The following updates have been made to AccountPlan

Version : 1.667

This package contains some new functionality and bug fixes identified in Winter 22 Salesforce release

1. **Goal RAG indicators in SWOT page** view - addition of a Red-Amber-Green status bar on each goal when viewed in the app. This is the same as the bar in the Goals page
2. **Activity filters** -in the filter area of the activity pages it is not possible to select which tasks and events to view. The user can toggle between the following states (and their selection is saved for them)
    a. All Account - shows ALL activities created against the account.
    b. Account plan - shows only activities created inside the AccountPlan application (using the buttons in the header)
3. Admins can select the **Default FY selection** for the org. If nothing is selected, the default is to the current Financial year defined for the org. But the admin can override this in set up to allow for different settings to be used. For instance, if in November you want the team to focus on their plans for the next financial year the default view will change to this. (instructions below and also in the installation guide)
4. **Notification** update - updated notification when a financial year's plan does not exist. Specifically informing the user that they do not have a plan created for the financial year set in default/current.

Notes for upgrade process:

If we push the update then none of this is required.

For customers manually upgrading the package - use this package link

https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1v000002NaMN

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.

4. If you want to set a default Financial Year for the users, follow the installation guide here

Following this activity, the application will be installed/upgraded. Reference : Installation guide

Further guidance for admins: To change the default FY in use for your org.

The Admin can select the default financial year that is used in the org. This means that when the focus of the sales organisation moves from one year to the next, it is possible to default the selected account plan to the year required.

For example - if you are in October 2021 and want the teams to default to next years plan. You can select FY2022 and this will automatically update the plan that is opened to 2022.

In Set up -> Custom Settings ->

Manage (Selected Financial Year) ->

Edit -> Enter the Name of the Financial Year (exactly as you defined it) ->

Save

If the name of the FY is not defined or defined incorrectly then the code will take the current year in both classic and lightning versions. Please remember to communicate this with users who can manually select a different plan year in set-up.

User communications

Communicate the activity filter process and point them toward the updated user guide.

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