



Revegy Summer 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

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

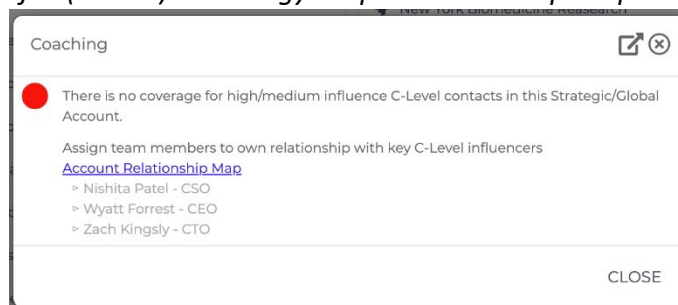
 = Requires Revegy Admin configuration

New Rules Engine Features

-  Revegy's rules engine has been enhanced to better give coaching insights that are more robust in nature. We have expanded the rules engine to combine different Revegy objects including maps, account & opportunity profile, tables, scorecards and others to give more precise and informative coaching suggestions within the Revegy platform.

Example of new rules complexity:

- Alert any Tier 2 accounts that do not have coverage for contacts that care for specific goals and projects.
 - Account Profile (or 2CT) + Strategy Map + Relationship Map



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Enhancements

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

Reporting Enhancements

Report Creation / Edit

You now can independently select from the sorting column without also having to select any grouping or limiting of rows.

Column Sort

Sort By Active Current Year ▼

Order Descending ▼

Limit Rows

Limit the number of rows displayed in the report (For example: "Top 10 Opportunities by Opportunity Size").

Rows To Display - None - ▼

Report Viewing

Users will have the added ability to sort reports by columns as well as filter columns. They also will have the added ability to directly navigate to either account or opportunity directly from report.

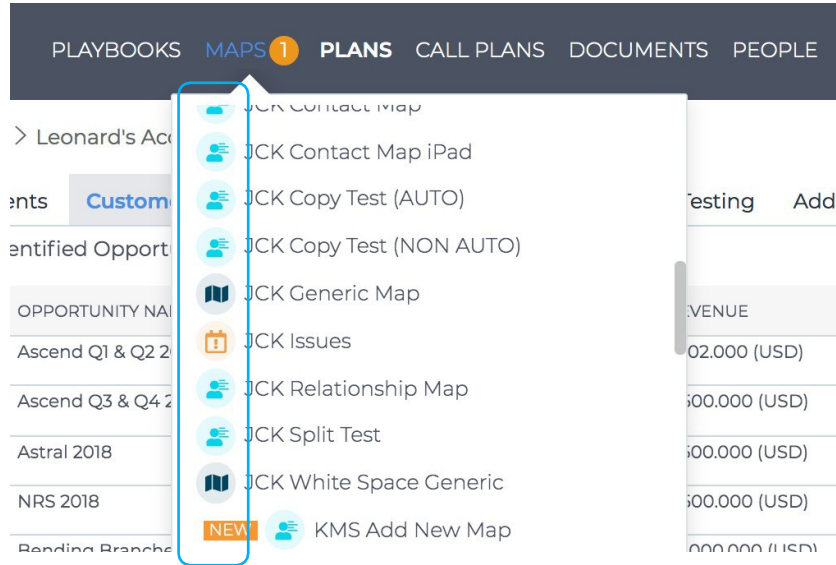
Sort				Filter			
NAME	AXIS: ANNUALLY RECURRING REVENUE	AXIS: RISK FACTORS	CATEGORY: SUPPORT USAGE	WON OPPORTUNITIES CURRENT YEAR ▼	OPEN OPPORTUNITIES CURRENT YEAR	POTENTIAL OPPORTUNITIES CURRENT YEAR	
JA Corporation	0	0	● 0	2,070,000	3,169,000	0	
King Inc	0	0	● 0	0	0	0	
WS Technologies, Inc.	0	0	● 0	0	0	0	

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UI Enhancements

Map Menu Icons

Users will now see map type icons as part of the map's menu dropdown.



Many Column Tables Progress Bar

If enabled within your configuration by a Revegy admin, users will now be able to see a progress bar for any percent field within multi column tables

Product Revenue

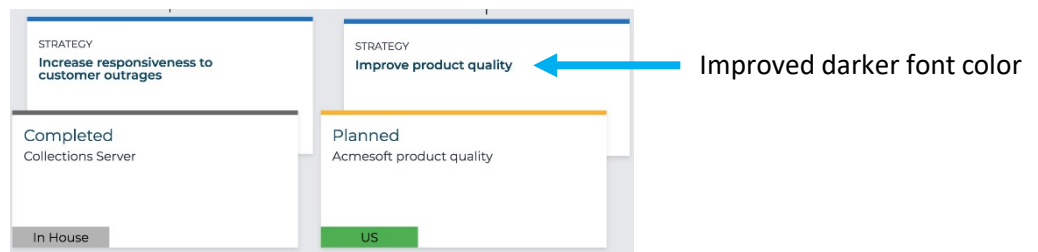
PRODUCT	EXPECTED REVENUE	ACTUAL REVENUE	PERCENT OF PLAN
Kayaks	2,250,000	2,252,750	101%
Paddles	250,000	200,000	80%
Life Jackets	325,000	425,000	131%
Apparel	1,500,000	1,257,500	84%
Wet Suits	100,000	75,000	75%
Ram Mounts	50,000	22,500	45%

The 'PERCENT OF PLAN' column includes progress bars for each row, which are highlighted with a blue circle in the image.

Readability Improvements

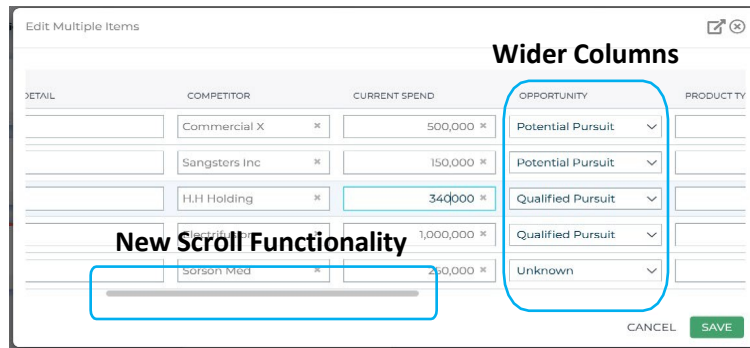
As part of overall platform readability improvements, users will notice a darker gray text color throughout the Revegy platform.

Updated the strategy and issue map cards with darker easier to read text.



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Updated edit multiple and add multiple screen so that the columns are wider and scrolls.



Edited Cell Highlighting

When editing cells only the current cell, being edited, will show as highlighted. All other cells that were previously edited will no longer remain highlighted until the user saves.

Improved Table of Contents

Users will notice a more aligned table of contents when viewing from the Plans, Table of Contents screen.

CRM Integration

Microsoft Dynamics Enhancements

Integration upgraded to use Dynamics OData service.

Added ability to see child contacts when making a contact map.

Added ability to see child opportunity in OSA, GOA, Strategy, Whitespace

General Enhancements

Check implemented when moving from one tool to another in a Playbook.

Task Permissions Enhancements:

- When enabled, only task and team owners can edit, clone, and delete tasks.
- Other users can still add new tasks and assign to others.

New backend process for archiving

Added ability for custom PowerPoint by roles.

Added ability to hide tasks belonging to other plans when “Reuse” is enabled for GOA

Corrected “Last Updated” field in Plan getting updated after cancel.

Added task notification link from email to embedded account/opportunity page.

Corrected Strategy map not in sync with related Relationship map.

Added decimal numbers and percentages to number fields within plan.

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