
The following updates have been made to AccountPlan

Version : 1.60

Updated:

1. Visibility controls for independent switching on and off for the financial charts
2. Added new account contracts functionality. Both as a page in the customer section of AccountPlan and also as a separate component that can be added to the Account page in Salesforce. This replaces functionality previously held in the Landscaping pages and as a result, the renewal date and competitor fields have been removed. In contracts you can capture the existing contract landscape for an account
3. New fields have been added to the revenue and order landscaping pages to allow for a simple future outlook on revenue trends. This allows for the Plan date +1 year and +2 years to be captured - this provides a three year view of the revenue trend.

plus minor bug fixes.

Upgrade package link

<https://login.salesforce.com/package/installPackage.apexp?p0=04t1v000002KRdo>

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. Review the 'AP Visibility' tab and ensure that the new page structure is included in your AccountPlan types as needed. If necessary add new pages to the layouts.
4. If you would like to add the account page component for the Contracts, review section 5 of the implementation guide for the steps to add this to the page.
5. To pre-populate suppliers into the contracts - follow the implementation guide to centrally add the most important competitor suppliers and also your company as an option (for when you have the contract). Users can add new ones in addition but this would help to provide the main ones used.

Following this activity, the application will be upgraded. Reference : [Installation guide](#)

Notes for User communications

This latest version of AccountPlan allows you to track the contract landscape for your account more easily. Simply capture the information as you learn it and this can be used in reporting to track potential opportunities.

The user guide has been updated

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