outside in

The following updates have been made to AccountPlan

Version : 1.669

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

1. **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 AccountPlan 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
2. **Contracts component** -   a fix for the supplier picklist which was not able to be viewed

Notes for upgrade process:

For customers manually upgrading the package - use this package link

https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1v0000028RHk

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

If you have more than one version to upgrade, be sure to read the prior release notes too.

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 all fields and pages are visible as you need them to be for each account plan type.

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

User communications

Optional, not essential.

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