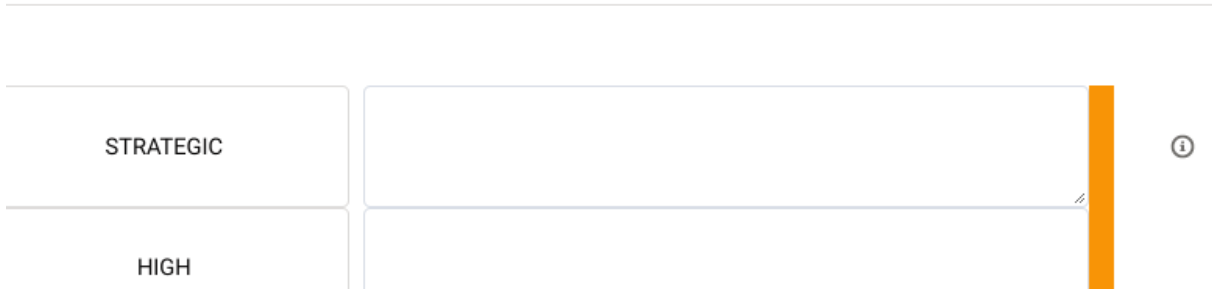


The following updates have been made to DealSheet

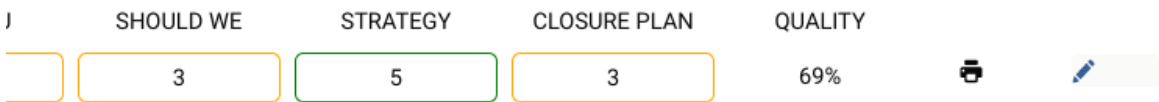
**Version : 2.32**

This package contains bug fixes identified in Winter 22 and some added user interface changes

- 1. Fixes have been implemented to address bugs identified since moving to Winter 22 Salesforce version; including, that the Index score was not updating (or changing to zero) when DealSheet is updated
- 2. Since the last upgrade of DealSheet, a superuser is now able to add a URL link to each question. This allows an internal intranet or external page to be linked to each question. In this version we update the icon as shown below.



- 3. On the same DealCoach summary page, some changes (Shown below)
  - a. In DealCoach, the overall quality of the opportunity plan is scored throughout by the manager. In the summary page, the previous title “Rating” has changed to “Quality” to reflect that the score is a measure of the perceived quality of the review.
  - b. the prior edit and delete links have been replaced by icons.



## 4. Closure plan page.

If you use templated closure plans to automatically create a list of tasks and events, there are some changes.

If you don't have preset closure plans these changes will be hidden from the users:

- the headings have been updated to emphasise that this is a templated closure plan.
- The user can continue to edit the tasks and events in line. The SAVE button will only show if something has been changed, otherwise it will not show in the page.
- The red button to DELETE has been replaced with an icon (not shown)

START CONTACT MAP ASSESS BUYING CRITERIA STRATEGY **CLOSURE PLAN** TIMELINE DEALCOACH

Closure Plan Templates

Select a Closure Plan Templates ▼

☐ Show all

## Tasks

5. The list of Tasks/Events can be filtered easily to show only open activities. The toggle switch defaults to 'show all' but the option to toggle this to 'open only' where all closed tasks and past events are hidden (Shown above with closure plan and below without).

START CONTACT MAP ASSESS BUYING CRITERIA STRATEGY **CLOSURE PLAN** TIMELINE DEALCOACH

☐ Show all

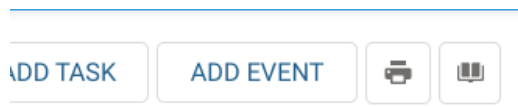
Tasks

Subject	Status	Due Date	
Add example Task	Completed		D
Add example Task	Not Started	22 May 2021	r

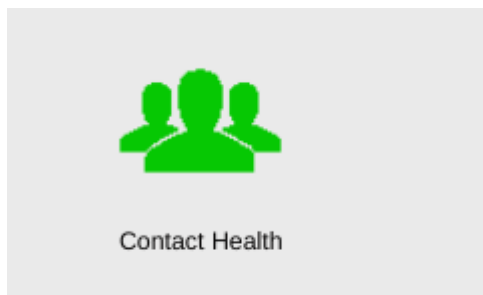
6. Adding a new task and event.
  - a. The user experience has been improved. No longer, after adding a new task or event, is the user taken to the task or event page. Now the addition of a task and event happens within DealSheet and the user remains on the page they were on before.
  - b. When a new task or event is added, the list is updated automatically.
7. The deal story related fields have an updated icon , shown below.



8. The PRINT button has been changed to an icon



9. The contact health title on the strategy component/page has been updated



10. DealCoach captures a record of deal coaching reviews and users can use this to track when reviews have happened. Therefore a field on the start page - *DealSheet reviewed date* - has been removed from the page. The field remains in the package and can continue to be used on the opportunity page, or in workflows.
11. The 'Buying Criteria' page has been elevated from the Assess sub-menu to the main navigation bar. This emphasises the value of understanding the customer's buying criteria and your differentiation.

The assess menu is now four pages.



12. For admins - on installing DealSheet for the first time, the DealSheet Set Up page's words and links have been updated. Including new links to the installation guide.

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### **Upgrade package link**

<https://login.salesforce.com/package/installPackage.apexp?p0=04t0I000000XcZe>

### **Notes for upgrade process:**

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

1. Select upgrade "for Admins only"
2. If needed communicate changes to users

Following this activity, the application will be upgraded.

END OF DOCUMENT