

New Navigation and Fresh Look

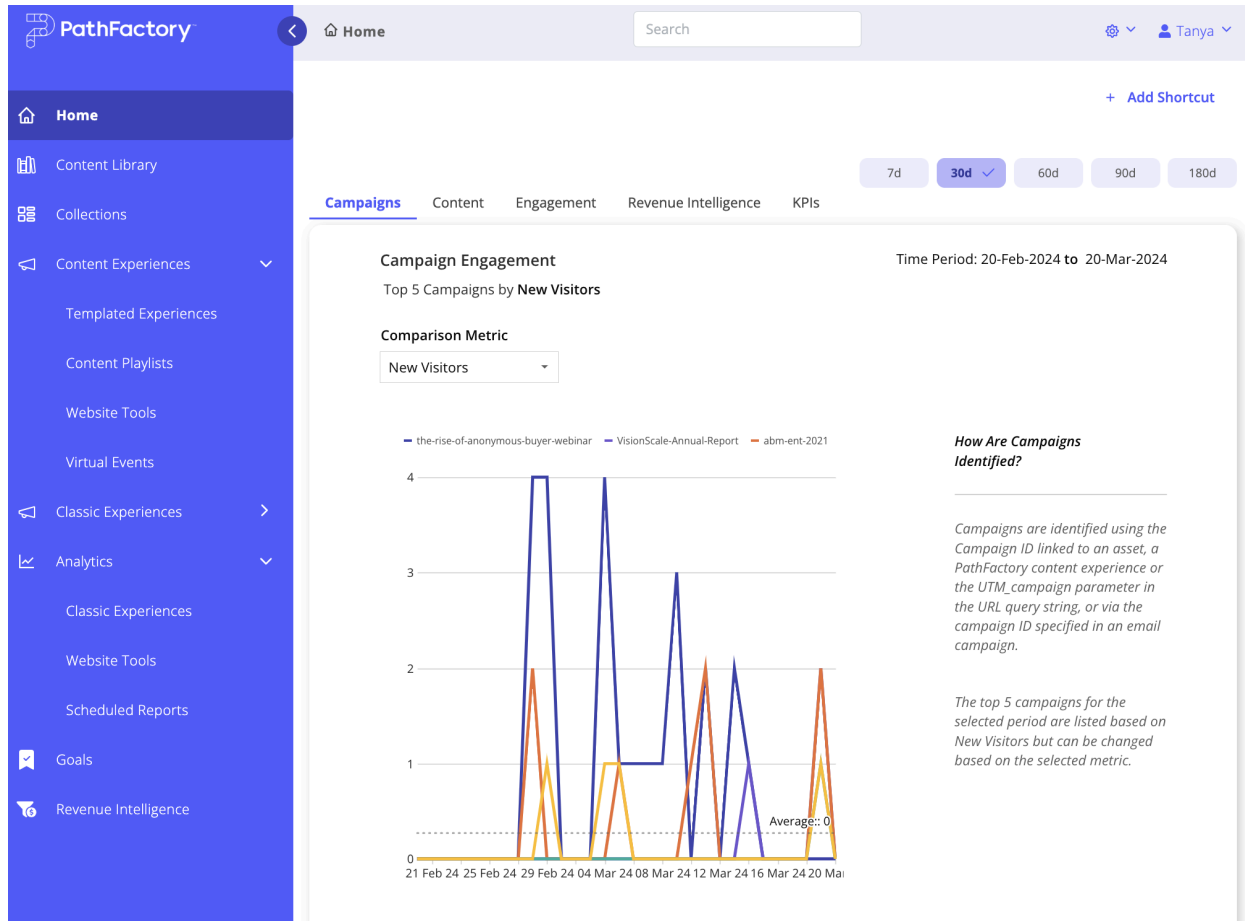
Introducing the Enhanced Navigation and Refreshed Look & Feel of PathFactory!

Whether you're a seasoned user or just getting started, you'll find that these updates streamline your workflow, allowing you to focus on what truly matters – unlocking the full potential of your content creation journey.

We are thrilled to present an exciting transformation to PathFactory with our latest updates to navigation and style. While we've kept the familiar menu names that you know and love, and we've taken strides to enhance the efficiency of your work flow and breathe new life into our visual appeal. You'll notice that the main navigation menu is located along the left side of the screen instead of along the top. You'll also see we have rearranged the menus to provide a more intuitive flow. Read the sections below to find out more about PathFactory's latest user interface.

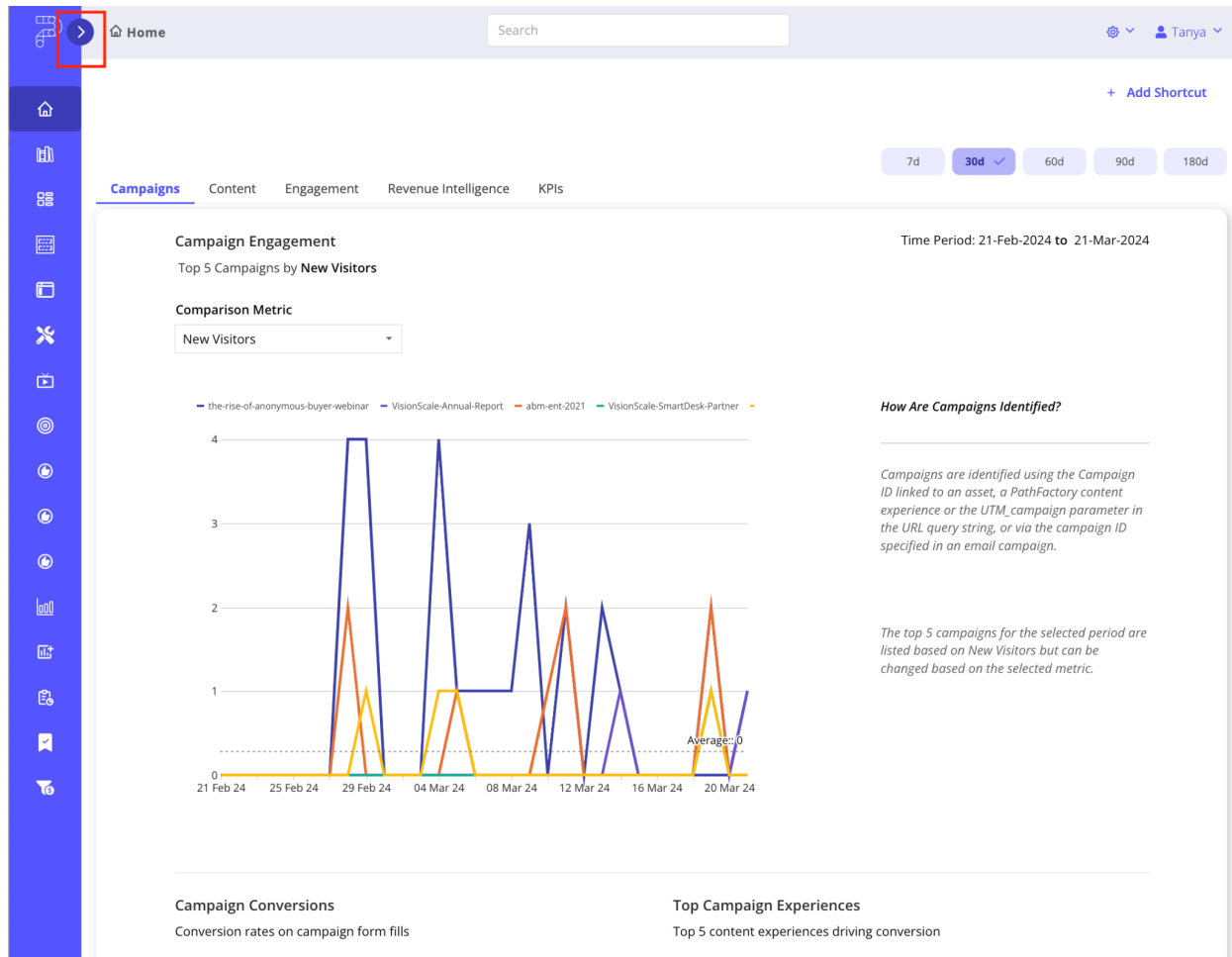
Homepage

Take a look at our new Homepage below.



Note: The legacy user interface will remain available. When you are ready to move to the upgraded user experience, your PathFactory customer success and support team will guide you through the process.

To close or open the left menu panel as needed, click on the arrow on the top left of the screen, as highlighted in the screen capture below.



Homepage Analytics

PathFactory's enhanced homepage now offers a comprehensive suite of analytics dashboards and filterable views. These tools help marketers understand audience engagement, content performance, and overall campaign effectiveness.

For detailed insights and instructions, refer to the full article, [Introduction to PathFactory Homepage Analytics](#).

Settings Menu

The Settings menu is still in the upper right corner of the screen and its menu items are unchanged as shown below.

Home

Search

Tanya

Engagement

Accounts Cohorts by

Category Industry Account

General

User Experience

Data Configurations

Classic Experiences

Virtual Events

Image Library

Appearances

Webhooks

Track Labels

Widgets

External Code

Languages

Visitor Activities

Access Protection

Links & Sharing

Content Tags

Form Library

Personalization

CTAs

Themes

Accounts ranked and grouped by aggregate engagement score

Fire

Cold

Warm

Hot

Fire

Cold

Warm

Hot

15

13

9

5

Number of Accounts

How to read this chart :

Account-level engagement scores are based on a percentile ranking using aggregate engagement for all visitors from the account.

Accounts in the Fire group form the top 10% percentile ranking

Category / Account Name	Industry	No of Visitors	Total Asset Views	Total Time Known(HH-MM:SS)	Change K	Bounce Rate	Total
Fire		227	1,268	06:55:30	-22.74%	0.00%	
Pathfactory		55	593	02:14:11	5.53%	0.00%	
Undefined		43	112	00:00:00	0.00%	0.00%	
Acme.Com		13	53	00:29:44	-42.38%	0.00%	
Gekko.Com		8	40	00:22:28	-31.40%	0.00%	
Globex.Com		8	38	00:20:57	-26.32%	0.00%	
Dunder.Com		7	34	00:19:39	-25.94%	0.00%	
Hooli.Com		7	39	00:21:53	-22.86%	0.00%	
Initech.Com		7	34	00:18:08	-42.13%	0.00%	
Centric.Com		6	26	00:15:07	-16.25%	0.00%	
Cyberdine.Com		6	16	00:09:35	-51.48%	0.00%	
Duff.Com		6	17	00:09:19	-43.48%	0.00%	
Umbrella.Com		6	18	00:09:41	-40.71%	0.00%	
Bluth.Com		5	17	00:10:46	-39.11%	0.00%	
Soylent.Com		5	14	00:07:39	-58.12%	0.00%	
Pied.Com		4	49	00:27:23	-2.26%	0.00%	

Definitions

Account Groups : Fire >= 90th percentile, Hot =75th-89th percentile, warm = 50th-74th percentile, cold is < 50th percentile

Engagement Score = Measures the effectiveness of a content engagement from buyers.

In the following sections is a brief description of each top-level menu item on the left panel.

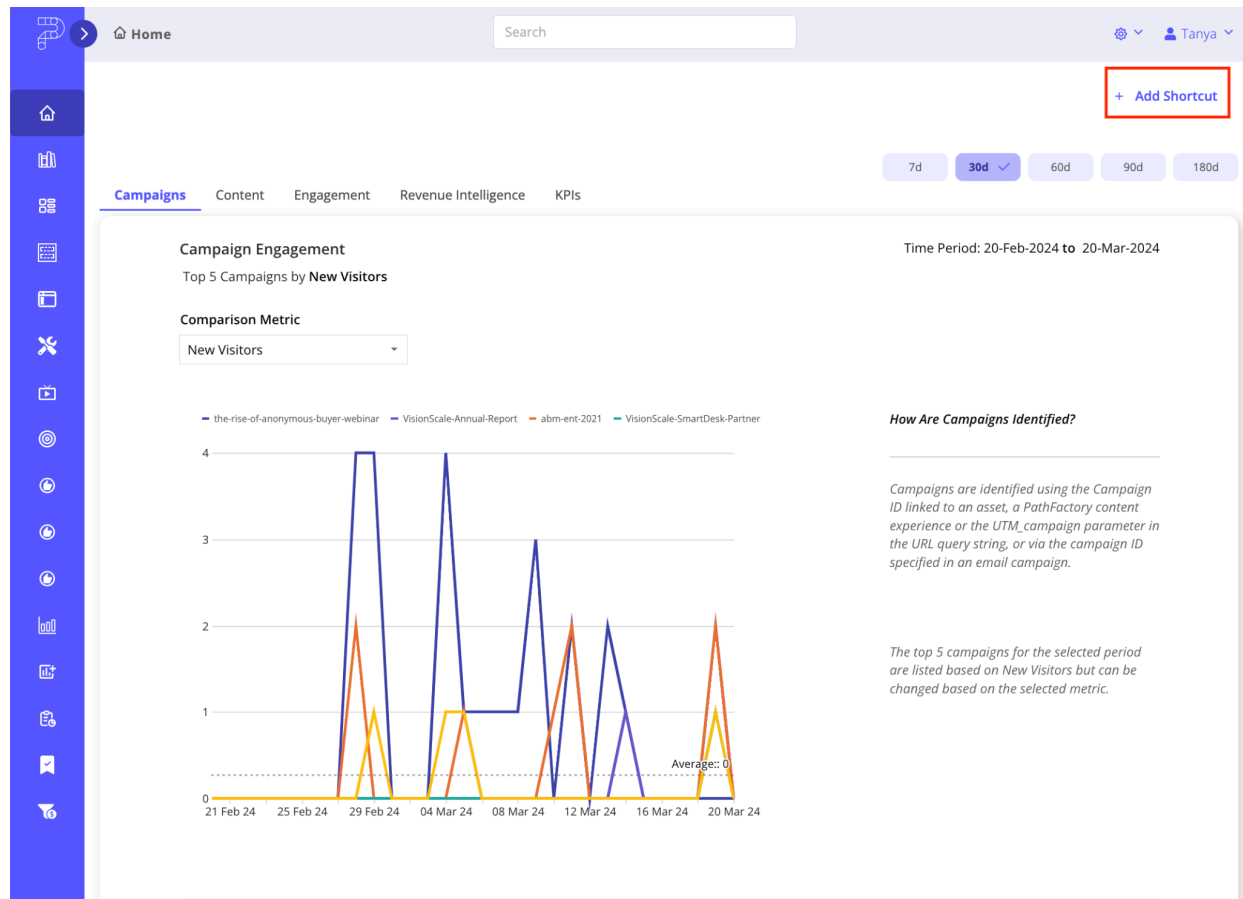
Shortcuts

In addition to analytics views, the new Homepage lets you add custom shortcuts at the top of the page to allow quick access to the PathFactory tools you use the most. You can add up to four shortcuts. Once you've added shortcuts you may want to edit or delete them occasionally. Read the sections below to find instructions on how to add, edit, and delete shortcuts on the Homepage.

How to Add a Shortcut

To add a shortcut, follow these steps.

1. Click **Add Shortcut** as shown below.

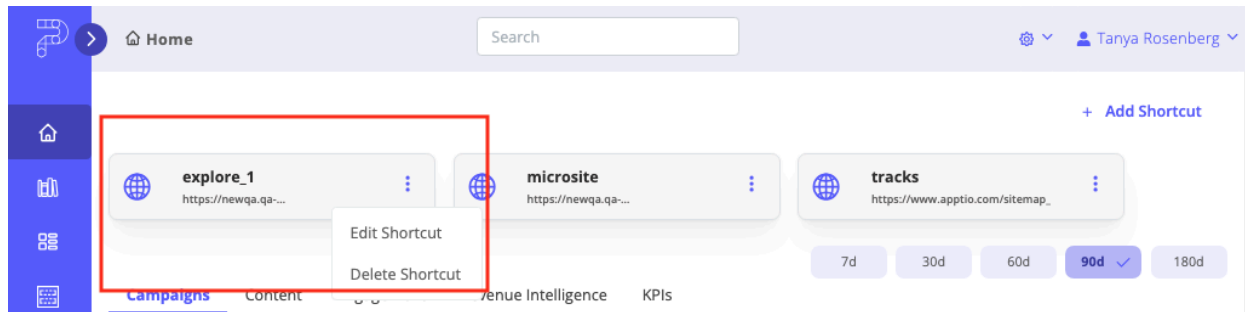


2. Follow the prompts to set up the new shortcut.

How to Edit or Delete a Shortcut

To edit a shortcut to point to a different function or to delete it, follow these steps.

1. Click the shortcut's associated **three dots**.
2. In the menu that appears, select **Edit Shortcut** or **Delete Shortcut**, as shown in the example below.



3. Follow the prompts to complete the edit or deletion.

Content Library

The PathFactory Content Library serves as your go-to hub for storing, organizing, and managing all the digital content assets crucial to your content marketing strategy. It acts as a centralized repository where you can curate, categorize, and access a wide array of content types, including owned, earned, and third-party content, in various formats such as articles, videos, whitepapers, webinars, and more.

The screenshot shows the PathFactory Content Library interface. It features a sidebar on the left and a main content area with a search bar and a user profile dropdown. The main content area displays a table of assets with the following columns: Name, Source, Date Published, Date Updated, and Updated By. The table contains 15 rows of assets, each with a checkbox, a thumbnail, a title, a source, and dates. The table is filtered by 'All Assets' (108) and includes buttons for 'Show Filters', 'Library Insights', and 'Add Assets'.

Name	Source	Date Published	Date Updated	Updated By
<input type="checkbox"/> Locking in predictable revenue: Gong takes Piano's forecast accuracy to 90%	Website URLs	2024-04-22 2:24 pm	2024-04-22 2:25 pm	TimBC
<input type="checkbox"/> Use Cases For Path Factory Data In Marketo	File Upload	2024-03-22 11:41 am	2024-03-22 11:43 am	jennasmith
<input type="checkbox"/> Vision Scale Total Economic Impact (TEI) ROI Calculator	Website URLs	2023-09-28 10:34 am	2024-03-19 10:06 pm	jennasmith
<input type="checkbox"/> Martechify Total Experience: Connecting Online and Offline Channels	Website URLs	2024-03-18 5:36 pm	2024-03-18 5:37 pm	TimBC
<input type="checkbox"/> LinkedIn Post Embed	Website URLs	2024-02-20 4:53 pm	2024-03-11 7:04 pm	TimBC
<input type="checkbox"/> The Cloud Operating Model: Advancing Capabilities and Control Across the Digital Infrastructure	File Upload	2024-02-29 7:20 am	2024-03-11 7:04 pm	mohit
<input type="checkbox"/> Futurum Research: The Future of Cloud is the Network	File Upload	2024-02-29 7:44 am	2024-03-11 7:04 pm	mohit
<input type="checkbox"/> LeadNutureChklist_2pger.indd	File Upload	2024-02-27 1:08 pm	2024-03-11 7:03 pm	NA
<input type="checkbox"/> Beyond SEM: A More Direct Path to Buyers	Website URLs	2022-03-16 11:06 am	2024-03-11 6:30 pm	Tanya
<input type="checkbox"/> Cisco Secure Infographic	File Upload	2024-03-01 1:13 pm	2024-03-01 1:14 pm	mohit
<input type="checkbox"/> Intel 5G Network Vision	File Upload	2024-03-01 1:13 pm	2024-03-01 1:13 pm	mohit
<input type="checkbox"/> Why Your Business Deserves Better Security	File Upload	2024-03-01 1:12 pm	2024-03-01 1:13 pm	mohit
<input type="checkbox"/> Accelerate your transition to a more sustainable Data Center	Website URLs	2024-02-20 1:11 pm	2024-02-20 1:13 pm	mohit

Overview

The Content Library provides you with the following benefits.

- **Storage and Organization** - At its core, the Content Library provides you with a secure and centralized space to store all your content assets, ensuring easy access and efficient management. You have the flexibility to organize content within the library using customizable folders, tags, or metadata, making it simple to categorize assets based on topics, formats, audiences, or any other relevant criteria.
- **Content Accessibility** - The Content Library acts as your single source of truth for content, enabling you to easily discover and access relevant assets whenever you need them. Whether you're a sales rep looking for product brochures, a marketer searching for case studies, or a customer seeking educational resources, the Content Library ensures that you have access to the right content at the right time.
- **Content Governance and Compliance** - With robust governance capabilities, the Content Library enables administrators to enforce access controls, permissions, and compliance policies to ensure that sensitive or regulated content is securely managed and accessed only by authorized users. This helps maintain data privacy, security, and compliance with industry regulations and standards.
- **Content Lifecycle Management** - The Content Library supports the entire content lifecycle, from creation and storage to distribution and retirement. You can easily track the performance and usage of content assets, retire outdated or underperforming content, and strategically plan for content refreshes or repurposing efforts based on analytics and insights gathered from the library.

Custom Categories and Content Tags

We have added functionality so that you can create custom categories to manage your content assets more effectively. This allows you to go beyond the default categories provided by PathFactory and tailor the organization of your content to better suit your specific needs and workflows.

Content Tags within the categories (default and custom) and can be added to both default and custom categories. By tagging your assets with relevant keywords or phrases, you can easily categorize and filter your content based on topics, formats, audiences, or any other criteria important to your content strategy. This ensures that you and your team can quickly access the right content at the right time, improving efficiency and content utilization.

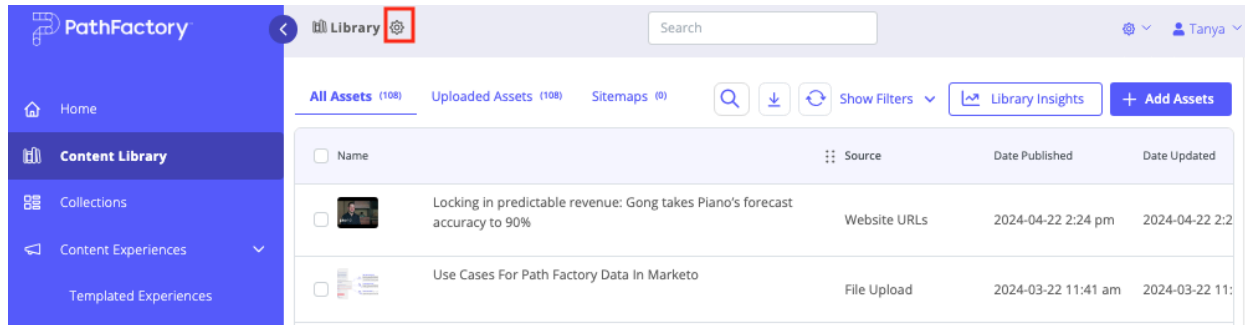
You can also edit which fields are mandatory to complete when uploading a content asset to the Content Library. To do this, follow these steps:

1. Select the **Content Library** tab from the side panel menu.

The screenshot displays the PathFactory Content Library interface. The left sidebar is a blue navigation menu with the 'Content Library' tab highlighted. The main content area shows a table of assets. The table has the following columns: Name, Source, Date Published, Date Updated, Updated By, Content Type, and Media Type. The table lists 18 assets, including 'Nook Home Page - PathFactory', 'Testing Loom with Countdown Timer', 'Product Scan Overview 1 Pager', 'Forrester Report: Artificial Intelligence Technologies An...', 'Locking in predictable revenue: Gong takes Piano's forecast...', 'Use Cases For Path Factory Data In Marketo', 'Vision Scale Total Economic Impact (TEI) ROI Calculator', 'Martechify Total Experience: Connecting Online and Offlin...', 'LinkedIn Post Embed', 'The Cloud Operating Model: Advancing Capabilities and...', 'Futurum Research: The Future of Cloud is the Network', 'LeadNutureChk1st_2pger.indd', 'Beyond SEM: A More Direct Path to Buyers', 'Cisco Secure Infographic', and 'Intel 5G Network Vision'. The bottom of the table shows pagination controls: '<< Previous 1 2 3 Next >>' and '50 per page'.

Name	Source	Date Published	Date Updated	Updated By	Content Type	Media Type
Nook Home Page - PathFactory	Website URLs	2024-05-14 4:56 pm	2024-05-14 4:56 pm	Tanya	NA	webpage
Nook Home Page - PathFactory	Website URLs	2024-05-14 4:32 pm	2024-05-14 4:42 pm	Tanya	NA	webpage
Testing Loom with Countdown Timer	Website URLs	2024-05-07 5:51 pm	2024-05-07 5:51 pm	TimBC	NA	webpage
Product Scan Overview 1 Pager	File Upload	2024-05-03 7:01 pm	2024-05-03 7:02 pm	TimBC	Product Page	pdf
Forrester Report: Artificial Intelligence Technologies An...	Website URLs	2022-03-16 11:04 am	2024-05-03 6:09 pm	TimBC	Report	pdf
Locking in predictable revenue: Gong takes Piano's forecast...	Website URLs	2024-04-22 2:24 pm	2024-04-22 2:25 pm	TimBC	Blog Post	video
Use Cases For Path Factory Data In Marketo	File Upload	2024-03-22 11:41 am	2024-03-22 11:43 am	jennasmith	NA	pdf
Vision Scale Total Economic Impact (TEI) ROI Calculator	Website URLs	2023-09-28 10:34 am	2024-03-19 10:06 pm	jennasmith	Blog Post	webpage
Martechify Total Experience: Connecting Online and Offlin...	Website URLs	2024-03-18 5:36 pm	2024-03-18 5:37 pm	TimBC	Video	video
LinkedIn Post Embed	Website URLs	2024-02-20 4:53 pm	2024-03-11 7:04 pm	TimBC	NA	webpage
The Cloud Operating Model: Advancing Capabilities and...	File Upload	2024-02-29 7:20 am	2024-03-11 7:04 pm	mohit	Report	pdf
Futurum Research: The Future of Cloud is the Network	File Upload	2024-02-29 7:44 am	2024-03-11 7:04 pm	mohit	Report	pdf
LeadNutureChk1st_2pger.indd	File Upload	2024-02-27 1:08 pm	2024-03-11 7:03 pm	NA	NA	pdf
Beyond SEM: A More Direct Path to Buyers	Website URLs	2022-03-16 11:06 am	2024-03-11 6:30 pm	Tanya	Video	video
Cisco Secure Infographic	File Upload	2024-03-01 1:13 pm	2024-03-01 1:14 pm	mohit	Infographic	pdf
Intel 5G Network Vision	File Upload	2024-03-01 1:13 pm	2024-03-01 1:13 pm	mohit	Guide	pdf

2. Next, select the gear icon next to the title of the **Library** page. For your reference, the gear icon is highlighted in the screen capture below.



3. Activate the checkboxes according to how categories are used, including making them mandatory if needed. The options available are as follows:
 - **Required** - The field is mandatory for saving the content asset.
 - **Shown on Other Configurations** - These fields will appear on the Other Configurations tab. On this tab, you can add attributes to the content asset, such as SEO Title, Canonical URL Override, Name, and more.
 - **Shown on Quick Pane** - The field will be visible in the right-side menu, whenever you are editing the attributes of a content asset.

- Home
- Content Library
- Collections
- Content Experiences
 - Templated Experiences
 - Content Playlists
 - Website Tools
 - Virtual Events
- Classic Experiences
 - Target
 - Recommend
 - Explore
 - Microsite
- Analytics
- Goals
- Revenue Intelligence

Search

Tanya

Configure Library Fields

Library

Field Name	Field Group	Field Type	Required	Show On Other Configuration	Show On Quick Pane
Topics	Internal Configuration	Select list (multiple choices)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Title	Public Configuration	Text field (single-line)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Thumbnail	Public Configuration	Image picker	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Solution	Internal Configuration	Select list (multiple choices)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Seo Title	Public Configuration	Text field (single-line)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Product	Internal Configuration	Select list (multiple choices)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Persona	Internal Configuration	Select list (multiple choices)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Name	Internal Configuration	Text field (multi-line)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Language	Internal Configuration	Select list (single choice)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Industry	Internal Configuration	Select list (multiple choices)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Funnel Stage	Internal Configuration	Select list (multiple choices)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
External ID	Internal Configuration	Text field (single-line)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Expiry Date	Internal Configuration	Date picker	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Estimated Cost	Internal Configuration	Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Description	Public Configuration	Text field (multi-line)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Custom URL Slug	Public Configuration	Text field (single-line)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Content Type	Public Configuration	Select list (single choice)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Content Engagement Score	Content Engagement Score	Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Canonical URL override	Public Configuration	Text field (single-line)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Business Units	Internal Configuration	Select list (multiple choices)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Cancel

Save

- After you have finished editing the categories, to lock in your changes click **Save**. To return to the Content Library without saving your work, click **Cancel**.

Collections

Collections are pools of content you can create manually or set up rules to create automatically, drawing from the Content Library.

Collection Name	Description	Collection Type	Date Published	Date Updated	Updated By
target_003	NA	Track	2024-01-09 5:51 am	2024-01-09 6:00 am	Anitha
Teja REC dec 2023-recommend	NA	Track	2023-12-12 1:16 pm	2024-01-09 4:50 am	tejanewqa
sgt_target_176	NA	Track	2023-12-19 7:19 am	2024-01-09 2:20 am	santoshi
Reg175-recommend	NA	Track	2023-12-05 4:54 am	2024-01-09 12:30 am	nagireddy
Target_002	NA	Track	2024-01-07 11:56 pm	2024-01-08 12:10 am	Anitha
bm-col-1	bm-col-1	Smart	2023-11-27 4:01 pm	2024-01-08 12:00 am	bhanu
smart	test	Smart	2023-11-24 4:55 am	2024-01-08 12:00 am	santoshi
Regression1	Regression1	Smart	2023-10-25 7:01 am	2024-01-08 12:00 am	mahender
ChatFactory - smart collection	for CF - all pathfactory-tracking-test2 ...	Smart	2023-10-20 3:06 pm	2024-01-08 12:00 am	tejanewqa
Test5_4	Test5_4	Smart	2022-05-10 9:06 am	2024-01-08 12:00 am	NA
smart_1234567	test1234567	Smart	2023-11-24 5:02 am	2024-01-05 1:40 pm	santoshi
test2213	test	Smart	2023-08-06 9:30 pm	2024-01-05 11:30 am	NA
Smart-M-collection	Understanding the domain of the test...	Smart	2023-07-19 11:10 pm	2024-01-05 11:30 am	NA
test-alex-2023	test	Smart	2023-07-05 11:14 am	2024-01-05 11:30 am	NA
test	test	Smart	2023-06-08 11:00 am	2024-01-05 11:30 am	NA

To learn more about Collections, read [How to Create and Use Collections for Templated Experiences](#).

Content Experiences

By clicking on its associated arrow to expand this menu section, you see all of the following options available.

- **Templated Experiences** - Templated Experiences are digital experiences that are easy-to-build, design and configure using a WYSIWYG (i.e., what you see is what you get) editor to create Content Pages and Landing Pages. To find out more about creating, managing and using them, read [Introduction to Templated Experiences](#).
- **Content Plays** - In this menu you can see a list of Content Playlists (formerly known as Content Tracks) that have been created by users in your organization. The functionality and folder structure remains the same as in Templated Experiences, but you can see the different experience types at a glance.

- **Website Tools** - Website Tools automatically analyzes website content, shows you who is engaging on your site and how they're engaging, and intelligently recommends the next best content to visitors. Website Tools addresses the need for visitors' self-exploration and education, which accelerates the buying journey. To find out more, read [Introduction to Website Tools](#).
- **Virtual Events** - PathFactory's Virtual Event Experience (VEX) leverages all of PathFactory's existing content activation features, and sits as a new immersive online events module within PathFactory. To find out more, read [Introduction to Virtual Event Experiences](#).

Classic Experiences

By clicking on its associated arrow to expand this menu section, you see the following options available.

- **Target** - Target Tracks are collections of content that you have selected and organized in order to give your visitors a specific content journey. Find out more by reading [Introduction to Target](#).
- **Recommend** - Recommend Tracks are collections of content specifically selected by you, and which rely on machine-learning to suggest the ideal content to show your prospects based on what they are already viewing. Find out more by reading [Introduction to Recommend](#).
- **Explore** - Explore Pages allow your visitors to quickly view all content assets in a content track. Each Explore Page you create is built on top of an existing Target or Recommend Content Track. Find out more by reading [Introduction to Explore](#).
- **Microsite** - Microsite builder expands on how Explore pages are used by PathFactory customers and improves on Explore with a more robust and advanced feature set. Find out more by reading [Use The Microsite Builder](#).

Analytics

Analytics within PathFactory offers a comprehensive view of your content journey, leveraging the Snowplow tracking model and unified data views across all PathFactory experiences. These analytics provide valuable insights into how content consumption impacts your PathFactory experiences.

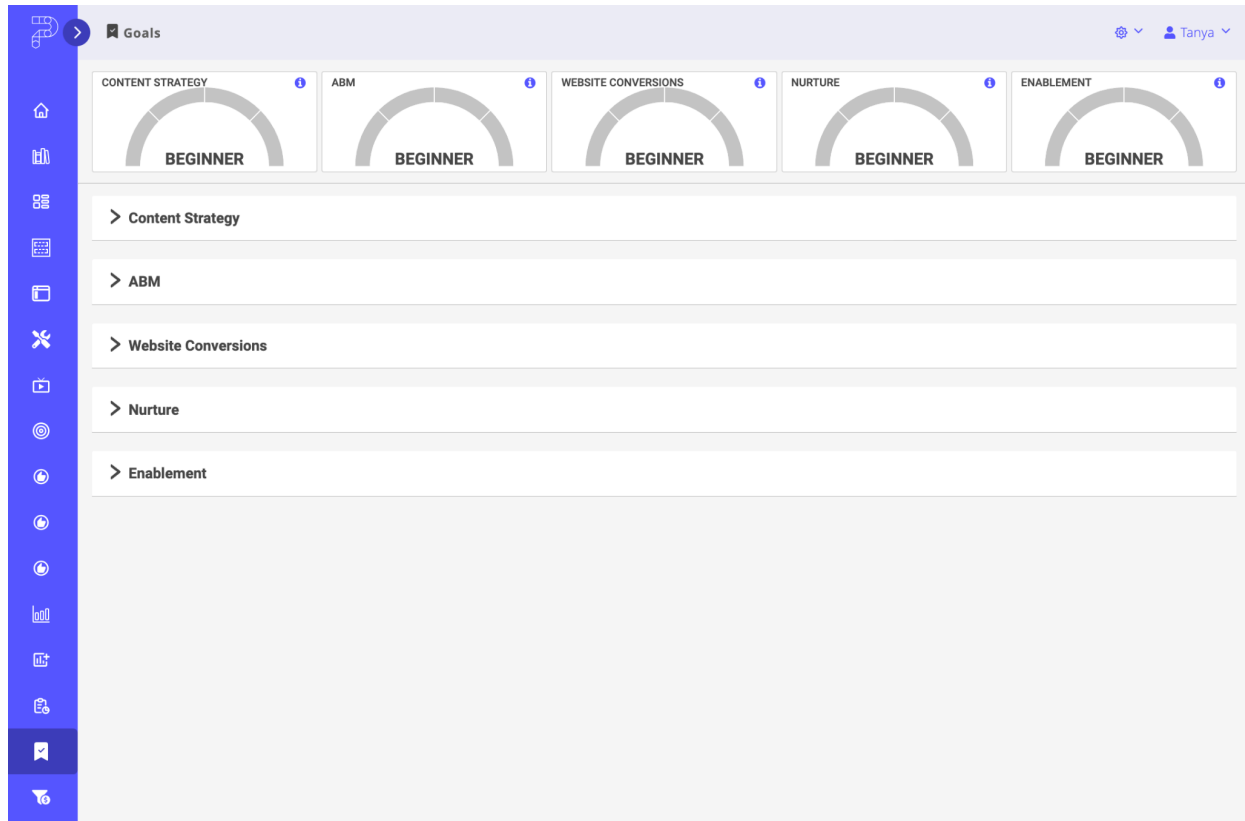
This menu item contains the following sub-menus:

- **Utility Reports** - This sub-menu provides essential reports for monitoring and optimizing your content performance. From engagement metrics to content effectiveness, utility reports offer valuable insights to guide your content strategy.
- **Unified Track Analytics** - These metrics offer in-depth insights into track performance, folder analytics, and overarching trends across all tracks and folders. Additionally, this section provides an engagement summary for both visitors and accounts, allowing you to understand audience behavior and tailor content experiences accordingly.
- **Website Tools** - This sub-menu equips you with powerful tools for analyzing website content and visitor engagement. From identifying who is engaging with your site to understanding how they interact with your content, website tools empower you to optimize your online presence and enhance the user experience.
- **Scheduled Reports** - Scheduled reports are automated reports that gather specific information and deliver it to predefined audiences or groups. Whether it's sharing key performance indicators with stakeholders or providing detailed analytics to your marketing team, scheduled reports ensure that relevant insights are distributed efficiently, keeping your team informed and aligned with your content strategy.

Goals

In your organization's journey with PathFactory, goals play a pivotal role as predefined targets or milestones that you aim to achieve within your visitors' content journey. These goals represent strategic objectives aligned with the desired outcomes of engaging with PathFactory's content experiences and analytics.

In essence, in your journey with PathFactory, goals serve as strategic compass points, guiding your content efforts toward achieving desired outcomes across various facets of your content strategy, from ABM and website conversions to lead nurturing and sales enablement. By setting clear goals and leveraging PathFactory's analytics capabilities, you can measure progress, optimize performance, and drive meaningful results in your content journey.

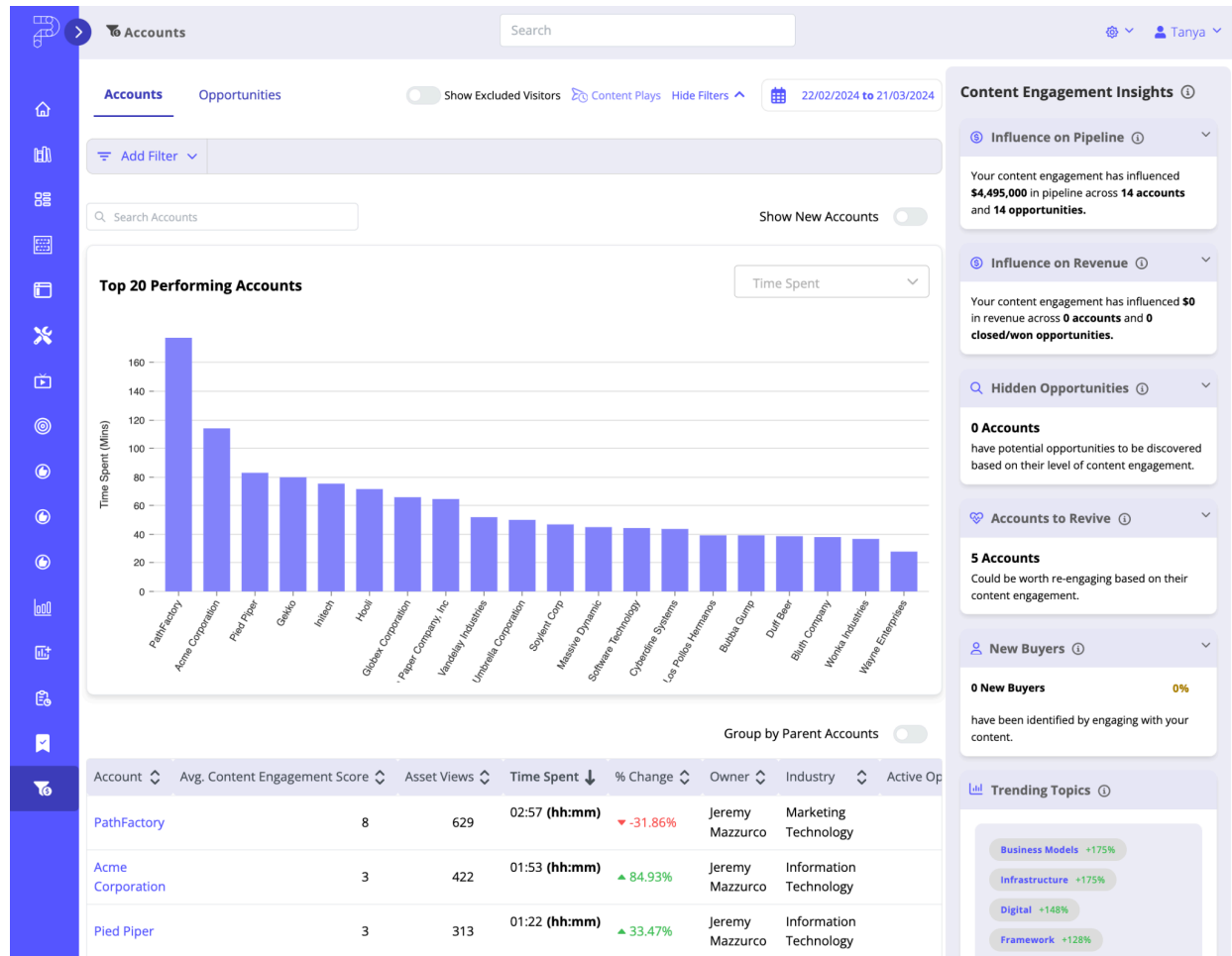


- **Content Strategy** - In crafting your content strategy, goals act as guiding stars, illuminating the path toward creating, distributing, and optimizing content that resonates with your target audience. Whether you're focused on increasing engagement metrics, driving lead generation, or nurturing prospects through the sales funnel, setting content strategy goals ensures that your efforts are purposeful and aligned with overarching business objectives.
- **Account-Based Marketing (ABM)** - Within your ABM initiatives, goals become essential in tailoring content experiences to specific target accounts or industries, aiming to deepen engagement, foster relationships, and drive conversions within key accounts. Your ABM goals might include metrics such as account engagement levels, pipeline acceleration, or revenue attribution, enabling you to measure the effectiveness of your ABM strategies and adapt accordingly.
- **Website Conversions** - For organizations like yours that prioritize website conversions, goals within PathFactory provide a means to track and optimize the impact of content interactions on conversion rates. Whether you're encouraging visitors to sign up for a newsletter, request a demo, or make a purchase, setting conversion goals allows you to gauge the effectiveness of your content in driving desired actions on your website, ultimately maximizing ROI and revenue opportunities.

- **Nurture** - Nurturing leads through the sales funnel requires personalized and targeted content experiences that guide prospects towards conversion. Your nurture goals may encompass metrics such as lead engagement scores, progression through nurture tracks, or conversion rates at various stages of the buyer's journey. By setting nurture goals, you can orchestrate tailored content experiences that effectively move prospects through the funnel towards conversion.
- **Enablement** - In the realm of sales enablement and customer education, goals focus on empowering your sales teams with the right content assets and insights to engage prospects and close deals effectively. Your enablement goals may include metrics such as content usage by sales reps, content effectiveness in advancing deals, or sales productivity improvements. By aligning enablement goals with sales objectives, you can equip your teams with the tools and knowledge needed to drive success in customer interactions.

Revenue Intelligence

PathFactory for Revenue Intelligence (PFRI) serves as a robust marketing and sales tool that offers multiple benefits.



PFRI enables the monitoring of pipeline health, guides teams in determining the next best actions to take, and ultimately facilitates revenue growth. To find out more, read [Getting Started with PathFactory for Revenue Intelligence](#).

How to Upgrade Your PathFactory Instance to the Latest Version

If you would like to find out more about how to upgrade your organization's PathFactory instance, contact your customer service manager.