9.9 Uninstall Guide

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Altify

Uninstalling Altify

This guide describes the uninstallation of Altify packages, which include:

- **Altify Core**

  This is the Altify package that contains the core functionality of all the Altify solutions. By default, it is automatically set as a site-wide license for the organization.

- **Account Manager licensing**

  This is the Altify package that allows the customer to license Account Manager and associated components to individual users. It is licensed on a named-user basis.

- **Opportunity Manager licensing**

  This is the Altify package that allows the customer to license Opportunity Manager and associated components to individual users. It is licensed on a named-user basis.

- **Sales Process Manager licensing**

  This is the Altify package that allows the customer to license Sales Process Manager and associated components to individual users. It is licensed on a named-user basis.

- **Conversation Manager licensing**

  This is the Altify package that allows the customer to license Sales Process Manager and associated components to individual users. It is licensed on a named-user basis.

- **Relationship Map License**

  This is the Altify package that allows the customer to license Account Manager and associated components to individual users. It is licensed on a named-user basis.

- **Altify Output Extension licensing**

  This is the Altify package that allows the customer to license the Output Extension export solution. This should be licensed on a site-wide basis.

Uninstallation should be carried out by an SFDC administrator user with sufficient Salesforce uninstallation privileges.

Overview

Uninstalling Altify software from Salesforce involves the following tasks:

1. [Removing links to Altify functionality](#)

2. [Uninstalling license packages](#)

3. [Uninstalling Core package](#)

These tasks are explained in detail in the sections that follow.

Removing Links to Altify Functionality

Removing all links to Altify functionality involves several tasks:

- Removing the PRIME action from Task page layouts

- Removing Altify from Opportunity page layouts

- Removing Altify from Account page layouts

- Deleting the custom Competitor list

- Uninstalling the Output Extension package

Removing the PRIME Action from Task Page Layouts

To remove the PRIME Action custom field from the Task Page Layout:

1. In **Setup** go to **Task**.

2. Open **Page Layouts**.

3. Open **Task Layout**.

4. Hover the mouse over the PRIME Action field and click the **Remove** icon.
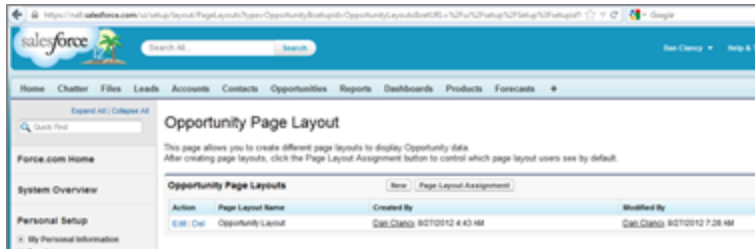

5. Click **Save**.

Removing Altify from Opportunity page layouts

To remove Altify from the Opportunities layout page:

1. In **Setup**, open the **Opportunity** object.

2. Open **Page Layouts**.

3. Open the Opportunity Layout page, and scroll down to the **Altify** or **Altify** section.

4. **Remove** the items in the section.

5. You can now remove the section itself. Click its **Remove** icon.
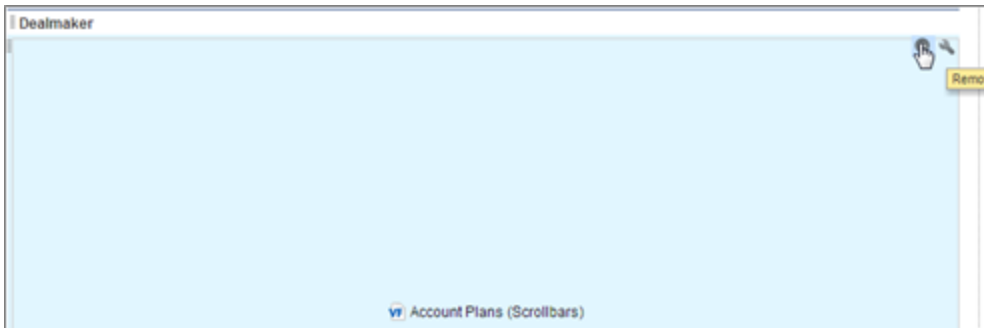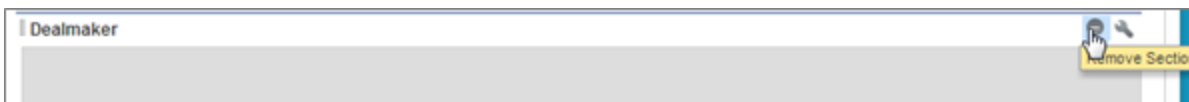

6. Click **Save**.

Removing Altify from Account page layouts

To remove Altify from Accounts Page Layout:

1. In **Setup** go to **Accounts**.

2. Open **Page Layouts**.

3. On the Account Layout , scroll down to the **Altify** or **Altify** section.

4. **Remove** the items from the section.

5. You can now remove the section itself by clicking its **Remove** icon.

6. Click **Save**.

## Deleting the Custom Competitor List

If you created a custom competitor list as part of your system configuration, you must delete it before you can uninstall Altify software.

Otherwise, you'll get an error message like the one below, stating that the `CompetitorListProvider` Apex class is still in use and can't be deleted.

To delete the custom Competitor list:

1. In **Setup**, go to **Apex Classes**.

2. Locate the Apex class relating to your custom list, and click **Del**.
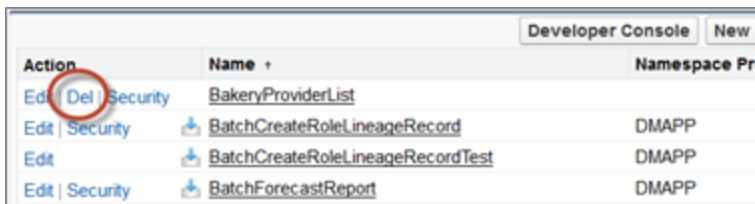
Uninstalling the Output Extension Package

If you installed the optional PPT export module, you should uninstall it before you uninstall the core package.

1. In **Setup**, go to **Installed Packages**.

2. On the Installed Packages page, locate Altify Output Extension, and click **Uninstall**.

3. On the Uninstalling a Package page, scroll down to the bottom of the page and select **Yes, I want to uninstall this package and permanently delete all associated components**.
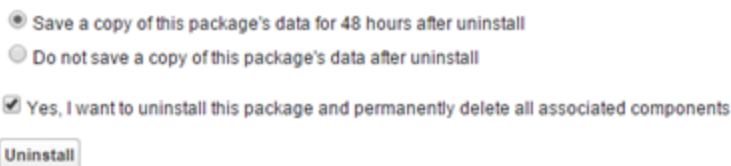
4. Click **Uninstall**.

Removing Altify License Packages

Before you uninstall the Altify Core package, you must uninstall any Altify license packages that are installed.

1. In **Setup**, go to **Installed Packages**.

2. Find the first Altify license package and click **Uninstall**.

3. On the Uninstalling a Package page, scroll down to the bottom of the page and select **Yes, I want to uninstall this package and permanently delete all associated components**.

4. Click **Uninstall**.

Repeat these steps for any other Altify license packages that are installed.

Uninstall the Core Package

To uninstall the Altify Core Package:

1. In **Setup**, go to **Installed Packages**.

2. On the Installed Packages page, locate **Altify**, and then click **Uninstall**.

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are in features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

Action	Package Name	Publisher
Uninstall | Manage Licenses	Altify Sales Process Manager	Altify
	Description Licensing Application for Altify Sales Process Manager	
Uninstall | Manage Licenses	Altify Call Planner	Altify Call Planner
Uninstall	Altify Output Extension	Altify Inc.
Uninstall | Manage Licenses	Altify Max	Upland Altify
Uninstall | Manage Licenses	Altify	Upland Altify
Uninstall | Manage Licenses	Altify Opportunity Manager	Altify
	Description Licensing Application for Altify Opportunity Manager	
Uninstall | Manage Licenses	Altify Account Manager	Altify
	Description Licensing Application for Altify Account Manager	

3. On the Uninstalling a Package page, scroll down to the bottom of the page and select **Yes, I want to uninstall this package and permanently delete all associated components**.

4. Click **Uninstall**.

You are returned to the Installed Packages page. A confirmation email is sent to your email address.

If you get an error message

If you get an error message like the one shown here when you try to uninstall the Altify Core Package, it may be because there are still links to Altify.

Altify

It is beyond the scope of this document to list all the possible references that may still exist in the org, but you'll need to investigate the situation to determine what additional changes are necessary before the uninstall can complete.

Altify

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 con-tinuous. • 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 con-tinuous effort to resolve the defect or provide a work-around. • Daily status updates until the defect is resolved or a work-around 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 repro-duction of the defect.
Normal	All other defects	1 business day	Defects will be addressed in Upland's normal update.