
The following updates have been made to DealSheet

Version : 2.12/3

Updated:

Changes to the DealSheet component that is used on the opportunity page, specifically;

1. Added the Pipeline RISK indicator (low, high, slip or loss) and the Indicator for the chosen strategy to the header bar of the component
2. Relocated the selector button for the sales process in the header bar next to the picklist.

The button to close DealSheet in the main application has been renamed. This now reads CLOSE rather than CANCEL. Otherwise, the functionality has not been changed

Version 2.13 includes some bug fixes

Upgrade package link

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t01000000o0Zl>

Notes for upgrade process:

The following process should be used to move from prior versions of AccountPlan to this version.

1. Use the provided link, or the link in the appexchange, to start the update process
2. Select upgrade "for Admins only"
3. Do not unpack the data as is common with upgrades.

Following this activity, the application will be upgraded.

Notes for User communications

For any component users, please advise them that the new items will be shown in the header bar. Like this

The screenshot shows a red header bar with a dropdown menu set to 'Enterprise', a 'Select' button, the number '27', a 'LOSS' button, and a 'PRESS' button. Below the header is a grid of filter buttons for three categories: BUSINESS CASE, BUYING CRITERIA, and CONTACT LEVEL. The 'IDENTIFIED' button under BUSINESS CASE is selected. A text input field next to it contains 'notes here'. The 'GENERIC' button under BUYING CRITERIA and the 'NONE OR RELUCTANT' button under CONTACT LEVEL are also selected. A 'Save' button is located at the bottom center of the grid.

Now instead of just the DealSheet index on the page, they also see the associated RISK for that opportunity in their pipeline/forecast.

If they have selected a deal strategy this will show too. If they have not selected one of the six strategies, it will not be shown on the component.

Advise users that the CANCEL button is now CLOSE but works in the same way

The user guide has been updated

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