Altify

9.10 Installation Guide (Altify Insights)

Altify Technical Information & Prerequisites

Altify software helps your company to optimize revenue by guiding you to apply proven sales best practices.

Altify is built natively on the Force.com platform, integrating tightly with customer data, and taking advantage of the capabilities of Force.com. It is delivered to you as a Salesforce.com "app" installed into your Salesforce.com "org".

There are no external dependencies on third-party web services or applications.

Altify is a managed-package application. This means that it doesn't count against your limits for custom apps, objects, and tabs.

Salesforce edition and licenses

The following Salesforce Editions are supported by Altify:

- Enterprise
- Developer
- Unlimited (incl. Performance Edition)

Altify users require a Salesforce license. Platform licenses are not sufficient.

Salesforce transaction security policies

Salesforce has an optional feature called 'Transaction Security Policy' which intercepts real-time events and applies appropriate actions to monitor and control user activity. These policies can be configured to restrict what your users can do in Salesforce and there are various types of policy available, as outlined on Salesforce.com.

Since the policies are defined by you, the customer, Altify code cannot be tested against them and we therefore do not support transaction security policies. If you are applying transaction security policies, there are several ways to exempt your Altify users from the policies, as described in Exempt Users from Transaction Security Policies on Salesforce.com.

Salesforce restriction rules

Salesforce also has an optional feature called 'Restrictions Rules' which allow you to limit the number of records that users see in various pages (list views, lookups, related lists, etc).

These restrictions can be applied to any objects and fields and also apply to SOQL & SOSL queries: effectively filtering the records seen by a user. Read more on Salesforce.com.

Since the policies are defined by you, the customer, Altify code cannot be tested against them and we therefore do not support restrictions rules in general and more specifically with regard to Altify Custom Objects.

If restriction rules are defined on the Salesforce Tasks or any Altify custom objects this will restrict the records returned by Altify code and may limit or break functionality in the Altify Applications.

If you are applying restriction rules, you will need to exempt Altify users by setting User Criteria to apply the rules to a subset of users such as those in a given role or profile. Read more on Salesforce.com.

New fields

Installing Altify makes several changes to your org's configuration. Before you start the installation process, please verify that you want to go ahead with these:

- On the Opportunity object, a new Lookup field is added that references the Altify Opportunity custom object.
- On the Task object, two extra fields are added: "PRIME Action" and a Lookup field that references the Altify Account Objective custom object.
- On the Product object, a new Lookup field is added that references the Altify Solution custom object.

Please note that these fields will add to your Salesforce field count.

Custom objects

Altify accesses Salesforce standard objects (Accounts, Opportunities, Contacts, Tasks, Products and Users) and Altify custom objects within the Altify package. In general, however, the Altify application cannot be configured to use any custom objects outside the Altify package.

In particular, the Altify Relationship Map can only display Salesforce Contacts and associate with Salesforce Opportunities and/or Accounts. The relationship map cannot display information from any custom objects in your Salesforce org.

Static resources

A Salesforce org has a static resource limit of 250MB. Installing Altify requires the following:

- 25MB for installing Altify
- an additional 5MB if you are installing Altify Max.

Implications for information technology and security

- You install Altify into your Salesforce.com org. All code and data resides solely in the org.
- Altify has passed the Force.com security review.
- As the Independent Software Vendor (ISV), Altify has no access to your org unless you explicitly grant access for the purposes of support.
- All Altify-related data resides at the same location as standard Salesforce CRM data (Salesforce.com). No copy of this data exists anywhere else unless you create it.

Installing upgrades

Periodically, as Altify extends application functionality, upgrades are made available to customers.

We recommend that you install these upgrades when they become available. This ensures that you always benefit from new features and enhancements.

For full details of how to upgrade Altify, please refer to the appropriate *Upgrade Guide*. These guides are available in Altify's online help site.

Installing Altify Insights

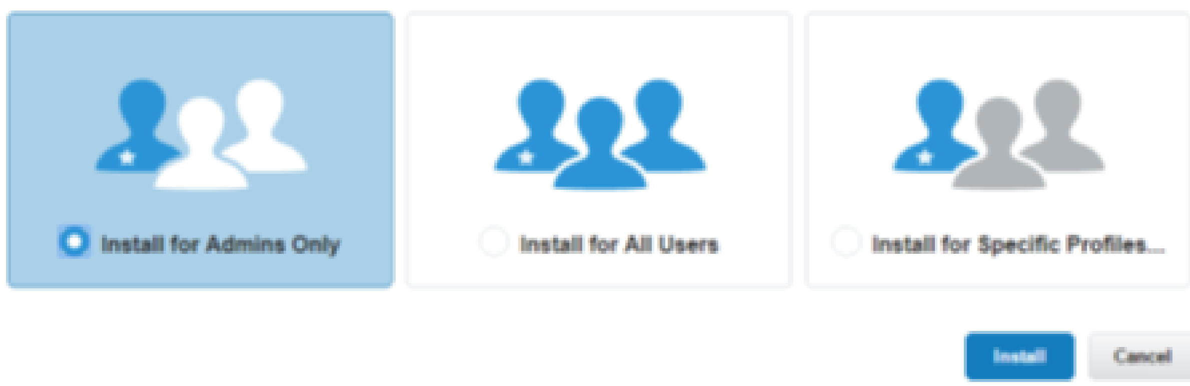
You will install two packages:

(1) Altify Core which provides the required functionality.

(2) the Licensing Package, needed to activate Altify Insights.

Follow these steps:

1. Log in to your accounts as a Salesforce administrator.
2. Install Altify Core: Install In Sandbox or Install In Production.
3. The Install window opens. Select **Install for Admins Only**.



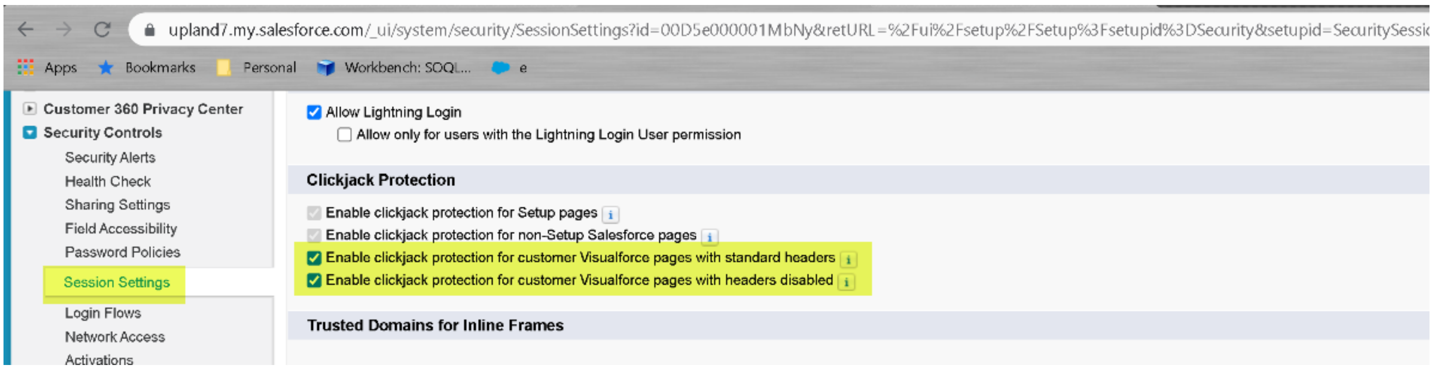
4. Click **Install**.
5. After a short interval, you should see a confirmation that the package has been installed. Click **Done**. You should also receive a confirmation email from support@salesforce.com.

   Next, you need to install the licensing package.
6. Install the Altify Insights Licensing Package: Install In Sandbox or Install In Production.
7. The Install window opens. Enter the following installation password: Qi5ZiWmtYyp7Lzh.
8. Select **Install for Admins Only**.
9. Click **Install**.
10. Read the confirmation message and click **Done**.
11. The Installed Packages window opens. Confirm that the package you have installed is listed.

Ensuring Access with Clickjack Protection or API Access Control Enabled

Clickjack Protection

If your org has Clickjack Protection enabled for Visualforce pages in the SFDC Session Settings (as shown in the example below), you need to take additional steps to ensure your users can access Altify.



1. In **Setup**, go to **Session Settings**.
2. In the section Trusted Domains for Inline Frames, click the **Add Domain** button.
3. Add each of the following domains with an **IFrame Type** of 'Visualforce Pages'.
    - '<*instantDomain*>.lightning.force.com'
    - '<*instantDomain*>--c.lightning.force.com'
    - '<*instantDomain*>--altf.visualforce.com'

    '<*instantDomain*>' in each case is the Org instance domain name from your Salesforce Domain, e.g. 'upland7' in the Salesforce Domain https://upland7.lightning.force.com/.

API Access Control

If API Access Control is enabled in your org, you need to ensure that the setting *Allow Visualforce pages to access APIs* is also enabled.

For more information, see Restrict Customers and Partners from Accessing APIs in Salesforce Help.

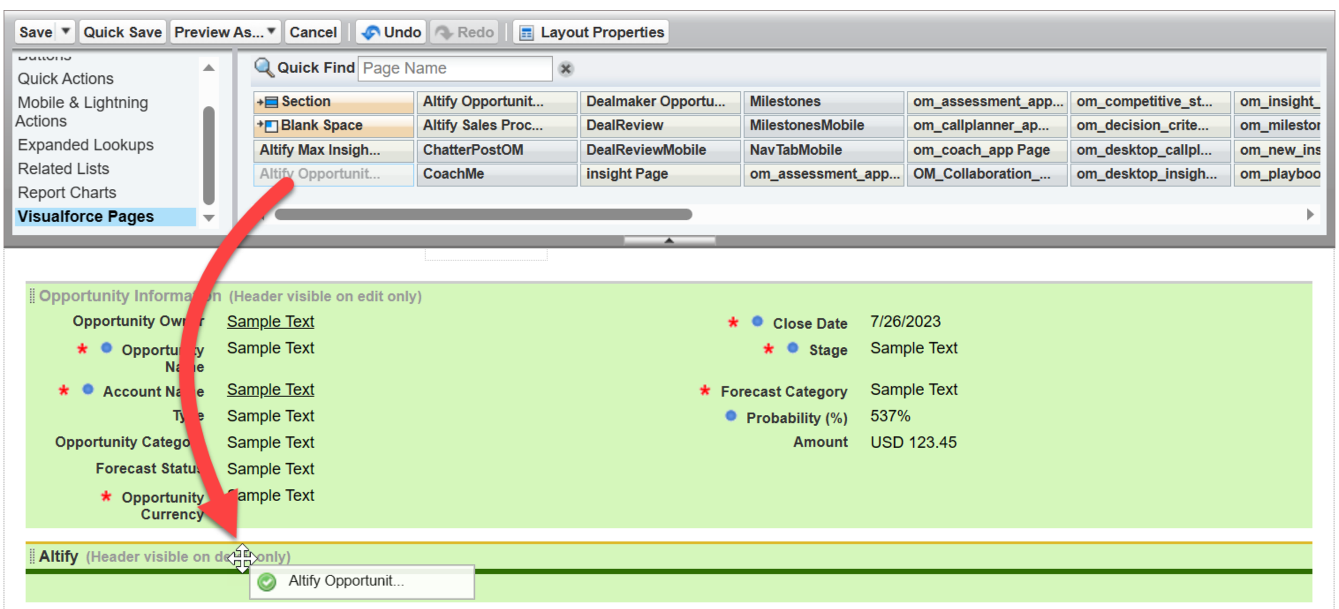
Setting up Altify Insights

Once the packages have been installed, you can edit your opportunity and account page layouts to add the relevant launchpads that will provide access to Altify Insights.

Add launchpad to the Opportunity page layout

To add the relevant launchpads to the Opportunity record, do the following

1. In **Setup**, go to the **Opportunity** object.
2. Click **Page Layout**.
3. Click **Page Layout Assignment** to see which page layouts are used by which user profiles.
4. Check which user profiles use which page layouts. This tells you which page layouts need the following launchpads.
5. Open one of the page layouts that requires the launchpads.
6. We recommend that you create an 'Altify' section in the page layout for Altify launchpads so under Visualforce Pages, drag a Section to a suitable location in the layout.
7. In the Section Properties dialog, specify the following settings:
    - **Section Name** = ‘Altify’
    - **Display Section Header On** = Edit Page
    - **Layout** = 1-Column
8. Drag the *Altify Opportunity Plan Launchpad* Visualforce page to the new section.



9. Click the spanner icon on the top right of the launchpad to specify the following settings:
    - **Height (in pixels)** = ‘200’
    - **Show Scrollbars** is disabled
10. Repeat steps 8 and 9 for the Visualforce page *Altify Opportunity Relationships & Insight Launchpad*, specifying the following settings:
    - **Height (in pixels)** = '450'
    - **Show Scrollbars** is enabled
11. Click **Save** to save your changes to the page layout.

Add launchpad to the Account page layout

Repeat the same process for the Account record.

In this instance however, the launchpads you are dragging into the Altify section are as follows:

- *Altify Account Manager* with the following settings:
    - **Height (in pixels)** = ‘550’
    - **Show Scrollbars** is not enabled
- *Altify Account Summary Launchpad* with the following settings:
    - **Height (in pixels)** = ‘650’
    - **Show Scrollbars** is enabled

Updating launchpad and page titles

The titles of the above launchpads, and page titles, can be manually updated to reflect your product license ('Altify Insights').

In the example shown below, the title of the *Altify Account Manager* launchpad on the account page is updated from 'Account Plan' to 'Altify Insights'.

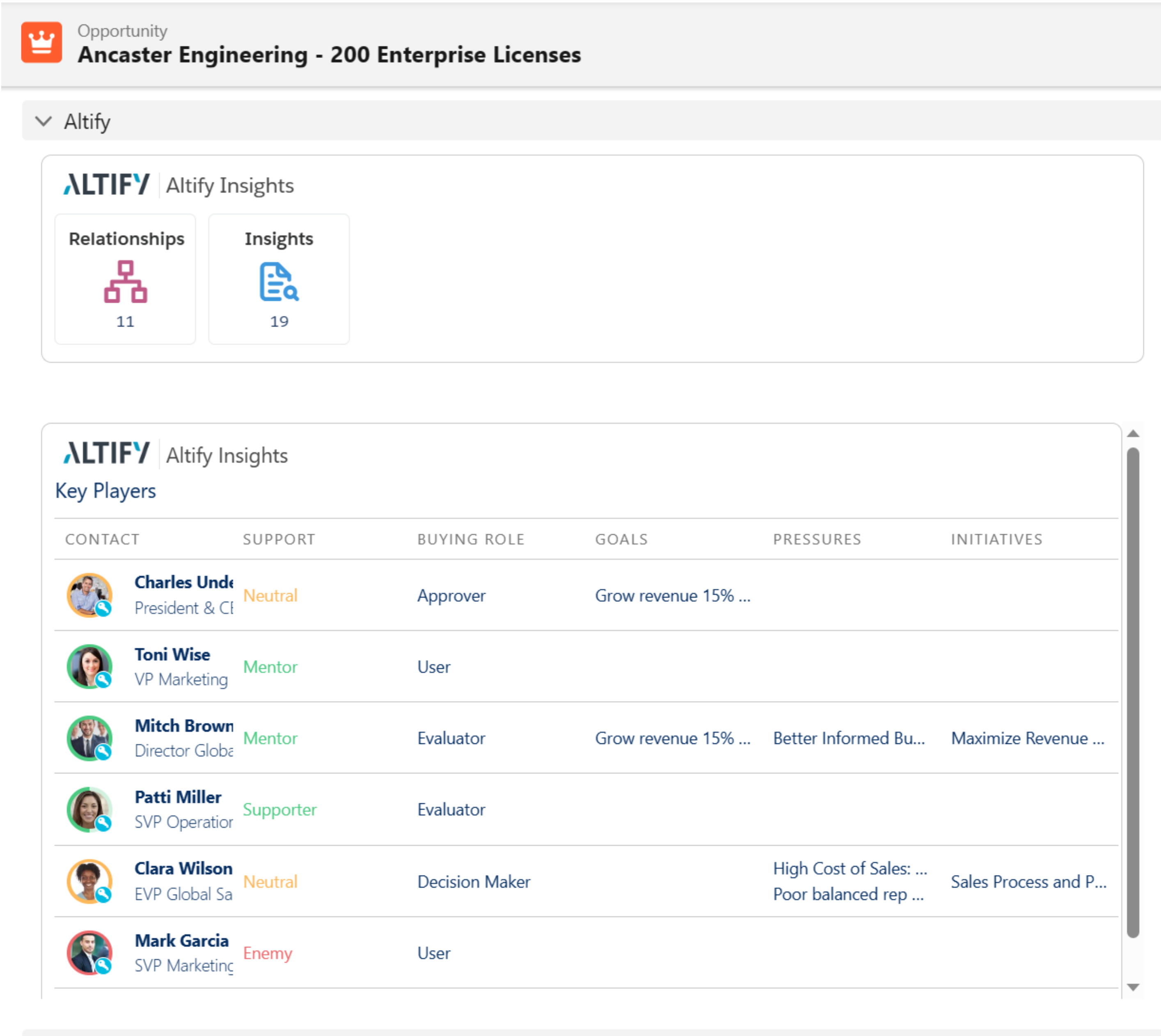
We recommend that you update the following custom labels to 'Altify Insights'.

- SINGLE_ACCOUNT_PLAN
- APP_NAME
- COMMON_ACCOUNT_MANAGER
- COMMON_OPPORTUNITY_MANAGER

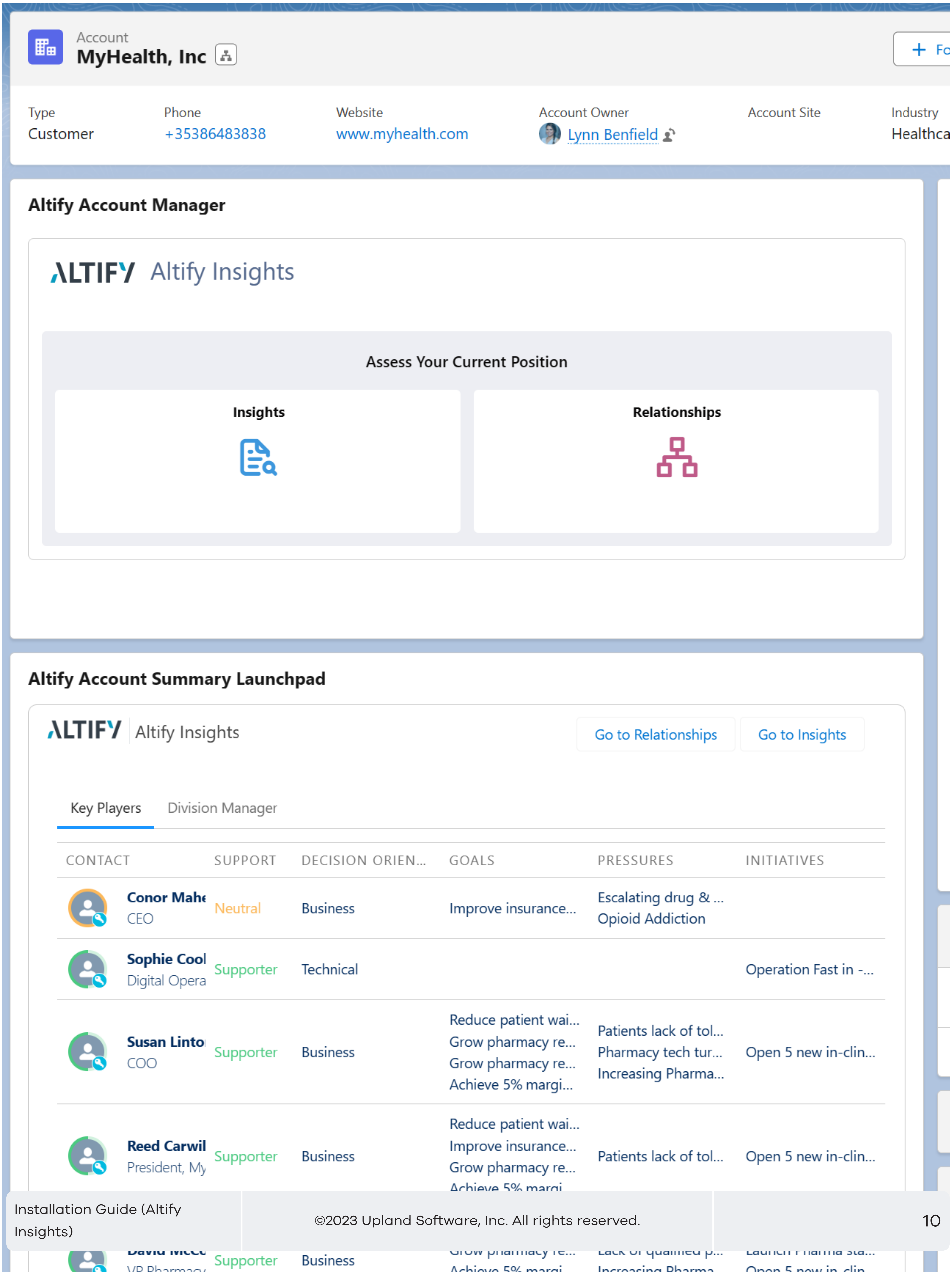
For help with translating see Translate Custom Labels in the Salesforce online help.

Verifying your page layouts

Your opportunity record should look like this after adding your launchpads and translating the custom labels:



Your account record should look like this after adding your launchpads and translating the custom labels:


Account
MyHealth, Inc
Type
Customer
Phone
+35386483838
Website
www.myhealth.com
Account Owner
Lynn Benfield
Account Site
Industry
Altify Account Manager
Altify Insights
Assess Your Current Position
Insights
Relationships
Altify Account Summary Launchpad
Altify Insights
Go to Relationships
Go to Insights
Key Players
Division Manager
CONTACT
SUPPORT
DECISION ORIEN...
GOALS
PRESSURES
INITIATIVES
CEO
Neutral
Business
Improve insurance...
Escalating drug & ...
Opioid Addiction
Supporter
Technical
Operation Fast in -...
COO
Supporter
Business
Reduce patient wai...
Grow pharmacy re...
Grow pharmacy re...
Achieve 5% margi...
Patients lack of tol...
Pharmacy tech tur...
Increasing Pharma...
Open 5 new in-clin...
Supporter
Business
Reduce patient wai...
Improve insurance...
Grow pharmacy re...
Patients lack of tol...
Open 5 new in-clin...
Supporter
Business
Achieve 5% margi...
Increasing Pharma...
Open 5 new in-clin...

Licensing Your Users for Altify Insights

Altify uses permission sets to provide standard users with access to product functions.

To make Altify available to your users, you must create a permission set and then assign the permission set and allocate licenses to users.

Create the Permission Set

1. In Classic mode, go to the **Altify Permission Set Administration** tab.
2. Click on the **Create/Update** button to create a permission set for Altify. If you've just installed Altify, a new permission set is created for access to Altify. If there's already a version of the Altify permission set in your org, this is updated.

Note: do not refresh or close the tab while the permission set job is running.

Assign the Permission Set

1. In **Setup**, open your list of **Users**.
2. Click into the relevant user.
3. In the Permission Set Assignments section, click **Edit Assignments**.
4. Select the relevant permission set in the Available Permission Sets panel and move it to the Enabled Permission Sets list box.
5. Click **Save**.

Allocate Licenses to Users

All Altify users need to be licensed for the Altify installed package.

1. In **Setup**, go to **Installed Packages**.
2. Your org's installed packages are listed. Click **Manage Licenses** beside the license package *Altify*.

   The *Package Details* page opens. Here you can see how many licenses you're allowed for the package, and how many are currently used.
3. Click **Add Users** to assign licenses to users.
4. Repeat these steps for another installed package: *Altify Insights*.

To verify your installation of Altify Insights, log in as a licensed user and check that the launchpads you have added to the Opportunity and Account page layouts are displaying correctly.

Congratulations! You are now ready to use Altify Insights.

Scheduled Jobs for Completeness

Configure the following scheduled jobs to generate completeness records on a weekly basis. You can use these records to create completeness reports. Specific jobs need to be created for completeness of account relationship and insight maps and completeness of opportunity relationship and insight maps.

> **Note:** the scheduled jobs outlined below also generate account and opportunity data on your Altify launchpad(s).

1. In **Setup**, go to **Apex Classes**
2. On the Apex Classes page, click the **Schedule Apex** button.
3. Enter a **Job Name** of 'Altify Opportunity Completeness Job' or 'Altify Account Completeness Job' as appropriate.
4. Set the **Apex Class** to 'ScheduledOpportunityCompleteness' or 'ScheduledAccountCompleteness' as appropriate.
5. Select a **Frequency** of *Weekly*.
6. Select the day that you want the job to run on.
7. Enter the date range (**Start** date and **End** date) over which you want the job to run.
8. Select a **Preferred Start Time**.
9. Click **Save**.

Initial Runs

The following instructions are for one-off runs of the above batch jobs:

1. Open the **Developer Console**.
2. Click **Debug** and select **Open Execute Anonymous Window**.
3. Run the appropriate code from the following two options:

```
new
ALTF.ScheduledAccountCompleteness().execute(null);
```

```
new
ALTF.ScheduledOpportunityCompleteness().execute(null);
```

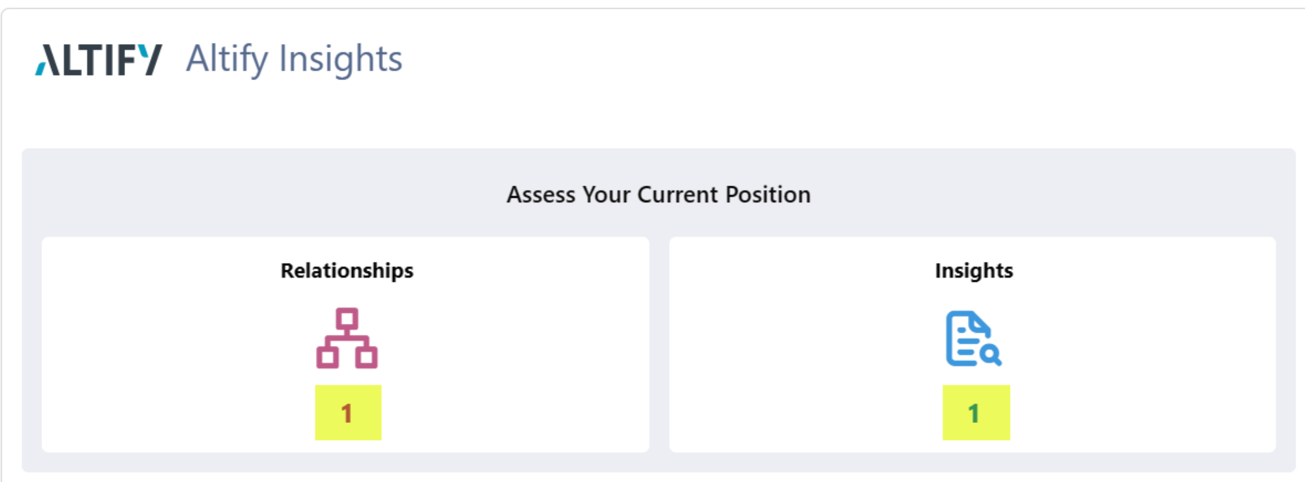
For more information on how completeness scores are calculated, and how to customize the batch size of the above jobs, see Completeness Scoring.

Post Install Checklist

Following your install of Altify, you can do the following to perform a quick sanity check of the product:

Account launchpads and functions

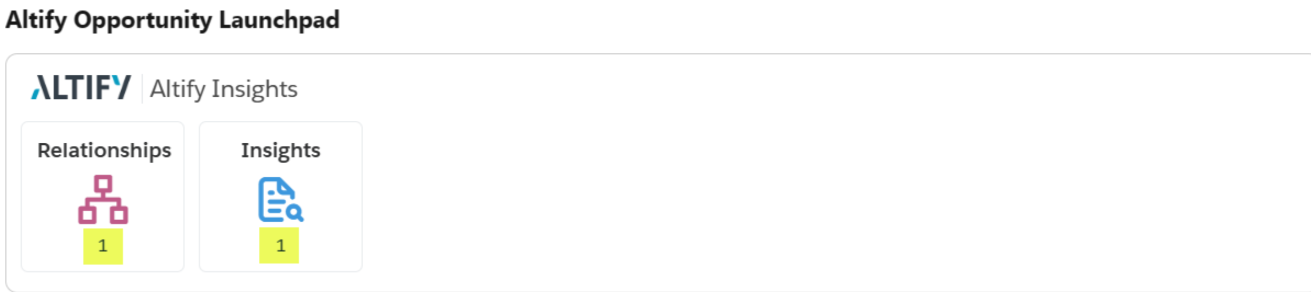
1. Create a test account record and ensure the Altify launchpads are displaying correctly:
    - *Altify Account Manager*
    - *Altify Account Summary Launchpad*
2. Click each tile, button and link on the launchpads to ensure the pages load successfully.
3. Using your test account, create some simple test data via the *Altify Account Manager* launchpad: insights and relationships.
4. Run the account completeness batch job and check to see that your test data is displayed on the *Altify Account Manager* launchpad (as highlighted in the example below).



Opportunity launchpads and functions

1. Create a test opportunity record and ensure the Altify launchpads are displaying correctly:
    - *Altify Opportunity Plan Launchpad*
    - *Altify Opportunity Relationships & Insight Map Launchpad*
2. Click each tile, button and link on the launchpads to ensure the pages load successfully.
3. Using your test opportunity, create some simple test data on the insight map and relationship map.
4. Check to see that the test data you have entered is reflected on the *Altify Opportunity Plan Launchpad* -

as shown in the example below:



Support

Need Assistance?

Upland Altify is here to help! We have a variety of online resources to help you find the information you need and a dedicated Technical Support team to help you resolve any issues or questions that are impeding your use of .

Upland Altify Community

The Upland Altify Community offers multiple resources to help you find the information you need, including:

- **Support ticket activity**: Submit and manage your support tickets.
- **Knowledge Base**: Read Articles on how to solve common problems, from configuration to troubleshooting issues
- **Release Information**: Get product release notes and release timelines.
- **Forums**: Start and reply to discussions with other users and customers.

Visit the Upland Altify Community.

Training

For training enquiries, please see Upland.com.

Technical support

The Technical Support team is dedicated to helping our customers succeed with their use of our products by providing timely resolutions to customer issues and questions that are impeding their use of products.

Contact Technical Support

When contacting Technical Support, you will need to provide your name, contact information, company account name, and as much technical detail that you can provide to clearly describe your question or issue. Attachments can be included when using the Community or email to request assistance.

- **Web**: Manage cases and open new cases by clicking the **Contact Support** button in the Community.
- **Email**: Send any support requests to altify-support@uplandsoftware.com.

Support hours

Standard support hours are 4:00 AM to 7:00 PM (U.S. Eastern Time), Monday-Friday. Support issues submitted after these hours will be addressed on the next business day.

After contacting Technical Support, what should I expect?

You will receive an email confirming your case has been created, along with the case number. Please use that case number when corresponding with Technical Support on any follow-up communications.

Response times

The following are our response times for each level of issue:

Priority Level	Definitions	Response Time	Commitments
Urgent (Outage)	Upland cloud service is unavailable.	1 hour (24 hours a day, 365 days a year)	• Immediate and continuous. • Hourly status updates.
Urgent (Business Critical)	• Production system defect that prevents business critical work from being done and no workaround exists. • Defect causes a material loss of data in the production system. • Security-related defect.	1 business hour	• Immediate and continuous effort to resolve the defect or provide a workaround. • Daily status updates until the defect is resolved or a workaround is provided.
High	• Production system defect that prevents business critical work from being done and a workaround does exist. • Defect violates the material specifications in the documentation and impacts your organization's production system.	4 business hours	Upland will use reasonable efforts to resolve the defect as rapidly as practical, but no later than the next update after reproduction of the defect.
Normal	All other defects	1 business day	Defects will be addressed in Upland's normal update.