associated with this exciting new feature:

- Convert ideas to opportunities in Revegy or in the CRM and trace an opportunity back to the RGI from the opportunity table
- Manage RGI tasks linked to your internal action plan (GOA)
- View an RGI in the Opportunity Summary Analysis (OSA)
- Create reports and coaching rules from RGI data. Export these reports via PDF or Powerpoint

Highly Configurable

RGIs, like other plan objects, are viewed and managed within plans. This tool is highly configurable; the name, headers, status, and confidence levels are just some of the fields that can be customized.

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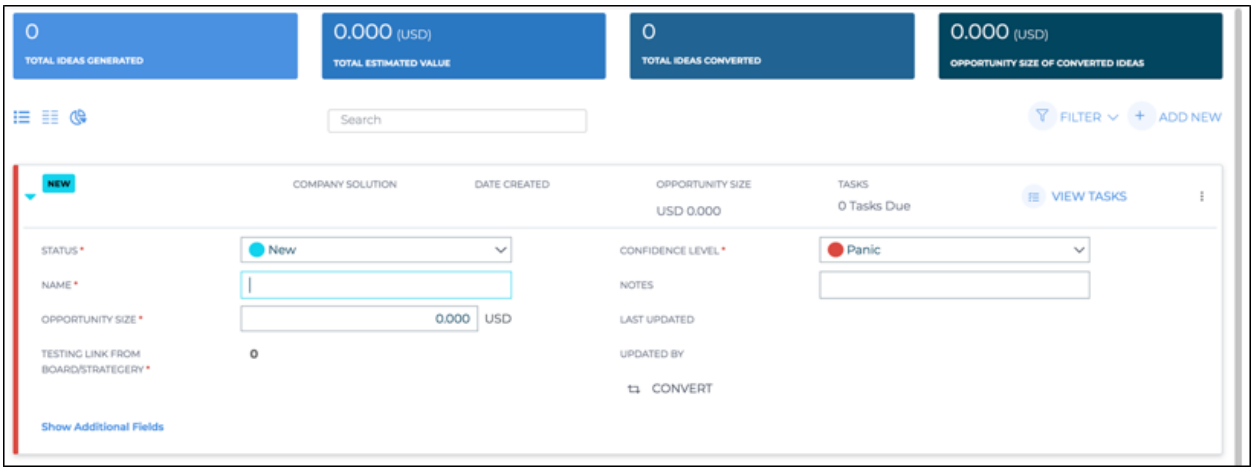
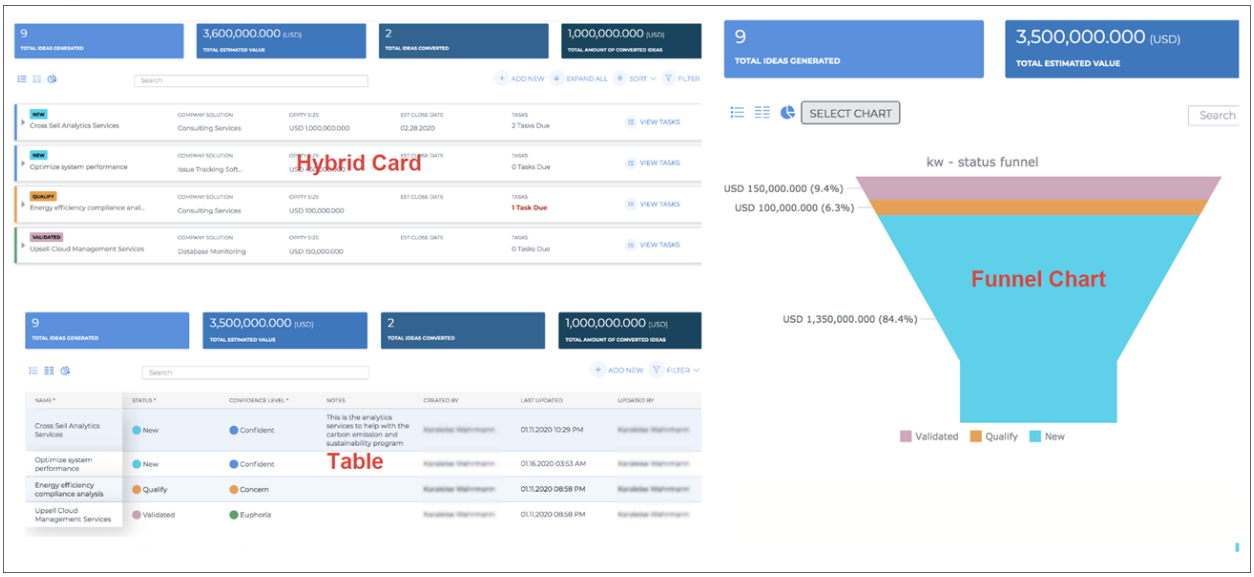


Multiple Views

RGIs are available in two views (**hybrid card** and **table**) and in a visualization (**funnel chart**). Users can toggle the view according to their preference.



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Enhancements

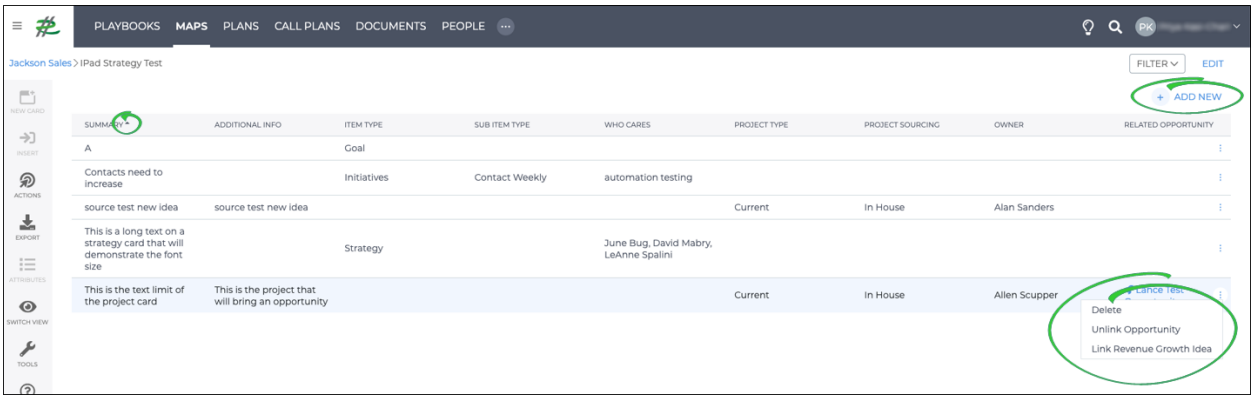
This release includes enhancements to the Revegy user interface to improve ease of use and allow quicker access to Revegy tools.

Maps

Editing Map Content in List View

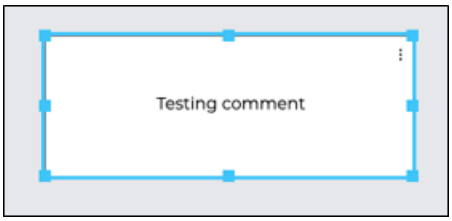
Users can now **make adjustments to Strategy, Issue, Team, and Generic Maps while in List View**. The available adjustments are similar to those found in the Whitespace+ table view:

- Sort the list
- Link/Unlink an Opportunity on a project card
- Edit Who Cares on an item card
- Add a new item card
- Add a new project card
- Delete an item card and/or project card



Resizing Comment Boxes on Maps

Users can adjust the size of the comment box by dragging the connect points while in edit mode. As the size of the box is adjusted, **the text will wrap** to match the size of the box.



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More Characters in Placeholder Cards in Relationship Maps

Users can hover over a placeholder card and **view up to 200 characters**.

Updated User Experience for Adding Opportunities to Strategy Maps

A **"Linked Opportunity" button has been added** to the project card. When a user clicks on "Add an Opportunity", they are able to add a new opportunity or select an existing opportunity. The **same experience holds true for Revenue Growth Ideas**; added ideas are visible on a project card in the form of an icon ( ) or hidden beneath the "+X" indicator.

Internal Action Plan (GOA)

Auto-Focus to the Latest Added Child

When a new task is added, **the system will auto-scroll to where the new task was added** and place the row in focus.

Multi-Currency

Currency Fields

This enhancement, if enabled, will show **currency fields in the user's currency** within parentheses.

Whitespace+

New Field Type: Dependent Droplist

With this enhancement, Revegy enabled users to create dependent droplists based on Company Solution and Whitespace+ drop list fields. How is this beneficial? **Users are now able to see a list of competitors based on the products or use cases**.

Change Log

A new menu item called **View Change Log** has been added to the side menu bar under Actions. The change log dialog **reveals all updates performed (and by whom)** to the Whitespace+ table.

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Visualizations on Overview Page

Users can view a **Whitespace+ chart** on an overview page widget **for a snapshot of needed Whitespace+ information**.

Editable Data Source Field

Data source-based fields can now be edited on Whitespace+ and the changes can be saved back to the data source. This will spare the user from losing time going back and forth between Whitespace+ and many-column tables (MCT) to edit data.

Adding New Records for the Same Company Solution

Admins can now **add new rows for the same Company Solution via csv import** by specifying up to two (2) other fields from Whitespace+ Config that should be considered for a new record.

Adding Rules Based on Whitespace+ Conditions

Admins can now **use Whitespace+ attributes as conditions** when configuring rules, thereby creating rules that are product-centric.

Rules Engine

Simplified Date Operators

In addition to the existing field conditions of "past" and "future", **admins can specify the date field conditions to include factors in quarters, months, years, etc.**

Add Last Updated Field

Users can now show an alert on an account/opportunity **based on the date its object was last updated**.

Contacts+

"No Email" Message

If the contact **does not have an email address entered**, when the interactions tab is opened, the following **message will now appear: "No email address found."**

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Microsoft Dynamics 365 Integration

MS Dynamics Integration

This release incorporated a **new integration for MS Dynamics 365** using OData (v.4.0) restful service. Now, the ability exists to add an advanced filter when pulling fields in many-column and two-column tables.

C4C Integration

Pull Fields from Opportunity Competitor and Product

When a many-column table (MCT) is set up in Revegy to pull opportunities from C4C, **admins can now pull attributes from the OpportunityProduct entity in C4C**. For fields that can be edited in C4C, the admin can edit the fields in Revegy and the values are pushed back to C4C.

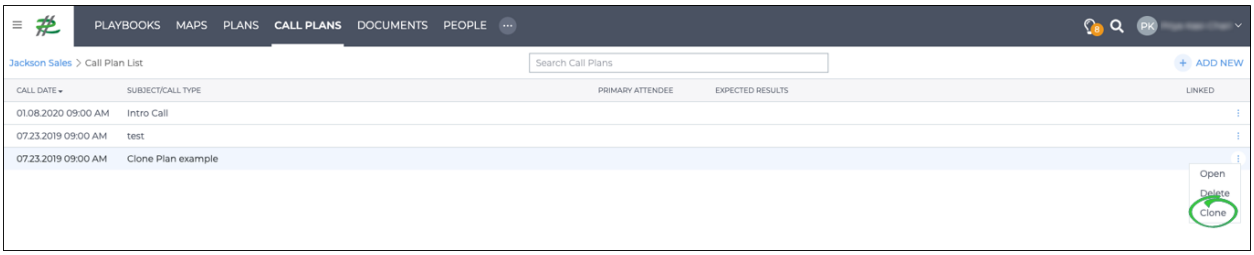
Pull Data Up To Two (2) Levels from Account/Opportunity

Data from C4C entities up to two levels below an account or opportunity can be pulled into Revegy many-column tables. For example, details of Service Request Items can be pulled into a Revegy many-column table in an account plan.

General

Cloning Plans and Call Plans

Users can now **clone plans and call plans within an account or opportunity**. The Clone option now appears along with the Open and Delete options.



Reordering Delete Option in Many-Column Table

"Delete" is now the last option in the drop down menu as opposed to the first one. This will prevent accidental deletions of rows in many-column tables (MCT).

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Setting the Global Date Format

The **global date format can now be changed at the company level**. For example, if a company is located in the USA and headquartered out of the UK, the global date can be formatted in the UK standard.

Clearing Error Messages

When error messages pop up, they **will clear from the screen after 15 seconds**.

"Global" Commands

With this release, **global Cancel and Save commands are available** when viewing objects opened **in split screen**, while working **in Whitespace+**, and while **in a Board**.

Admin

Backup/Import

The admin now has the ability to **backup and import Boards, Rules, Tool Profiles, Admin Profiles, and Whitespace+ from one environment to another**.

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Resolved Issues

The following issues have been fixed in Revegy:

- When the value in a calculated column is "NaN", that portion of the archive will no longer produce an error
- Can now enter numbers in Numeric and Currency Fields using AZERTY keyboard
- When using the Copy From feature for a Board, the "Include Associated Stories" link will use the configured story name in place of "Stories"
- The unique identifier (UUID) found in the Employee table has been added to the Team Members' Table (Revegy Admin). As a result, the UUID between the Account Team and Sales Team now match
- C4C Opportunity Owner & Team fields now pulling from C4C Sales Teams
- C4C Odata integration accounts with lower case letters do not generate an error
- For Odata in C4C, contacts with accents (e.g. "Jesús") do not generate an error when pushing to C4C
- HTML Reports that contain a date will successfully export
- Hyperlinks do not break when wrapped inside comment boxes
- Map list values preceded by a hyphen (-) will successfully export matching values; the results will not be replaced with "#NAME?"
- Comment cards no longer truncate due to double-spacing within text
- Role Hierarchy does not error after 2000 roles. Username is now case-insensitive
- The Owner field now pulls for 2-column tables and for the plugin Admin
- When opening an opportunity on a newly created account (Dynamics ODATA Embedded Revegy), the user will not get a validation error
- Related to Multi-Currency, the standard attribute "EstimatedSize" (Opportunity Profile) is now available as a currency field
- Map template is available when creating a new map
- Pages with many rows do not take a long time to load nor result in an error during a load
- Text in Strategy Map Template comment boxes now wrap
- Revegy initial load time in Dynamics and SAP C4C reduced
- Revegy no longer timing out in large accounts in Dynamics
- Can add special characters to contact card without generating "Error Fetching Entity: Bad Request" error
- When opening/editing a Strategy Map project card, clicking on "Select Existing Opportunity" will not generate an error
- When pushing a task from Revegy, user will not get a "400 Bad Request" error
- Assignedto field now pushes/pulls in Dynamics OData
- Pull Account doesn't crash on many-column table (MCT)
- An Outlook contact can be dragged and dropped into a map without generating an error
- Text within Firefox-related error messages is correctly spelled

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- Many-column table (MCT) csv exports map to the proper columns and without errors
- Values render properly in the X-axis when creating a heat map from Whitespace+ with an X-axis text field
- After editing a plan object, the Save option does not keep the object checked out
- The GOA Log/Monitor now includes task information and Goals/Objectives (before and after)
- GOA Log/Monitor emails now include task keys as opposed to IDs
- Any GOA errors that are generated during editing will now display in the overview widget
- GOA does not produce errors after performing multiple saves in the same dialog
- When Multi-Currency is enabled, the currency code will pull from Salesforce (SFDC) for the account
- When using the ellipsis (three vertical buttons to right) to perform an action on a task, only one dialog box will open
- Clicking on email addresses in a comment box opens the email client as opposed to a website
- In Whitespace+ numeric columns, users can set the color for the "Greater Than" value and when "Use Color" is selected. This is also true when the MCT data has a comma
- The Whitespace+ legend now shows all ranges in the Color Indicator Field
- When saving the HTML Report for playbook no longer generates a validation error when saving
- The Heatmap View for Whitespace+ now displays all products on the y-axis
- Whitespace+ Account Names that have special characters will import properly when pulled from a data source
- Values within the Whitespace+ Heatmap cells now display clearly. Only very large values will truncate/wrap

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