Altify

9.6 to 9.9 Upgrade Guide

CONTENTS

Introduction

This guide describes the procedure for upgrading from Altify 9.6 to Altify 9.9.

If you are running a version earlier than 9.6, you should first upgrade to 9.6 (using the appropriate Upgrade Guide) before upgrading to 9.9.

Upgrade the Altify Core Package

To upgrade the Altify core package to the latest version:

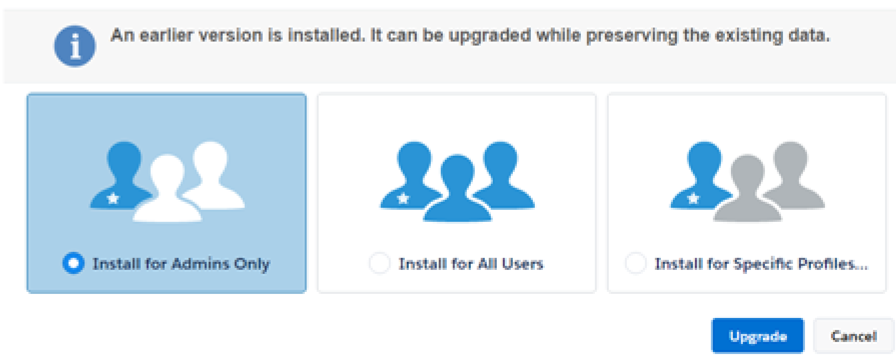
1. Log into Salesforce.com with your administration username and password.
2. Copy the package URL into your browser's address field.

   This URL is supplied by Altify.

   For production Salesforce environments, the URL starts with `https://login.salesforce.com/`

   For sandbox environments, the URL starts with `https://test.salesforce.com/`
3. Select **Install for Admins Only**.

   Note: Do not select any other option. This could corrupt user profiles during installation.



4. Click **Upgrade**.
5. Read the confirmation message and click **Done**. (If you see a message stating that the installation is taking a long time, don't worry. This is a normal part of the process.)
6. When the Installed Packages page opens, confirm that Altify 9.9 is installed in the org.

Upgrade the Altify Output Extension App

This section only applies if you have the Altify Output Extension App installed. This app is used to export to PowerPoint files, Microsoft Word, or Quip. If you have the Altify Output Extension app installed, you must ensure you have the latest version, which is 1.35.

In Opportunity Manager and Account Manager, installing v1.35 of the **Altify Output Extension App** has the following benefits:

- It gives you the latest PowerPoint Export feature enhancements.
- It facilitates the generation of Executive Briefing documents in Microsoft Word format and Quip online document format.

If a version of the Extension App is not already installed, the full installation procedure is required, rather than the steps in this upgrade guide.

See the Altify *Installation Guide* to get details of the full procedure.

To check the number of your currently installed version, in **Setup** go to **Installed Packages** and note the version number.

If you already have v1.35, you can skip the steps described in this section.

To upgrade the Extension App:

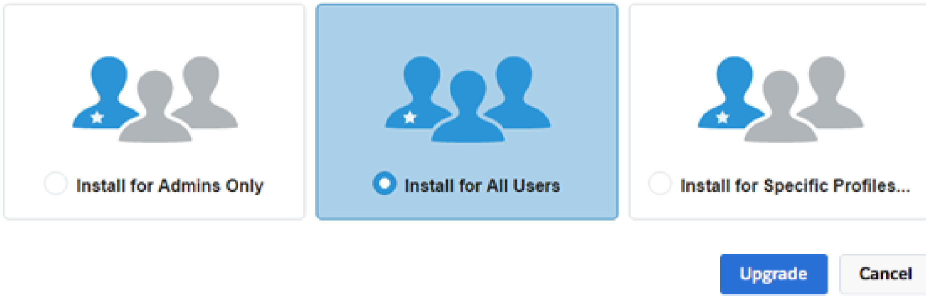
1. Ensure that **Files Connect** is enabled in your org. The extension app can't install otherwise.

   To enable it, go to **Setup > Files Connect**, and then select the **Enable Files Connect** checkbox.
2. Log into Salesforce.com with your administration username and password.
3. Copy and paste the Altify Output Extension App installation URL into the browser.

   This URL is supplied by Altify.

   For production Salesforce environments, the URL starts with `https://login.salesforce.com/`

   For sandbox environments, the URL starts with `https://test.salesforce.com/`
4. The installation page opens. Select **Install for All Users**.



5. Click **Upgrade**.

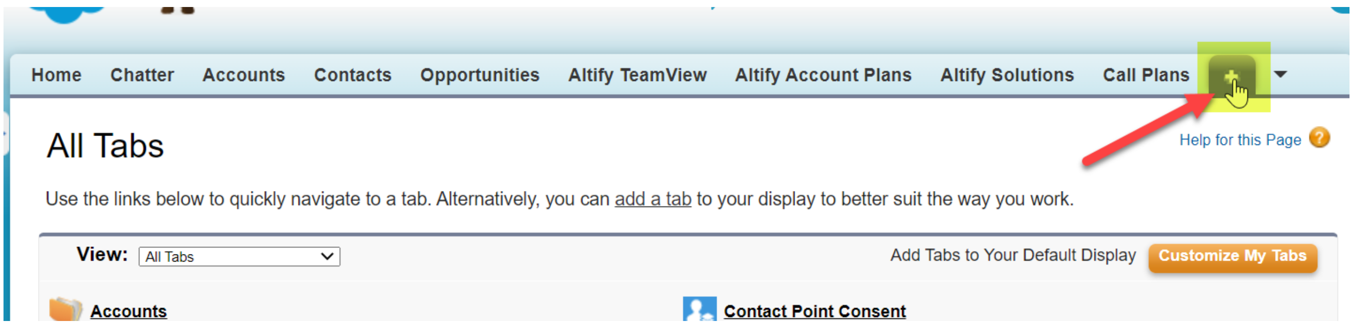
When the installation is complete, a confirmation page is displayed.

> **Note:** You can use an EU-hosted service for PowerPoint Export, rather than the normal USA-based service. (Typically, you would do this for GDPR reasons.)

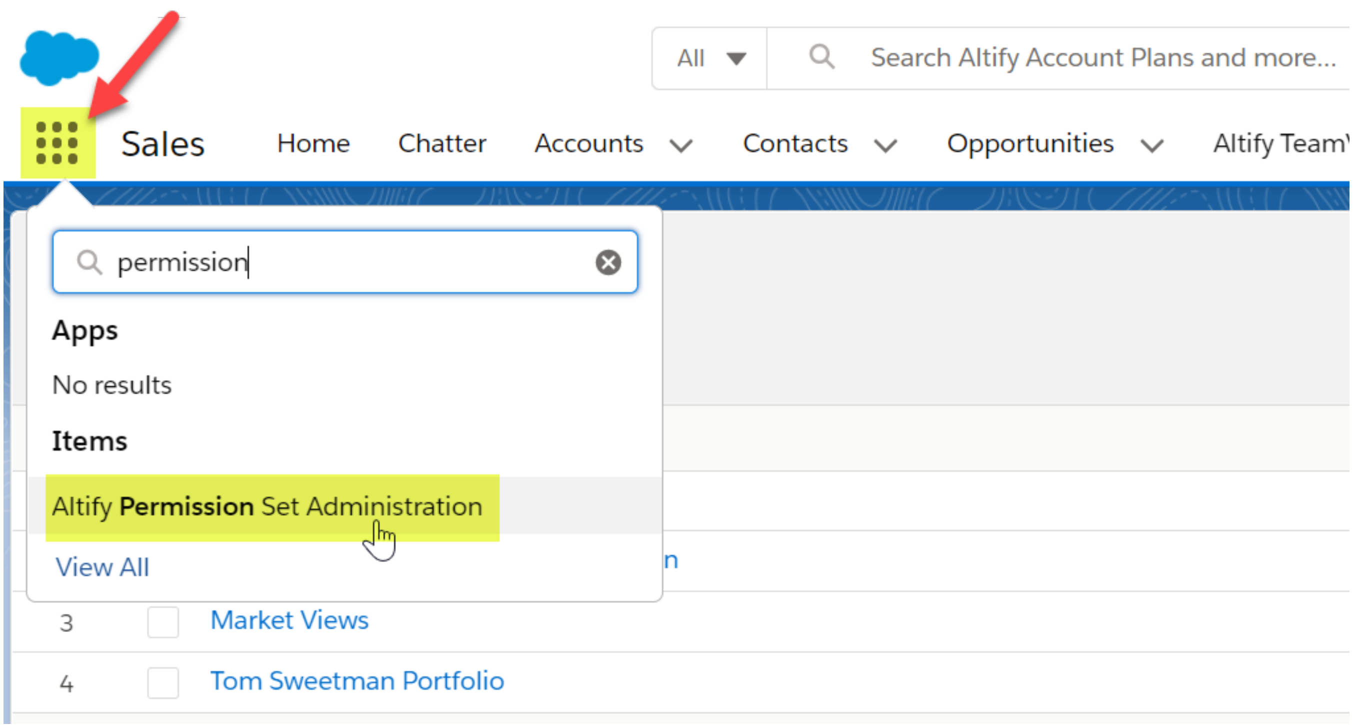
Altify Permission Set

Following the upgrade, you must refresh the Altify Permission Set.

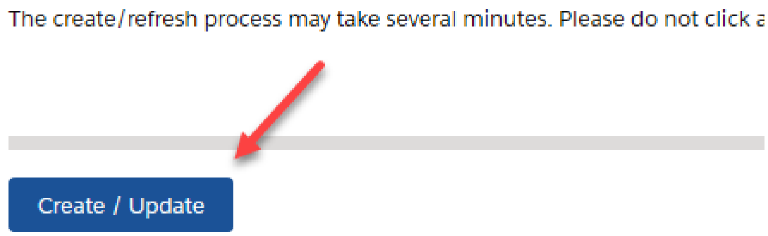
1. Click the **All Tabs** button and select **Altify Permission Set Administration** in the displayed list.



In Lightning mode, search for and select **Altify Permission Set Administration** in the App Launcher menu.



2. Click **Create/Update**.



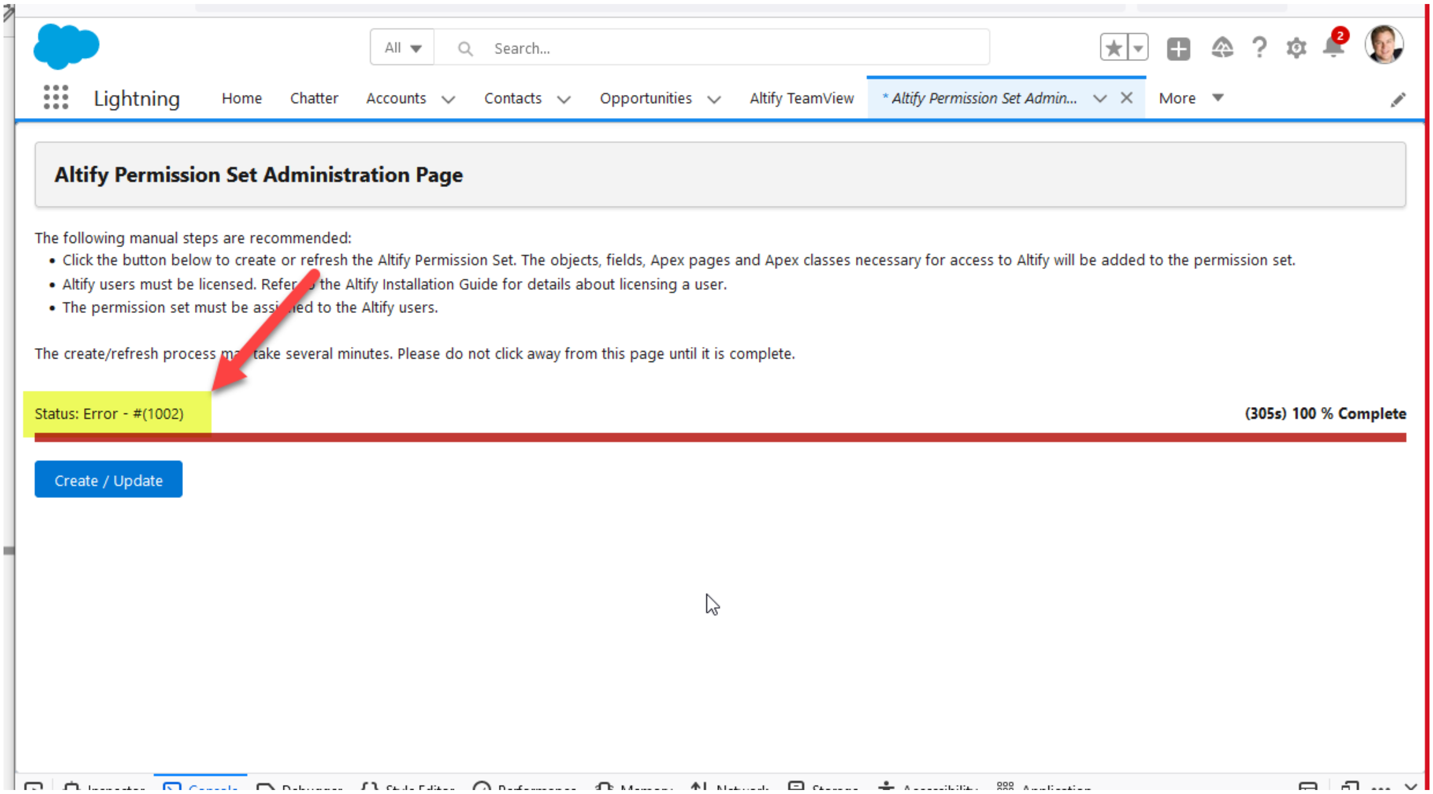
When that has completed successfully, you will see a confirmation message.

Caution: The create/update process can take a few minutes. Don't browse away from the page while the refresh is in progress.

Note: We recommend that you do not make changes to the Altify Permission Set. However, if you have made changes, these will need to be reapplied after completing the steps above (as any edits are lost when the permission set is refreshed).

Troubleshooting

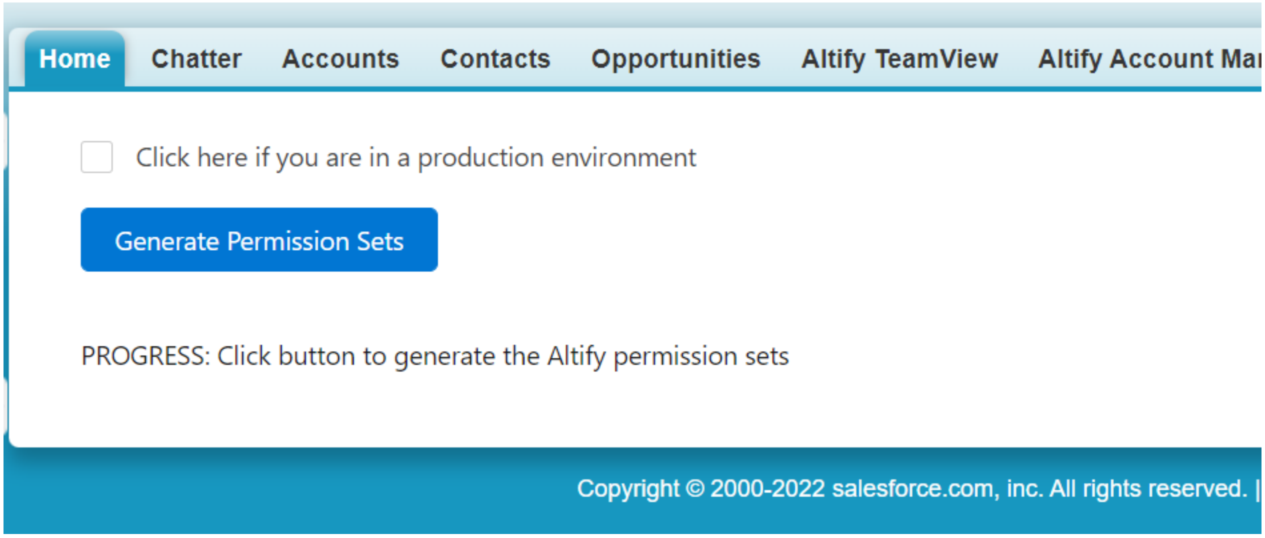
If you are working with a large org, you may encounter an error when refreshing the permission set (as highlighted in the example below).



To resolve this issue, do the following:

1. If you are in Lightning mode, go to Classic mode (and return to the *Altify Permission Set Administration Page*).
2. Update the URL by changing the page to 'PermissionSetAdmin' (as shown in the example below, where the page is highlighted).
    - https://uplandaltify--altf.visualforce.com/apex/PermissionSetGenerator?sfdc.tabName=01r8c000002IqUY
    - https://uplandaltify--altf.visualforce.com/apex/PermissionSetAdmin

   You should see the following page:



3. Click **Generate Permission Sets**.

   The following message is displayed when the job is successfully completed: *PROGRESS: Permission Set Generation Succeeded*.

Changes to Altify Terminology

This release includes an important change in terminology that is applied in the product and in the online help:

- What was previously known as an account plan is now an Altify Account Manager Plan.
- From 9.9, an Altify Account Plan is a plan that is applied at the level of a single account – see Altify online help for more information.

In line with this change, and the fact that account planning can now be applied at the level of a single account, the names of a number of objects and settings are updated in Altify.

For example, objects are renamed as follows:

- *Altify Account Plan Type* is now *Altify AM Plan Type*
- *Altify Account Plan Question* is now *Altify AM Plan Question*
- *Altify Account Question* is now *Altify AM Account Question*
- *Altify Account Plan Type Question* is now *Altify AM Plan Type Question*
- *Altify Account Plan Question Quicklink* is now *Altify AM Plan Quicklink*

In custom settings, examples of renamed settings are listed below:

- *Account Plan Public Read Only* is now *Account Manager Plan Public Read Only*
- *Use Solution Family* is now *Use Solution Family on Opportunity Map*

New Permanent Settings

A number of 'temporary' custom settings you may have been using in your previous version are replaced with 'permanent' custom settings when you install the upgrade package.

During the upgrade process, Altify automatically moves any values you had in the temporary settings to the new permanent settings (clearing the temporary settings in the process).

When upgrading from 9.6 to 9.9, the following temporary setting values are moved.

Altify Account Manager Settings

9.7 Temp settings

The following temporary setting in v9.7 is converted as follows:

- Temp1 is now *Disable competitor creation*

9.8 Temp settings

The following temporary settings in v9.8 are converted as follows:

- TempStr1 is now *Completeness - Revenue Objective Types*
- TempStr2 is now *Completeness - Business Dev Objtve Types*
- TempStr3 is now *Completeness - Relationship Objtve Types*
- Temp1 is now *Hide Legacy Divisions*

Altify Core Settings

9.7 Temp settings

The following temporary setting in v9.7 is converted as follows:

- TempStr2 is now *User Query Filter*

9.8 Temp settings

Most of the new permanent settings listed below are relocated (and the new location is provided in each case).

- TempStr2 is now *Skip Triggers for non-core users*
- TempStr3 is now *Contact Title Field* (now under Altify Relationship Settings)
- Temp3 is now *Enable Action Spinner* (now under Altify Opportunity Manager Settings)
- Temp4 is now *Disable Sales Process Overview* (now under Altify Sales Process Settings)
- Temp5 is now *Disable Print Buttons* (now under Altify Relationship Settings)

- Temp6 is now *Disable Import Contact Opp Search* (now under Altify Relationship Settings)
- Temp7 is now *Enable CRUD Advanced Search*

Deleting Deprecated Custom Settings

The following custom settings are deprecated and need to be removed if they are visible in your org.

Altify Core Settings

- *DEPRECATED OM Hide PRIME Type Column*

Altify Account Manager Settings

- *Scorecard Batch Execution Time*
- *Use Standard List Page*
- *Enable Account Plan Task Updates*

Altify Opportunity Manager Settings

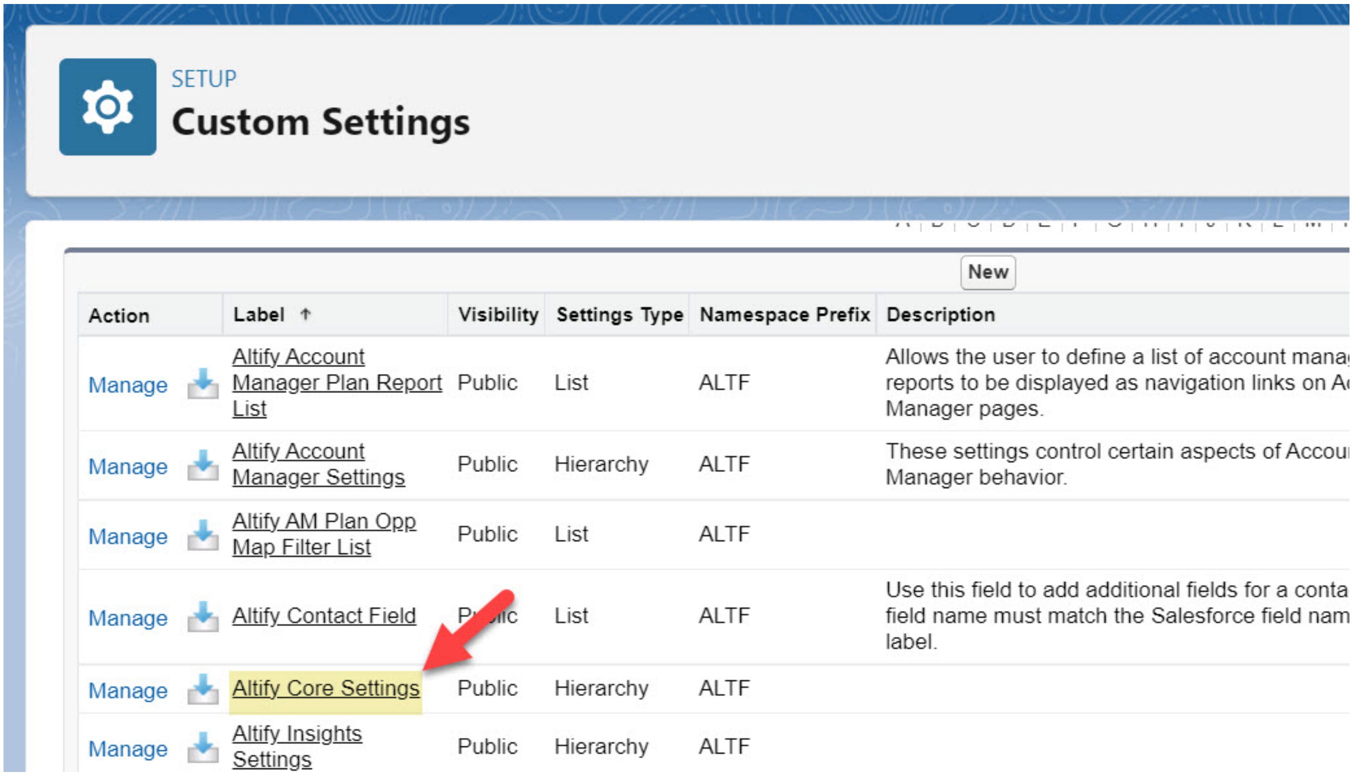
- *Hide Sales Process on Launchpad*
- *Show Insights*
- *Show Relationship Map*

Altify Powerpoint Settings

- *Custom Skin*
- *Widescreen Format*

To check if these settings are visible, and delete them if they are, do the following:

1. In **Setup**, go to **Custom Settings**.
2. Click the label **Altify Core Settings** (highlighted in the image below).



3. On the *Altify Core Settings* page, check to see if the setting *DEPRECATED OM Hide PRIME Type Column* is listed.

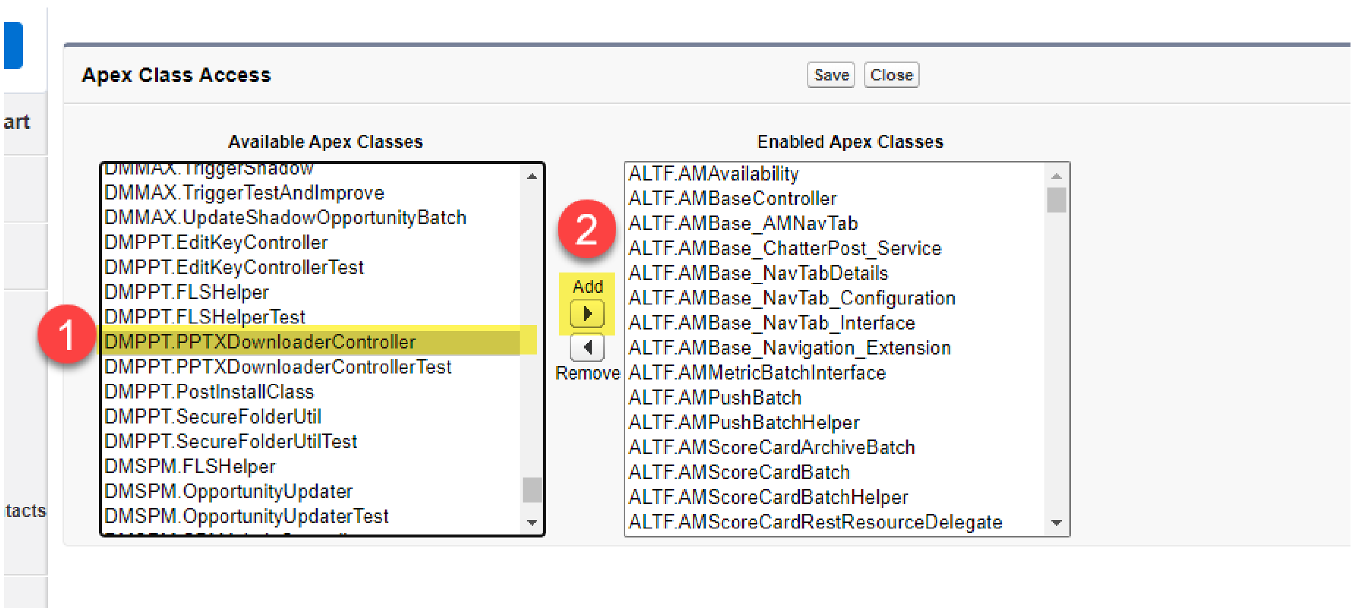
   If it is, click the delete option (**Del**).
4. Confirm your decision in the dialog that pops up, and click **Delete**.
5. Repeat steps 2-4 for each of the remaining settings listed above.

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**.

Update Page Layouts

The page layouts of the following objects require updating after you upgrade.

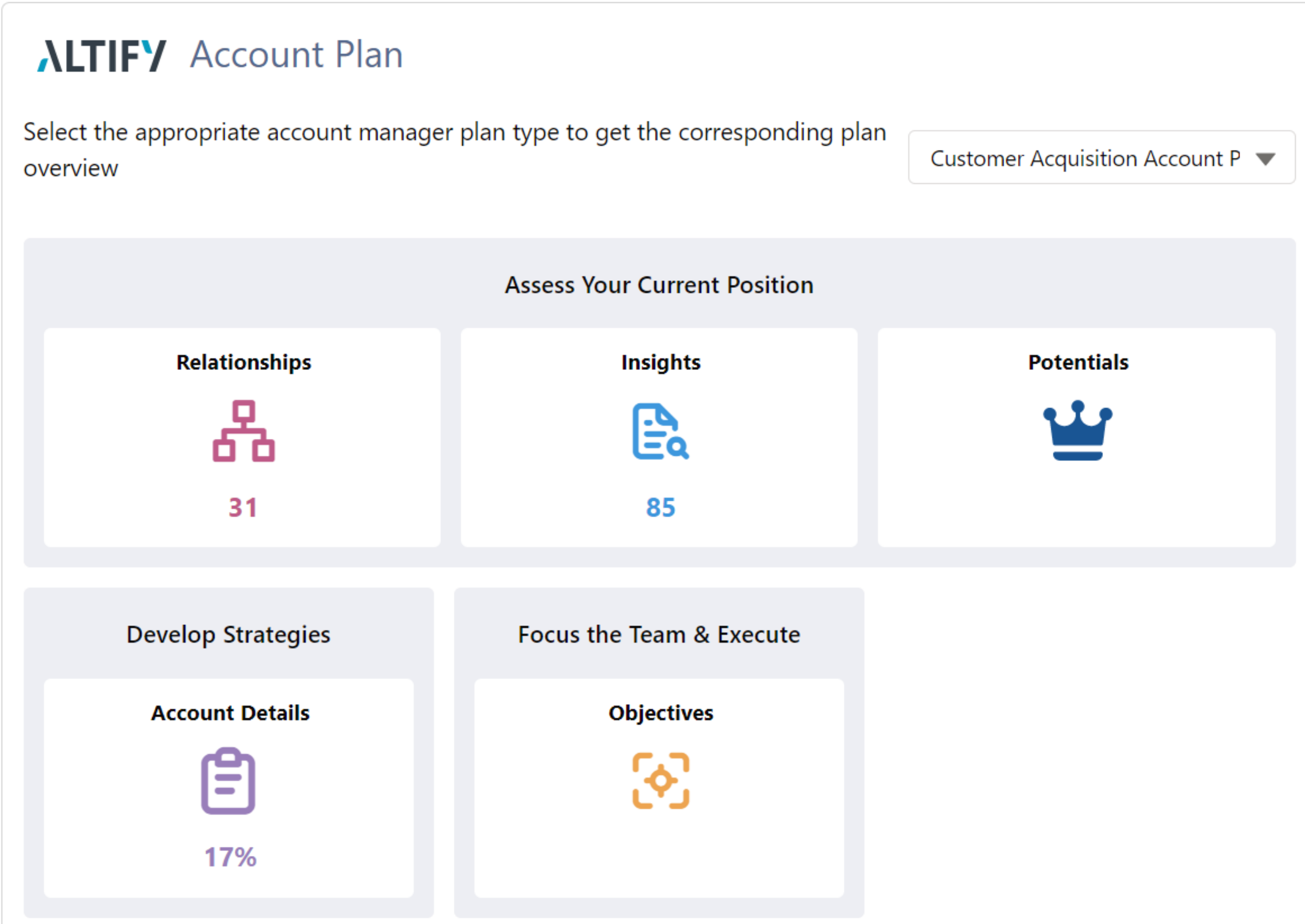
To access page layouts of an object, do the following:

1. Go to **Setup**.
2. Go to **Objects** (**Object Manager** in Lightning mode).
3. Click on the relevant object.
4. Scroll down to the Page Layouts section and click **Edit** next to the relevant layout. (In Lightning, click **Page Layouts** in the sidebar and then select the relevant layout on the subsequent screen).

Salesforce Account Object

Altify 9.9 introduces complete account planning at the account level. For more information, see Altify Account Planning in the online help. To provide users with access to this functionality, a new launchpad (shown below) needs to be added to the relevant page layout of the Account object.

Altify Account Manager



Adding the Account Plan launchpad

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

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

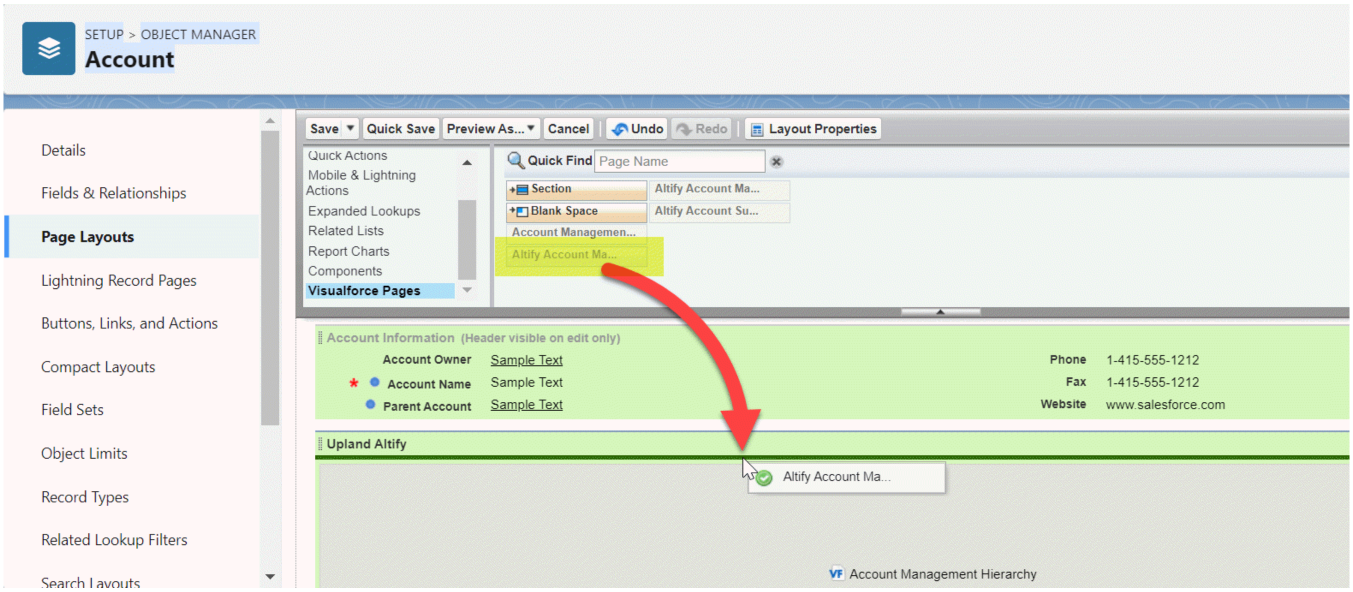
   In Lightning mode, go to **Account** in **Object Manager** and select **Page Layouts** in the sidebar.

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

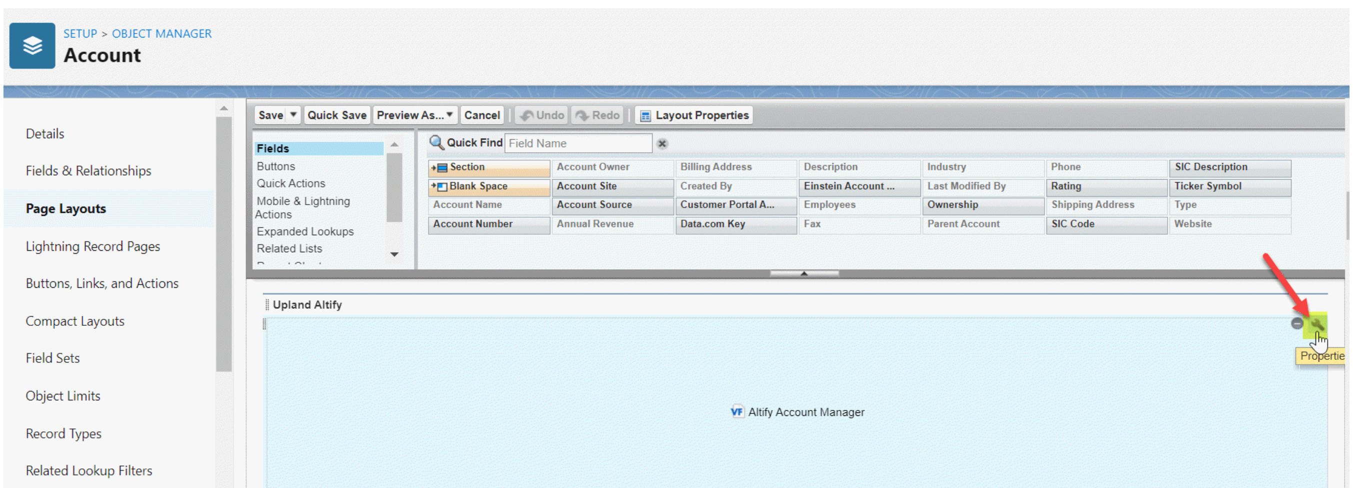
   This tells you which page layout(s) need the Account Plan launchpad.

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

4. Under **Visualforce Pages**, select the **Altify Account Manager** launchpad, and drag it to a suitable location in the layout (the *Altify Installation Guide* recommended that you create an 'Altify' section for Altify launchpads).

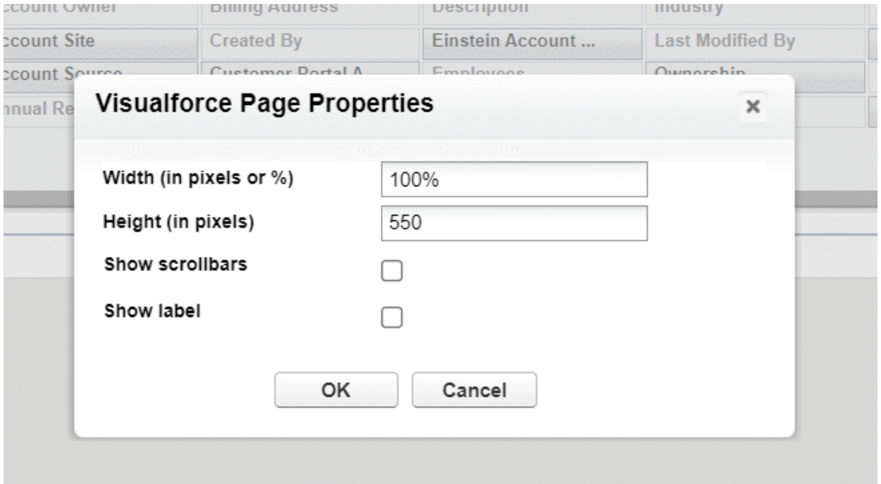


5. Click the **Properties** (spanner) icon on the top right of the Altify Account Manager launchpad to specify suitable panel settings.



6. Set the Visualforce Page Properties as follows:
   - **Width (in pixels or %)**: '100%'
   - **Height (in pixels)**: '550'
   - **Show scrollbars** checkbox is deselected.

- **Show label** checkbox is deselected.



7. Click **OK**.
8. Click **Save**.

Altify AM Plan Type

Adding new fields

To organize the configured tabs that are displayed for account plans, you need to add a new field to the Altify AM Plan Type page layout.

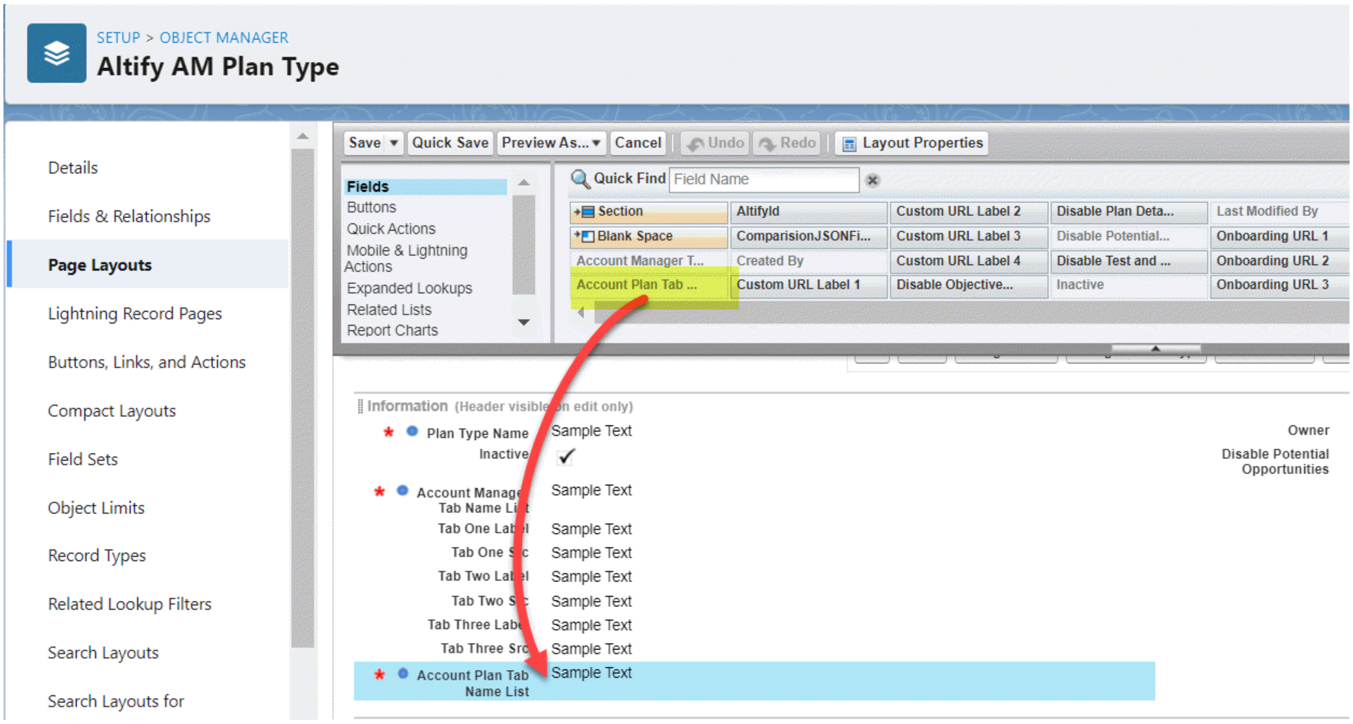
> **Note:** This action is only required if your org is using the new account plan functionality.

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

   In Classic mode, go to **Page Layouts** in **Altify AM Plan Types**.

   In Lightning mode, go to **Altify AM Plan Type** in **Object Manager** and select **Page Layouts** in the side-bar.
2. To check which user profiles use which page layouts, click the **Page Layout Assignment** button.

   This tells you which page layout(s) need the Account Plan launchpad.
3. On the Page Layouts screen, select **Edit** for the relevant layout.
4. Under **Fields**, select the field **Account Plan Tab Name List** and drag it to the Information section.



> **Note:** The field that configures the tabs that are displayed for Account Manager plans is renamed from *Account Plan Tab Name List* to *Account Manager Tab Name List*.

5. Do the same for the field **Disable Potential Opportunities** if your organization does not want to display Potential Opportunities in one or more Altify AM Plan Types. For more information, see Disabling Potential Opportunities in the online help.

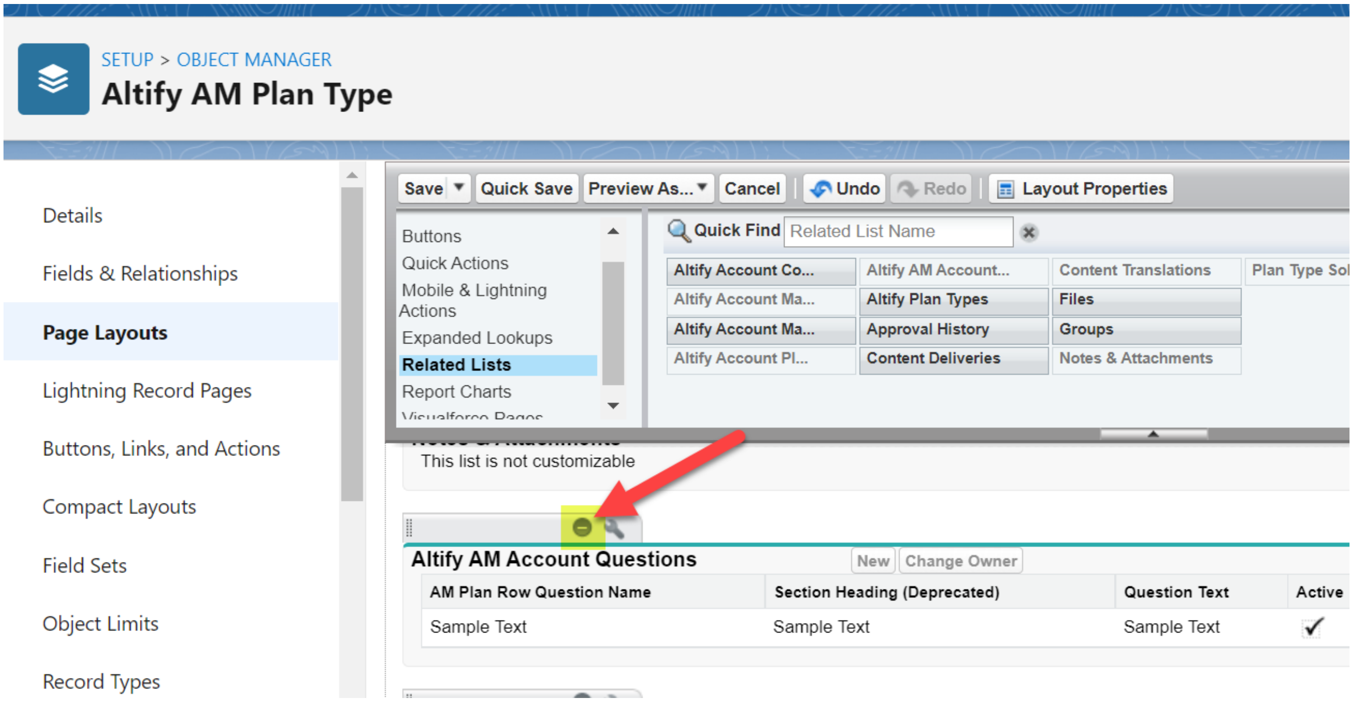
6. Finally, add the *Onboarding URL 1* field if your organization wants to customize the help link provided to user who are creating an Account Manager plan. For more information, see Assistance for account planners.

7. Click **Save**.

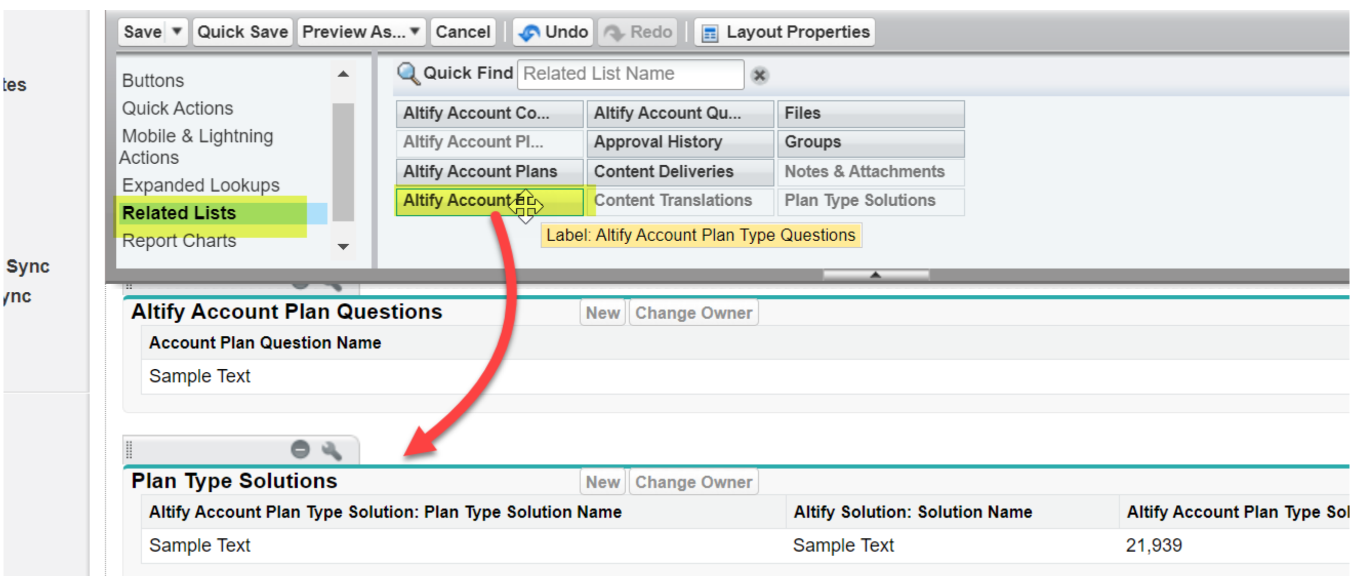
Updating related lists

To accommodate the new process for setting up account questions, you also need to perform the following tasks on the Altify AM Plan Type page layout:

1. Remove the related list **Altify AM Account Questions**.



2. Add the related list **Altify AM Plan Type Questions**.

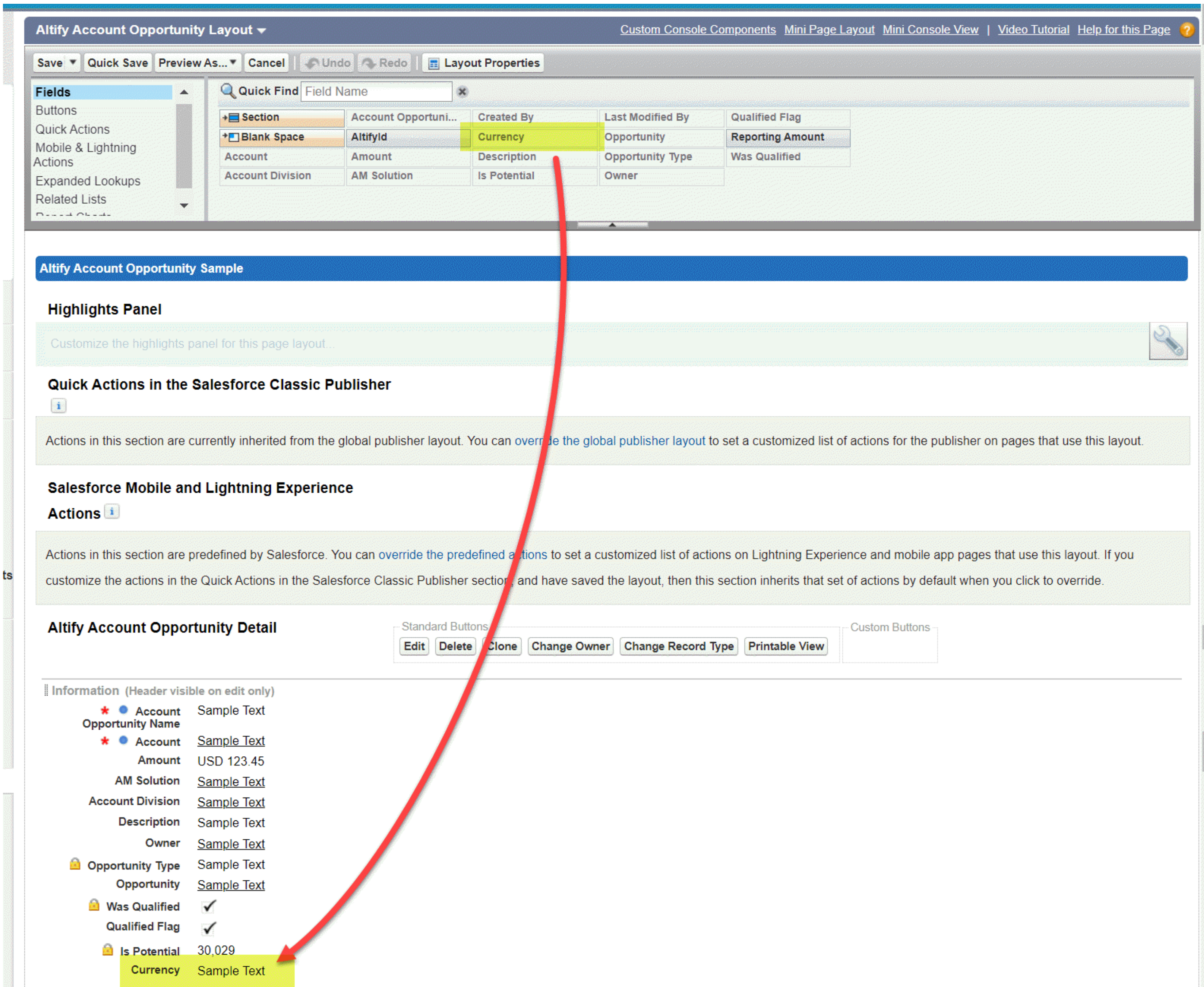


Altify Account Opportunity

Adding a field

The following field should be added to the relevant page layout of the Altify Account Opportunity: *Currency*.

Note: This action is only required if your org is using the new account plan functionality AND your org is a multicurrency org.

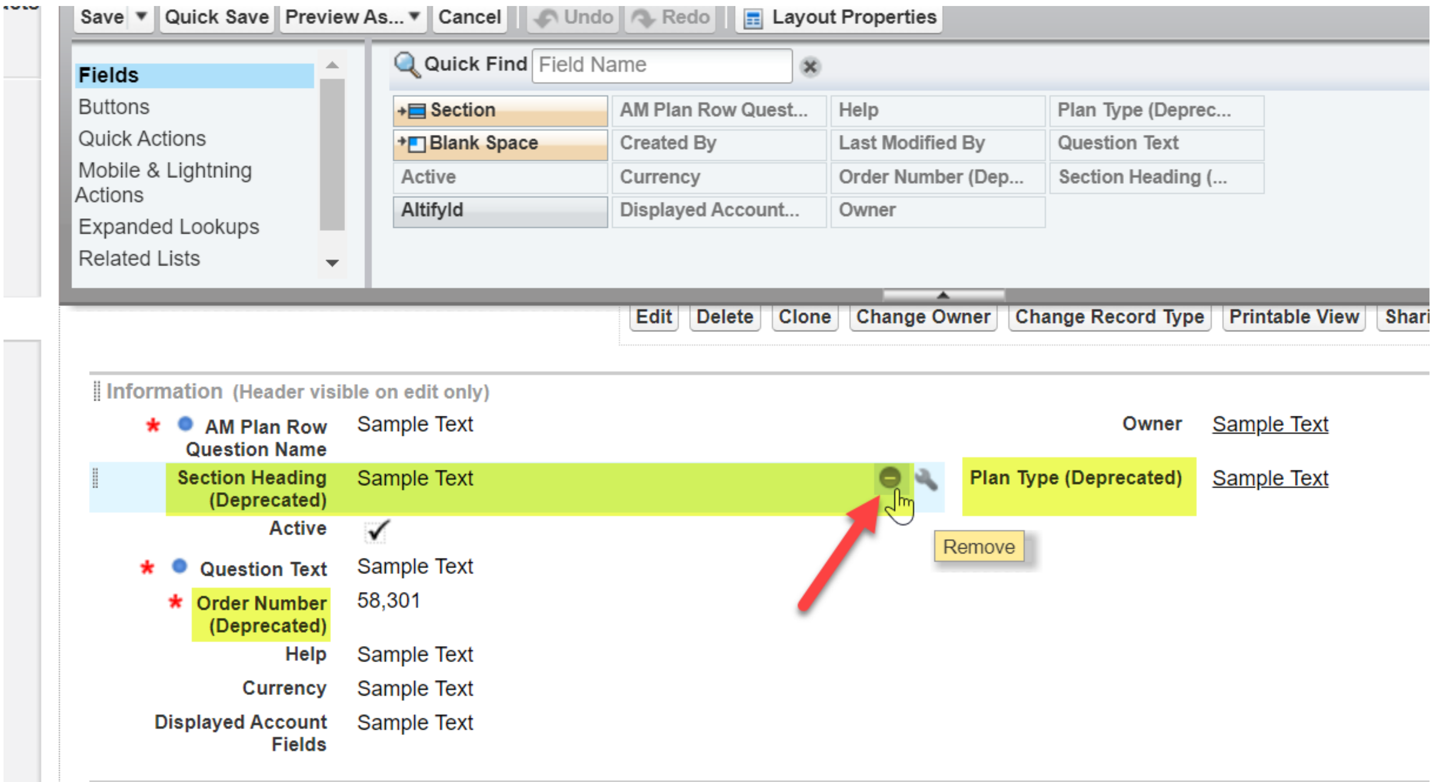


Altify AM Account Question

This configuration only applies to Account Manager.

Removing deprecated fields

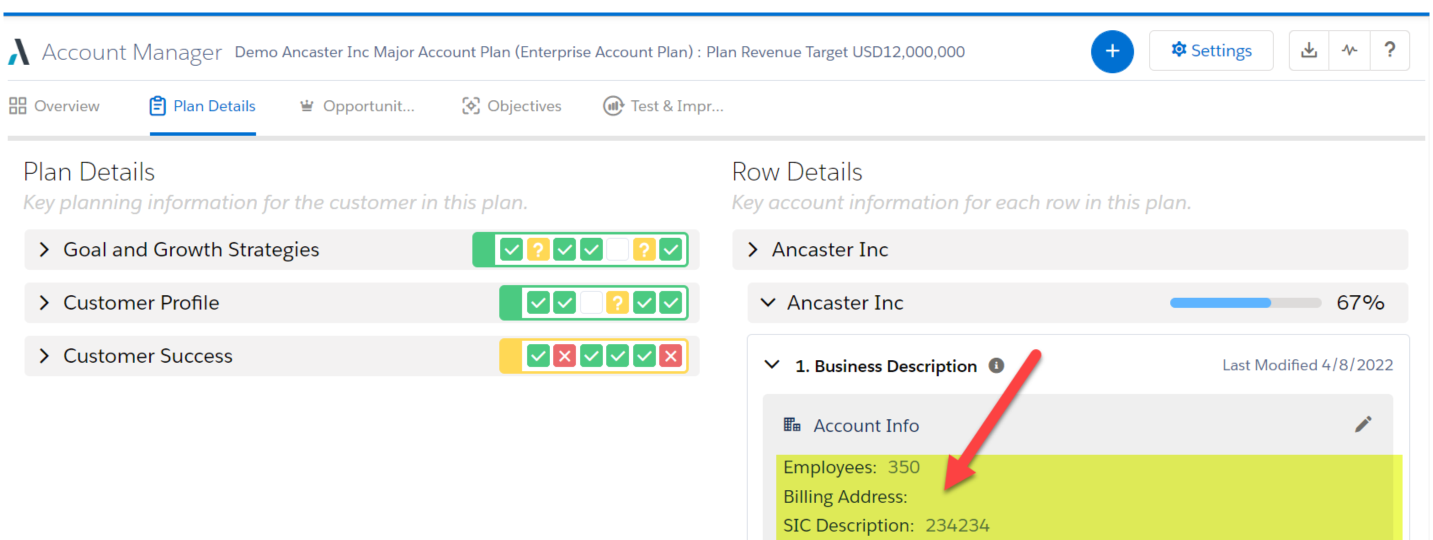
This is another required step to facilitate the new account question configuration process. On the Altify AM Account Question object, the following deprecated fields need to be removed from the AM Plan Unit Question Layout: **Section Heading (Deprecated)**, **Order Number (Deprecated)** and **Plan Type (Deprecated)**.



Adding a new field

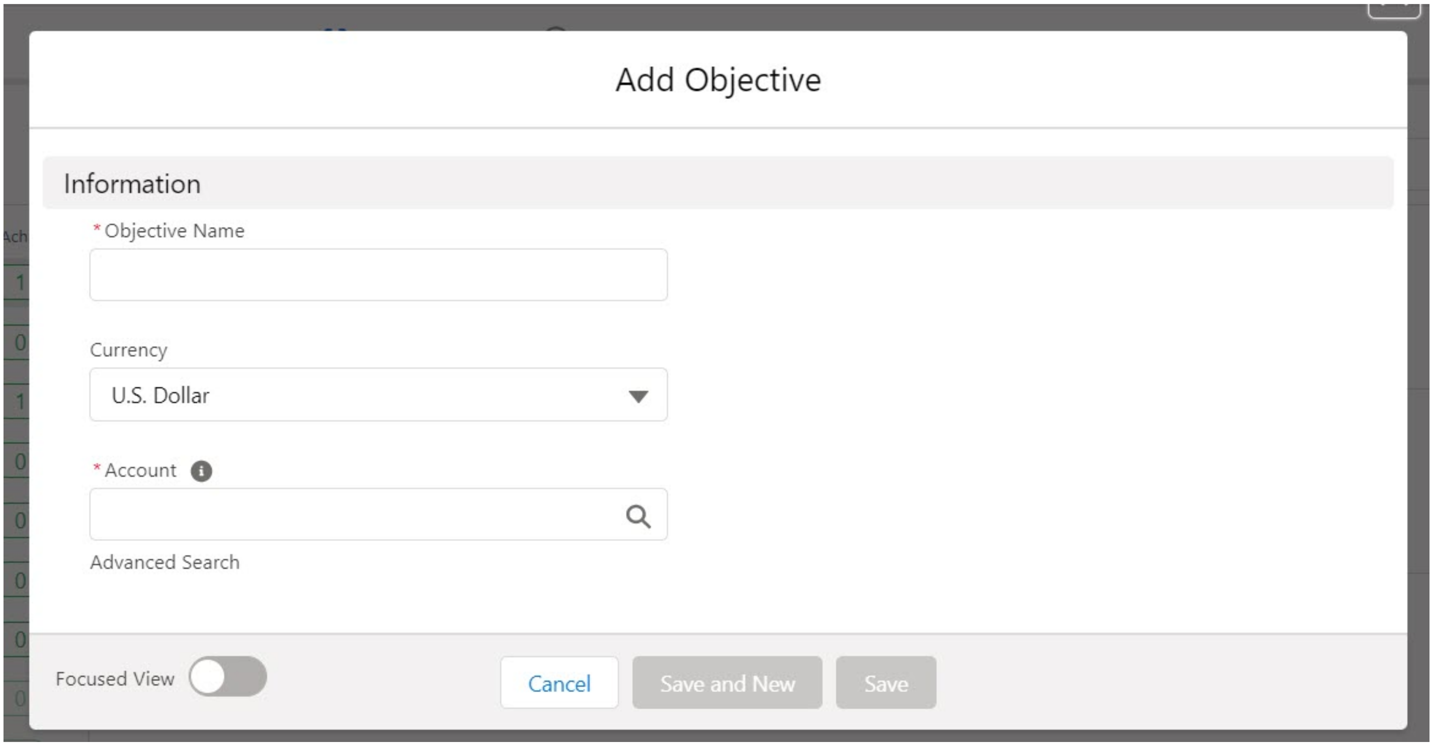
The **Displayed Account Fields** field needs to be added to the layout of the Altify AM Account Question object (if it's not already present).

This configuration is necessary if you want account fields to be displayed in account/row detail question (as shown in the example below from an Account Manager plan).



Altify Account Objective

After upgrading the Add Objective dialog will appear as follows.



Altify recommends the following changes:

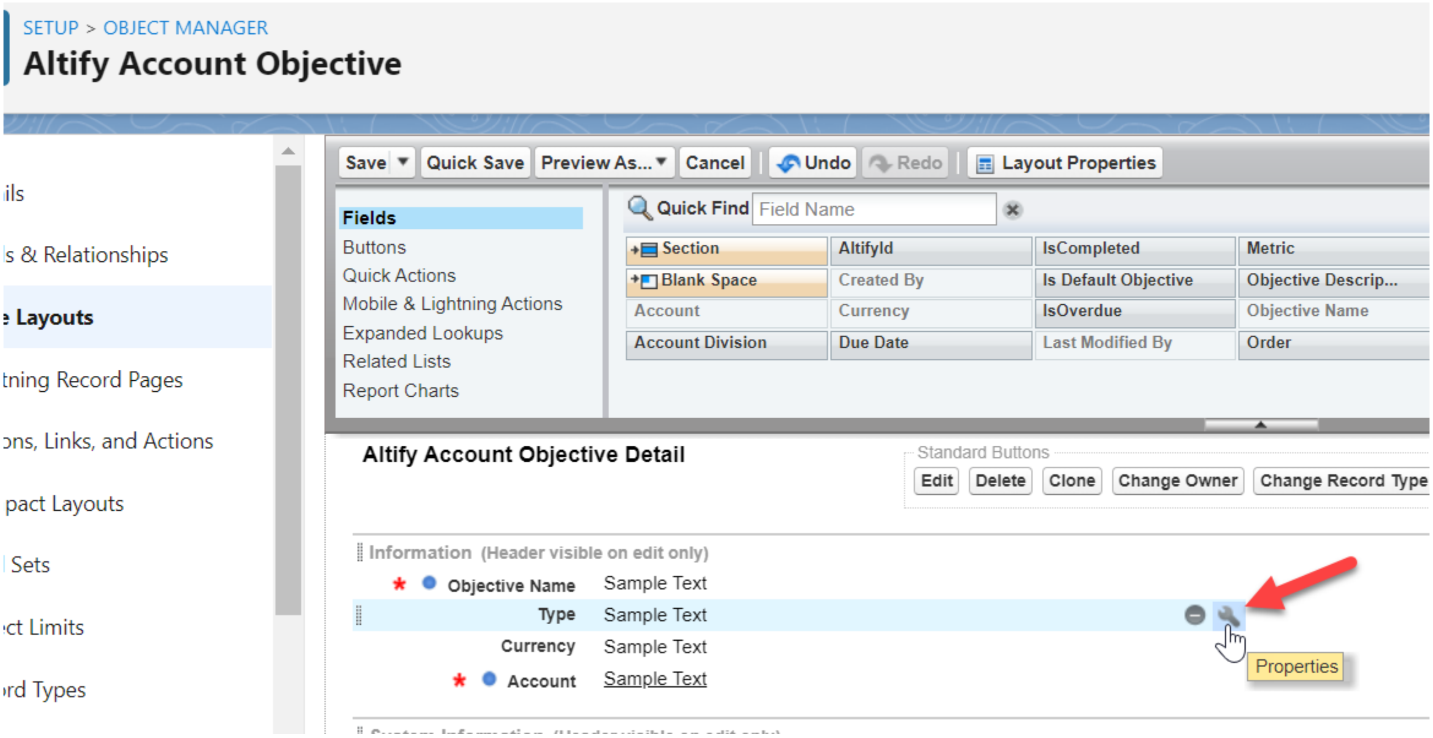
Adding fields

Add the following fields to the page layout:

- *Type**
- *Account Division*
- *Metric*
- *Objective Description*
- *Strategy*
- *Status**
- *Owner**
- *Priority**
- *Due Date**

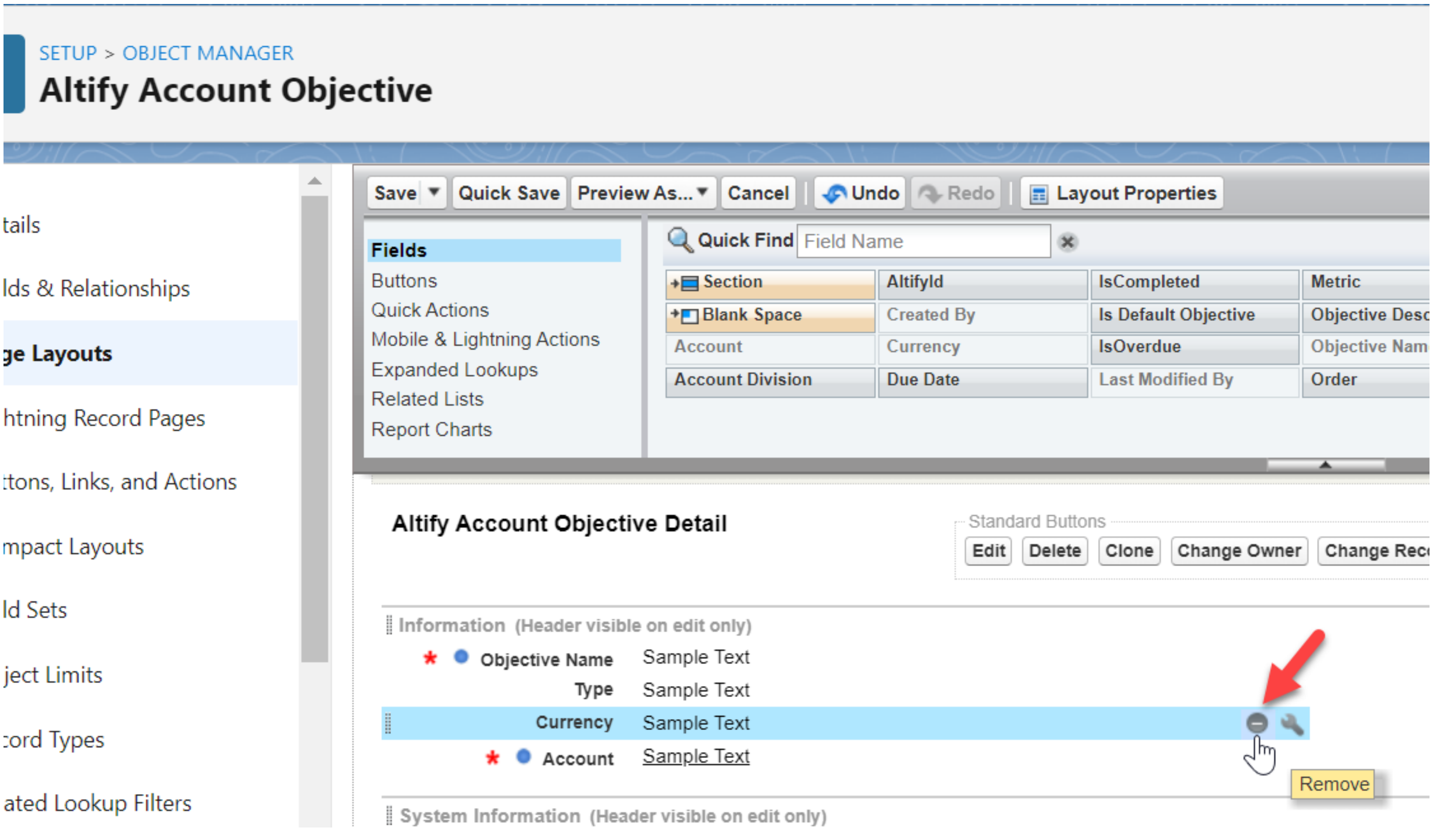
Fields with an asterisk should be marked as required (*Objective Name* and *Account* should already be set to required).

To mark a field as required, hover your cursor over the relevant field and click on the **Properties** button that is displayed (as shown in the example below).



Removing a field

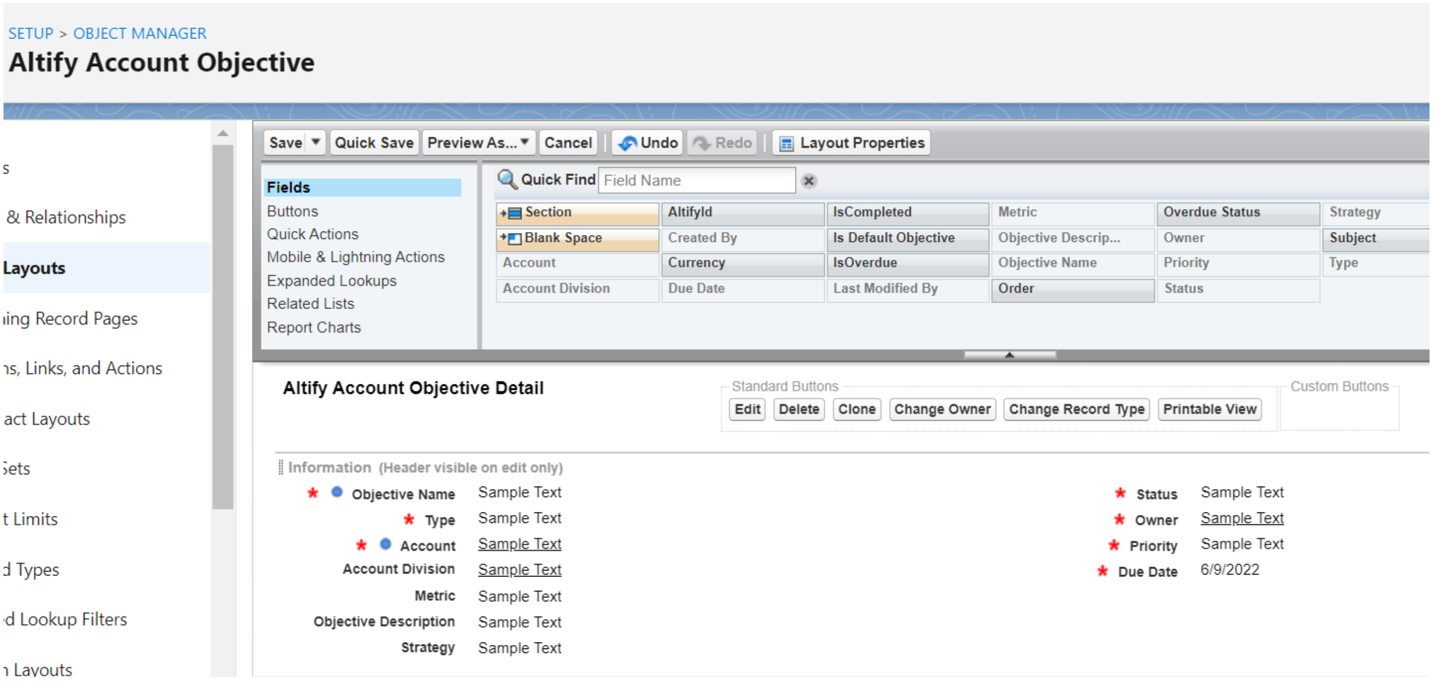
The *Currency* field is added by default to the page layout if your Salesforce org is a multicurrency org. Altify recommends that this field is removed (as shown in the example below).



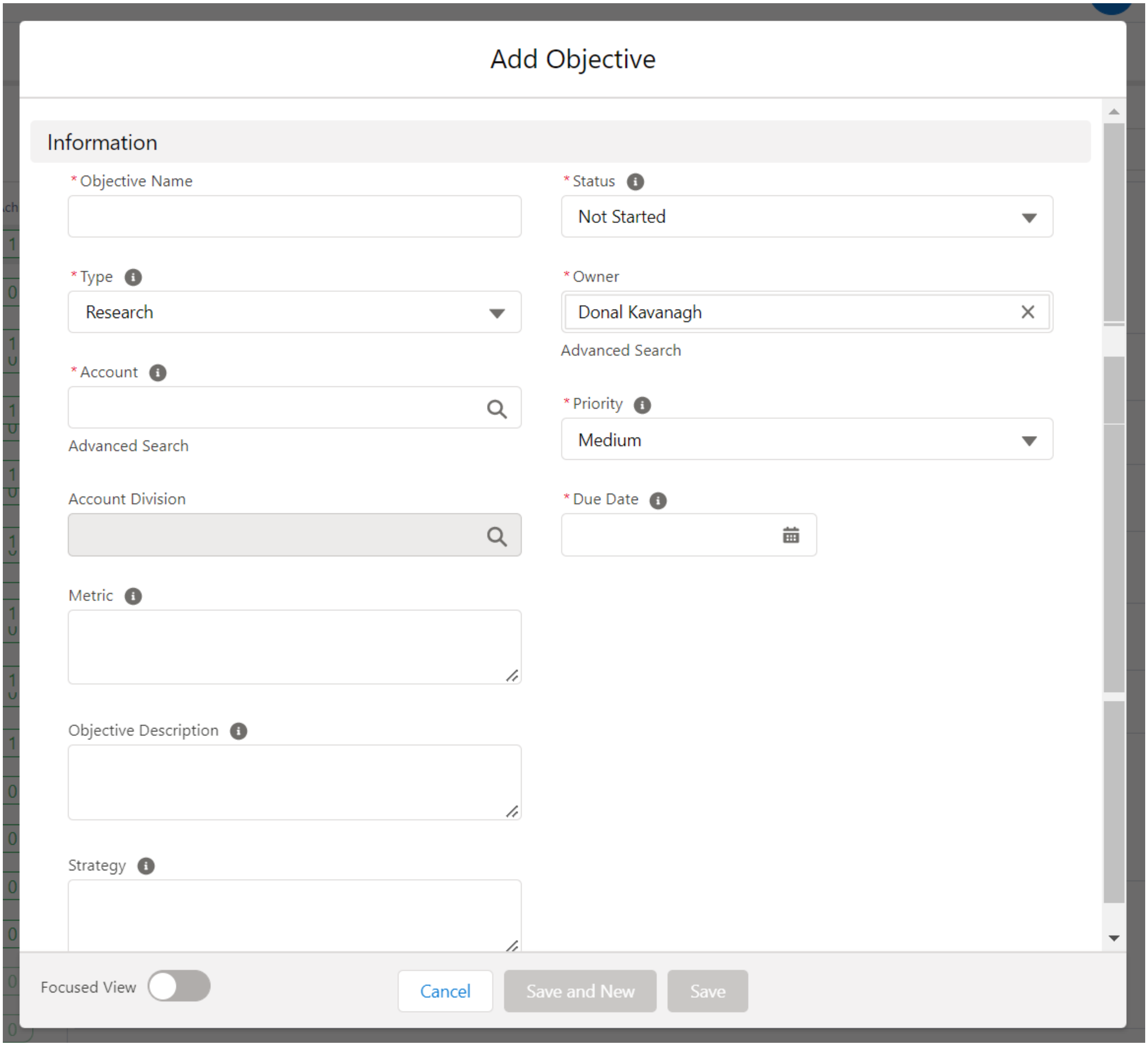
Organizing the layout

The following is how Altify recommends that you organize the fields on the Altify Account Objective page layout:

Objective Name	Status
Type	Owner
Account	Priority
Account Division	Due Date
Metric	
Objective Description	
Strategy	



This layout appears as follows to your users:

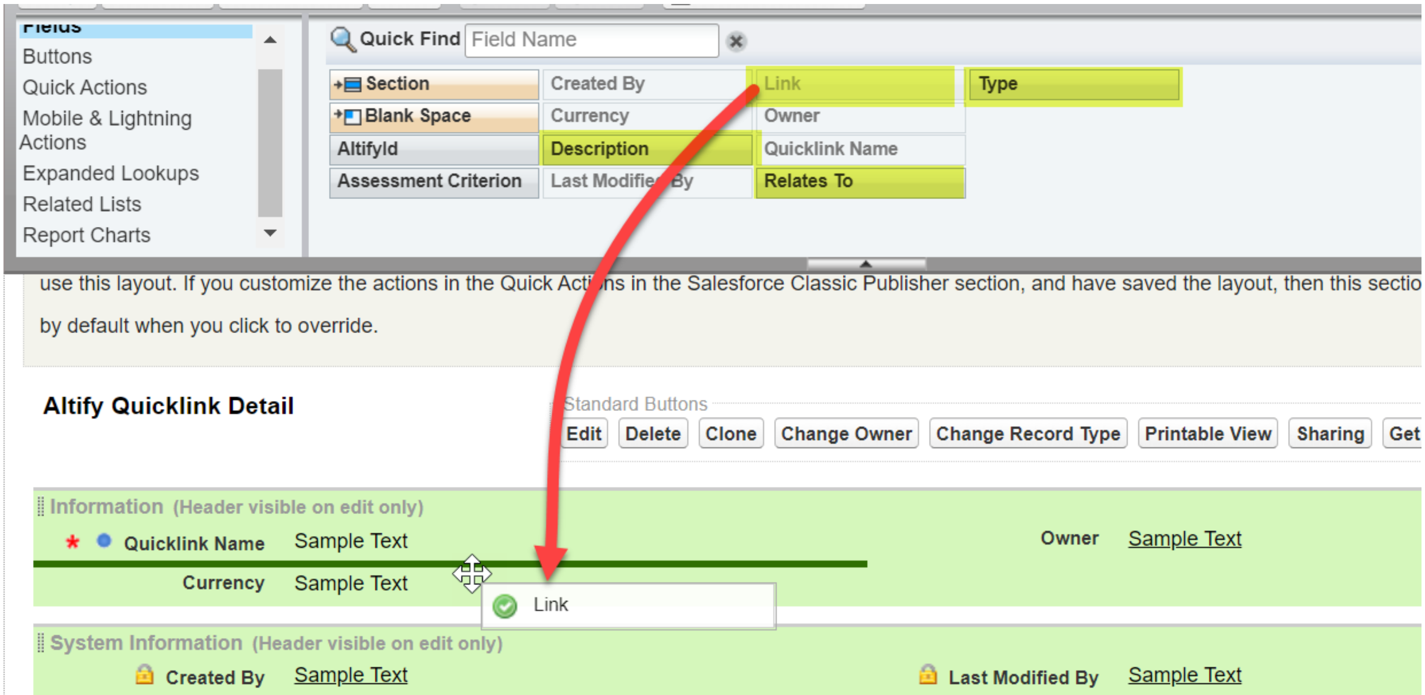


Activating the **Focused View** toggle hides the fields that are not required.

Altify Quicklink

Adding new fields

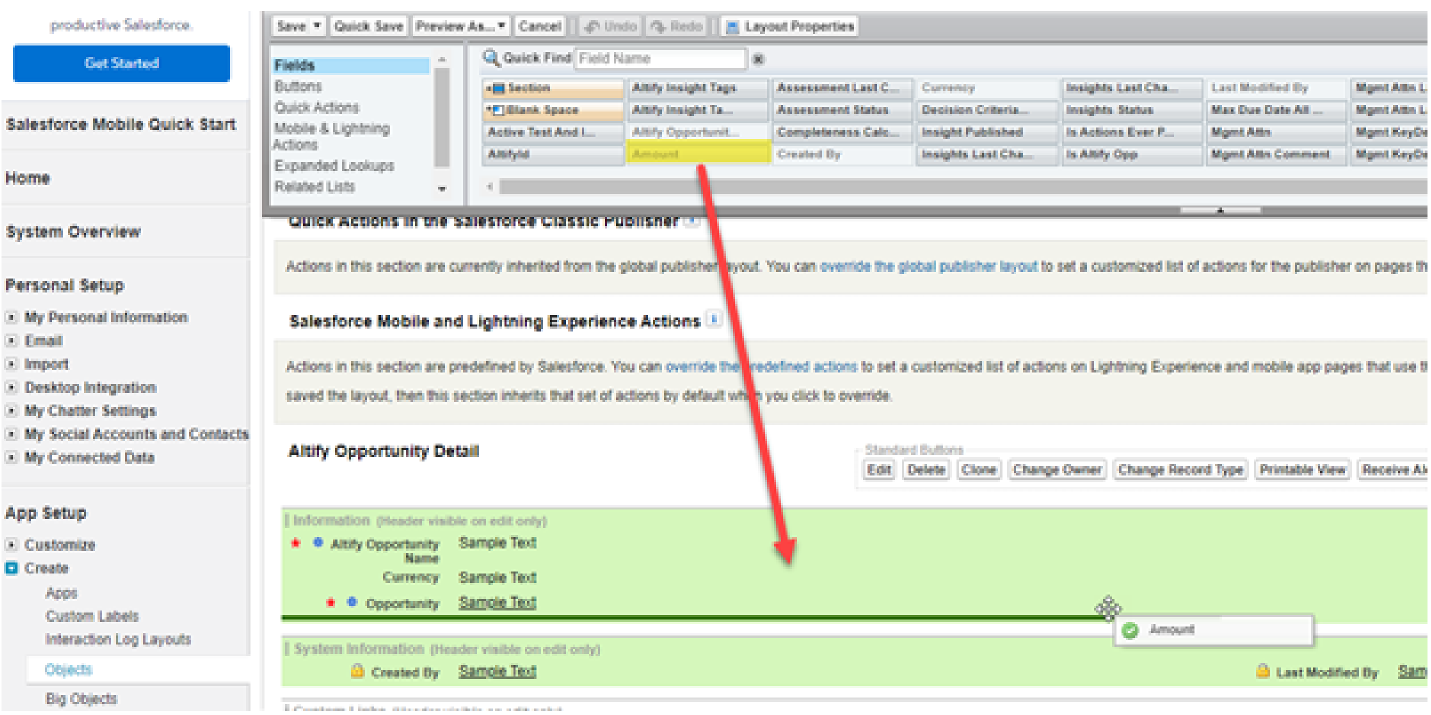
To add quicklinks to the contact details panel on relationship maps, the following fields need to be added to the page layout of the Altify Quicklink object: **Type**, **Link**, **Relates To** and **Description**.



Altify Opportunity

Adding a new field

The **Amount** field needs to be added to the layout of the Altify Opportunity object (if it's not already present).



Editing/Translating Suggested Target Content

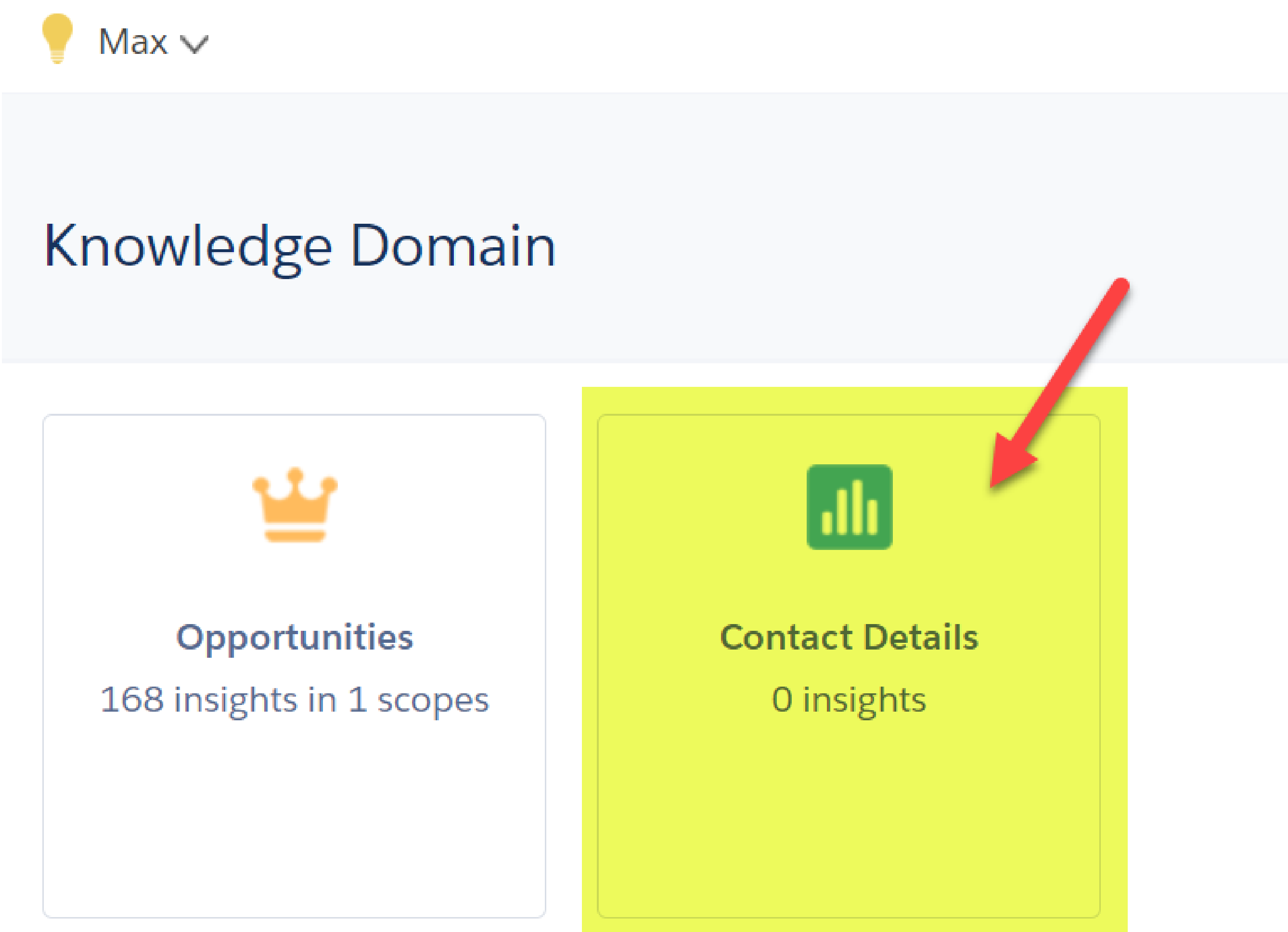
With the latest version of Altify Max installed, your organization can edit or translate Suggested Target content shown on content details panels in Altify Relationship Maps.

For more information, about this functionality see Suggested Target Rules in the online help for admins.

In order to do this, you must do the following:

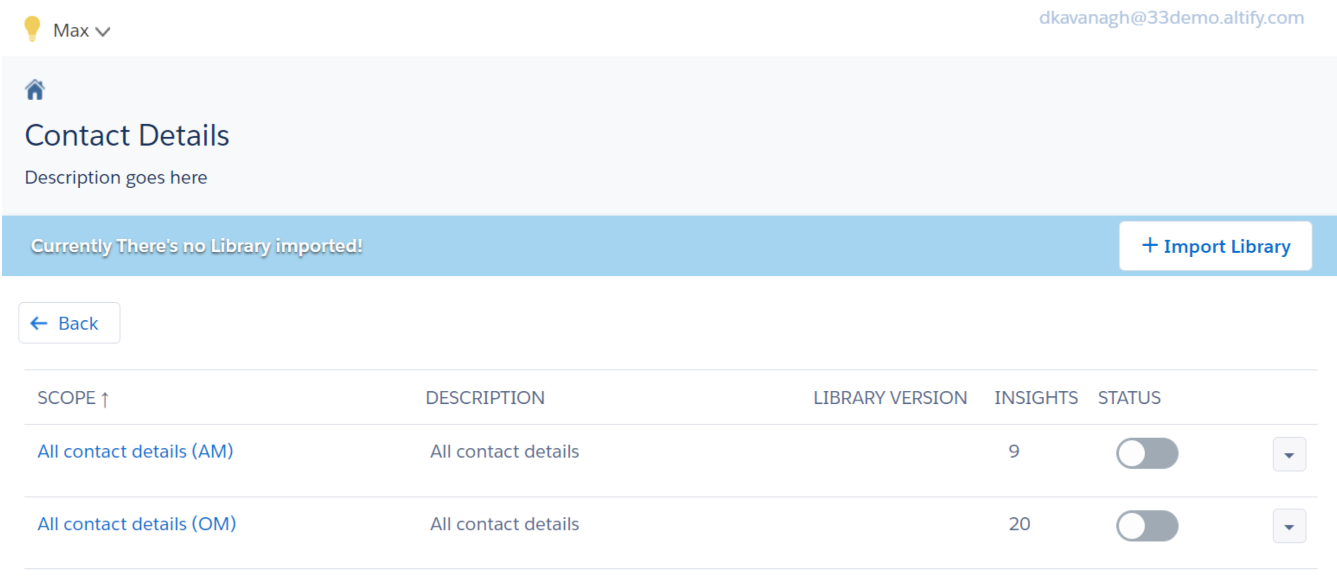
- Ensure you have version 1.61.6 of Altify Max installed.
- Next, you need to import the Suggested Target insights.

  Two scopes (AM & OM) are available in Max Insight Editor for insights that control the suggested target content. Access the scopes by clicking **Contact Details** in the Knowledge Domain screen.



Contact your Altify CSM for the JSON files containing the default insights. These files can be imported into the relevant scopes and are replicas of the suggested target rules that apply by default in Altify. See Importing a Max Library File in the online help.

Pictured below, are the scopes with the insights imported.



With the files imported, you can edit or translate the insights to suit your organization.

Translating New and Updated Labels

Note: This topic applies only to customers who have translated Altify custom labels.

The Altify upgrade introduces a number of new custom labels, and updates the default English text of some others.

If you have previously translated Altify's custom labels into other languages, following the upgrade you'll need to translate the new labels and re-translate the updated ones.

The new labels include:

- Labels for new features.
- Labels that replace 'temp' labels added in software patches.

Accompanying this release is a file that contains the new labels that have been added in this release (compared to the previous release).

Using the file, you can translate and import the new labels.

Please refer to the *Altify Localization Guide* for complete details about how to translate and import labels into your org.

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.