



**2020R1**

Revegy, Inc.  
300 Galleria Parkway  
Suite 1850  
Atlanta, Georgia 30339  
[www.revegy.com](http://www.revegy.com)



# Table of Contents

---

<b>OVERVIEW</b> .....	<b>4</b>
<b>NEW FEATURES</b> .....	<b>4</b>
Font Enhancements .....	4
New Font .....	4
Font Size Increase .....	5
Line-Height Increase .....	5
Word Cloud Visualization .....	5
Word Cloud Visualization .....	5
<b>ENHANCEMENTS</b> .....	<b>6</b>
Inline Editing in Map List Views .....	6
Contact Maps .....	6
"Add New" Button .....	6
Context Menus .....	6
Show/Hide Information .....	6
Exporting .....	7
Revenue Growth Ideas (RGI) .....	7
Contact Maps .....	7
Contact Titles .....	7
Task Lists .....	7
Add New .....	7
Contacts+ .....	7
Domain Suggestions .....	7
Revenue Growth Ideas .....	8
RGI Tasks .....	8
RGI UI Updates .....	8
Converting Revenue Growth Ideas .....	8
Consistent Labels in Strategy Maps .....	9
RGI Reporting .....	9
C4C Integration .....	9
Configurable Endpoints .....	9
General .....	9
Editing System-Generated Reports .....	9
Phone Numbers .....	9
Contact Map .....	9
Admin .....	10
Importing .....	10
Whitespace+ .....	10
Calculations Field Configuration .....	10
RGI Attributes Configuration .....	10
Admin Permissions .....	10


Rules .....	10
Protecting API Calls .....	10
<b>RESOLVED ISSUES .....</b>	<b>11</b>

# 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.

Back to [Table of Contents](#)

# New Features

---

New features have been added to the Revegy user interface to improve usability and efficiency.

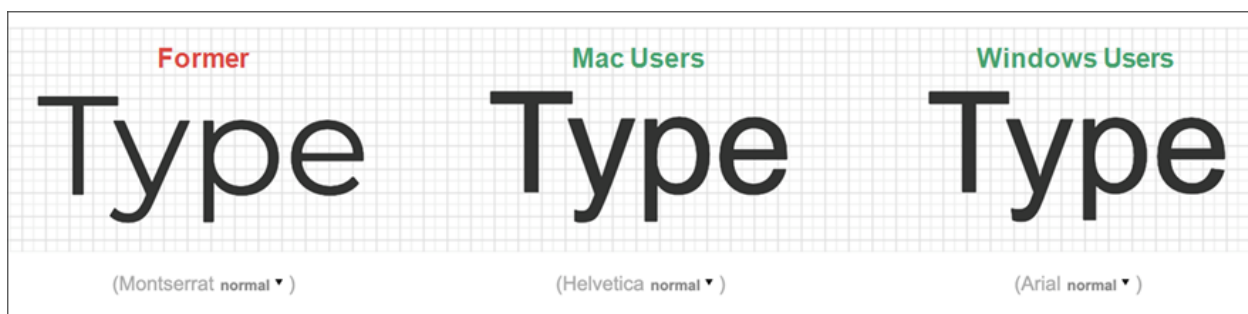
 = Requires Revegy Admin configuration

## Font Enhancements

To improve overall readability, research and user-testing was performed. Based on the findings, a number of changes were made to the font UI, including a thicker font-style system-wide that improves legibility, targeted font-size increases, and more consistent spacing between text. As a result of the changes, our users reported a 43% improvement in ease of readability. Details regarding the most prominent changes are as follows:

### New Font

Revegy has a new font (Helvetica/Arial), resulting in **improved performance and legibility**, all while maintaining visual hierarchy. This enhancement has been implemented throughout the entire application.



## Font Size Increase


The larger font size **improves readability** for viewing Revegy on a desktop or on a large screen/projection during a presentation. Currently, this enhancement will only affect plans.

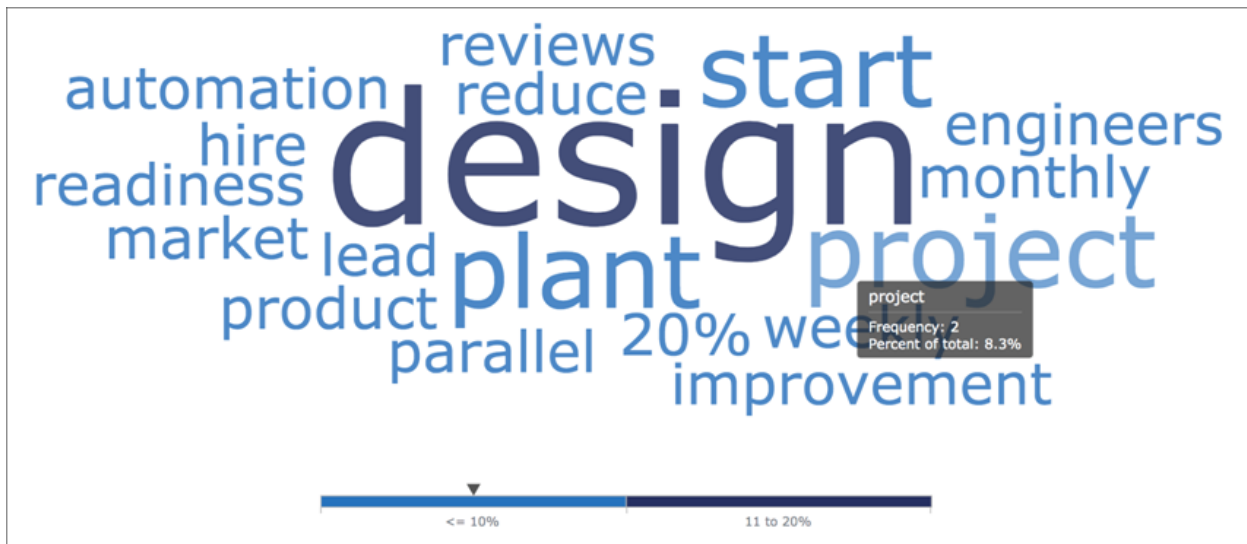
## Line-Height Increase

There is now greater spacing (140%) between sentence lines, resulting in **optimal readability**. This enhancement will affect plans and maps.

Back to [Table of Contents](#)

## Word Cloud Visualization

 Revegy now has a Word Cloud **visualization that shows the frequency of words in the Summary and Detail of all cards in the Strategy map**. Hovering over a word reveals the Frequency and Percent of Total.



Back to [Table of Contents](#)


# Enhancements

---

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

## Inline Editing in Map List Views

### Contact Maps

 Users can now **edit map content while in View Mode within the List View** by clicking Edit or clicking in an editable field. **All map card attributes** located on the side panel or dialog (both displayed and not displayed on card) **are visible**. Inline editing can be performed on the following maps:

- Contact Maps
- Issue Maps

### "Add New" Button

The **New** button has been **renamed to Add New** with a revised icon. Users can **add a new row while in List View**.

### Context Menus

The singular command **buttons Open and Delete have been replaced with a context menu**. The context menu provides **options that can be performed in List View**:

- Open Contact details
- Delete a record
- Assign an existing contact to a placeholder record
- Add a new contact for a placeholder record

### Show/Hide Information

Similar to the existing capability in Map View, users can now **show/hide sensitive information and project cards in List View** while in a Strategy Map or Issue Map.

Back to [Table of Contents](#)

## Exporting

### Revenue Growth Ideas (RGI)

Users can now export RGI visualizations (hybrid card, funnel chart, and table views) to a custom PPT, standard PPT, and PDF.

## Contact Maps

### Contact Titles

Contact titles are now viewable on the Contact Maps' Grid Views and on exported documents. Additionally, hovering over the names reveals pertinent information.



## Task Lists

### Add New

When a user selects **+ Add New** and begins editing fields within the new task row, **another row - pre-populated with default settings - is automatically added below the new row**. After the user saves the new row, their cursor defaults to the next row. If fields are edited in this row, another row is automatically added below the row currently being edited. If the user saves the Task List and does not enter any value in the new row that was automatically added, that empty row is not saved.

## Contacts+

### Domain Suggestions

When Contacts+ is enabled and the user logs into a Contact Map, **Revegy will assist with the setup by suggesting the domains for the account**. The suggestions will be based on the email addresses of the contacts for that account.

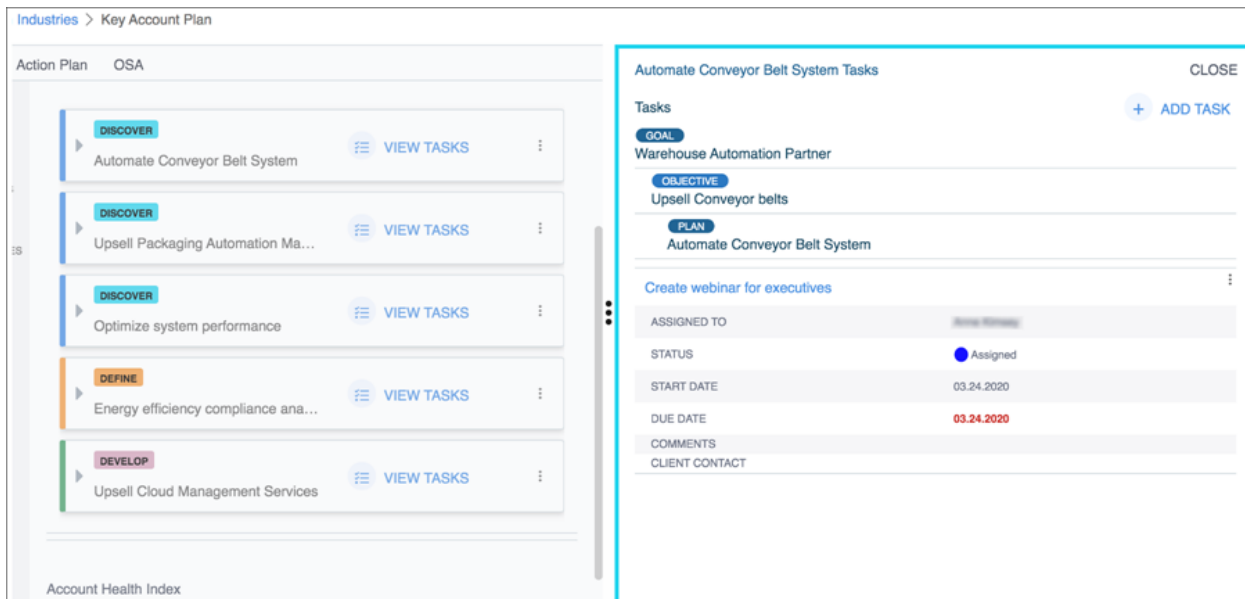
Back to [Table of Contents](#)

## Revenue Growth Ideas

A number of user interface (UI) updates were performed to improve the user experience with Revenue Growth Ideas (RGI). The enhancements include, but are not limited to the following:

### RGI Tasks

The user can now view and **quickly associate RGI tasks with the GOA** based on uniform styles and colors. Additionally, **when a Revenue Growth Idea is converted** to an opportunity, the **RGI task automatically changes to a completed status**.



### RGI UI Updates

- When no chart is configured, the chart icon will not be visible
- The Notes field allows unlimited text and truncates the text in View Mode
- For funnel charts that are based on status, the following message will appear below the legend: "Funnel chart does not include closed ideas." Closed Ideas are those that have a status type of "converted" or "abandoned"
- Revegy now has hover-over descriptions for RGI visualization icons

### Converting Revenue Growth Ideas

Users can **convert an RGI to an existing opportunity**, enabling the user to link an RGI to an opportunity that was already created.



## Consistent Labels in Strategy Maps

The Strategy Map **list view and side panels will show the same configured label for linked RGIs**. If the user changes the Strategy Map attributes, the changes will take effect in both the list view and side panel views simultaneously.

## RGI Reporting

Revegy now includes user enablement to create a **basic standard report with Revenue Growth Idea header fields only**.

Back to [Table of Contents](#)

## C4C Integration

### Configurable Endpoints

The user is now enabled to **set specific endpoints** for many-column tables (MCTs) and pull additional endpoints for two-column data.

## General

### Editing System-Generated Reports

Users can now **edit reports in the 'Available Reports' field and grids/scorecards that have 'Create Summary View' checked**. When 'Edit' is clicked, a page opens to display the Account- and Opportunity-related fields. These fields can be arranged per the user's preferences.

### Phone Numbers

**Revegy now validates the phone number format** (via required fields) to ensure a standard phone number is entered in the phone number fields.

### Contact Map

When **Preferred Alternative is selected** in preferences, the **competitor's name will be displayed** in the card view, list view, and on PDF exports.

Back to [Table of Contents](#)

## Admin

### Importing

When an admin copies (transfers) data between two tenants in two different environments (i.e. sandbox to production), **they can now include visualizations** in this transfer.

### Whitespace+

Admins can **configure the label for Whitespace+**. When this is done, the new name will appear in all areas related to Whitespace+.

### Calculations Field Configuration

Admins can now **set the "field type"** in the calculation field configuration. Three options are available: **Numeric, Percentage, and Currency**.

### RGI Attributes Configuration

The admin can reorder where the Confidence Level and Notes fields appear to the user.

### Admin Permissions

Revegy now **prevents** an admin from **impersonating a user with higher admin permissions**. Additionally, admins can **grant admin access to individual configs** in configuration admin.

### Rules

Admins can **create a rule to identify** accounts, opportunities, and relevant **objects that have not been updated in the last 30 days**.

### Protecting API Calls

Application Programming Interface (**API**) calls can now be protected by creating an annotation for **admin-only access** (i.e. @HasSystemAdminPermission, @HasCompanyAdminPermission).

Back to [Table of Contents](#)

## Resolved Issues

---

The following issues have been fixed in Revegy:

- Kanji characters now appear correctly in HTML Report exports
- Users will not get a timestamp error message in Revegy when attempting to rename a plan
- The contact list on the right hand side is no longer cut-off when there are more than 13 contacts on a map in grid view
- A Contact Map split over multiple pages will export to only one page (when exporting to a custom PPT)
- During Dynamics task updates, the "Owner" information is now pulling into the task's Assigned To field
- When exporting a Contact Map, MCT, or list view, the map name no longer prints in the header area
- When a master admin attempts to edit a Global Report created by another user, they will not get an error prohibiting them from saving the changes
- Orphan tasks can be associated with objectives that have drop-down options
- The horizontal scroll bar, the right-side column data, and all contacts now appear in the Contact Map list view
- All attributes are now available when the default map grid axis and color indicator is selected

Back to [Table of Contents](#)