



**Altify**

# 9.8 to 9.9 Upgrade Guide



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# Introduction

This guide describes the procedure for upgrading from Altify 9.8 to Altify 9.9.

If you are running version earlier than v.9.8, you should refer to the appropriate Upgrade Guide:

- *9.7 to 9.9 Upgrade Guide*
- *9.6 to 9.9 Upgrade Guide*

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.

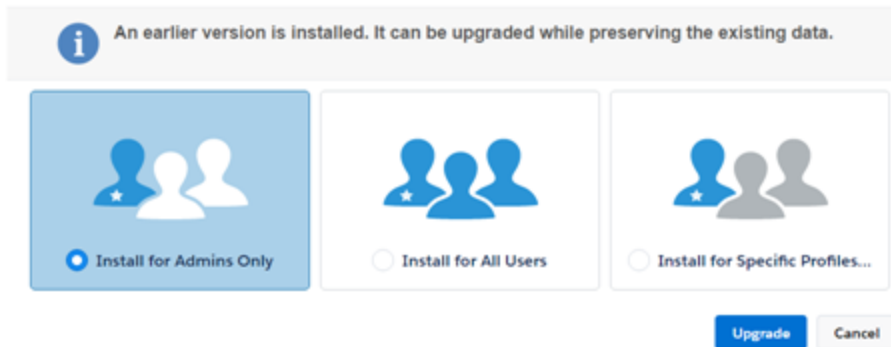
This URL is supplied by Altify.

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:

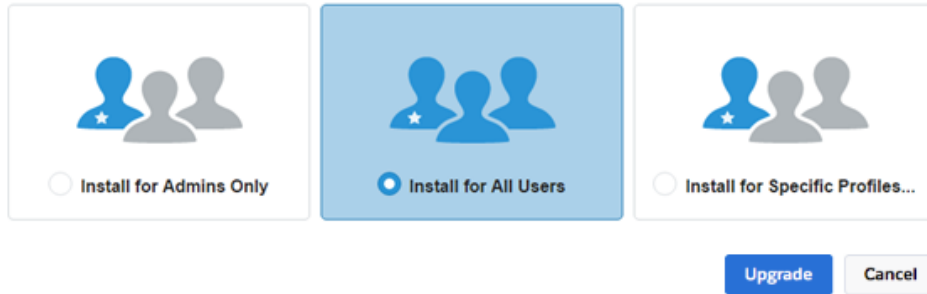
1. Ensure that **Files Connect** is enabled in your org. The extension app can't install otherwise.  
To enable it, go to **Setup > Files Connect**, and then select the **Enable Files Connect** checkbox.
2. Log into Salesforce.com with your administration username and password.
3. Copy and paste the 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**.

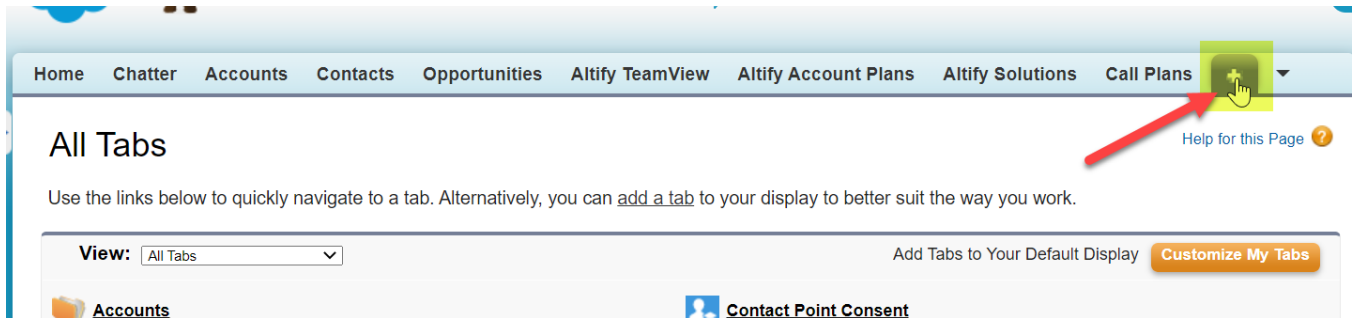
When the installation is complete, a confirmation page is displayed.

**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.)

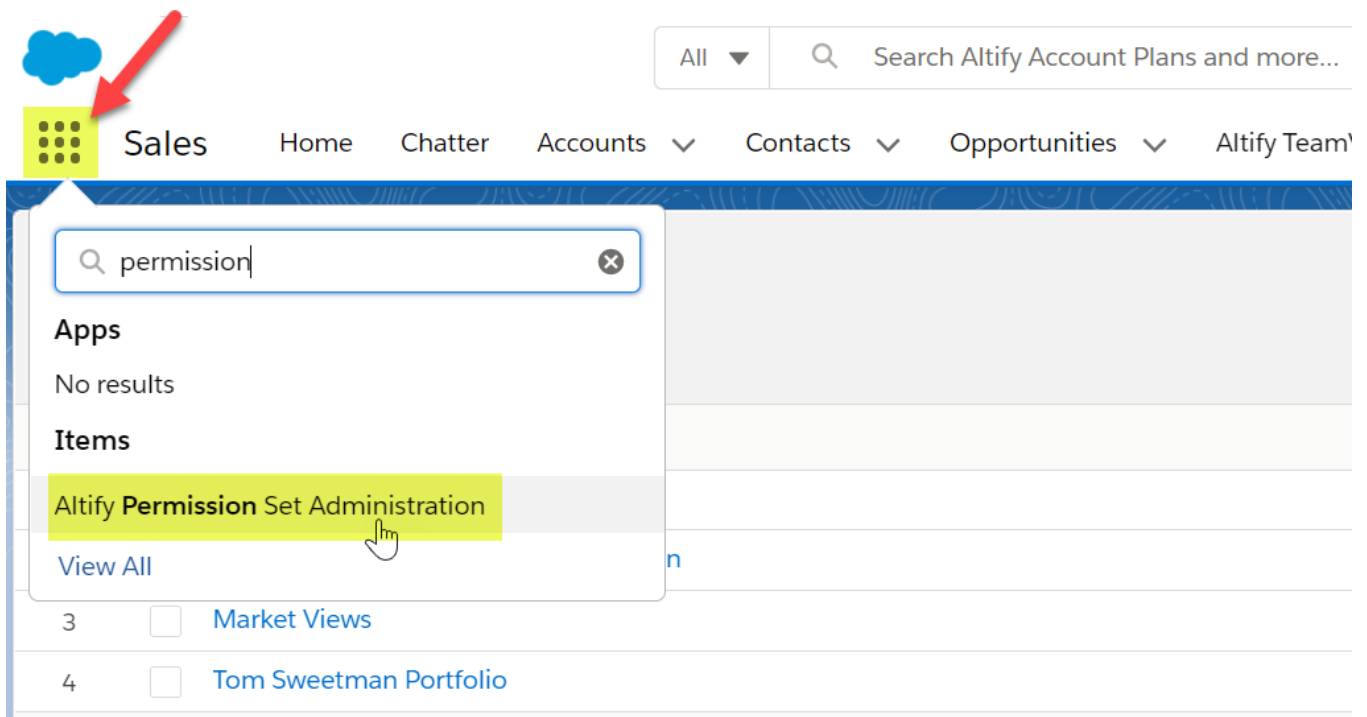
# Altify Permission Set

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**.

The create/refresh process may take several minutes. Please do not click a



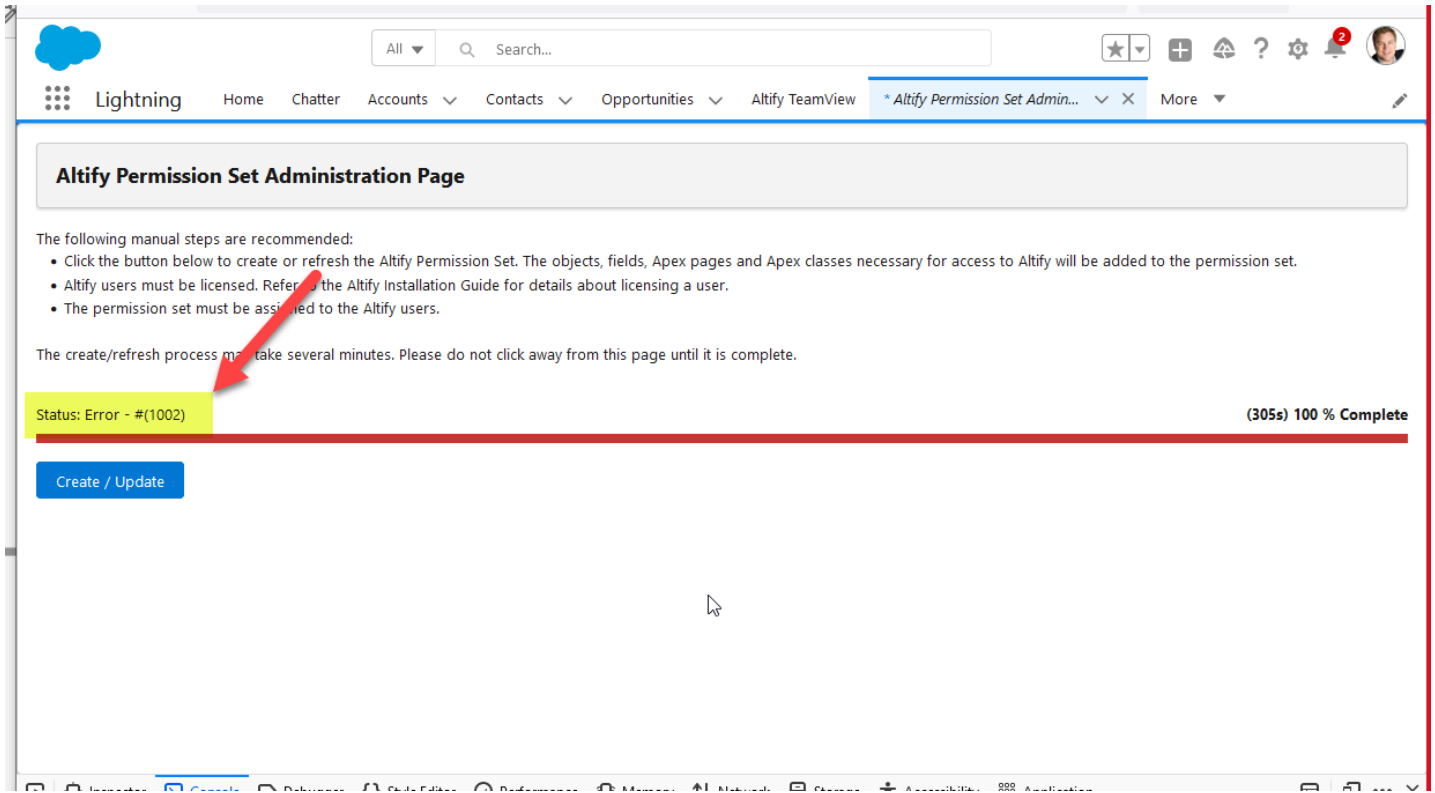
When that has completed successfully, you will see a confirmation message.

**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

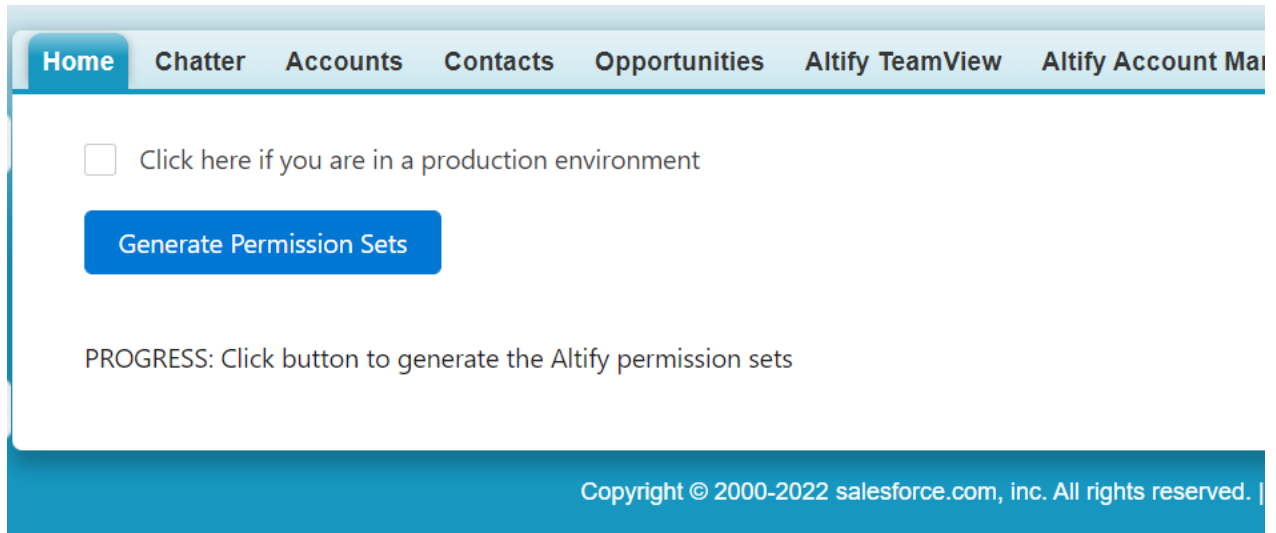
If you are working with a large org, you may encounter an error when refreshing the permission set (as highlighted in the example below).



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 9.8 to 9.9, the following temporary setting values are moved.

## Altify Account Manager 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

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).



SETUP

## Custom Settings

[New](#)

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description
Manage 	<a href="#">Altify Account Manager Plan Report List</a>	Public	List	ALTF	Allows the user to define a list of account manager reports to be displayed as navigation links on Account Manager pages.
Manage 	<a href="#">Altify Account Manager Settings</a>	Public	Hierarchy	ALTF	These settings control certain aspects of Account Manager behavior.
Manage 	<a href="#">Altify AM Plan Opp Map Filter List</a>	Public	List	ALTF	
Manage 	<a href="#">Altify Contact Field</a>	Public	List	ALTF	Use this field to add additional fields for a contact. The field name must match the Salesforce field name label.
Manage 	<a href="#">Altify Core Settings</a>	Public	Hierarchy	ALTF	
Manage 	<a href="#">Altify Insights Settings</a>	Public	Hierarchy	ALTF	

- 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**).

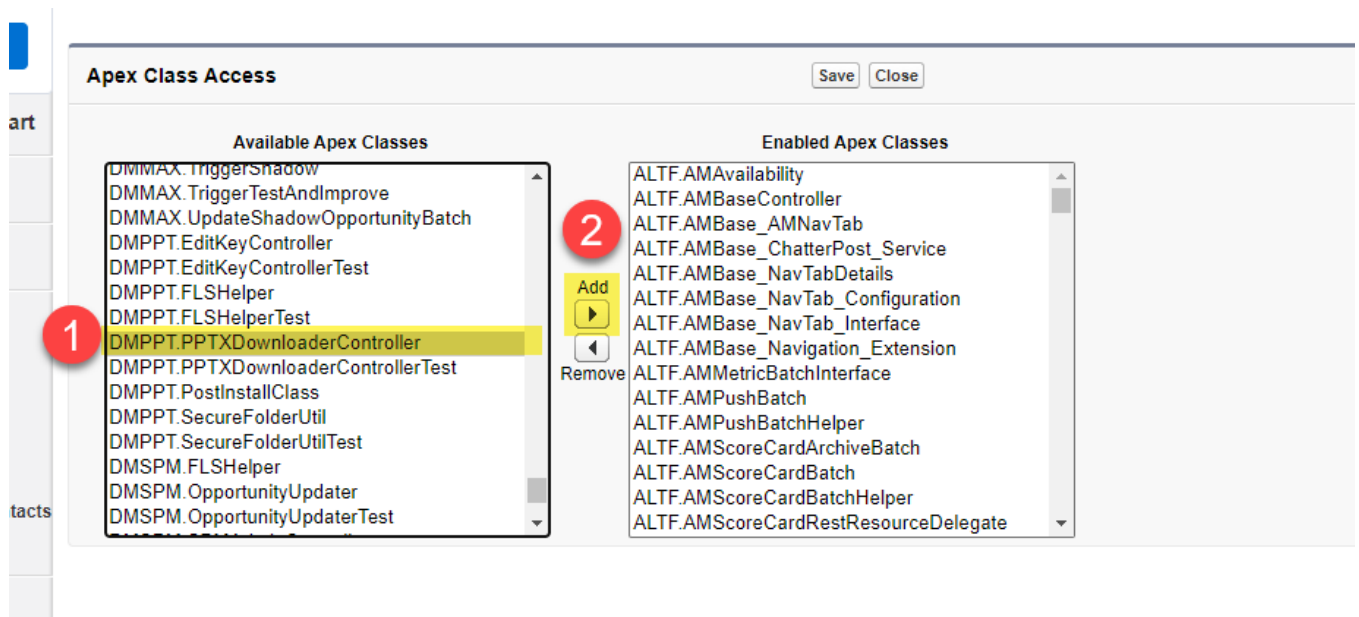
- Confirm your decision in the dialog that pops up, and click **Delete**.
- Repeat steps 2-4 for each of the remaining settings listed above.

# 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


ALTIFY Account Plan

Customer Acquisition Account P ▼

Select the appropriate account manager plan type to get the corresponding plan overview


Assess Your Current Position

**Relationships**




31

**Insights**




85

**Potentials**



Develop Strategies


**Account Details**



17%

Focus the Team & Execute

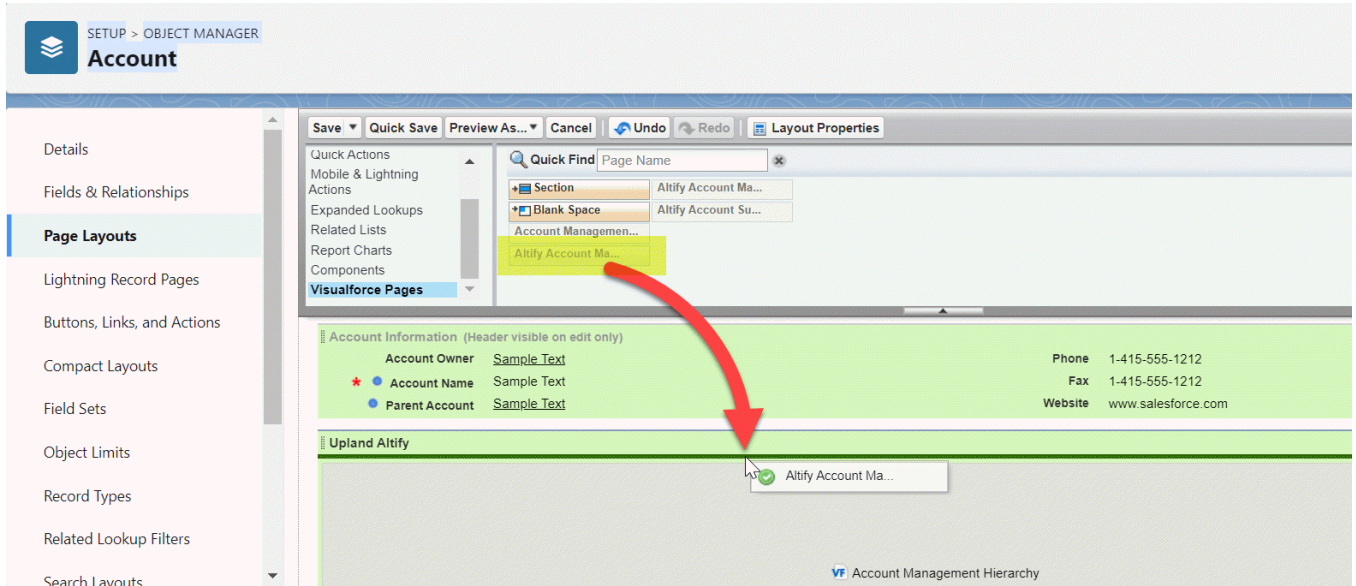
**Objectives**



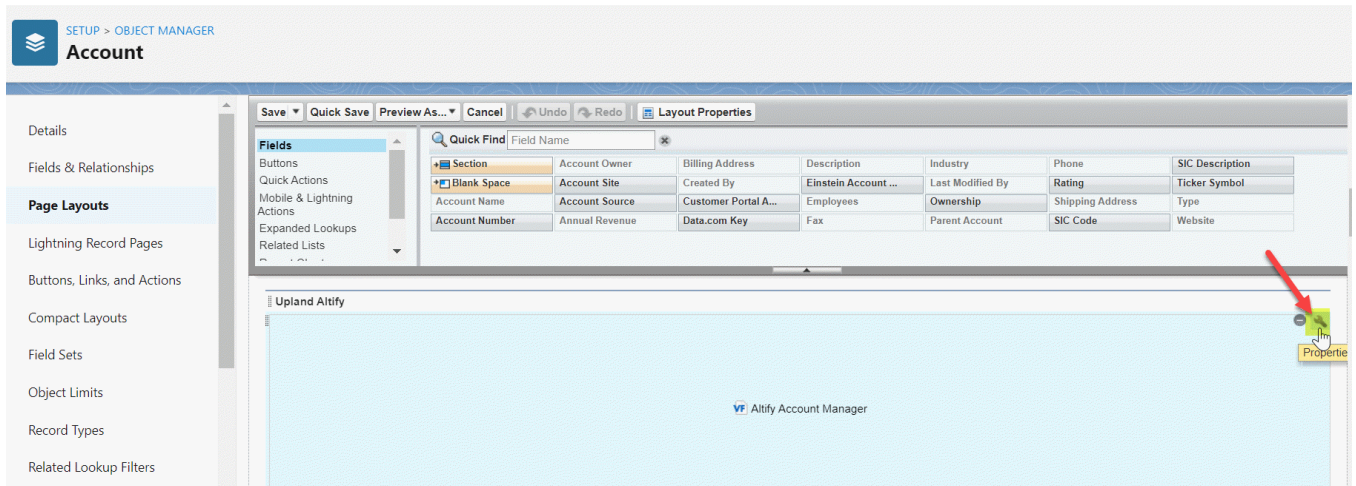
## Adding the Account Plan launchpad

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).

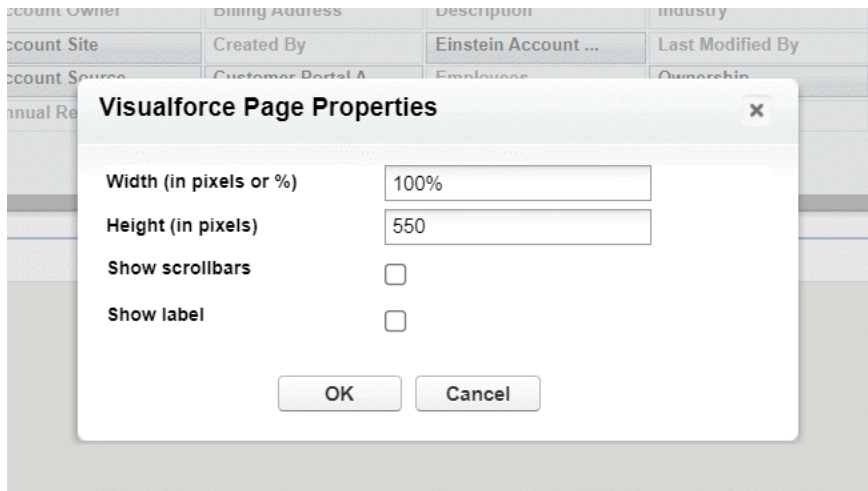


5. Click the **Properties** (spanner) icon on the top right of the Altify Account Manager launchpad to specify suitable panel settings.



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**.

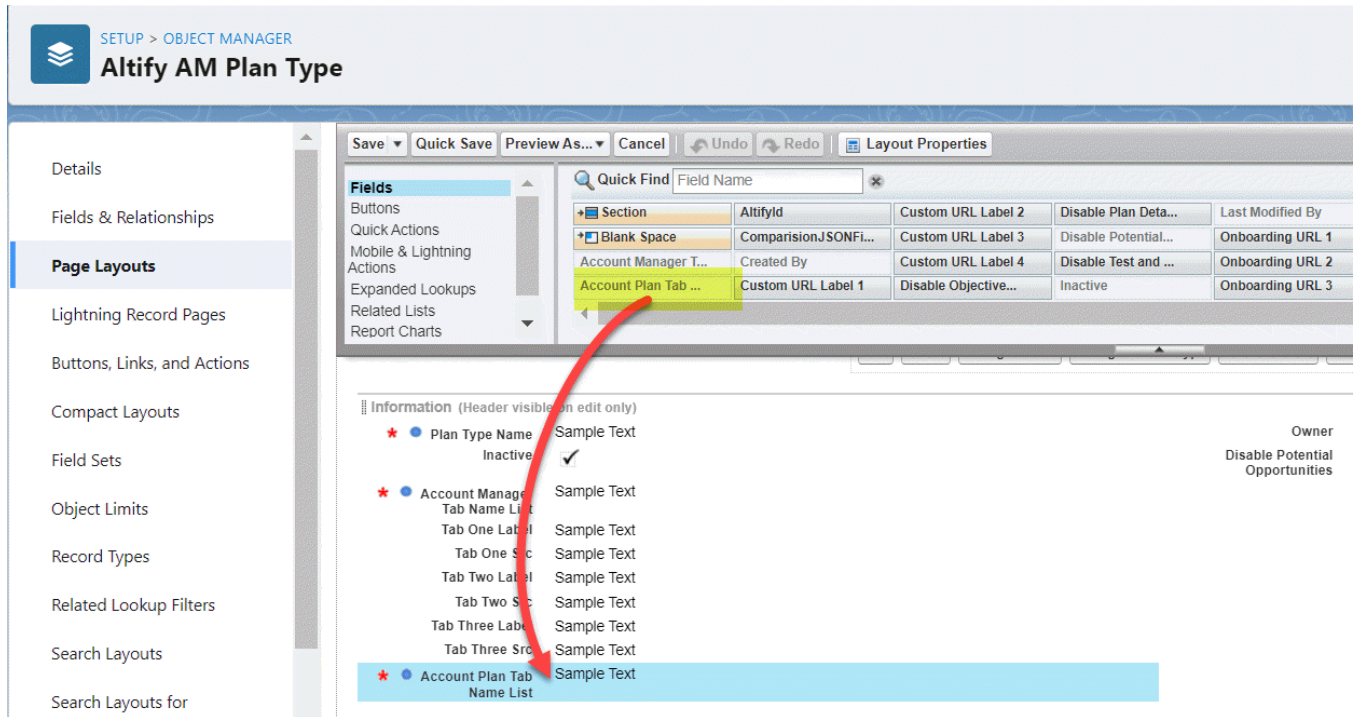
## Altify AM Plan Type

### 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 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 **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*.

- 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.
- Click **Save**.

## 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 Account Opportunity Layout

Custom Console Components Mini Page Layout Mini Console View | Video Tutorial Help for this Page

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons  
Quick Actions  
Mobile & Lightning Actions  
Expanded Lookups  
Related Lists

Quick Find Field Name

Section	Account Opportuni...	Created By	Last Modified By	Qualified Flag
Blank Space	Altifyid	Currency	Opportunity	Reporting Amount
Account	Amount	Description	Opportunity Type	Was Qualified
Account Division	AM Solution	Is Potential	Owner	

Altify Account Opportunity Sample

Highlights Panel

Customize the highlights panel for this page layout.

Quick Actions in the Salesforce Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience

Actions

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section and have saved the layout, then this section inherits that set of actions by default when you click to override.

Altify Account Opportunity Detail

Standard Buttons: Edit Delete Clone Change Owner Change Record Type Printable View

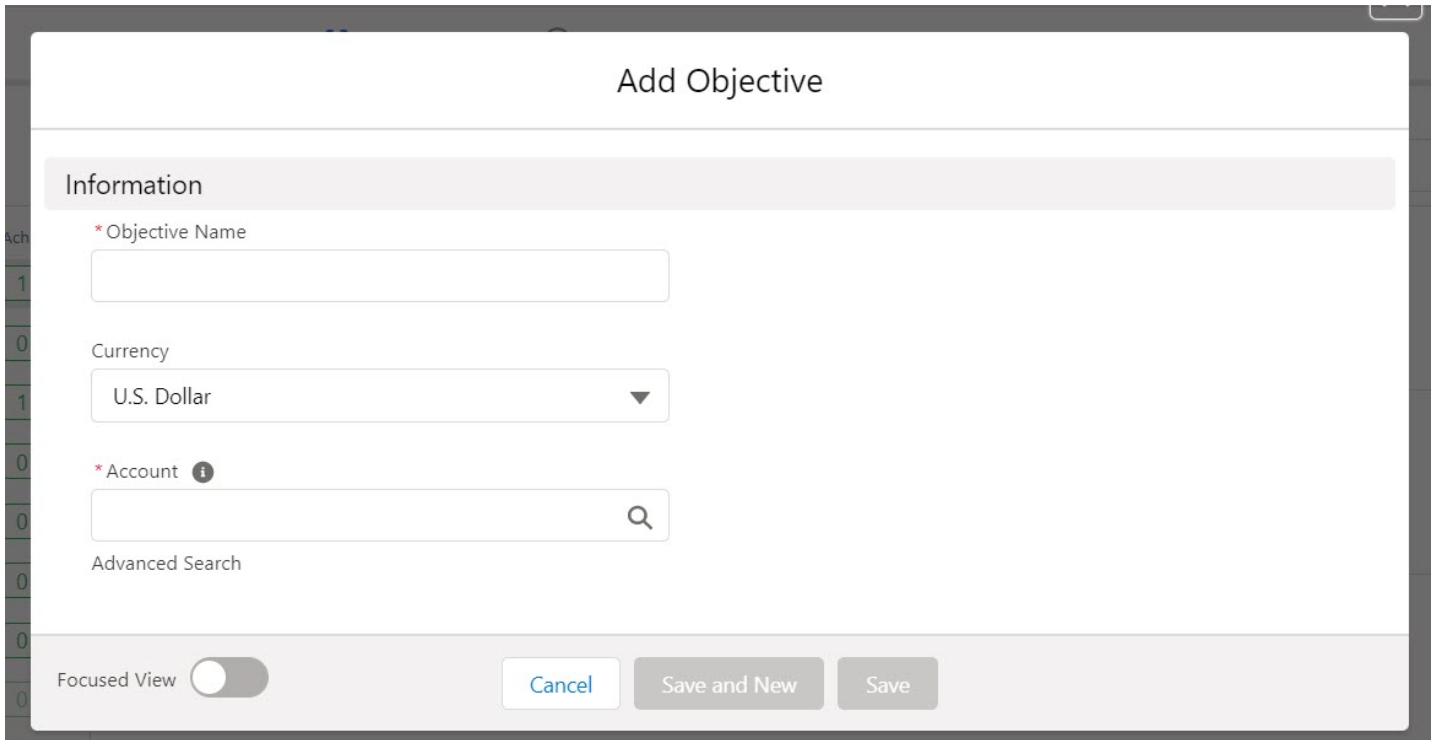
Custom Buttons

Information (Header visible on edit only)

- Account Opportunity Name: Sample Text
- Account Amount: USD 123.45
- AM Solution: Sample Text
- Account Division: Sample Text
- Description: Sample Text
- Owner: Sample Text
- Opportunity Type: Sample Text
- Opportunity: Sample Text
- Was Qualified: ✓
- Qualified Flag: ✓
- Is Potential: 30.029
- Currency: Sample Text

## 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).

SETUP > OBJECT MANAGER

## Altify Account Objective

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Report Charts

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find

Section	AltifyId	IsCompleted	Metric
Blank Space	Created By	Is Default Objective	Objective Descrip...
Account	Currency	IsOverdue	Objective Name
Account Division	Due Date	Last Modified By	Order


**Altify Account Objective Detail**

Standard Buttons

---

Information (Header visible on edit only)

<span style="color: red;">*</span>	Objective Name	Sample Text		
	Type	Sample Text	-	+
	Currency	Sample Text		
*	Account	Sample Text		



### 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).



# Altify Account Objective

The screenshot shows the Altify Account Objective layout editor. On the left is a sidebar with categories like 'Fields', 'Buttons', 'Quick Actions', 'Mobile & Lightning Actions', 'Expanded Lookups', 'Related Lists', and 'Report Charts'. The main workspace has a top toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below the toolbar is a 'Quick Find' search bar and a table of fields:

Section	AltifyId	IsCompleted	Metric
Blank Space	Created By	Is Default Objective	Objective Desc
Account	Currency	IsOverdue	Objective Nam
Account Division	Due Date	Last Modified By	Order

Below the table is the 'Altify Account Objective Detail' section. It features a 'Standard Buttons' bar with 'Edit', 'Delete', 'Clone', 'Change Owner', and 'Change Rec'. Underneath is an 'Information' section with the following fields:

- Objective Name: Sample Text
- Type: Sample Text
- Currency: Sample Text
- Account: Sample Text

A red arrow points to a 'Remove' button next to the 'Currency' field.

## 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	

## Altify Account Objective

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

**Fields**

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Report Charts

Quick Find

<b>Section</b>	AltifyId	IsCompleted	Metric	Overdue Status	Strategy
<b>Blank Space</b>	Created By	Is Default Objective	Objective Descrip...	Owner	Subject
Account	Currency	IsOverdue	Objective Name	Priority	Type
Account Division	Due Date	Last Modified By	Order	Status	

**Altify Account Objective Detail**

Standard Buttons

Custom Buttons

Edit Delete Clone Change Owner Change Record Type Printable View

**Information** (Header visible on edit only)

<b>* Objective Name</b>	Sample Text	<b>* Status</b>	Sample Text
<b>* Type</b>	Sample Text	<b>* Owner</b>	<u>Sample Text</u>
<b>* Account</b>	<u>Sample Text</u>	<b>* Priority</b>	Sample Text
<b>Account Division</b>	<u>Sample Text</u>	<b>* Due Date</b>	6/9/2022
<b>Metric</b>	Sample Text		
<b>Objective Description</b>	Sample Text		
<b>Strategy</b>	Sample Text		

This layout appears as follows to your users:

### Add Objective

#### Information

* Objective Name	* Status <i>i</i>
<input type="text"/>	Not Started ▼
* Type <i>i</i>	* Owner
Research ▼	Donal Kavanagh ×
* Account <i>i</i>	Advanced Search
<input type="text"/> 🔍	* Priority <i>i</i>
Advanced Search	Medium ▼
Account Division	* Due Date <i>i</i>
<input type="text"/> 🔍	<input type="text"/> 📅
Metric <i>i</i>	
<input type="text"/>	
Objective Description <i>i</i>	
<input type="text"/>	
Strategy <i>i</i>	
<input type="text"/>	

Focused View

[Cancel](#) [Save and New](#) [Save](#)

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

# 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](mailto: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"> <li>Immediate and continuous.</li> <li>Hourly status updates.</li> </ul>
Urgent (Business Critical)	<ul style="list-style-type: none"> <li>Production system defect that prevents business critical work from being done and no workaround exists.</li> <li>Defect causes a material loss of data in the production system.</li> <li>Security-related defect.</li> </ul>	1 business hour	<ul style="list-style-type: none"> <li>Immediate and continuous effort to resolve the defect or provide a workaround.</li> <li>Daily status updates until the defect is resolved or a workaround is provided.</li> </ul>
High	<ul style="list-style-type: none"> <li>Production system defect that prevents business critical work from being done and a workaround does exist.</li> <li>Defect violates the material specifications in the documentation and impacts your organization's production system.</li> </ul>	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.