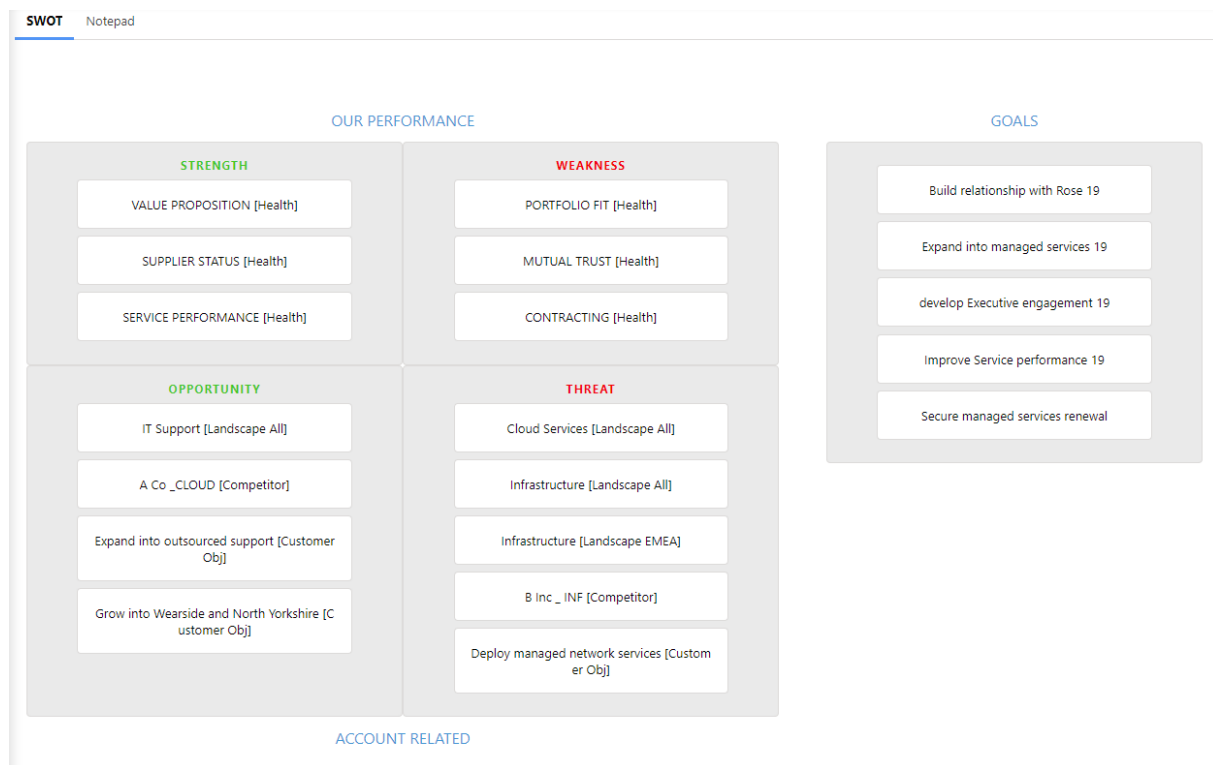

The following updates have been made to AccountPlan

Version : 1.65

Updated:

1. **Customer overview** page
 - a. In future should there be no Business units identified in the set-up page, this part of the page will be automatically hidden from the page.
 - b. A new field has been added to the customer overview page - "Their customers" can be used to capture information about the main customers, markets and accounts for this particular account. This was added based on user requests.
2. **AccountPlan visibility for Status page** the components for Account Impact and Account Development, available on the Customer Status page, can now be toggled on/off for specific account plan types. For example if you do not want to see one or both on an accountplan type you have defined, the admin can toggle these off in APVisibility and users will no longer see these elements on the page.
3. **Goals** page - based on user feedback and usage, the following items have been removed from the goals page and users will no longer see, or have access, to these. As a result the addition of a goal for a user should be simplified.
 - a. Key contact
 - b. proposition
 - c. incremental value & cost
 - d. SWOT area
4. **Activity pages** - Kanban pages have been renamed as Cards. The functionality remains the same the rename is in the page titles only.
5. **Summary SWOT page** - The layout has changed. The SWOT element is displayed as a traditional SWOT analysis. The goals have been separated as a single list of goals associated with the plan. This is shown below.



plus a number of minor bug fixes.

Upgrade package link

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1v000001pIdQ>

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 you turn on the Account Impact and Account Development components for those accountplan types requiring them to show on the page. The default is that they will not show.

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

User communications

Please communicate this internally to users and also the helpdesk teams, so they are aware of the changes should a user call with a ticket.

The user guide has been updated and can be accessed via the AccountPlan application, or here: <http://outsde.in/APUser>

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