Altify

9.10 Installation Guide

Contents

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 and Configuring Altify

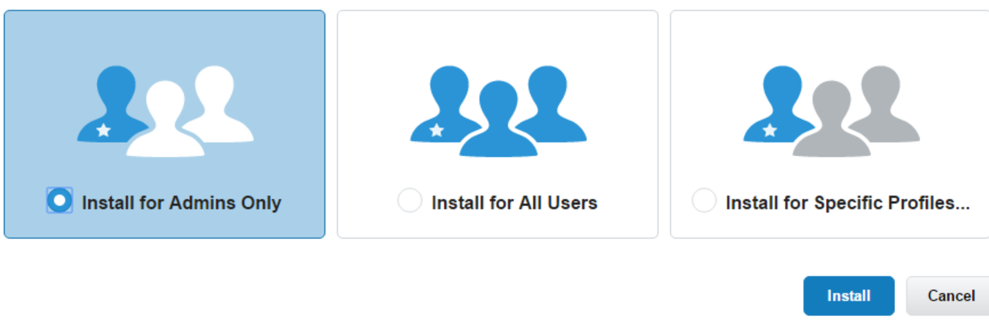
This section explains how to carry out a **new** installation of the Altify core package and associated license packages.

Installing the Altify Core Package

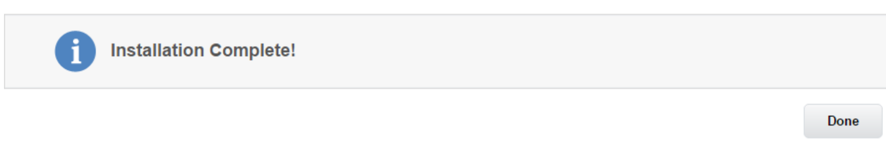
The Altify core package contains all Altify core functionality. It is a prerequisite for all the Altify products referenced in this document.

1. Open the package installation URL in your browser. This URL is provided by Altify.
2. Log into Salesforce.com with your administration username and password.
3. The Install window opens. Select **Install for Admins Only**.

   IMPORTANT: Do not select either of the other options. This could corrupt user profiles. (Access to Altify is controlled through licensing and permission set allocation.)
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.



Installing License Packages

Now that you have installed the Altify core package, you need to install the license package for each Altify application you want to make available to users.

Note: License installation is not required for sandbox environments.

After installing a license package, you can assign individual licenses to users.

License Packages

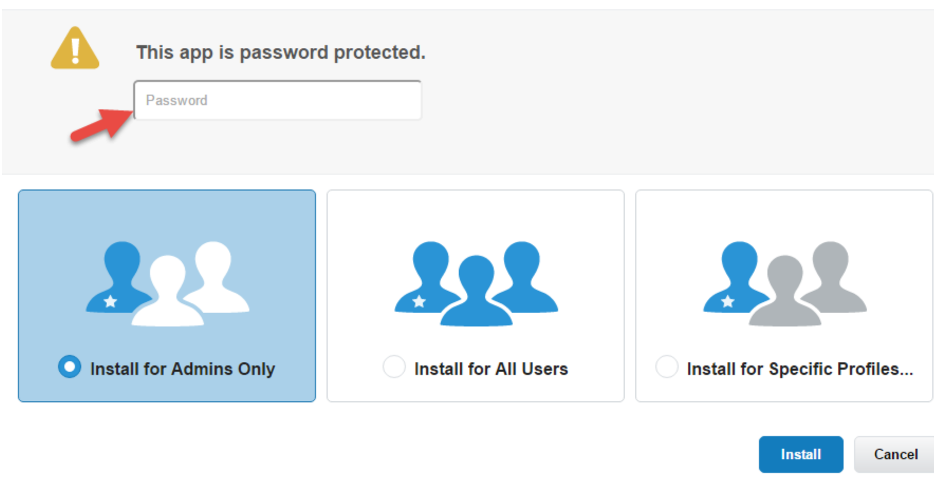
- **Altify Opportunity Manager**
- **Altify Account Manager**
- **Altify Sales Process Manager**
- **Altify Relationship Map** (for relationship map only users)
- **Altify Insights** (for relationship map and insight map only users)

Applications are licensed on a named-user basis.

To obtain an activation key for a license package, please contact Altify.

To install a license package:

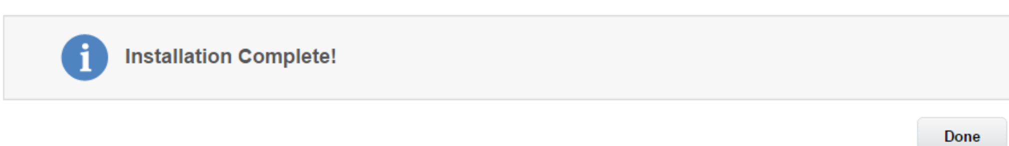
1. Log into Salesforce.com with your administration username and password.
2. In your web browser's address field, enter the package installation URL provided by Altify.
3. The Install window opens. Enter the installation password you have been provided with.



4. Select **Install for Admins Only**.

> **Caution:** Do not select either of the other options. This could result in profiles being corrupted.

5. Click **Install**.
6. Read the confirmation message and click **Done**.



7. The Installed Packages window opens. Confirm that the package you have installed is listed.

Ensuring Security Access

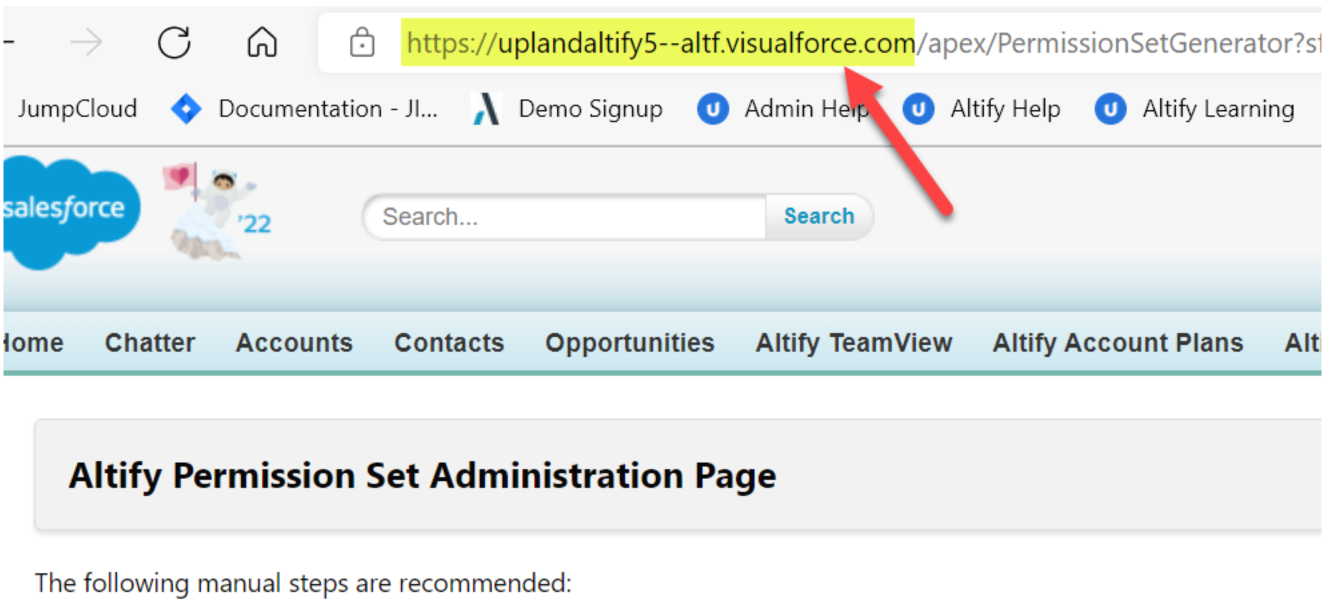
This section outlines some processes to ensure that access to Altify is not blocked by your Security configuration.

Making Altify an Allowed Origin

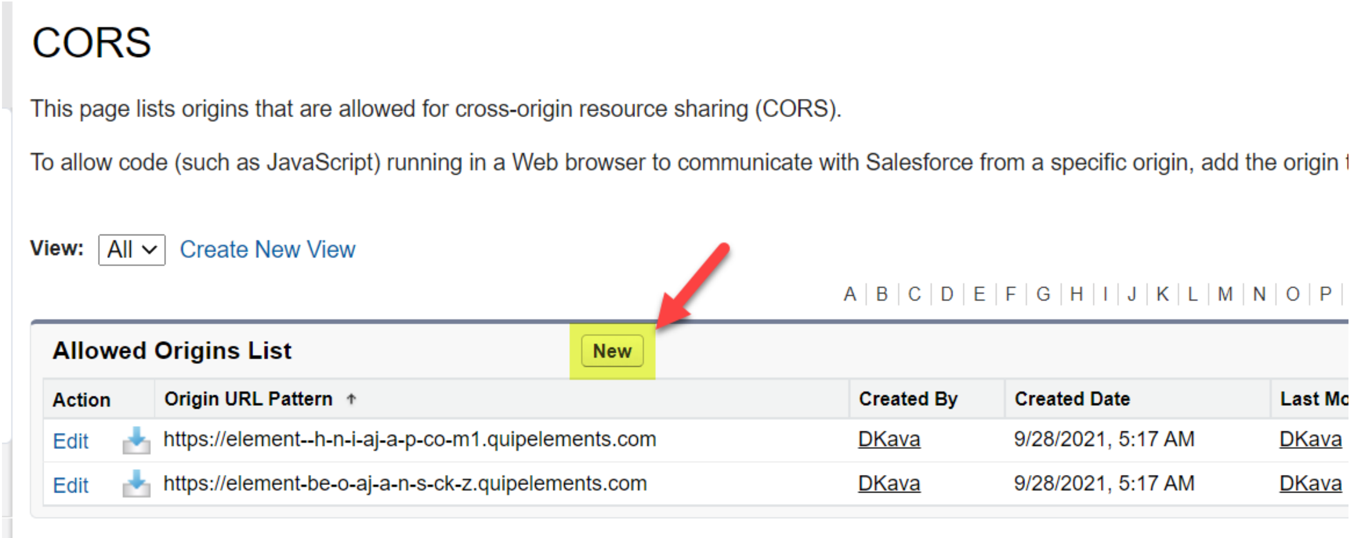
To ensure access to Altify T&Is (Test & Improves), you need to set up the installed app as an Allowed Origin, as follows:

Note: The following steps need to be carried out in Salesforce Classic Mode.

1. Select **Altify Permission Set Administration** in the custom tab menu.
2. On the Altify Permission Set Administration Page, copy the URL up to and including the '.com' - as shown in the example below.

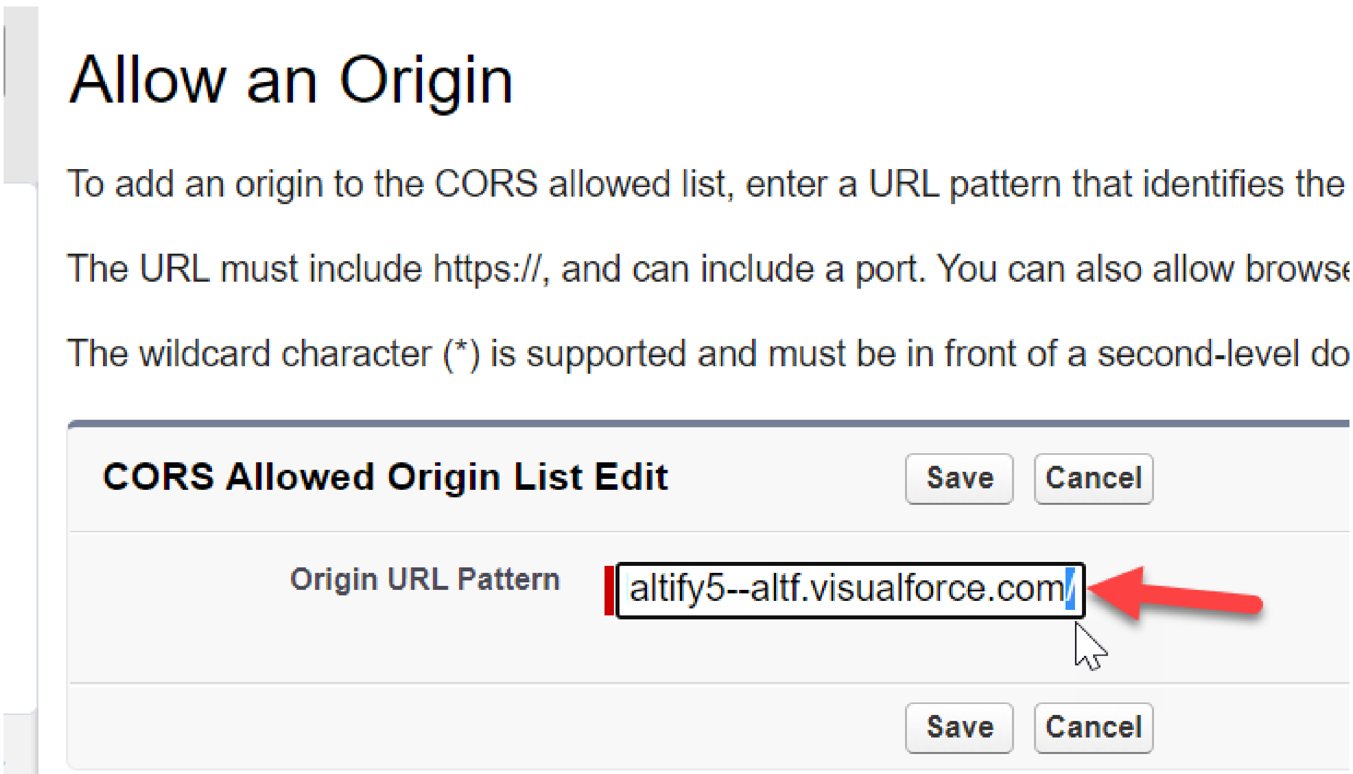


3. In **Setup**, go to **CORS**.
4. Click **New** in the Allowed Origins List section (as highlighted below).



5. Paste the URL you copied into the **Origin URL Pattern** field.

   An additional slash might be automatically added to your URL when you paste it into the field (as indicated in the example below). Check the value and delete the slash if it is present.

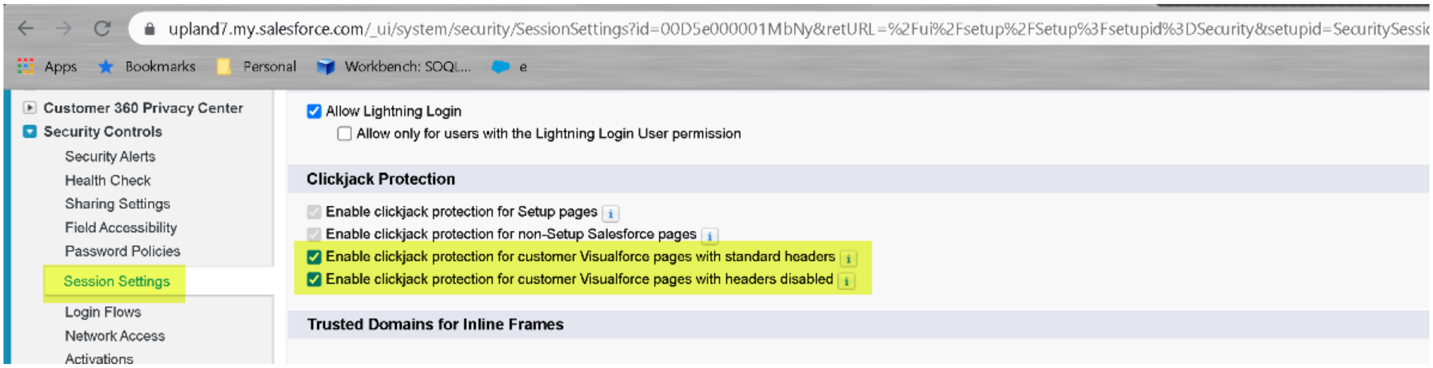


6. Click **Save**.

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.

Configuring Page Layouts for Opportunity Manager

For the installation of Opportunity Manager, the relevant Altify launchpads that suit your business requirements need to be added to the Opportunity page layout. For example, the *Altify Opportunity Plan Launchpad* is added to an Opportunity page layout to provide your users with access to the various functions of Opportunity Manager. This launchpad is typically required by all Altify customers that use Opportunity Manager.

Each launchpad is a Visualforce page that links to pages within Altify software. User access to the launchpads depends on which Altify products the user is licensed for.

The following section explains how to prepare the Opportunity page layout for the Altify launchpads and install the Altify Opportunity Plan Launchpad. We recommend that you do not attempt to install the remaining launchpads (detailed in the Appendix) before speaking with your Altify Customer Service Manager.

Also included in this section is a necessary step for enabling PRIME action methodology in Opportunity Manager.

Preparing the Page Layout for OM Launchpads

Altify recommends adding launchpads via the page layout (as documented below for Lightning and Classic). With this approach, the launchpads are hidden from unlicensed users.

In Salesforce Lightning, another method of adding launchpads is to add them as Visualforce components via the Lightning App Builder. However, with this approach, whereby launchpads are added directly to the record (outside the page layout structure), unlicensed users will see a placeholder and error message where the launchpad was added to the record.

1. In **Setup**, do the following:

   In Classic mode, go to **Page Layouts** in **Opportunities**.

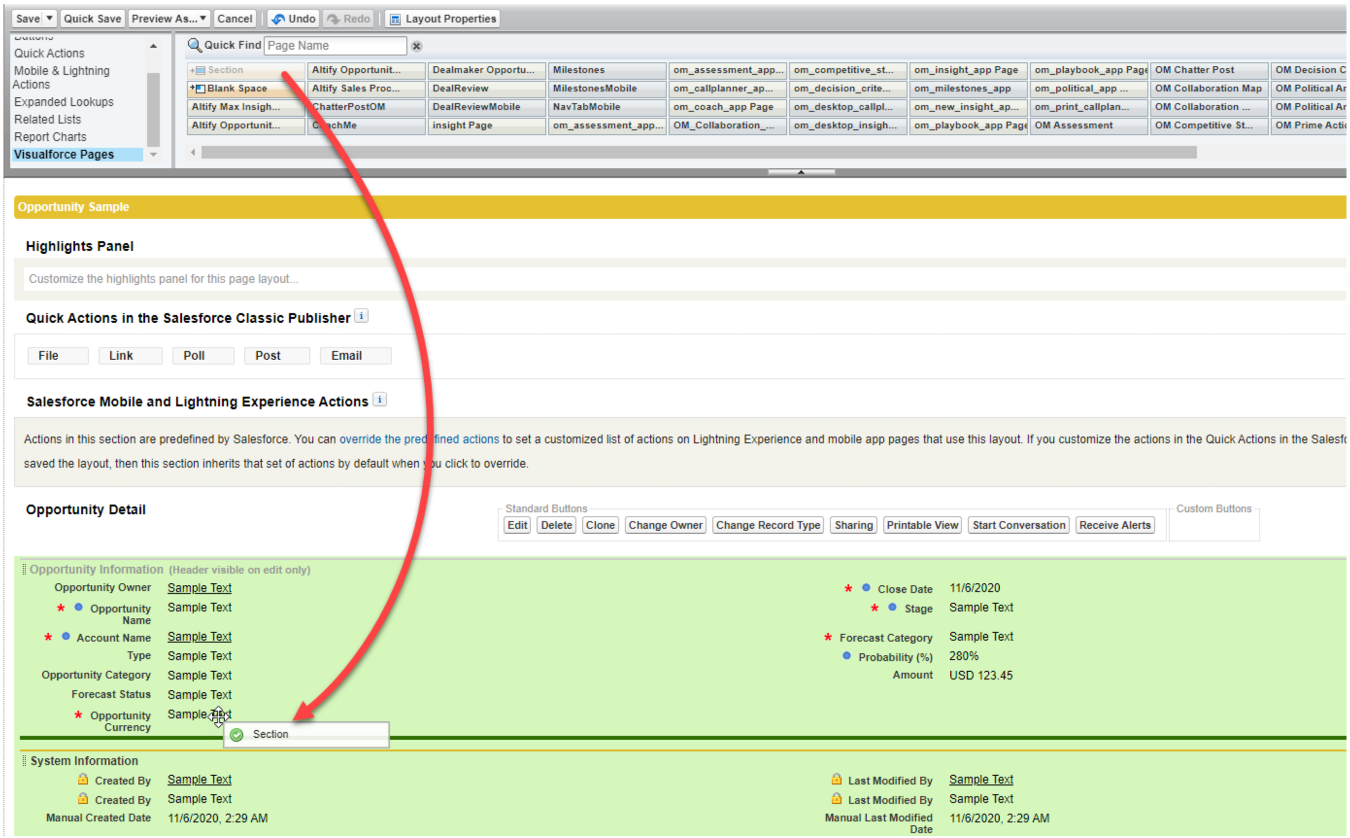
   In Lightning mode, go to **Opportunity** in **Object Manager** and select **Page Layouts** in the sidebar.

2. To check which user profiles use which page layouts, click the **Page Layout Assignment** button.

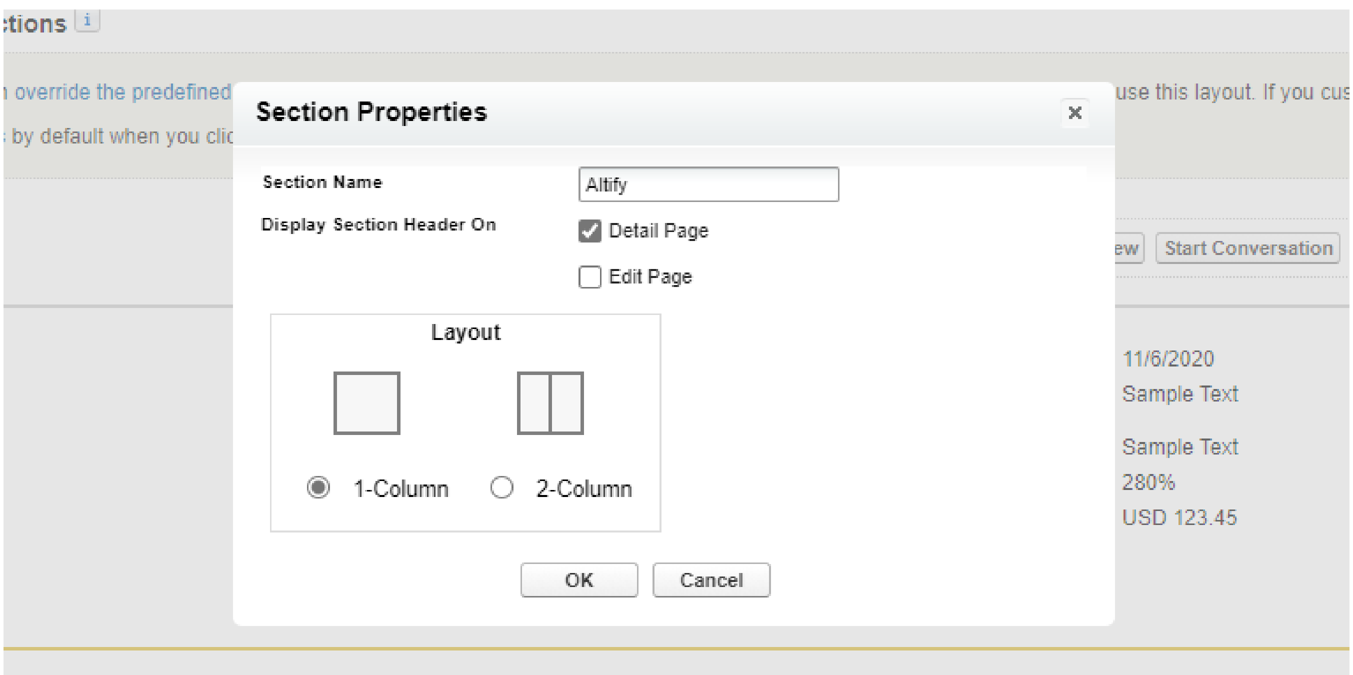
   This tells you which page layouts need the Opportunity Manager launchpad.

3. On the Page Layouts screen, select **Edit** for the relevant layout.

   We recommend that you create an 'Altify' section in the page layout for Altify launchpads. Under **Visualforce Pages**, drag a **Section** to a suitable location in the layout (as shown in the example below).



4. In the *Section Properties* dialog (shown below), specify the following settings:

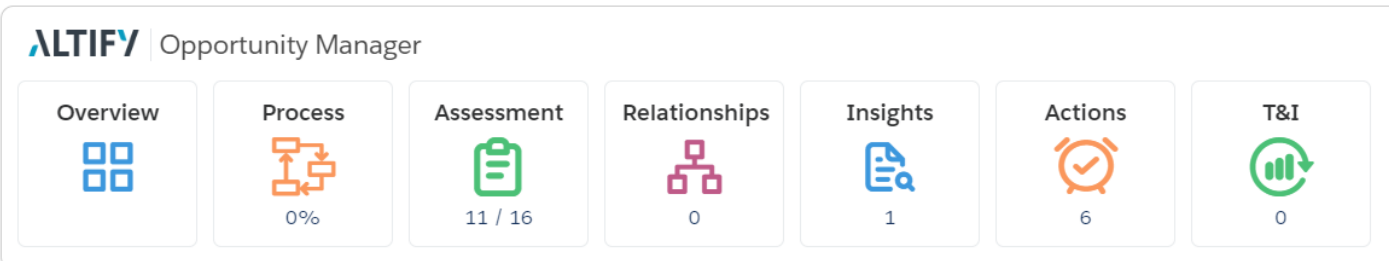


- Section Name = 'Altify'
- Deselect 'Edit Page'
- Layout = 1-Column

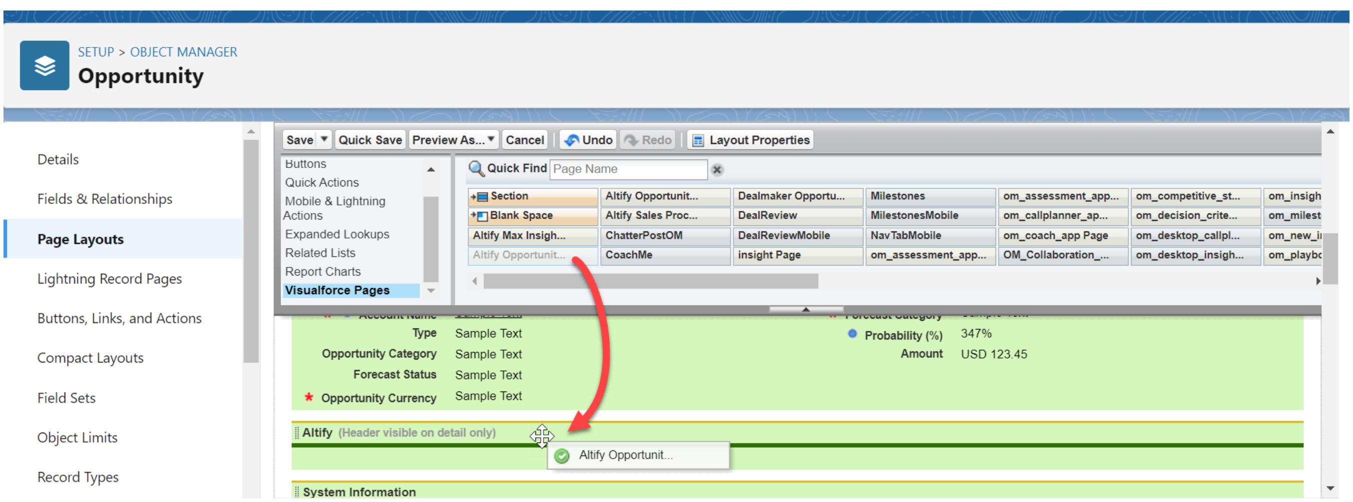
5. Click **OK**.
6. **Save** your changes to the page layout.

Adding the Altify Opportunity Plan Launchpad

You are now ready to add the *Altify Opportunity Plan Launchpad* to the Opportunity page layout. This launchpad, pictured below, features clickable tiles that provide access to all areas of Opportunity Manager (actions, assessment, etc.). The set of tiles available to the user is determined by the user's license and the Altify configuration.



1. On the Page Layout screen, click and drag the **Altify Opportunity Plan Launchpad** from the *Visualforce Pages* menu into the section you created when "Preparing the Page Layout for OM Launchpads" on page 9 (as shown in the example below).



2. Click the spanner icon on the top right of the launchpad to specify the *Visualforce Page Properties*.

   The recommended values for the following settings can vary for each launchpad. For the *Altify Opportunity Plan Launchpad*, we recommend the following:

- **Width (in pixels or %)** of '100%'.
- A **Height (in pixels)** of '200'.
- **Show scrollbars** is deselected.
- **Show label** is deselected.

3. Click **OK**.
4. Click **Save** when you return to the page layout screen.
5. Check to see that your launchpad is displaying as shown in this image.

Tip: You can add custom tiles to this launchpad once it is successfully installed.

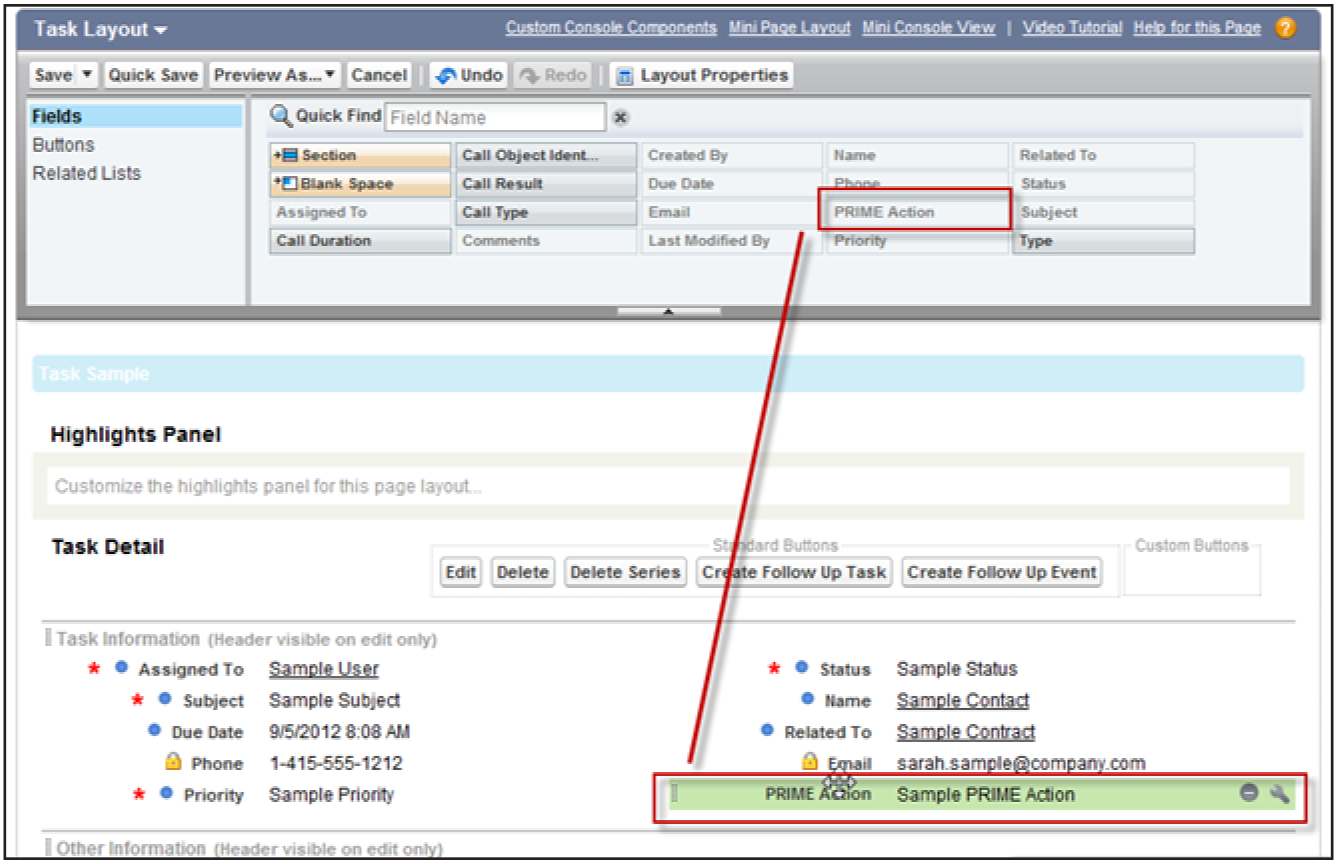
We recommend that you don't add more launchpads until you have spoken with an Upland Altify Technical Consultant. For a preview, see "Appendix: Other Opportunity Manager Launchpads" on page 45.

Adding the PRIME Type field to the Tasks Page Layout

Note: This topic applies only if you have installed Opportunity Manager.

For Opportunity Manager users, the Task page layout must include the PRIME Type field.

1. In **Setup**, go to the **Task** object.
2. In **Page Layouts**, open **Task Layout**.
3. Drag the **PRIME Action** field to a suitable location on the page layout, as shown below.



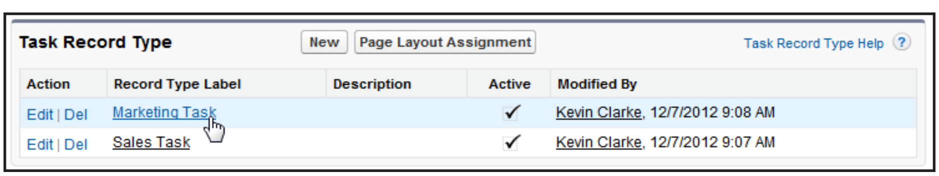
4. Click **Save**.

If You Use Task Record Types

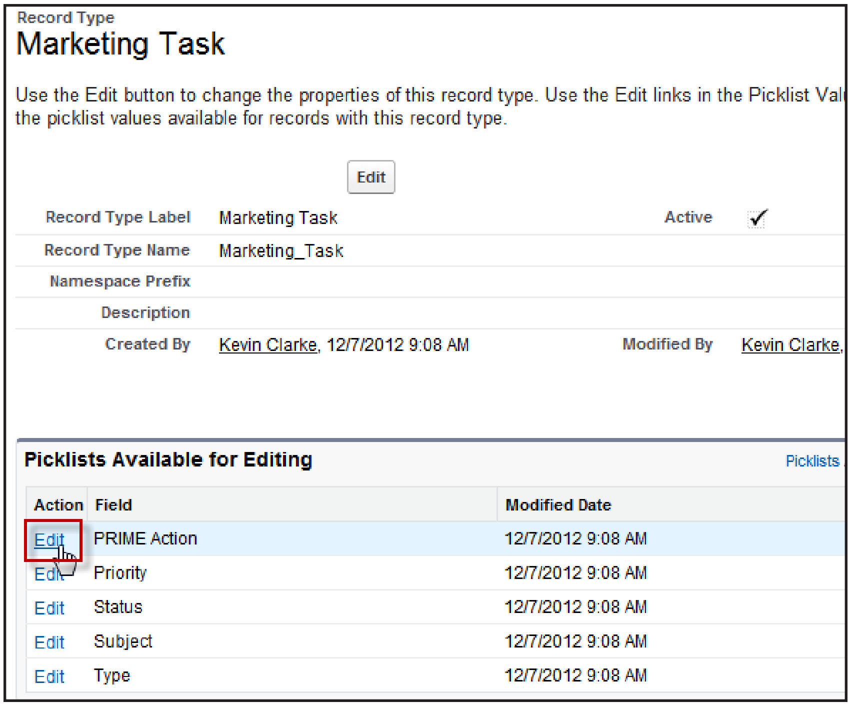
Note: This task is required if you have Task record types in your org.

If you have Task record types in your org, you need to update the picklist items for the PRIME Action picklist within each Task record type.

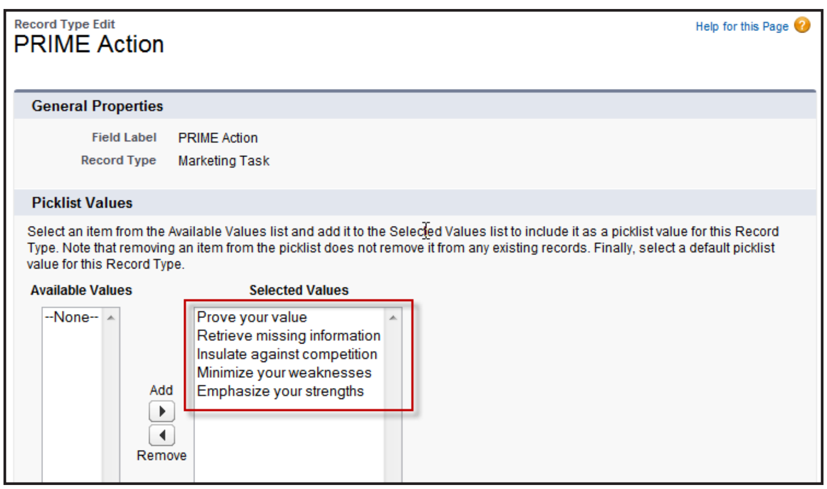
1. In **Setup**, go to **Task**.
2. Open **Record Types**.
3. Click into the first Task record type:



4. Click **Edit** beside **PRIME Action**.



5. On the PRIME Action page, ensure that all the picklist items are added to the Selected Values list, as shown here:



6. Click **Save**.

7. Repeat this process for each Task record type.

Configuring Page Layouts for Account Manager

For the installation of Account Manager, Altify launchpads need to be added to the Account page layout. Each launchpad is a Visualforce page that links to pages within Altify software. For example, you must add the *Altify Account Manager* launchpad to the Account page layout to provide access to areas of the associated Account Plan.

(Access depends on which Altify products the user is licensed for.)

Also detailed in this section is a necessary configuration if you intend to manage account opportunities using product lines.

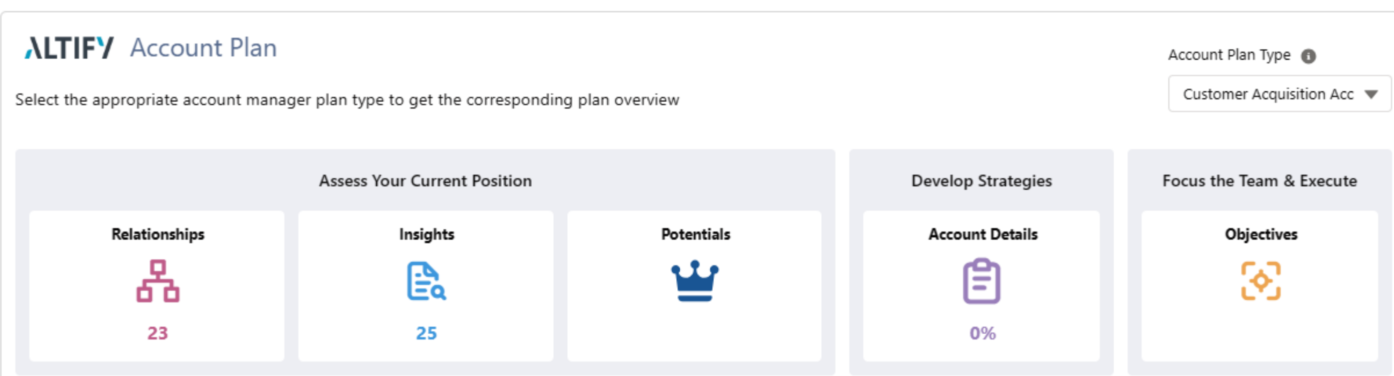
Account Manager Launchpads

Altify strongly recommends that you refrain from adding launchpads that are not required for your business processes. If you are in any doubt, hold off until your scheduled call with an Altify Technical Consultant.

Launchpad	Description
"Altify Account Manager" below	Provides access to an account plan, which allows users to plan at the level of a single account. The plan type that is applied can also be selected on the launchpad.
"Altify Account Manager Plans" below	Shows a list of Account Manager plans associated with the account. Users can click into an Account Manager plan from the launchpad, or create a new plan.
"Altify Account Summary Launchpad" on the next page	Provides an overview of account planning details relating to this particular account, including hyperlinked details about the people on the account and the business problems they face. From here users can also create and manage account divisions.

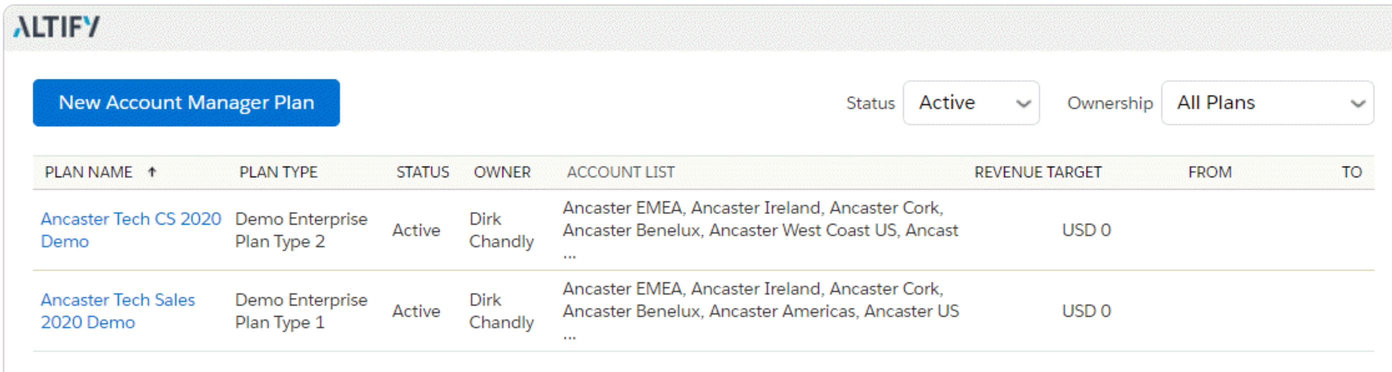
Altify Account Manager

The Altify Account Manager launchpad provides access to the account plan. Users can also select the type of plan that is applied to the account.



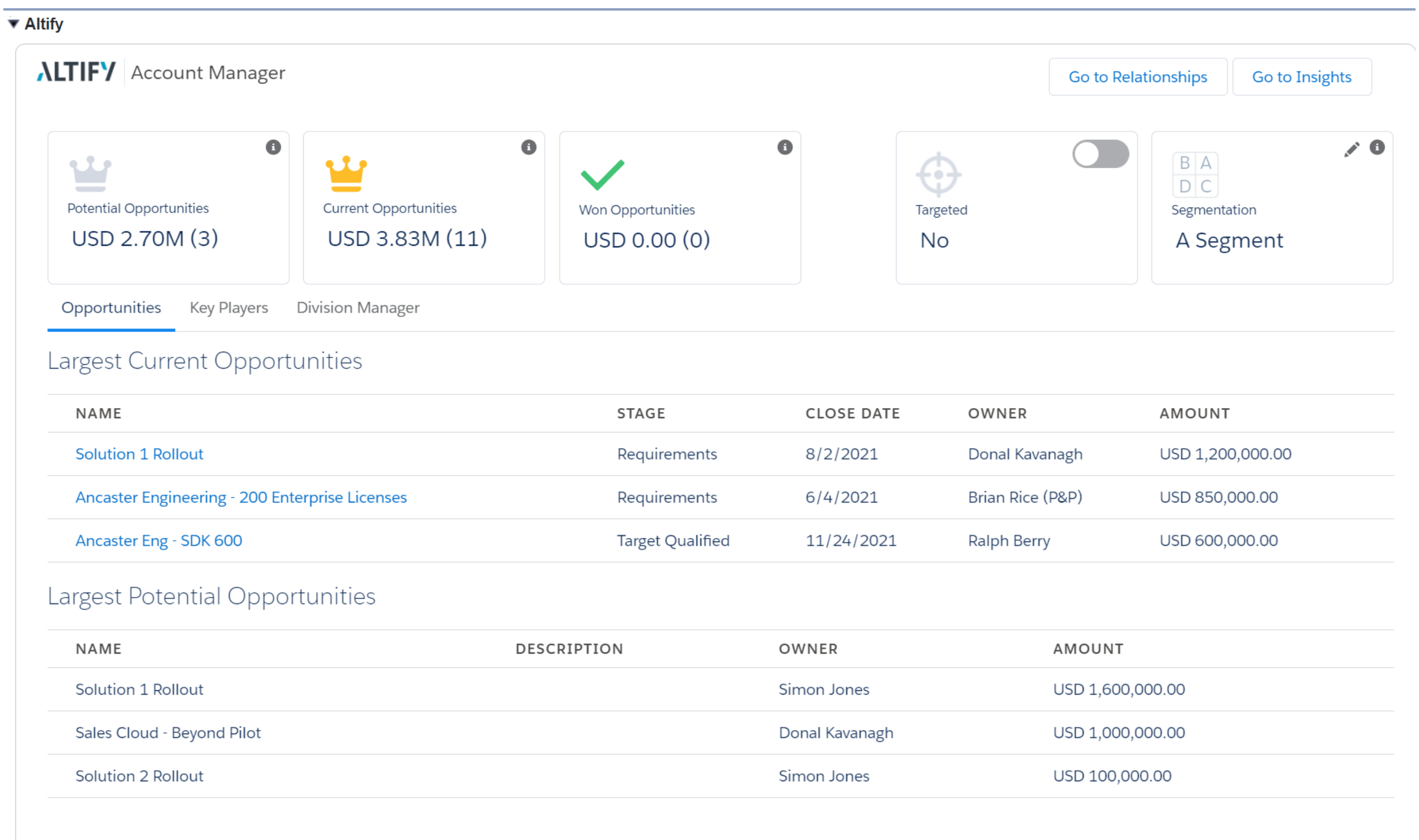
Altify Account Manager Plans

The Altify Account Manager Plans launchpad lists the Account Manager plans that the account belongs to. Clicking one of these plans opens it in Account Manager. Users can filter the listed plans by Status and Ownership, or can create a new Account Manager plan.



Altify Account Summary Launchpad

This launchpad shows information about the account's opportunities, provides targeting and segmentation options and lists the key players on the account's relationship map along with their level of support for your organization and associated business insights. The Division Manager tab provides the ability to manage the account's associated divisions and gives access to their specific relationship and insight maps.



Preparing the Page Layout for AM Launchpads

Altify recommends adding launchpads via the page layout (as documented below for Lightning and Classic). With this approach, the launchpads are hidden from unlicensed users.

In Salesforce Lightning, another method of adding launchpads is to add them as Visualforce components via the Lightning App Builder. However, with this approach, whereby launchpads are added directly to the record (outside the page layout structure), unlicensed users will see a placeholder and error message where the launchpad was added to the record.

1. In **Setup**, do the following:

   In Classic mode, go to **Page Layouts** in **Accounts**.

   In Lightning mode, go to **Account** in **Object Manager** and select **Page Layouts** in the sidebar.

2. To check which user profiles use which page layouts, click the **Page Layout Assignment** button.

   This tells you which page layouts need the Account Manager launchpad.

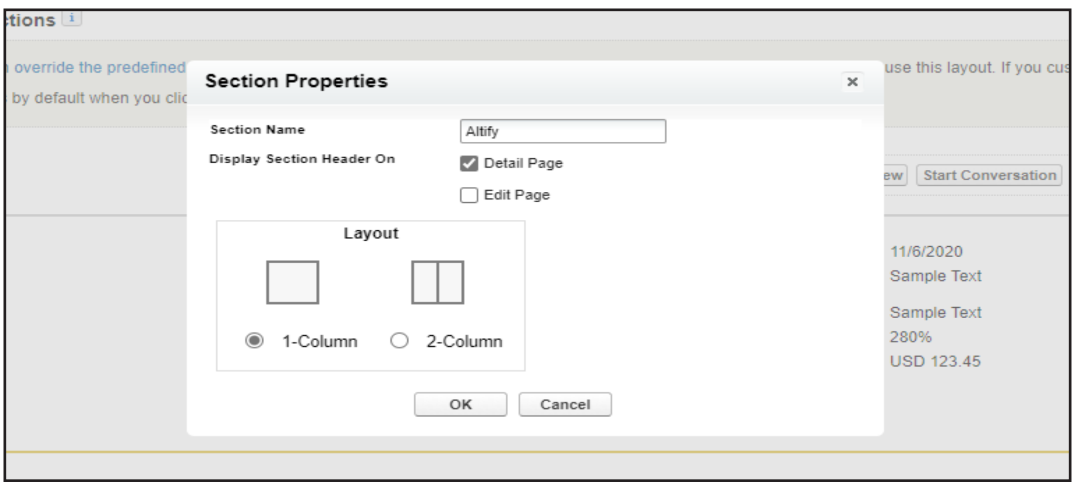
3. On the Page Layouts screen, select **Edit** for the relevant layout.

   You are free to choose your own location for Altify components within the page layout. However, we recommend that you create an 'Altify' section for Altify components.

   To do this, under **Visualforce Pages**, drag a **Section** to a suitable location in the layout

4. In the Section Properties dialog, specify the following settings:

   - **Section Name** = Altify
   - Deselect **Edit Page**
   - **Layout** = 1-Column



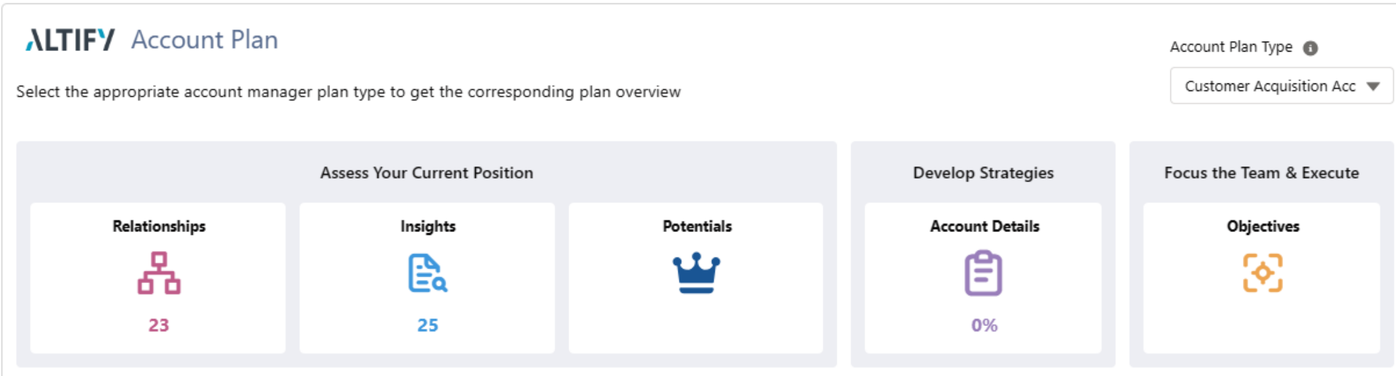
5. Click **OK**.
6. **Save** your changes to the page layout.

Account Launchpads

The following launchpads can be added to an Account page layout.

Altify Account Manager

The Altify Account Manager launchpad provides access to the account plan. Users can also select the type of plan that is applied to the account.



Recommended settings:

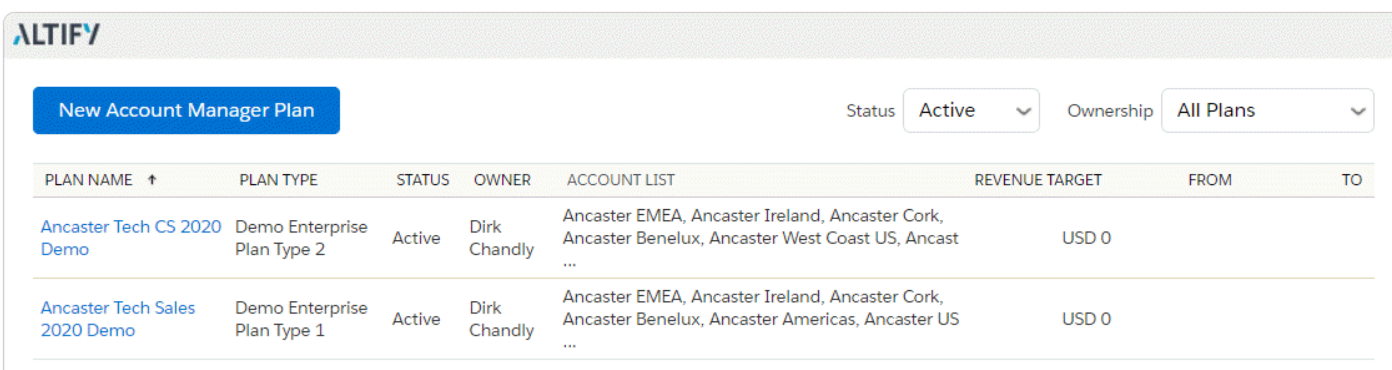
- **Show Scrollbars** is not enabled.
- A height of 550 pixels.

Altify Account Manager Plans

The Altify Account Manager Plans launchpad lists the Account Manager plans that the account belongs to. Clicking one of these plans opens it in Account Manager. Users can filter the listed plans by *Status* and *Ownership*, or can create a new Account Manager plan.

Recommended settings:

- **Show Scrollbars** is enabled.
- A height of 300 pixels.

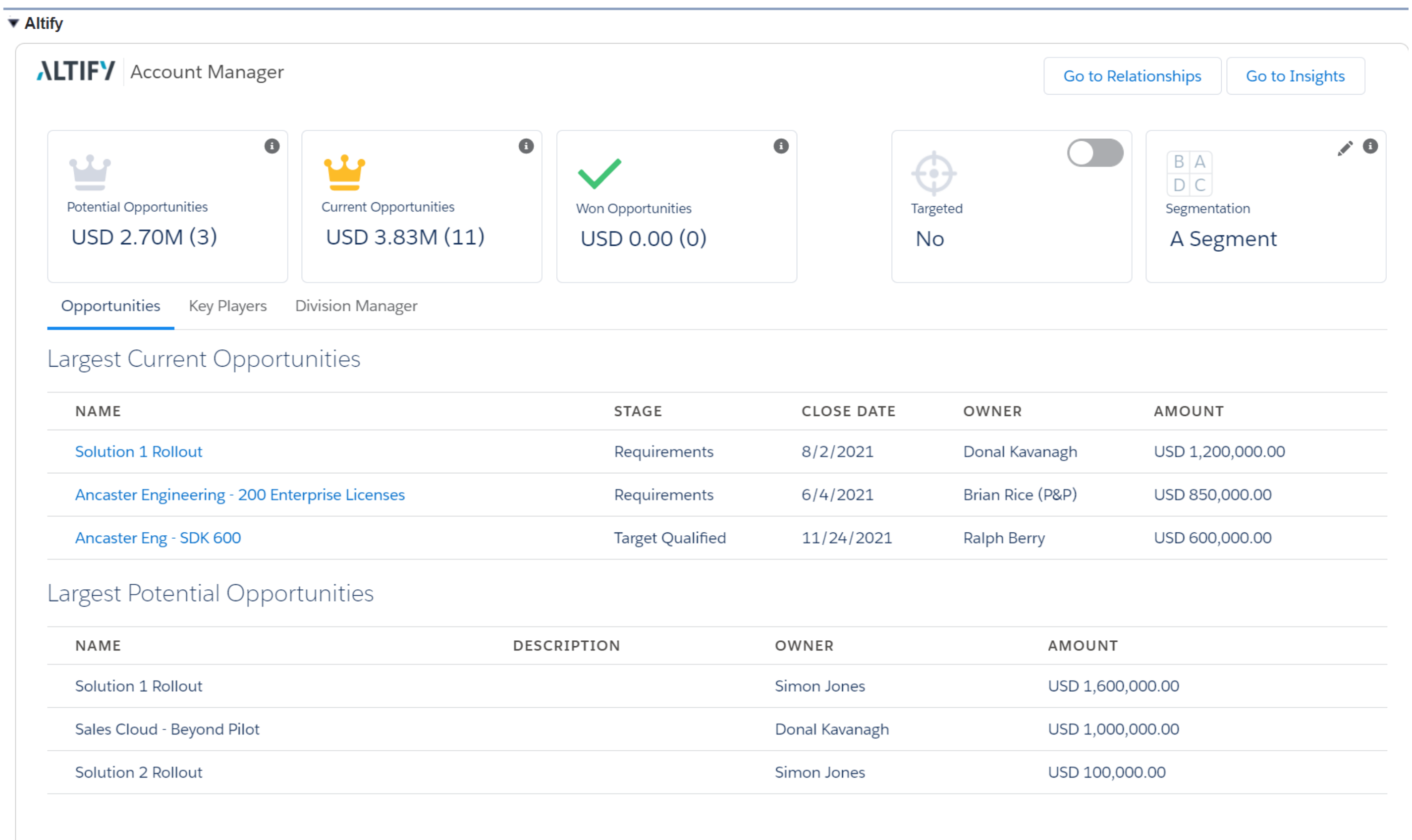


Altify Account Summary Launchpad

This launchpad shows information about the account's opportunities, provides targeting and segmentation options and lists the key players on the account's relationship map along with their level of support for your organization and associated business insights. The Division Manager tab provides the ability to manage the account's associated divisions and gives access to their specific relationship and insight maps.

Recommended settings:

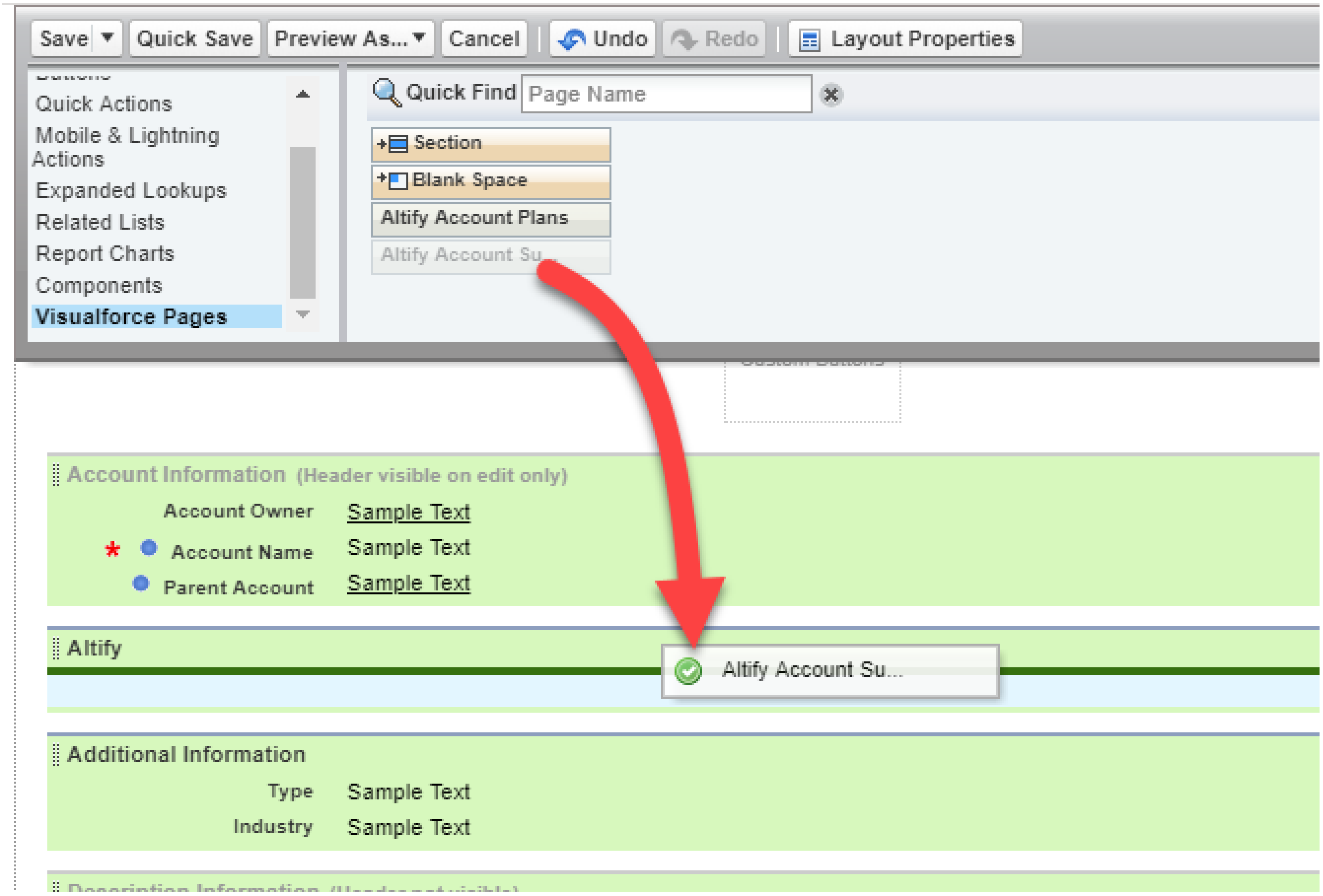
- **Show Scrollbars** is enabled.
- A height of 650 pixels.



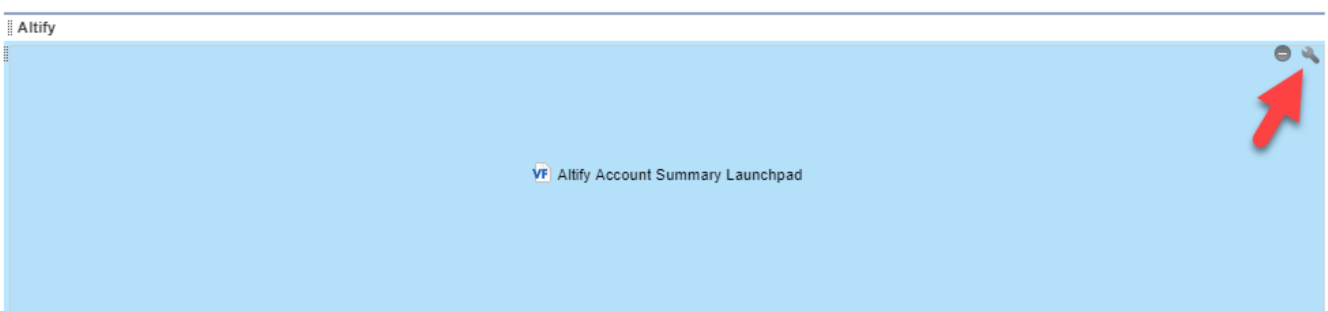
Adding Account Manager Launchpads

You are now ready to add the required launchpad or launchpads to the Account page layout.

1. On the Page Layout screen, click and drag the relevant launchpad from the *Visualforce Pages* menu into the section you created when "Preparing the Page Layout for AM Launchpads" on page 16 (as shown in the example below).



2. Click the spanner icon on the top right of the launchpad (as indicated below) to specify the *Visualforce Page Properties*.



The following values are specific to each launchpad. Set them as follows for the launchpad you are installing:

Altify Account Manager

- **Show Scrollbars** is not enabled.
- A **Height (in pixels)** of '550' pixels.

Altify Account Manager Plans

- **Show Scrollbars** is enabled.
- A **Height (in pixels)** of '300' pixels.

Altify Account Summary Launchpad

- **Show Scrollbars** is enabled.
- A **Height (in pixels)** of '650' pixels.

3. Make sure the **Show Label** check box is deselected.
4. Click **OK**.
5. Click **Save** when you return to the page layout screen.
6. Check to see that your launchpad is displaying as shown in the example above.
7. Repeat the process to add another launchpad.

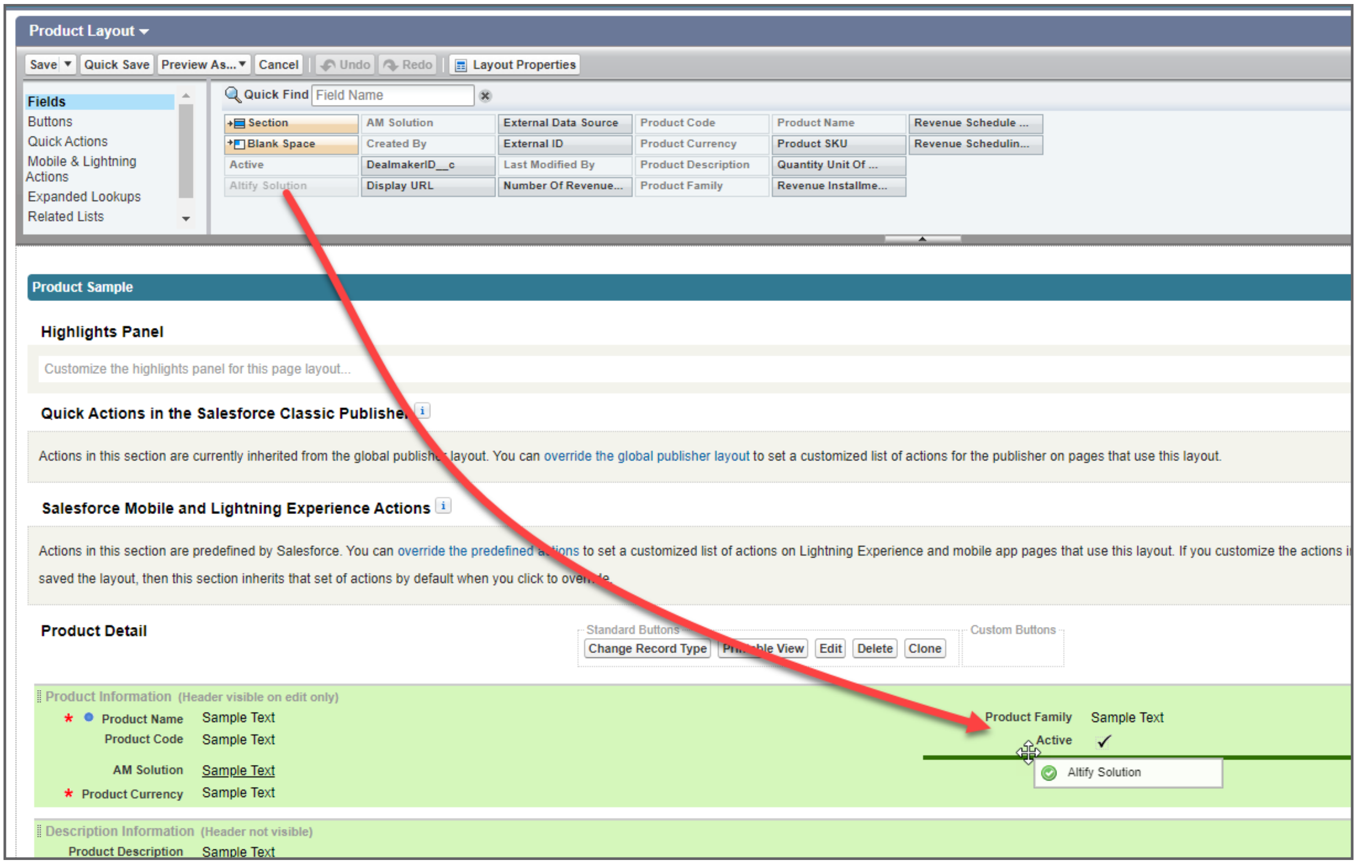
Adding the Altify Solution Field to the Product Page Layout

Note: This topic is relevant to Account Manager only. It is necessary only if opportunities in your org involve product line items.

To add the Altify Solution field to a Product page layout:

1. In **Setup**, open the **Product** object.
2. Open the Product page layout you want to modify.
3. Drag the **Altify Solution** field down to a suitable location on the page layout.

Figure 5-1



4. Click **Save**.

Repeat this process for all relevant Product page layouts.

Making the Application Available to Users

Standard users are granted access to Altify functionality through the Altify Permission Set. You create this permission set as part of the installation process. Then you need to allocate it to users.

(The separate Altify Administrator permission set provides access to Altify administration features.)

1. Creating the Altify Permission Set
2. Assigning a Permission Set to Users
3. Allocating Licenses to Users

About Permission Sets

Managing user access to tools and functions can be an extremely complex task for administrators, particularly in large and complex orgs.

For example, suppose that an org has:

- 100 custom objects, and 50 fields for each of these
- 2 page layouts per object, with a record type for each one
- 10 apps
- 100 Apex classes
- 100 Visualforce pages

With these elements in the org, for any given profile or permission set there are 11,000 permissions that can be configured, with an almost infinite number of possible combinations. And this is before you even consider the organizational complexities of staff hierarchies and profiles within the company.

Much of this complexity can be avoided by using permission sets.

A permission set is a collection of settings and permissions that give users access to various tools and functions. The same settings and permissions are also found in user profiles, but permission sets extend users' functional access without changing their profiles.

For example, to give users access to a custom object, you can:

1. Create a permission set.
2. In the permission set, enable the required permissions for the object.
3. Assign the permission set to users.

This means you don't have to change user profiles, or create a user profile for a single use case.

A user can have only one profile, but they can have multiple permission sets.

When using Altify, we recommend that you use permission sets when providing access to your users.

Creating the Altify Permission Set

As part of installing the Altify Core package, you need to create the Altify permission set:

1. Open the **Altify Permission Set Administration** tab.
2. Click the **Create/Update** button. 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.

Caution: Do not refresh or close the tab while the permission set job is running.

Assigning a Permission Set to Users

All standard users require the 'Altify Permission Set'. Additional permission sets may need to be allocated to users as follows:

- 'Altify Administrator' - for administrators who need to configure Altify.
- 'Altify Call Planner Permission Set' - for users who require access to the Call Planner product.
- 'Altify Max Administrator' - for users who need to enable Max or configure batch jobs or emails for Altify Max.
- 'Altify Max Editor' - for users who need to create and edit Max insights or insight rules, and import or export insight library files.
- 'Altify Max User' - for standard users to view Max insights that are generated for opportunities.
- 'Altify Relationship Map Live App User' - for users who need to access and edit relationship maps in a Quip document.

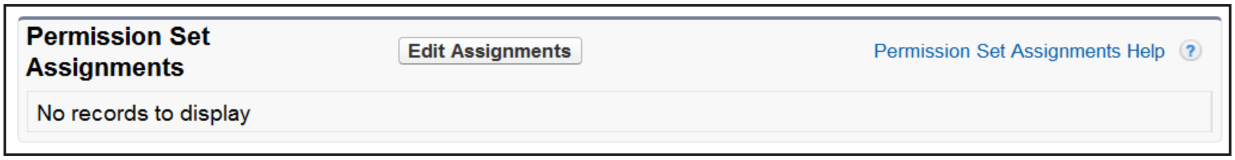
There are two ways to assign a permission set:

- Assign it to an individual user
- Assign it to multiple users at the same time using the Data Loader

Manually Assigning a Permission Set to a User

To manually assign the permission set to individual users:

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**.

Bulk-Assigning a Permission Set to Multiple Users

To assign a permission set to multiple users at once, use the Salesforce Data Loader. You'll need details of the following two fields:

- UserID
- PermissionsetID

Note: If you have not yet installed Data Loader, in **Setup** go to **Data Loader**.

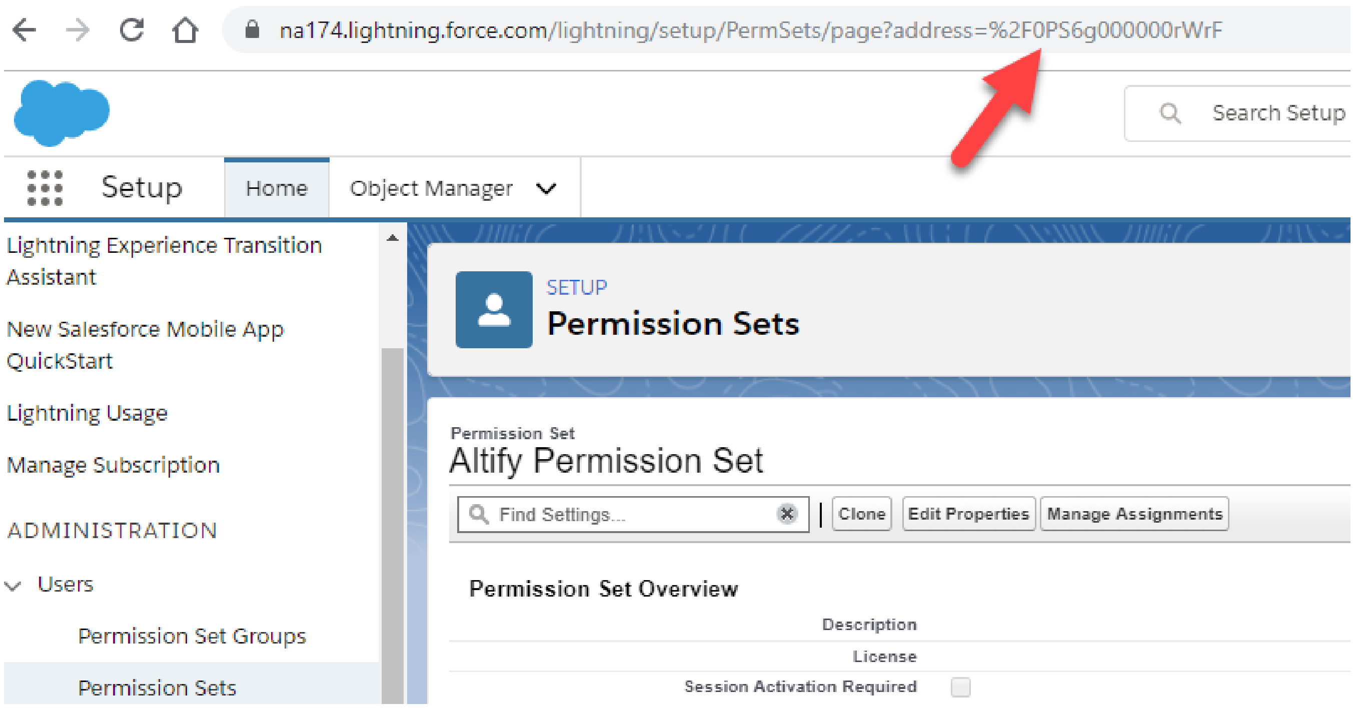
<u>Stage 1</u>

You or your Salesforce Admin must generate a list containing the userID of each user who will be assigned the permission set.

<u>Stage 2</u>

1. In **Setup**, go to **Permission Sets**.
2. Open the permission set you want to assign to users.
3. Copy the Permission Set ID from the page URL. In the example below, you can see the ID of the Altify

Permission Set.

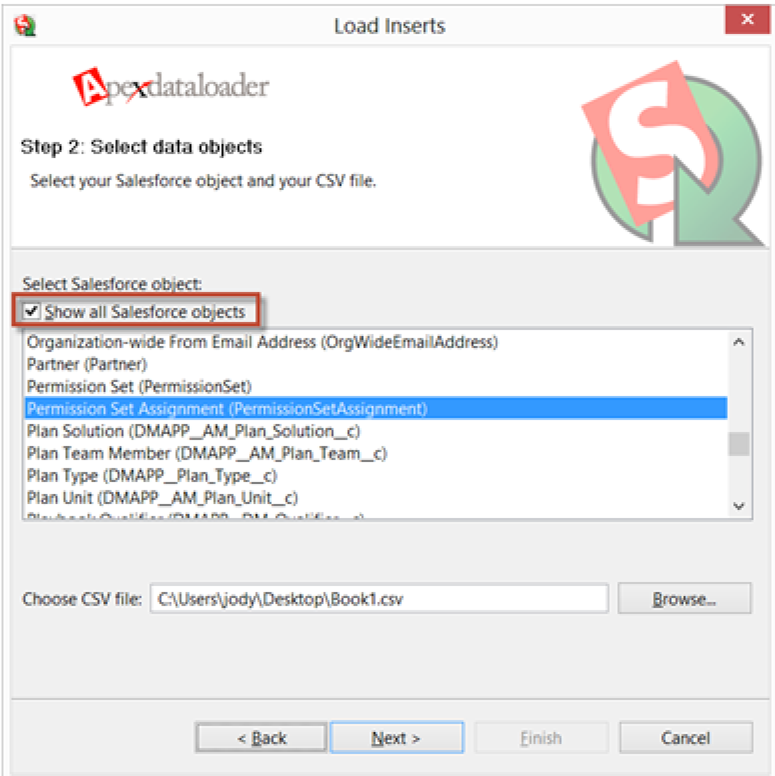


Stage 3

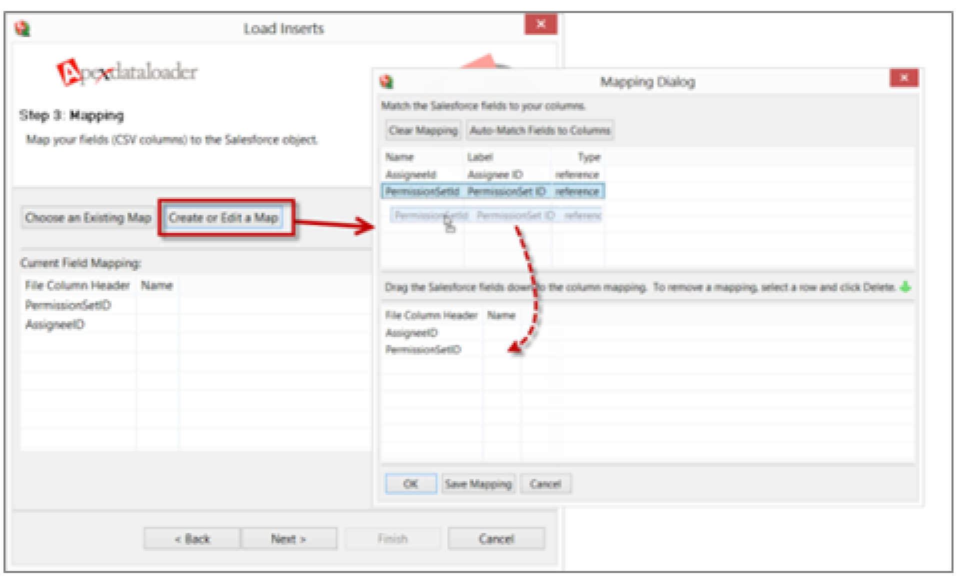
1. Create a .csv file with the following headings:
   - AssigneeID
   - PermissionSetID
2. Add the **UserID** of each user to the **AssigneeID** column.
3. Add the **PermissionSetID** to the **PermissionSetID** column for each user.

Stage 4

1. Open the Dataloader and click **Insert**.
2. Select the **Show all Salesforce objects** checkbox.
3. In the object list, select the **Permission Set Assignment**.



4. Click **Browse** to locate your .csv file.
5. Click **Next** to continue.
6. Click **Create or Edit a Map** and create your field mapping. When you have finished, click **OK**.



7. Click **Next** and **Finish** to upload.

8. To check that the permission set was applied, go to the **User Detail** page for a user. If the permission set was correctly applied, it is listed in the Permission Set Assignments section.

Altify Administrator Permission Set

The Altify Administrator permission set grants a user access to Altify administrative features. You should assign it to any user who needs administrative access for Altify software.

> **Note:** Some administrative tasks relevant to Altify software require Salesforce Administrator access.

Allocating Licenses to Users

> **Note:** This step is not necessary if you are installing Altify in a sandbox environment.

All Altify users first need to be licensed for the core 'Altify' package, and then, depending on which product they need access to, you need to assign the other license packages as follows to your organization's users:

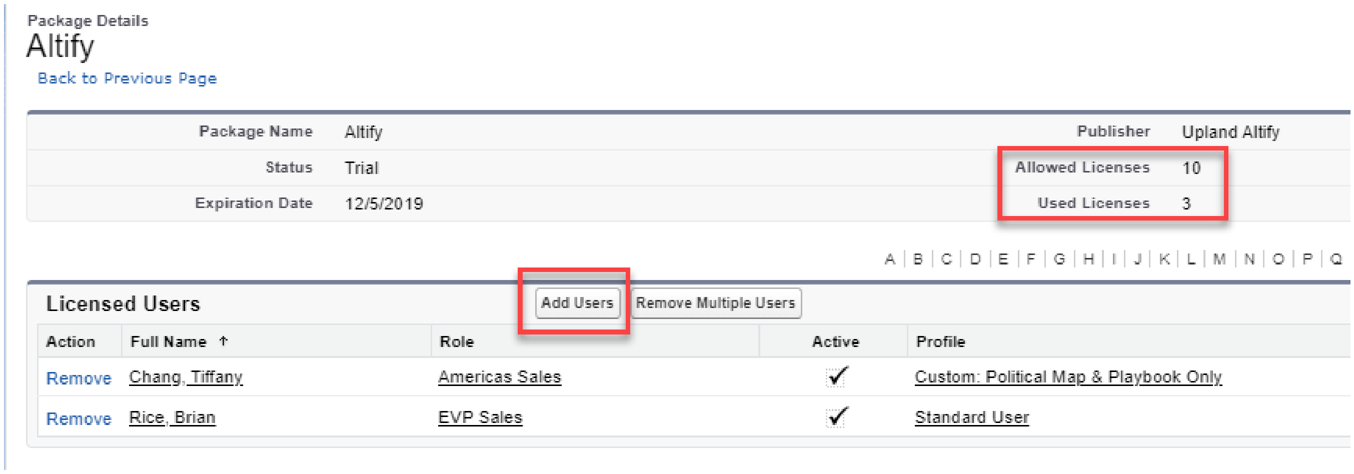
- 'Altify Opportunity Manager '
- 'Altify Sales Process Manager'
- 'Altify Account Manager'
- 'Altify Relationship Map' - for relationship map only users.
- 'Altify Insights' - for access to relationship maps and insight maps.

  > **Note:** users with an Opportunity Manager or Account Manager license automatically have access to relationship maps and insight maps, and do not require an Altify Relationship Map or Altify Insights license.

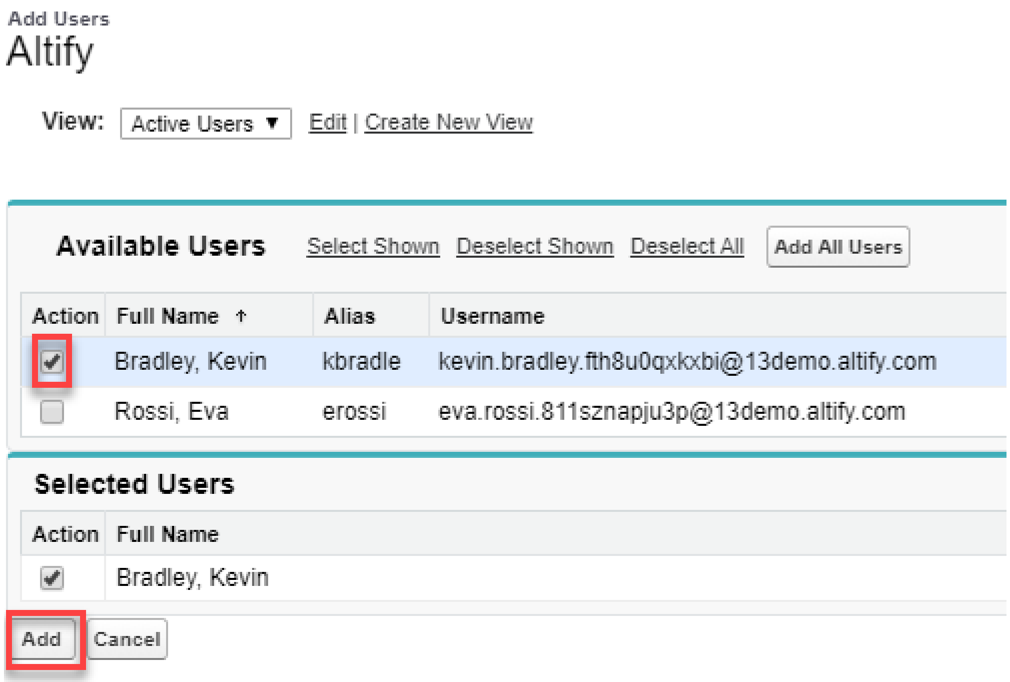
- 'Altify Max' - for access to Max insights generated for opportunities.
- 'Altify Call Planner'
- 'Altify Relationship Map for Quip' - allows users to access and edit relationship maps in a Quip document.

To allocate users to a particular Altify package:

1. In **Setup**, go to **Installed Packages**.
2. Your org's installed packages are listed. Click **Manage Licenses** beside the license package you want to allocate to users.
3. The Package Details page opens. Here you can see how many licenses you're allowed for the package, and how many are currently used. Click **Add Users** to assign licenses to users.



4. On the Add Users page, select all the users to whom you want to assign the license, and then click **Add**.



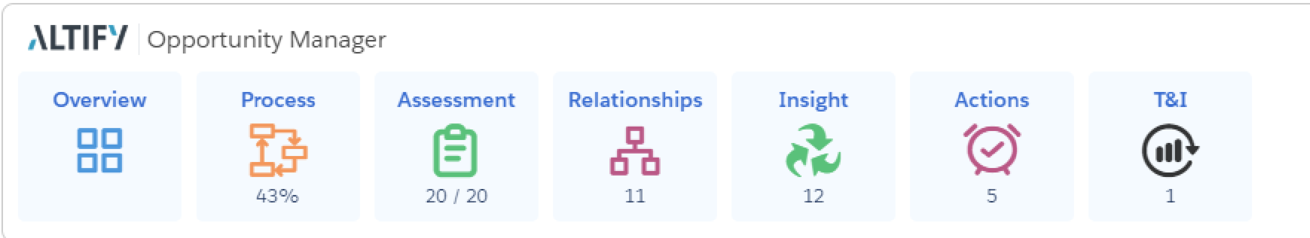
5. Repeat these steps for each Altify installed package for which you want to assign licenses to users.

Verifying That Licenses Are Working

To verify that the installation and licensing have worked correctly:

1. Log in as a licensed user.
2. Check that the launchpads you have added to a page layout are displaying correctly.

For example, if you have installed Opportunity Manager, check that the Altify Opportunity Plan Launchpad is displaying correctly. Browse to an opportunity and go to the Altify section. You should see the launchpad.



When You Use Altify on a Site-Wide Basis

By default, Altify ships with ten named-user licenses. These are valid for 30 days.

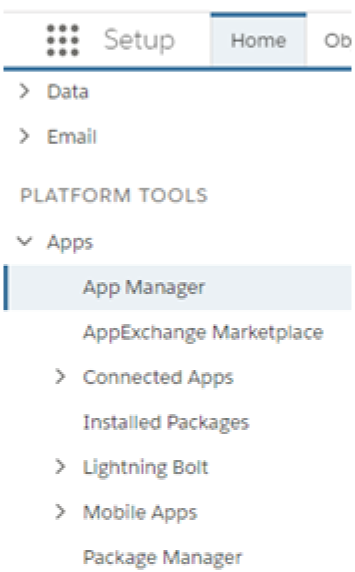
If Altify products will be used on a site-wide basis by most or all of your Salesforce users, contact Altify technical support to make the software available as a site-wide license. This means you'll only have to do license management for the individual Altify module(s) you have licensed.

Sales App in Salesforce Lightning

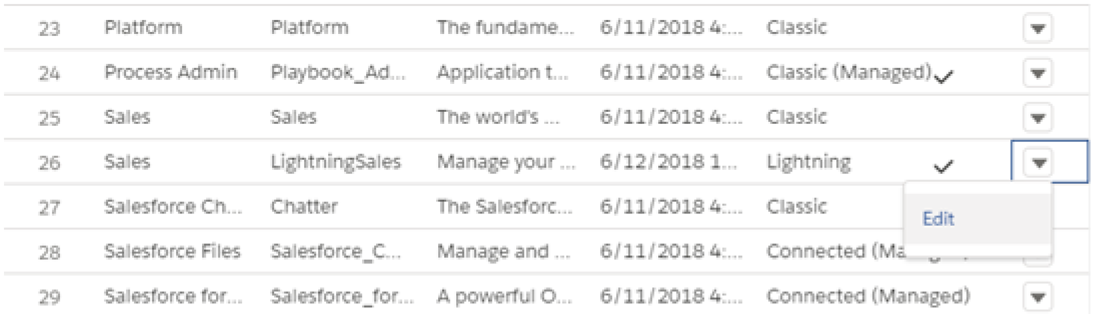
In Lightning, the **Sales** app does not automatically show Altify tabs.

To add Altify tabs to the Sales app in Lightning:

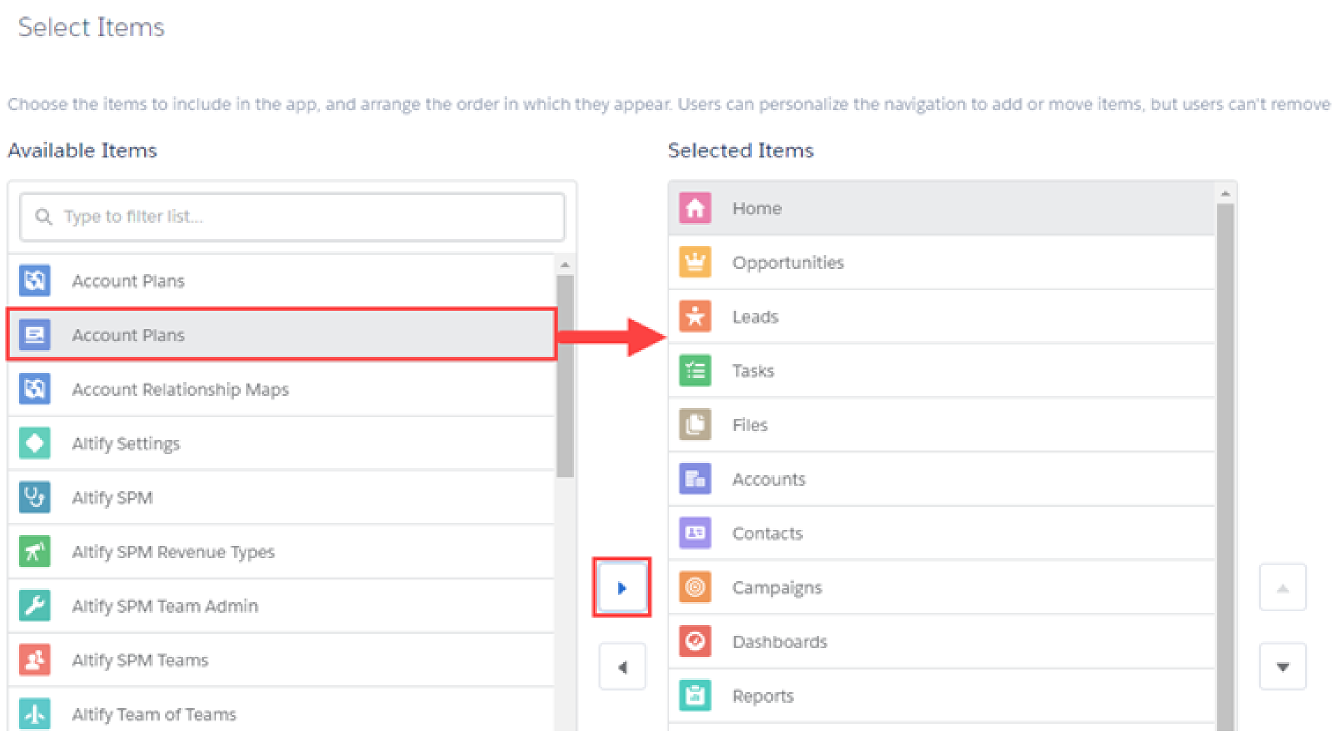
1. In Lightning Experience, go to **Setup > App Manager**.



2. Select the **LightningSales** app's **Edit** option.



3. In the left-hand panel, click **Select Items**.
4. Use the horizontal arrow buttons to add and remove items from the Sales app. In particular, move your Altify tabs into the Selected tabs list.

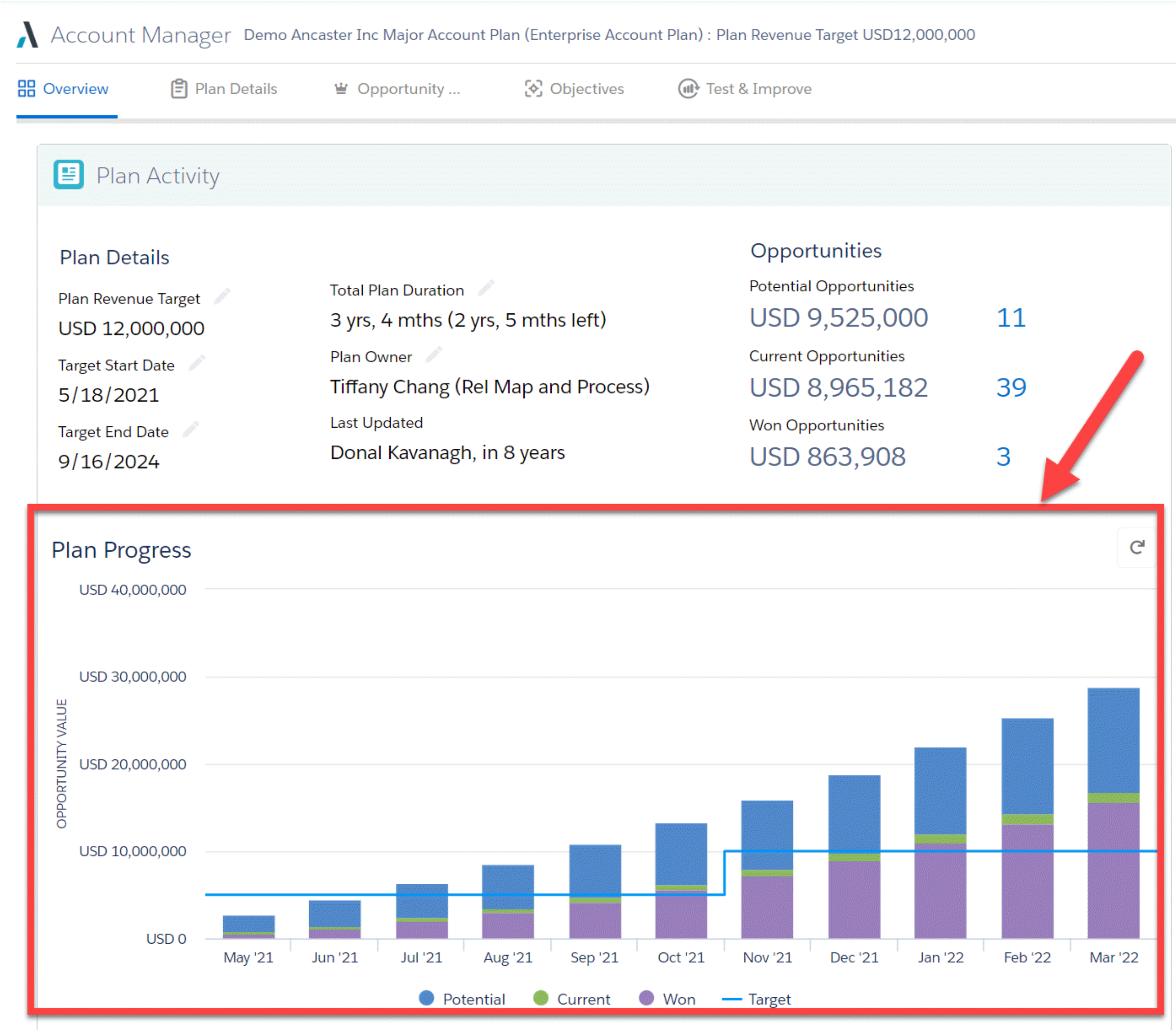


5. Use the vertical arrow keys to arrange the selected items into the order you want.
6. Click **Save**.

Plan Progress Batch Job

Note: This task is for **Account Manager** customers only.

The Plan Progress information shown on an Account Manager plan's Overview tab are based on calculations carried out by a daily batch job.



To set up and schedule this batch job.

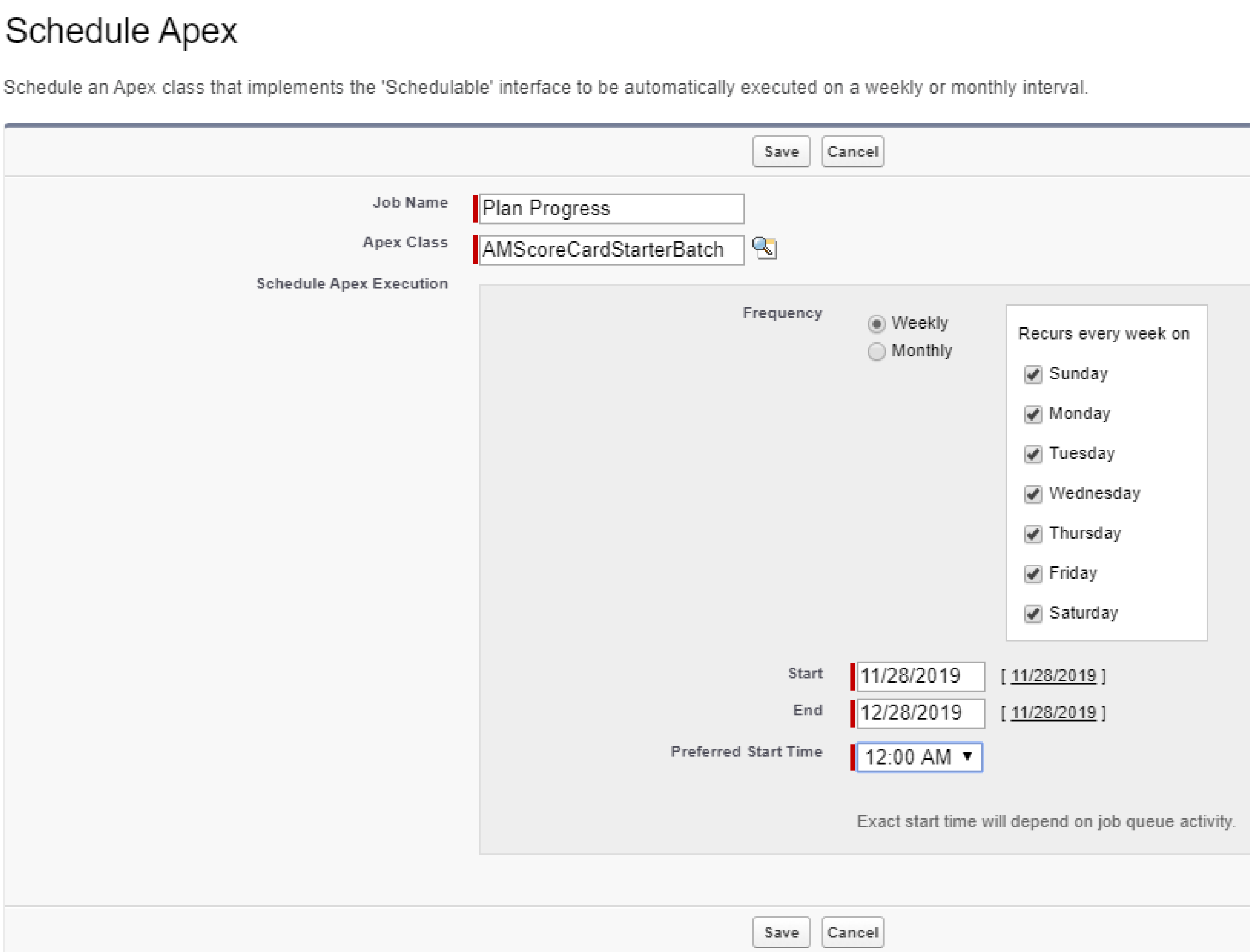
1. In **Setup**, go to **Apex Classes**.
2. Click the **Schedule Apex** button.

3. Enter a descriptive name for the Apex job, such as *Plan Progress Batch Job*.
4. Using the search button, specify the Apex class *AMScoreCardStarterBatch*.

> **Note:** Ensure that you select the class with the *Namespace Prefix* 'ALTF' (an Apex class with the *Namespace Prefix* 'DMAPP' may also appear in your search results).

5. Set the batch job to run daily.
6. Specify a start date, a finish date and a preferred start time for this job.

   (The preferred start time should be an hour when there is limited activity within your org.)



7. **Save** your changes.
8. To confirm that the batch job has been scheduled, go to **Setup > Scheduled Jobs**. You should see the job in the list.

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 account completeness and opportunity completeness.

> **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 the following:.

- Completeness Scoring [AM]
- Completeness Scoring [OM]

Enabling Export of Altify Data

If users are exporting from Altify to PowerPoint, Microsoft Word or PDF, they will need Create, Read and Delete permissions on the Documents object.

We strongly recommend that this is implemented in Salesforce administration, e.g. by editing the user profile, and not by updating the Altify Permission Set.

If you want your users to be able to export Account Manager plans, Opportunity Manager, or opportunity/account relationship maps in a PowerPoint or Executive Briefing format, further configuration is necessary - continue on to the next section: "Output Extension Application (Optional)" on page 37.

Output Extension Application (Optional)

If you need Powerpoint export capability for Account Manager plans, Opportunity Manager, or opportunity/account relationship maps, you need to install the latest version of the **Altify Output Extension Application** (previously known as the Powerpoint Extension Application).

This app also makes it possible to generate Executive Briefings in Word and Quip format.

Tip: For information on installing Quip, see [Quip Integration with Salesforce](#) in the online help.

Installing the Extension Application

Before you install the extension app, ensure that Files Connect is enabled in your org. The installation will fail otherwise. Go to **Setup > Files Connect**, and select the **Enable Files Connect** checkbox.

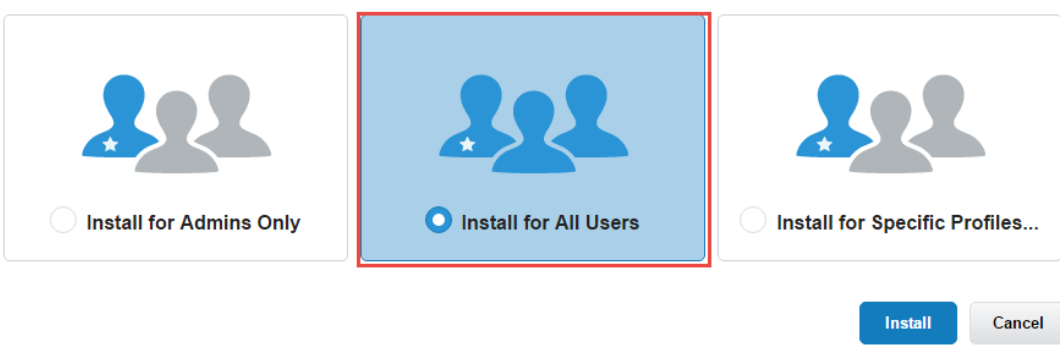
To install the Output Extension Application in Salesforce:

1. Copy and paste the Extension App package installation URL into the browser.

   Note: This URL is supplied by Altify. For production Salesforce environments the URL provided will start with 'https://login.salesforce.com/'. For sandbox environments, the URL will start with 'https://test.salesforce.com/'.

2. Log into Salesforce.com with your administration username and password.
3. The installation page opens. Select **Install for All Users**.

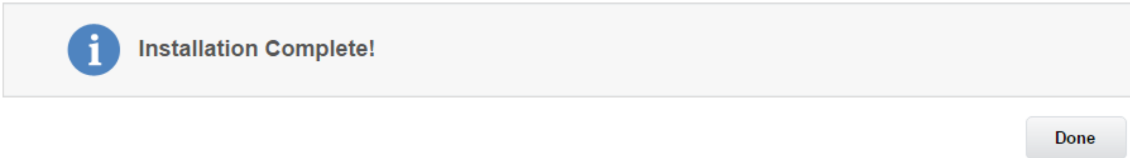
   Note: This option makes the extension application available to all users and is the preferred approach for most Altify customers. However, you can install for admins only and thereafter manually assign licenses to specific users. For more information, see "Installing for admins and specific users" on the next page.

4. Click **Install**.
5. Select the **Yes** checkbox to grant access to the site for the output generation service.

6. Click **Continue**.

   The package is installed, When the process is complete, this page is displayed:



Installing for admins and specific users

It is possible to install the Altify Output Extension for admins only and assign licenses individually.

To do this, you must first raise a ticket with the Altify "Support" on page 49 team signaling your intention. In response, they will change the Altify Output Extension license from a site license to a standard license.

Once that is done, you can follow the above process - selecting **Install for Admins Only** in step 3.

Once the extension app is installed, you can assign the licenses to specific users by following these steps:

1. In **Setup**, go to **Installed Packages**.
2. On the Altify Output Extension row, click the link **Manage Licenses**.
3. On the Package Details screen, click the **Add Users** button in the Licensed Users section to allocate an Altify Output Extension license to specific users in your org.

Using the EU-Hosted Service for Powerpoint Export

Note: This task is **optional**.

The default remote site providing the Powerpoint generation service is hosted in the United States. However, for GDPR compliance you can use the service hosted in the EU instead.

Add the EU-Hosted Remote Site

1. In **Setup**, go to **Remote Site Settings**.
2. Click **New Remote Site**.
3. Specify the following details:

Field	Value
Remote Site Name	Heroku_PPTX_EU
Remote Site URL	https://pptgen-eu.herokuapp.com

4. Select the **Active** checkbox.
5. Click **Save**.

You have added the EU-hosted service to your org.

Set Altify to Use the EU-Hosted Service

1. In **Setup**, go to **Custom Settings**.
2. Click **Manage** beside **Altify Powerpoint Customization**.
3. Click **New** at the top of the page.
4. Enter *https://pptgen-eu.herokuapp.com/* in the Heroku URL field.
5. Click **Save**.

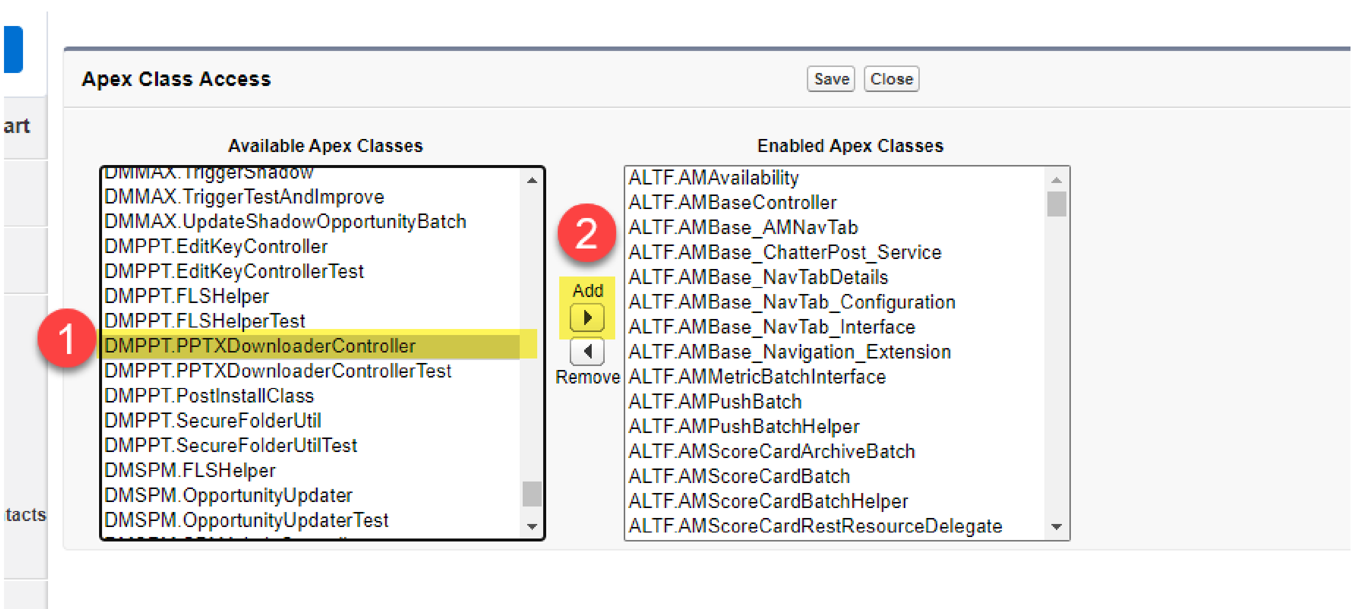
You have configured Altify Powerpoint Export to use the EU-hosted service.

Enabling PowerPoint Export

If your org is licensed for the 'Altify Output Extension', you need to enable Altify to export to PowerPoint.

To configure the necessary permission, do the following:

1. In **Setup**, go to **Permission Sets**.
2. Click **Altify Permission Set**.
3. Click **Apex Class Access** in the Apps section.
4. Click the **Edit** button in the Apex Class Access section.
5. Find and select **DMPPT.PPTXDownloaderController** in Available Apex Classes (**1**) and click **Add** (**2**) to move it to Enabled Apex Classes.



6. Click **Save**.

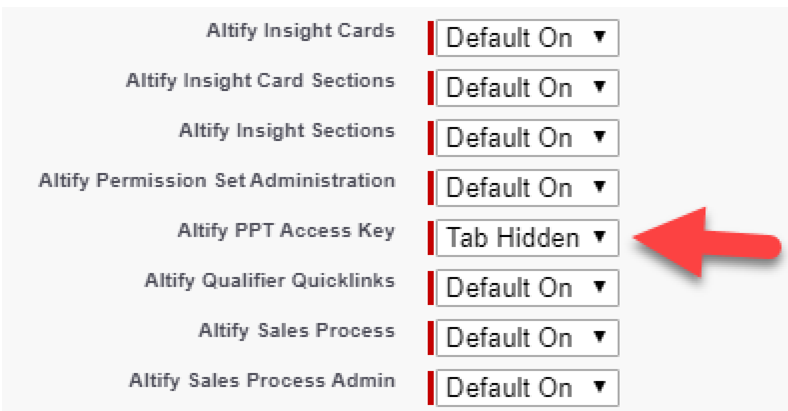
Entering the Access Key

1. Open the **Altify PPT Access Key** tab in Salesforce.
2. Click **Edit**.
3. Enter the access key provided by Altify.
4. Click **Save**.

Hiding the Access Key Page from Users

To prevent users from accidentally overwriting the access key for the Extension App, we recommend that you hide this page from all non-admin users.

1. In **Setup**, go to **Profiles**.
2. Click **Edit** beside a profile that should not be able to access the **Altify PPT Access Key** tab.
3. In the Custom Tab Settings section, select **Tab Hidden** in the ‘Altify PPT Access Key’ picklist.



4. Click **Save**.

Repeat this for each profile that does not need access to this tab.

Configuring PowerPoint Custom Settings

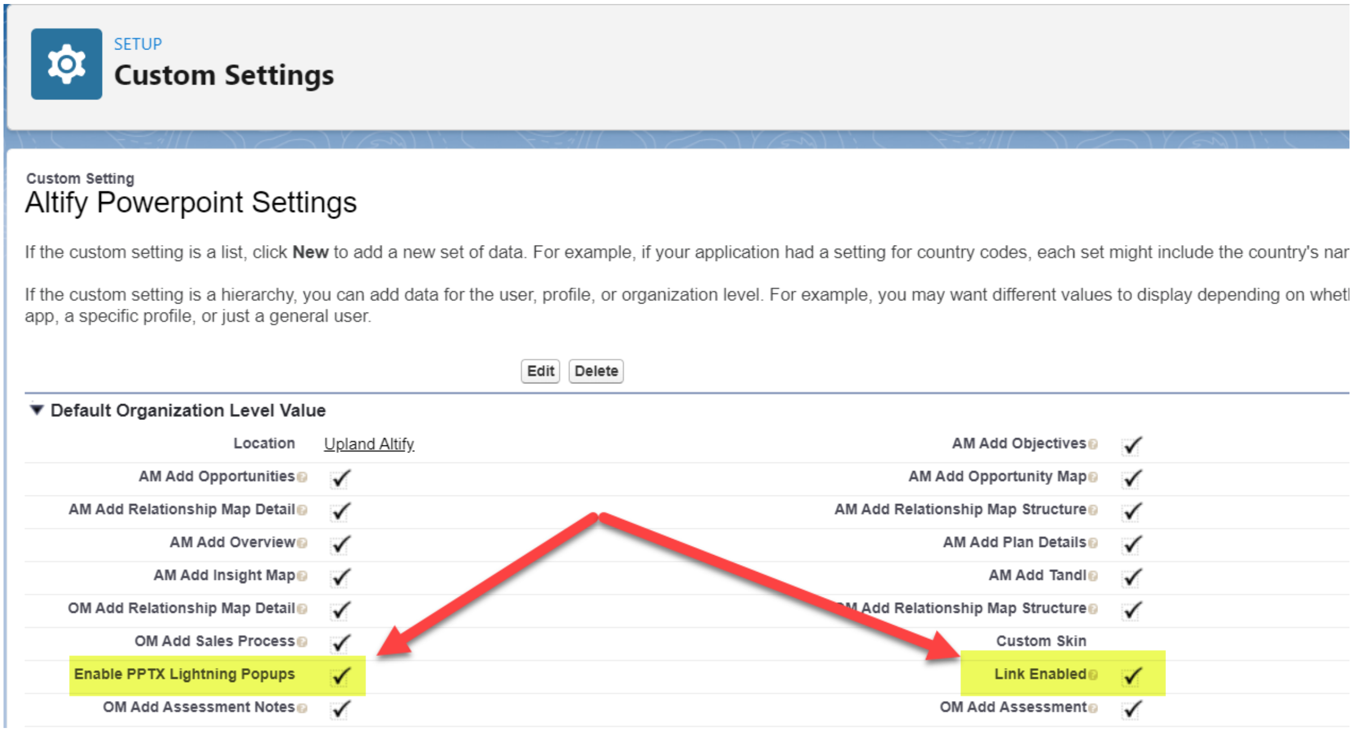
When the **Link Enabled** setting is enabled, the **Create > PPT Export** option becomes available in Opportunity Manager, Sales Process Manager, and Account Manager (depending on what the user is licensed for)

> **Note:** It also enables the **Export to Word** option in the Executive Briefing wizard in Opportunity Manager and Account Manager.

1. In **Setup**, go to **Custom Settings**.
2. Click **Manage** beside **Altify PowerPoint Settings**.
3. Click **Edit** and select the **Link Enabled** checkbox.

4. If your org employs clickjack protection, you also need to select the checkbox **Enable PPTX Lightning Popups** (otherwise PPT export will not function correctly).

   The settings *Link Enabled* and *Enable PPTX Lightning Popups* are checked and highlighted in the example below.



5. Click **Save**.

The *Altify Powerpoint Settings* also enable you to configure the content and format of Powerpoint exports.

For full details see the following:

- PowerPoint Settings [OM]
- PowerPoint Settings [AM]

Audit Trail of Powerpoint Exports

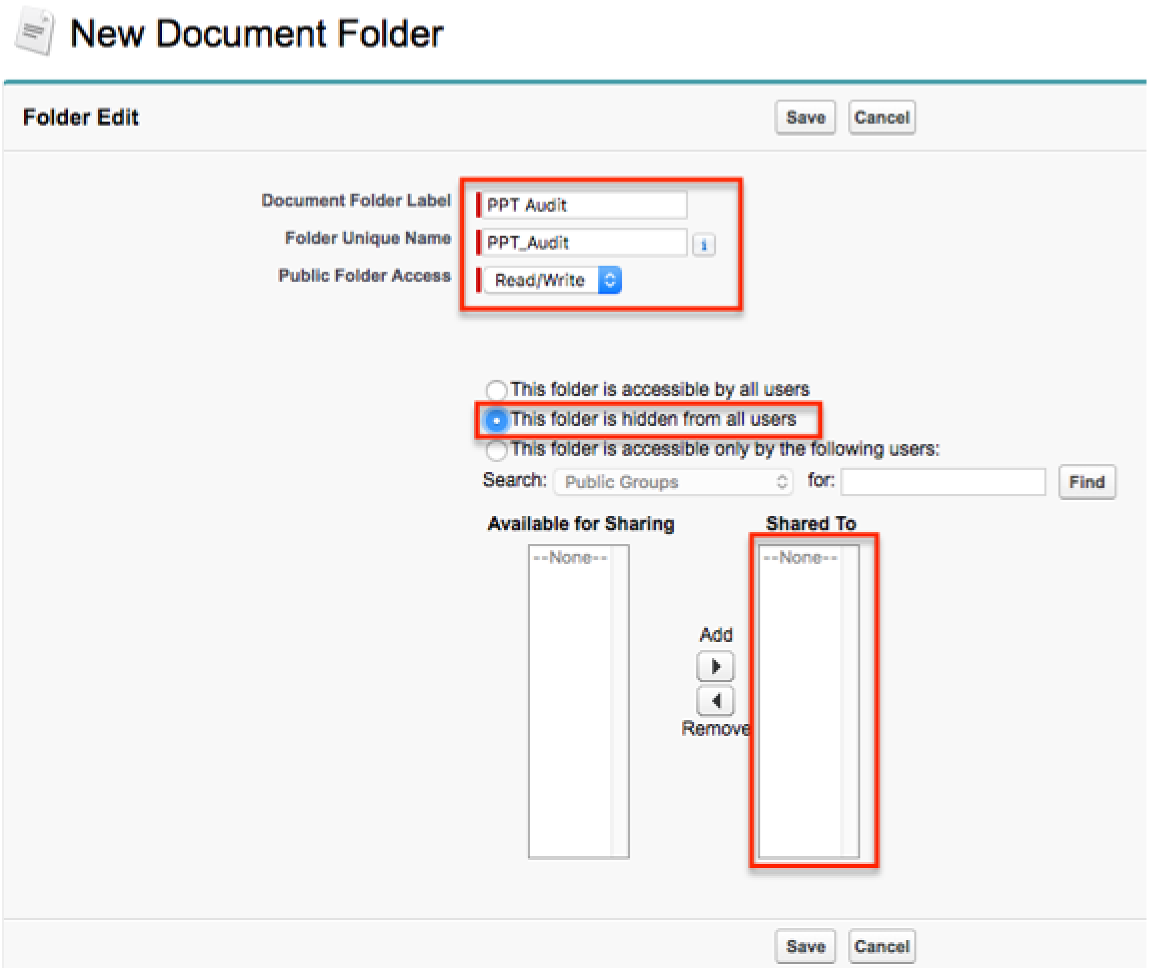
Note: This task is **optional**.

You can configure the Extension Application to record an audit trail of Powerpoint Export events. These events can occur in account-level relationship maps, in Account Manager, and in Opportunity Manager. The audit trail is stored in a secure folder specifically created for this purpose. For each event, the folder provides the following event details:

- A link to the Powerpoint or JSON file generated by the event. (A JSON file with error details is generated for a failed export.)
- Powerpoint file size.
- File creation date.
- File type.
- The user who generated the export.

Create a Secure Folder to Store the Audit Trail Information

1. Open the **Documents** tab in Salesforce Classic mode.
2. Click **Create New Folder**.
3. Specify a folder label and name. Make a note of the Folder Unique Name. You'll need to specify this in Custom Settings. (Salesforce doesn't allow the unique name to have any spaces.)
4. Set it to *Read/Write* access.
5. Make sure it’s hidden from all users.



6. Click **Save**.

The folder is accessible (to administrators only) in the **Documents** tab in Salesforce Classic mode. (It is not accessible in Salesforce Lightning mode.)

Specify the Folder's Unique Name in Custom Settings

1. In **Setup**, go to **Custom Settings**.
2. Click **Manage** beside **Altify Secure Folder Settings**.
3. Click **New** or **Edit**.
4. In the Secure Folder Name field, specify the Folder Unique Name of the folder you created.
5. Click **Save**.

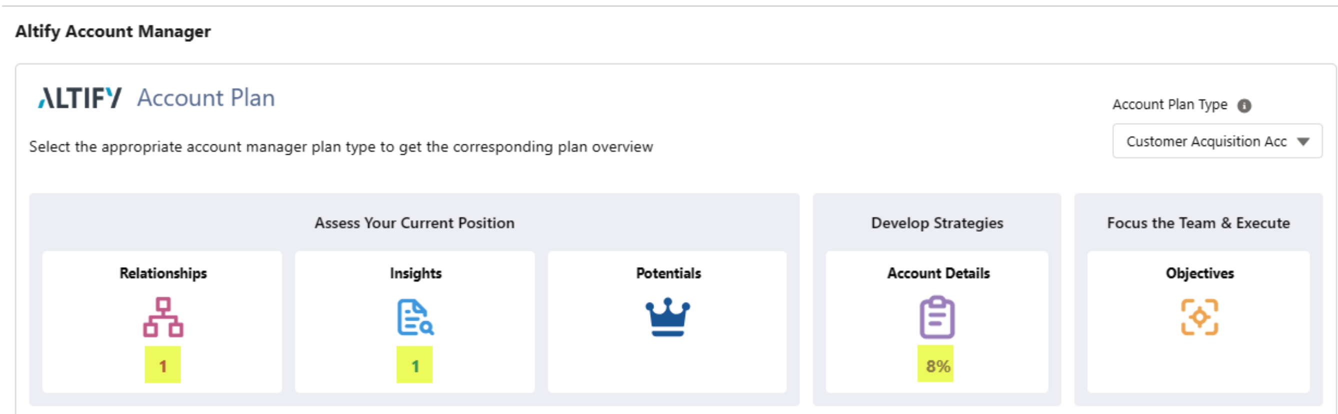
The folder is now configured to contain Powerpoint Export data, and has the required level of access. Only administrators can access the folder.

Post Install Checklist

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

Account Manager launchpads and functions

1. Create a test account record and ensure the Altify launchpads are displaying correctly:
   - *Altify Account Manager* (if you are employing account plans in your org)
   - *Altify Account Summary Launchpad*
   - *Altify Account Manager Plans* (if you are employing Account Manager plans in your org)
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 for the account plan via the *Altify Account Manager* launchpad: relationships, insights, account details and objectives.
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).

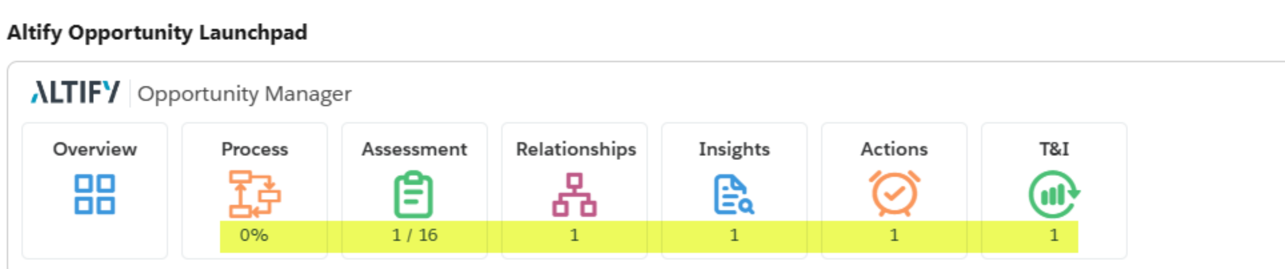


5. Create a simple Account Manager plan, using your test account, via the *Altify Account Manager Plans* launchpad. Follow the setup wizard and enter data as desired. It's best if you have a test Altify Solution set up prior to commencing this step.
6. Check to see that the account details you entered for the account plan are displayed on the Plan Details tab (under Row Details).
7. Add further test data (Plan Details and Objectives) to your Account Manager plan.
8. Create a current opportunity for your test account and import it on the opportunity map of the Account Manager plan.
9. Schedule a test T&I for the Account Manager plan, inviting at least two participants and checking to see that their emailed invitations were received.

10. If you have installed our Altify Output Extension app, test the output by [exporting the Account Manager Plan](#).

Opportunity Manager 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*
   - *Altify Sales Process Launchpad*
   - *Altify Max Insight Panel*
2. Click each tile, button and link on the launchpads to ensure the pages load successfully.
3. Create some simple test data for actions, insight map and relationship map for the opportunity.
4. Create some simple test data for assessment (including decision criteria on specific assessment questions).
5. Schedule a test T&I for the opportunity, inviting at least two participants and checking to see that their emailed invitations were received.
6. Check to see that the test data you have entered is reflected on the *Altify Opportunity Plan Launchpad* - as shown in the example below:



7. If you have installed our Altify Output Extension app, test the output by exporting the opportunity.

Appendix: Other Opportunity Manager Launchpads

Altify recommends that you do not install these launchpads until you have spoken with your Altify Technical Consultant and discussed your business requirements.

Launchpad	Description
Altify Opportunity Relationships & Insight Map Launchpad	This provides quick access to the opportunity's relationship map and insight map. It lists the opportunity's key players and the insights owned by each one.
Altify Sales Process Launchpad	This shows summary information on the state of the opportunity, such as the opportunity stage and progress through the sales cycle. It also provides a link to Opportunity Manager's **Process** tab.

Launchpad	Description
Altify Max Insight Panel	Altify Max gives you insights – real-time coaching – about the current state of your opportunity or account plan. The Altify Max Insight panel makes insights for opportunities visible on the main opportunity page. If Altify Max is licensed, this launchpad shows the Max insights currently applicable to the opportunity. (These are also shown within Opportunity Manager.) You can click an insight to go to the relevant Opportunity Manager page.

To install these launchpads, follow the instructions provided in "Adding the Altify Opportunity Plan Launchpad" on page 11 and specifying the *Visualforce Page Properties* detailed below in each case.

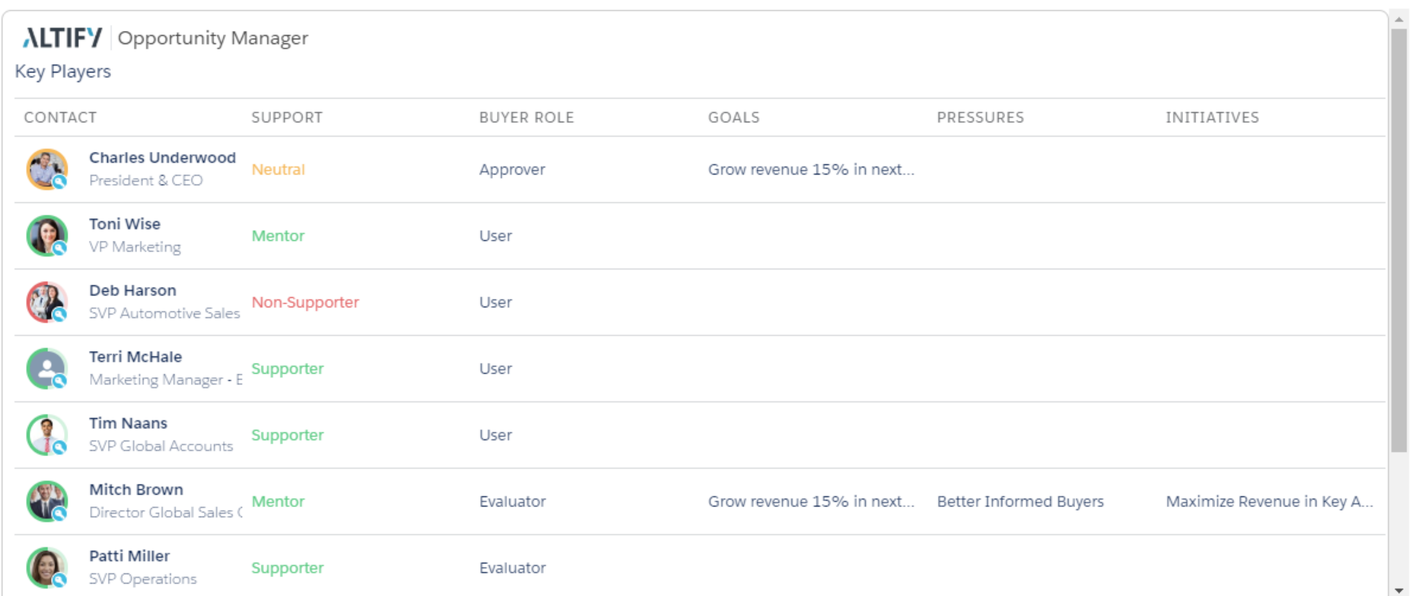
Altify Opportunity Relationships & Insight Launchpad

Note: This launchpad is for Opportunity Manager and Relationship Map users.

This launchpad lists the opportunity's key players. Clicking a key player opens the opportunity's relationship map. Clicking one of the insights associated with a key player (if any) opens the opportunity's insight map.

Recommended settings:

- **Show Scrollbars** is enabled.
- A height of 450 pixels.



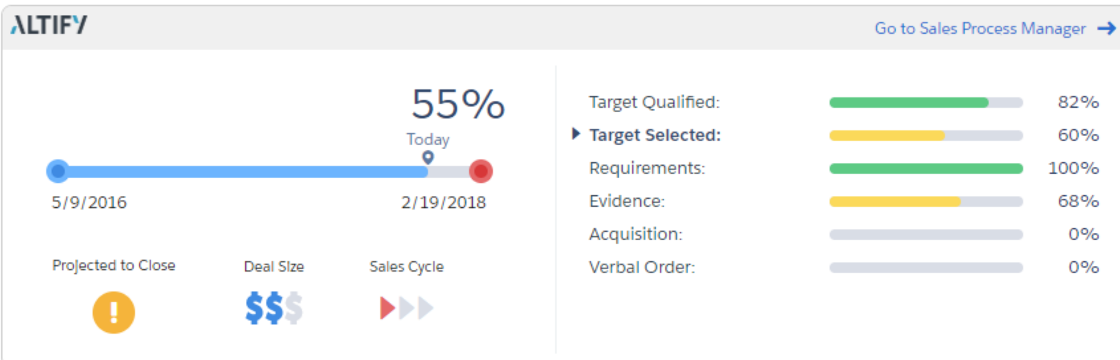
Altify Sales Process Launchpad

Note: This launchpad is for users who are licensed for Sales Process Manager.

This launchpad provides summary information on the state of the opportunity including a timeline from creation date to projected close date, and a sales cycle progress indicator (to see whether the deal is on track.) It also provides a link to the opportunity's **Process** tab.

Recommended settings:

- **Show Scrollbars** is disabled.
- A height of 260 pixels.



Hiding 'Process' on the Altify Opportunity Plan Launchpad

If you have added the *Altify Sales Process Launchpad* to the Opportunity page layout, you may wish to remove the **Process** tile from the *Altify Opportunity Plan Launchpad*.

You can do this when you are configuring feature visibility in Opportunity Manager.

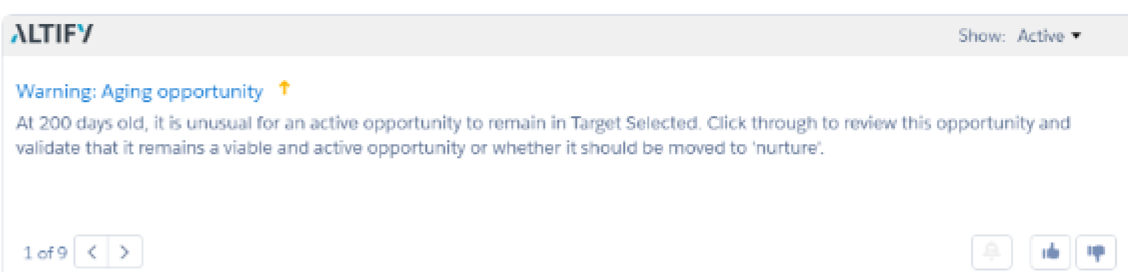
Altify Max Insight Panel

Altify Max gives you insights – real-time coaching – about the current state of your opportunity or account plan. The Altify Max Insight panel makes insights for opportunities visible on the main opportunity page.

(Contact Altify for more information about the Altify Max package.)

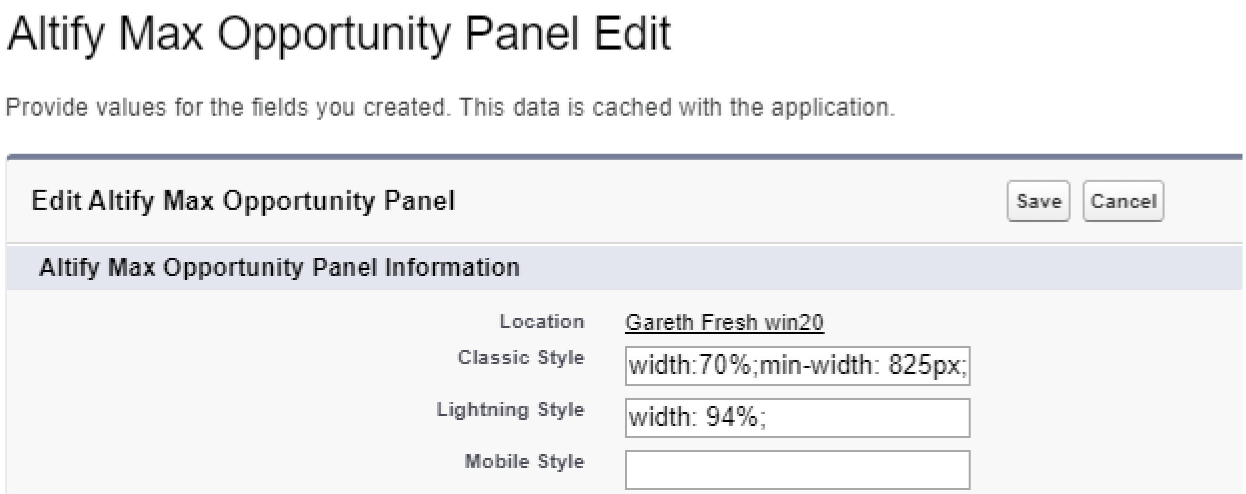
Recommended settings:

- **Show Scrollbars** is disabled.
- A height of 225 pixels.



The custom setting *Altify Max Opportunity Panel* (shown below) allows you to set a custom width for the panel.

Use the fields to specify HTML width attributes for the launchpad. There's a field for Salesforce Classic mode, Salesforce Lightning mode, and mobile device mode.



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.