



Altify

9.9 Installation Guide (Relationship Map only)

Introduction

You are about to install Altify Relationship Map.

Relationship Map helps you visualize the relationship landscape of the buyer's organization, with graphical maps, smart coaching and social network integration for each contact.

By identifying the right people, you can gain access and develop support to give you a competitive advantage to win.

This document is a quick guide on how to install and configure Altify Relationship Map in your Salesforce org. If you are familiar with installing software in Salesforce, this web page should be all you need.

Required Salesforce Editions

The following Salesforce Editions are supported by Altify:

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

Pre-Requisites

Installing Altify Relationship Map makes several changes to your org's configuration. Before you start the installation process, please verify that you are happy to proceed with the following:

- On the Opportunity object, a 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 lookup field is added that references the Altify Solution custom object.

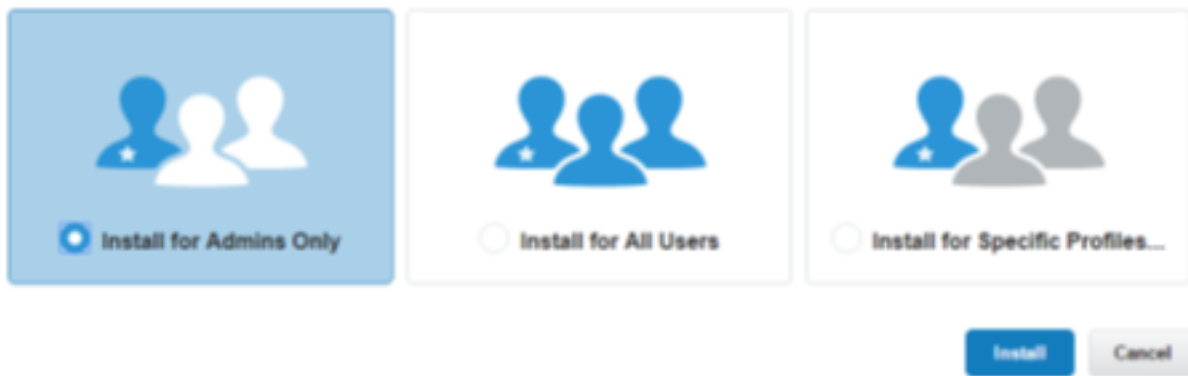
Installing Relationship Map

You will install two packages:

- (1) Altify Core which provides the required functionality.
- (2) the Licensing Package, needed to activate Altify Relationship Map.

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.

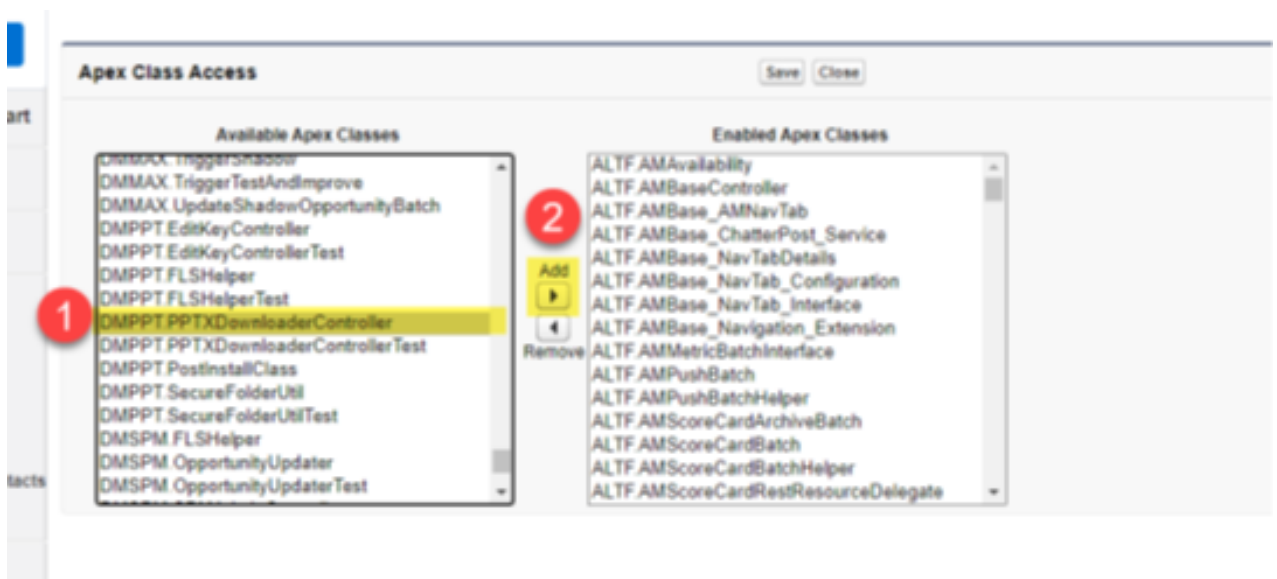
6. Install the Relationship Maps Licensing Package: [Install In Sandbox](#) or [Install In Production](#).
7. The Install window opens. Enter the following installation password: asH82Bfs7F%
8. Select **Install for Admins Only**.
9. Click **Install**.
10. Read the confirmation message and click **Done**.
11. The Installed Packages window opens. Confirm that the package you have installed is listed.

Installing Output Extension App Extension Package (Optional)

The following package allows you to avail of the option to print your Relationship Maps to PowerPoint and as a PDF.

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 ensure that the **Enable Files Connect** checkbox is selected.

1. [Install In Sandbox](#) or [Install In Production](#).
2. Log in to Salesforce.com with your administration username and password.
3. The installation page opens. Select **Install for All Users**.
4. Click **Install**.
5. Select the **Yes** checkbox to grant access to the site for the output generation service.
6. Click **Continue** to install the package.
7. When it is installed, open the **Altify PPT Access Key** tab in Salesforce, enter the following key: F0jA8RWsKnnNWC, and **Save**.
8. Two further steps are required to enable export to PPT in Altify Relationship Maps:
 - a. The apex class 'DMPPT.PPTXDownloaderController' needs to be moved from Available Apex Classes to Enabled Apex Classes. You can do this by going to **Permission Sets > Altify Permission Set > Apex Class Access**.



- b. Go to **Setup > Custom Settings > Altify Powerpoint Settings** and enable the following settings:
 - *Link Enabled*
 - *Enable PPTX Lightning Popups*

Notes on Output Extension App

- By 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. For more information, see the *Altify Installation Guide*.
- You can configure the Output Extension App to record an audit trail of PowerPoint export events. For more information, see the *Altify Installation Guide*.

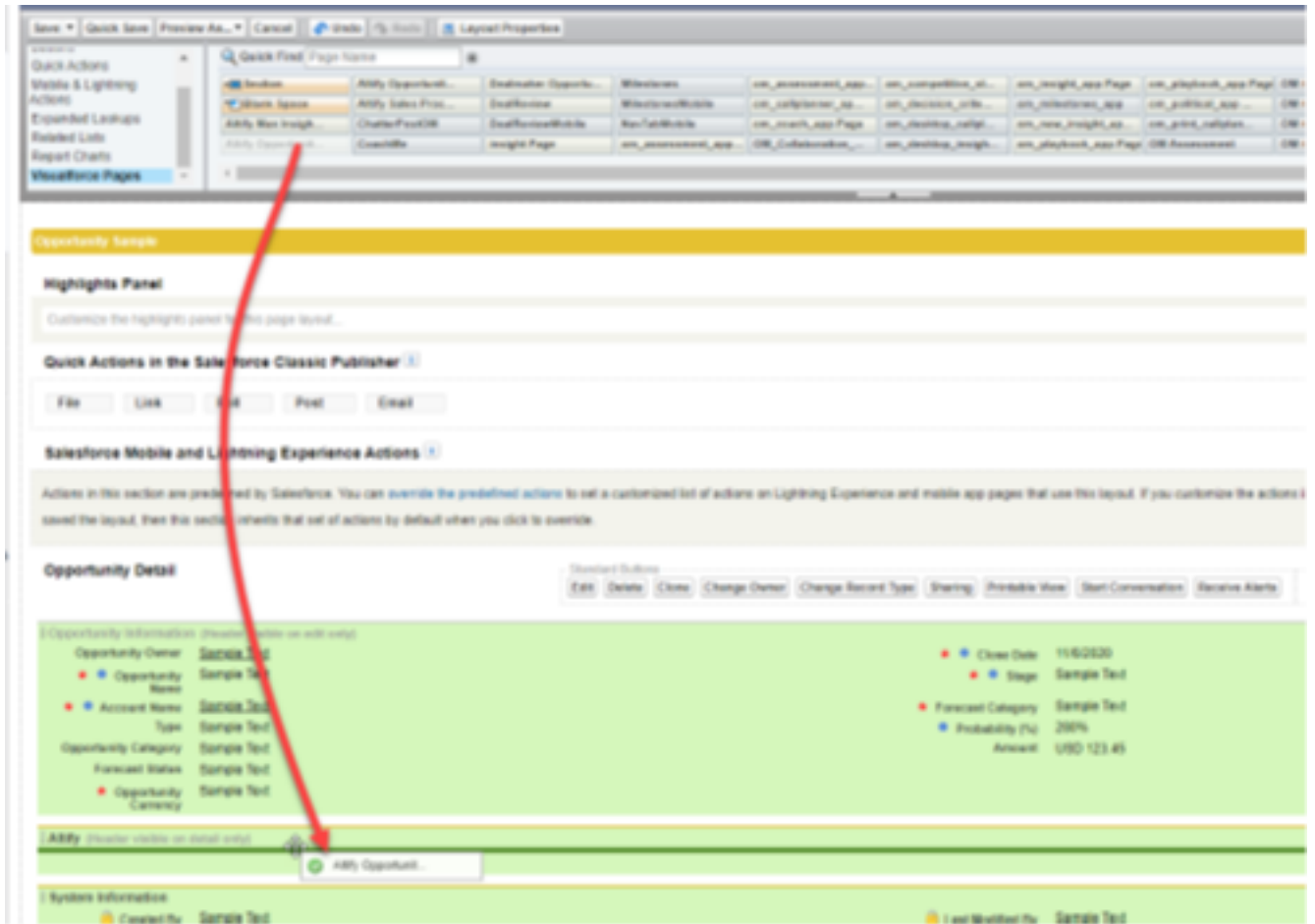
Setting up Altify Relationship Map

Once the packages have been installed, you can edit your Opportunity and Account Page Layout to add the Launchpad to your Opportunity and Account displays.

Add Launchpads 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 the Altify Launchpad to the Account Page Layout

Repeat the same process for the Account record.

In this instance however, the launchpad you are dragging into the Altify section is the Altify Account Summary Launchpad and the following settings are applied to the launchpad:

- **Height (in pixels)** = '650'
- **Show Scrollbars** is enabled

Licensing Your Users for Relationship Maps

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 Relationship Map'.

To verify your installation of Altify Relationship map, 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 Relationship Maps.

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) | <ul style="list-style-type: none"> Immediate and continuous. Hourly status updates. |
| Urgent (Business Critical) | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> 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. |