



Altify

9.9 Localization Guide

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Introduction

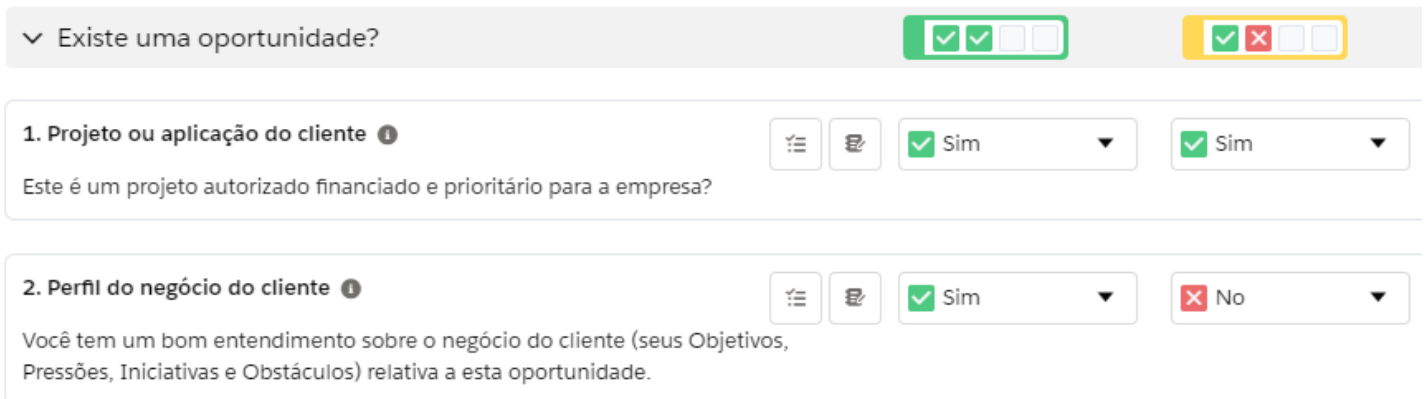
Altify software's default language is English. However, you can localize it for other languages. (Administrator-facing pages are not currently localizable.)

There are a number of aspects to localizing Altify software. These are summarized in the sections that follow, and are explained in detail in subsequent sections.

Most of the text you see on Altify pages is governed by custom labels, and can be translated using [the normal Translation Workbench process](#). This includes the headings and drop-down options on Opportunity Manager's **Assessment** tab, for example.

Wherever the software displays text about Altify sales methodology, this text is translated using special custom objects called '[Translation](#)' objects. For example, the question text on Opportunity Manager's **Assessment** tab is translated in this way. (Altify Max insights and emails have a [very similar translation process](#).)

Translated into Portuguese using the methods outlined above, the text on Opportunity Manager's **Assessment** tab looks like this:



▼ Existe uma oportunidade? ✓✓□□ ✓✗□□

1. Projeto ou aplicação do cliente ⓘ ☰ 🗨️ ✓ Sim ▼ ✓ Sim ▼
Este é um projeto autorizado financiado e prioritário para a empresa?

2. Perfil do negócio do cliente ⓘ ☰ 🗨️ ✓ Sim ▼ ✗ No ▼
Você tem um bom entendimento sobre o negócio do cliente (seus Objetivos, Pressões, Iniciativas e Obstáculos) relativa a esta oportunidade.

The following Altify modules support localization:

- Opportunity Manager (including Altify Max)
- Account Manager
- Sales Process Manager
- TeamView
- Relationship Map
- Call Planner

For each release, we'll give you all the information you need to ensure that your translations remain up to date with the latest changes in the software.

Localization Videos

[Click here](#) for some short videos that give you a quick overview of each area of Altify localization.

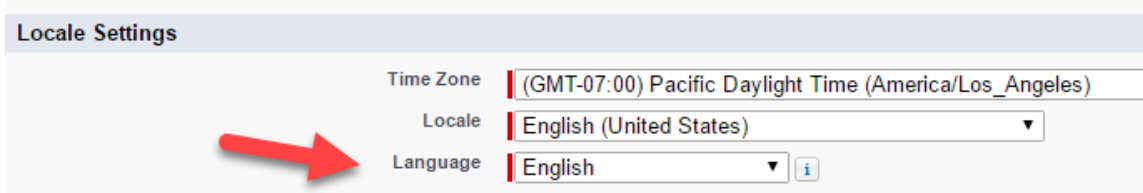
We recommend that you watch them before you read the full Localization Guide.

Prerequisite: Salesforce Language Settings

A prerequisite to localizing your Altify software is to ensure that Salesforce language settings have been configured appropriately.

Check Your Users' Languages

Check which languages your users are set up to use in Salesforce. Each user's personal language is in the Locale Settings section on their user record:



Enable the Languages You Want to Support

Having determined which languages you need to translate Altify into, enable those languages in Language Settings:

1. In **Setup**, go to **Language Settings**.
2. If necessary, use the **Enable** checkboxes to make the relevant languages available.
3. Add each relevant language to the Displayed Languages list.

Language Settings

Language Preferences

Enable end-user languages - Help and Setup are not translated in end-user languages
Hungarian, Polish, Czech, Turkish, Indonesian, Romanian, Vietnamese, Ukrainian, Hebrew, Greek, Bulgarian,

Enable platform-only languages - no default translations are provided for platform-only languages
French (Canadian), Georgian, Serbian (Cyrillic), Serbian (Latin), English (Australian), English (Malaysian), Eng
Welsh, Icelandic, Malay, Tagalog, Luxembourgish, Romansh, Armenian, Hindi, Urdu, Bengali, German (Austria
Arabic (Oman), Arabic (Qatar), Arabic (Saudi Arabia), Arabic (Sudan), Arabic (Syria), Arabic (Tunisia), Arabic (L
(Belgium), French (Luxembourg), French (Switzerland), German (Belgium), German (Luxembourg), Italian (Sw
Spanish (El Salvador), Spanish (Guatemala), Spanish (Honduras), Spanish (Nicaragua), Spanish (Panama), S

Add or remove languages from the Available Language list

Available Languages

- Hungarian
- Polish
- Czech
- Turkish
- Indonesian
- Romanian
- Vietnamese
- Ukrainian
- Hebrew
- Greek
- Bulgarian
- English (UK)
- Arabic
- Slovak

Add

▶

Remove

◀

Displayed Languages

- English
- German
- Spanish
- French
- Italian
- Japanese
- Swedish
- Korean
- Chinese (Traditional)
- Chinese (Simplified)
- Portuguese (Brazil)
- Dutch
- Danish
- Thai

Top

▲

Up

▲

Down

▼

Bottom

Languages that appear in gray are currently used by your company, users, or both. They cannot be deactivated.

4. Click **Save**.

Enable the Languages on the Translation Workbench

On the Translation Workbench, enable each language you need to support. This makes it possible to import translated Altify custom labels into the org.

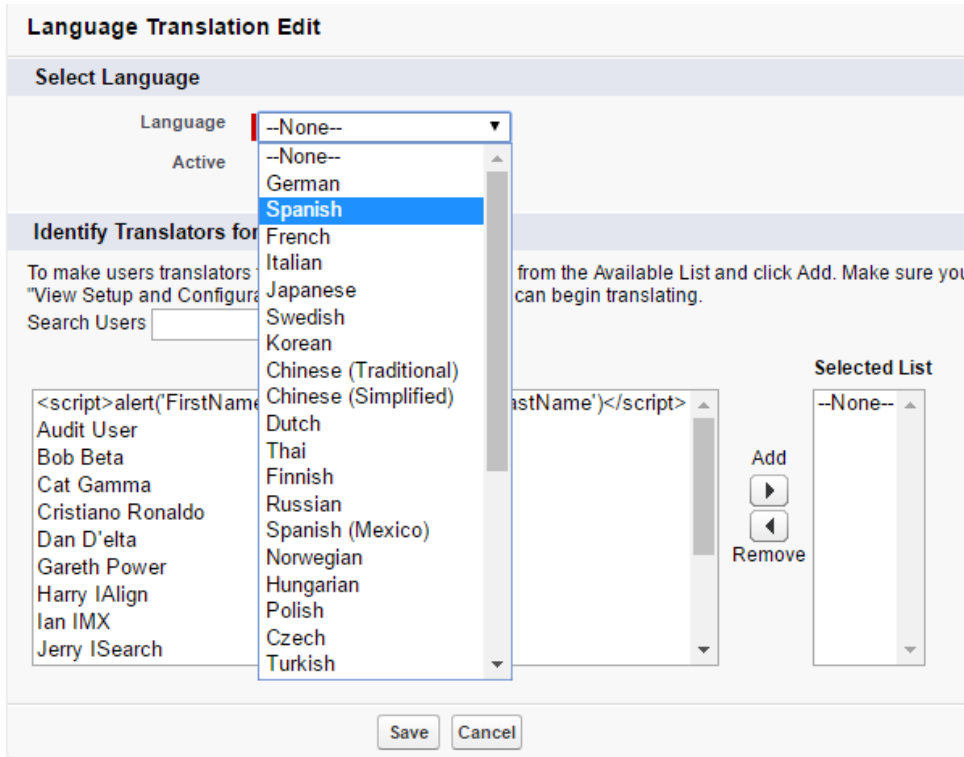
1. In **Setup**, go to **Translation Language Settings**.
2. Click **Add**.

Translation Workbench

Click Add to select the languages your organization supports and the users who are

Supported Languages <input type="button" value="Add"/>		
Action	Language	Active
Edit	Danish	<input checked="" type="checkbox"/>
Edit	English	<input type="checkbox"/>
Edit	Portuguese (Brazil)	<input checked="" type="checkbox"/>
Edit	English (UK)	<input checked="" type="checkbox"/>

3. Select the language you want to add, and click **Save**.



Translating Custom Labels

Most of the text you see in Altify software is governed by custom labels. For example, the contact details fields you see on relationship maps have custom labels.

The sections that follow explain how you can use STF files to export custom labels, get them translated into a particular language, and import them back into the org.

Tip: If you just want to translate a few specific labels, you can do so in Salesforce without recourse to STF files. For more information, see the [Salesforce online help](#).

Overview

Custom labels are imported and exported in an STF (Salesforce Translation Format) file. An STF file includes:

- A header area specifying the language code. This code applies to all the labels included in the file.
- A list of labels. There is one label per line. A tab separates the "key" (label ID) and the label itself. (The tab is mandatory. Using spaces to separate them will lead to an import error.)

```
# Language: e.g. Port Brazil
Language code: pt_BR
Type: Source
```

```
CustomLabel.ALTF__COMMON_ACCOUNT Account
CustomLabel.ALTF__COMMON_ACCOUNT_PLAN Account Plan
CustomLabel.ALTF__COMMON_ACHIEVED Achieved
CustomLabel.ALTF__COMMON_ACTION Action
CustomLabel.ALTF__COMMON_ACTION_RIGHTS_ERROR You don't have access rights to edit the action.
CustomLabel.ALTF__COMMON_ACTIONS Actions
CustomLabel.ALTF__COMMON_ACTIONS_LIST Actions List
CustomLabel.ALTF__COMMON_ACTIVE Active
CustomLabel.ALTF__COMMON_ADD Add
CustomLabel.ALTF__COMMON_ADD_TYPE Add ${resource}
CustomLabel.ALTF__COMMON_ADVANCED Advanced
CustomLabel.ALTF__COMMON_ALL All
CustomLabel.ALTF__COMMON_ALL_OWNERS All Owners
CustomLabel.ALTF__COMMON_ALL_TYPES All Types
CustomLabel.ALTF__COMMON_AMBER Amber
```

In outline, the basic steps are:

1. Ask Altify for the master STF file containing all Altify custom labels.
(This file includes a comprehensive set of comments explaining how to use the file, and which labels apply to which area of the software.)
2. Delete any sections that are not relevant to you. For example, if you're not licensed for Account Manager, delete the section containing Account Manager labels.

3. Each language requires its own separate STF file, so make a copy of the file for each language you want to support, and specify the language code in the header.
4. Send the file to the translator so that they can translate the label text.
5. When you get the translated file back, import it back into Salesforce.

The sections that follow explain the process in more detail.

Making a Suitable Copy of the Altify STF File

Suppose that you want to translate Altify into German. First, you need to make a suitable copy of the master STF file.

1. Ask Altify to give you a copy of the master STF file.
2. Open the file with the text editor of your choice, such as Notepad++ or Sublime.

Note: Do not open the file in Microsoft Excel. This may add extraneous characters that corrupt the file.

3. The master STF file includes all Altify custom labels. However, you only need to translate labels for the modules you're licensed for.

The file is organized into sections to make it easy to see which labels are associated with each module. Delete any sections not relevant to your users.

For example, if none of your users are licensed for Account Manager, delete the Account Manager sections of the master STF file.

4. If the file does not already specify the correct language code, change it in the header area.

For a full list of supported languages and their codes see this [Salesforce help page](#).

5. Save the file to a suitable location. Use a name that indicates the file is for Brazilian Portuguese translation.

Sending the File to Your Translator

Send the STF file to your Brazilian Portuguese translator.

They should translate the label (indicated in green below). They should not translate the keys or the text in the header area.

Labels have a 1000 character limit (including white space), so it is important that the translated text does not exceed this.

KEY

LABEL

CustomLabel.ALTF__COMMON_ACTION_RIGHTS_ERROR

You don't have access rights to edit the action.

Tabs (`\t`), new lines (`\n`) and carriage returns (`\r`) are represented by special characters in label text. These characters should be preserved in the translation so that formatting is maintained.

Certain labels includes parameters that are substituted in the software. These have the syntax `#{value}` or `{value}`. They should be left unchanged in the translated text.

Note: The translator should make sure that the translated text is synonymous with the default English text. Otherwise, it may not match the software logic.

Import the Translated File into Salesforce

When you receive the translated STF file back from the translator, import it into your org using the Translation Workbench.

To import an STF file:

1. In **Setup**, go to **Translation Workbench > Import**.
2. On the Import screen, click the **Choose File** button.
3. Select your edited STF file and click **Import**.
4. You should receive an automatic email confirming that your translation was implemented successfully.

(It may take a few minutes before the translations are visible in your org.)

The translated text is now visible to any user set to this language in Salesforce.

If the import fails, review the messages in the log file added to the **Documents** tab. This will help you to resolve the issue(s) that caused the failure.

Points to Note

- In addition to Altify custom labels, certain Salesforce standard labels are also presented on Altify pages. These relate to Opportunity Stage, Contact Role, Task Priority, Task Status, and Salutation. These standard labels also need to be translated. They are:

```
PicklistValue.Standard.opportunityStage.Closed Lost
```

```
PicklistValue.Standard.opportunityStage.Closed Won
```

```
PicklistValue.Standard.opportunityStage.Id. Decision Makers
```

```
PicklistValue.Standard.opportunityStage.Needs Analysis
```

```
PicklistValue.Standard.opportunityStage.Negotiation/Review
```

```
PicklistValue.Standard.opportunityStage.Perception Analysis
```

```
PicklistValue.Standard.opportunityStage.Proposal/Price Quote
```

```
PicklistValue.Standard.opportunityStage.Prospecting
```

PicklistValue.Standard.opportunityStage.Qualification
PicklistValue.Standard.opportunityStage.Value Proposition
PicklistValue.Standard.taskPriority.High
PicklistValue.Standard.taskPriority.Low
PicklistValue.Standard.taskPriority.Medium
PicklistValue.Standard.taskStatus.Completed
PicklistValue.Standard.taskStatus.Deferred
PicklistValue.Standard.taskStatus.In Progress
PicklistValue.Standard.taskStatus.Not Started
PicklistValue.Standard.taskStatus.Waiting on someone else
PicklistValue.Standard.salutation.Dr.
PicklistValue.Standard.salutation.Mr.
PicklistValue.Standard.salutation.Mrs.
PicklistValue.Standard.salutation.Ms.
PicklistValue.Standard.salutation.Prof.

- The following are picklist value sets created by the Altify package on install. Your administrator configures these values to include your organization's picklist values.
 - Altify Insight Tags
 - Altify Personas

The picklist values are candidates for translation via the stf file.

- If the Output Extension App is installed in your org, it's mandatory to translate the following custom label:

CustomLabel.DMPPT__Click_To_Save

However, if the app is not installed in your org, the import will fail if this label is included in the STF file.

Translating Sales Methodology Text

In addition to the text governed by [custom labels](#), Altify software includes sales methodology text, such as the Assessment questions in Opportunity Manager.

Sales methodology text is managed using Altify custom objects rather than labels. Translating it involves the use of "Translation" records.

This requires full access to Altify's Translation object. If you don't already have this access, you can obtain it through the **Altify Administrator** permission set.

Note: Every org has the same set of Altify custom labels. However, the precise set of records containing sales methodology text can vary from org to org. For example, the set of Plan Details questions in one org may be different to that in another.

Overview of the Process

Each item of sales methodology text requires a Translation record. For example, each Assessment question in Opportunity Manager requires a corresponding Translation record for each language it will be translated into.

The Translation record contains the translated text. Any Altify user set to that language will see the translated text rather than the default English text.

Types of Sales Methodology Text

The table below lists all Altify custom objects that contain sales methodology text.

Depending on which Altify products you are licensed for, some of these may not be relevant to your org. For example, Assessment Questions are relevant only if you are licensed for Opportunity Manager.

Area	Altify Types
Opportunity Manager	<ul style="list-style-type: none"> Assessment questions Sales process qualifying questions Quicklinks (Because these are URLs, the 'translation' process for Quicklinks involves providing a URL to an alternative resource or retaining the default URL.) <div style="background-color: #e6f2ff; padding: 5px; margin-top: 10px;"> <p>Note: While the Yes and No options in Assessment questions are governed by Content Translation records on a per-question basis, the Unknown option is applied globally across all questions using a custom label.</p> </div>
Account Manager	<ul style="list-style-type: none"> Plan Details Questions Row Details Questions <div style="background-color: #e6f2ff; padding: 5px; margin-top: 10px;"> <p>Note: While the Yes and No options in Plan Details Questions are governed by Translation records on a per-question basis, the Unknown option is applied globally across all questions using a custom label.</p> </div>

Note: Account Manager email alerts are also governed by Translation records.

Prerequisite

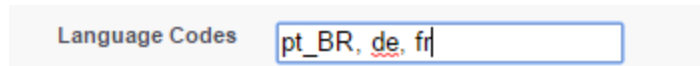
Before you begin, ask Altify for the SOQL query and the "field mappings" file.

Note: The Translation records have IDs specific to the org you are working in. This means that the entire translation process must be carried out in your production org. You can't generate translation records in sandbox and then import them into production.

Enabling Languages for Translation

To enable one or more languages so that Translation records can be generated for that language:

1. In **Setup**, go to **Custom Settings**.
2. Click **Manage** beside **Altify Core Settings**.
3. In the Language Codes field, enter the Salesforce language code of every language you want to enable. Separate the language codes with commas. In this example, the codes for Brazilian Portuguese, German, and French have been entered.



4. Click **Save**.

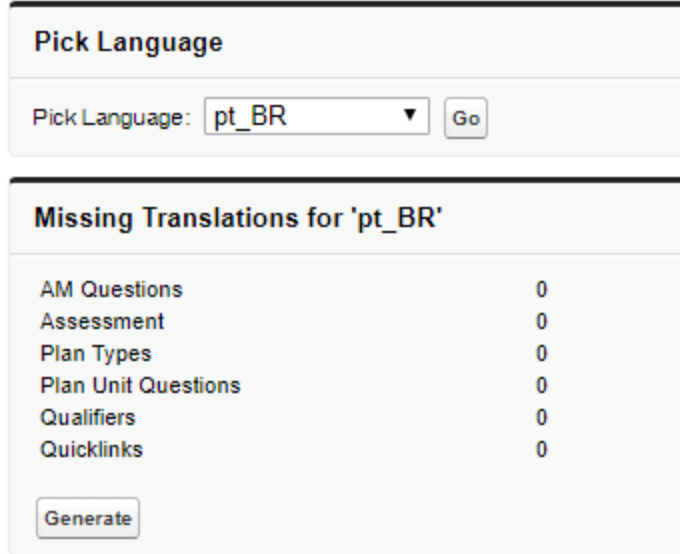
Generate the Translation Records

To generate Translation records for Brazilian Portuguese translations of Altify sales methodology text:

1. Open the **Altify Content Translations** tab.
2. Select **pt_BR** in the Language drop-down. (The languages available here are the ones you enabled in the previous section.)
3. Click **Go**.
4. The page lists all the relevant Altify custom objects, and specifies how many "missing" Content Translation records there are for Brazilian Portuguese. Click **Generate**.

When the records have been generated, the number of 'missing translations' for each type changes to 0. This means that all the necessary Content Translation records for Brazilian Portuguese have been

built.



Missing Translations for 'pt_BR'	
AM Questions	0
Assessment	0
Plan Types	0
Plan Unit Questions	0
Qualifiers	0
Quicklinks	0

You have generated a full set of translation records for Brazilian Portuguese. These can now be exported from the org and then translated.

Exporting the Translation Records

Initially, the Translation records contain the default English text.

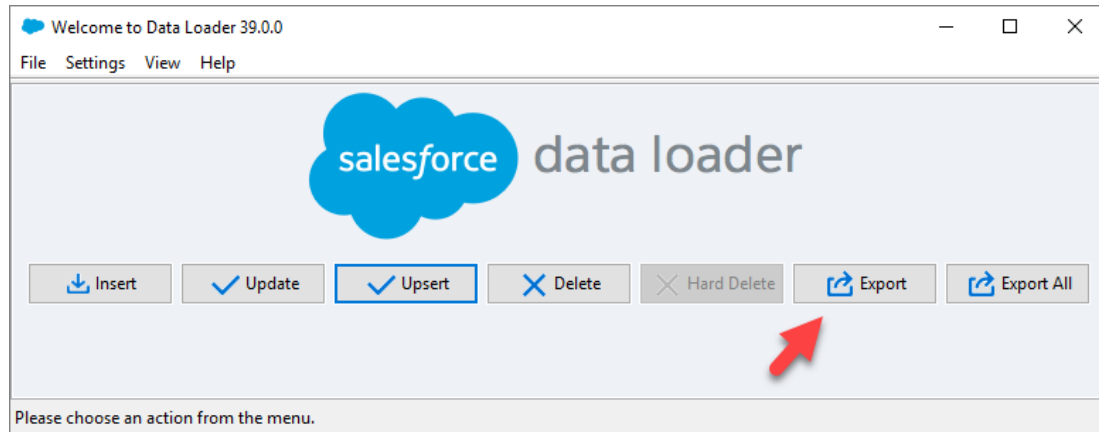
So at this stage a Brazilian Altify user continues to see English text. For a Brazilian user to see the text in Portuguese, translated text must be added to each Translation record, and then these must be imported back into the org.

To export all the translation records to a single CSV file:

1. Open the Salesforce Data Loader app.

Note: You'll need to install this on your computer if you have not done so already. It's available for download from **Setup** in your org.

2. Click **Export**.



3. Log into the Data Loader with System Administrator credentials.
4. Click **Next**.
5. In the Select Salesforce Object list, select **Altify Translation**.

Step 2: Select Data Objects

Select your Salesforce object and your target file



Select Salesforce Object:

Show all Salesforce objects

- Altify Stage (ALTF__Stage__c)
- Altify TeamView Filter (ALTF__TeamView_Filter__c)
- Altify TeamView Team (ALTF__TeamView_Team__c)
- Altify TeamView Team Member (ALTF__TeamView_Team_Member__c)
- Altify TeamView View (ALTF__TeamView_View__c)
- Altify Template Qualifier (ALTF__Template_Qualifier__c)
- Altify Template Qualifier Details (ALTF__Template_Qualifier_Details__c)
- Altify Test And Improve (ALTF__Test_And_Improve__c)
- Altify Translation (ALTF__Translation__c)
- Altify Usage (ALTF__Usage__c)
- Caso (Case)
- Catálogo de preços (Pricebook2)
- Compromisso (Event)

Choose a target for extraction:

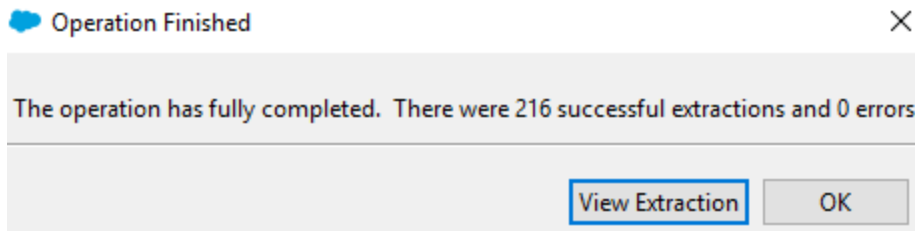
6. Specify the location and name of the CSV file to export Translation records to.
7. Click **Next**.
8. Paste the SOQL query shown below into the query field. This tells the Data Loader which data to extract from the records.

Note: You can obtain the query from Altify or copy it from below. Note, however, that if you copy it from below the query may include a number of end-of-line markers that need to be removed before you run it.

In the query's WHERE clause, specify the language code that's relevant to you. In this example, the language code is for Brazilian Portuguese, so the WHERE clause ends with `= 'pt_BR'`

```
Select Id, ALTF__Text1__c, ALTF__RefText1__c, ALTF__Text2__c, ALTF__
RefText2__c, ALTF__Text3__c, ALTF__RefText3__c, ALTF__Text4__c, ALTF__
RefText4__c, ALTF__Text5__c, ALTF__RefText5__c, ALTF__TextLong1__c, ALTF__
RefTextLong1__c, ALTF__TextRich1__c, ALTF__RefTextRich1__c, ALTF__Tex-
tRich2__c, ALTF__RefTextRich2__c, ALTF__URL1__c, ALTF__RefURL1__c FROM
ALTF__Translation__c WHERE ALTF__Language__c = 'pt_BR'
```

9. Click **Finish**.
10. Click **Yes**.
11. When the export is complete, click **OK**.



12. Review the CSV file to make sure that you're happy with the content it includes. We recommend OpenOffice as the best software to use for this.

Note: Do not open the file in Microsoft Excel. This may add extraneous characters that corrupt the file.

Viewed in a spreadsheet, you can see that there are a number of columns in the CSV file.

Each record has its own row, and each column represents a field in the record. For each field that needs to be translated, there's also a "ref" column where you can always see the default English text.

In this example, the TEXT1 column must be translated, and the REFTEXT1 column shows the English default text.

B	
ALTF_TEXT1_C	ALTF_REFTEXT1_C
Acesso aos Recursos	Access to Funds
Account Description	Account Description
Acquisition question #1 (edit text)	Acquisition question #1 (edit text)
Acquisition question #2 (edit text)	Acquisition question #2 (edit text)
Acquisition question #3 (edit text)	Acquisition question #3 (edit text)
Active Projects	Active Projects
Are all terms and conditions for the project, including final prices, agreed in writing?	Are all terms and conditions for the project, including final prices, agreed in writing?
Are the next steps in formalizing an engagement between Gareth Fresh win20 and the customer confirmed?	Are the next steps in formalizing an engagement between Gareth Fresh win20 and the customer confirmed?
Are the next steps in formalizing an engagement between Gareth Fresh win20 and the customer confirmed?	Are the next steps in formalizing an engagement between Gareth Fresh win20 and the customer confirmed?
Are you a viable fit in the customer's environment?	Are you a viable fit in the customer's environment?
Are you engaged with legal or procurement to get master contracts, statements of work, or purchase orders?	Are you engaged with legal or procurement to get master contracts, statements of work or purchase orders?
Barriers or Risks	Barriers or Risks
Barriers or Risks	Barriers or Risks

13. Provide the CSV file to the translator. Make sure they're clear about which columns need to be translated.

Where fields include HTML markup tags, ensure that these are retained in the translation so that formatting is preserved.

"Numeric character references" such as `'`, which represents an apostrophe character, should also be preserved.

Import the Translated Content

When the translator returns the CSV file to you with all the translations completed, you are ready to import it into your org.

1. In the Data Loader, click **Update**.
2. Select the **Altify Translation** object.
3. Select the CSV file you received back from the translator.
4. Click **Next**.
5. You should see an 'initialization succeeded' message. Click **OK**.
6. Now you need to map the fields in the CSV file to the fields in the Altify Translation object. To do this, we recommend selecting **Choose an Existing Map**. Then you can browse to the .SDL mapping file provided by Altify. When you select it, the field mappings specified in the .SDL file are listed.

Alternatively, you can choose to "auto-match" the fields. As long as the columns in your CSV file are correctly titled, this should map the fields successfully.

Mapping Dialog ✕

Match the Salesforce fields to your columns.

Name	Label	Type
ALTF_Account_Plan_Question_c	AM Question	reference
ALTF_Account_Plan_Type_c	Plan Type	reference
ALTF_Account_Question_c	AM Plan Row Question	reference
ALTF_AltifyId_c	AltifyId	string
ALTF_Assessment_Criterion_c	Assessment Criterion	reference
ALTF_Language_c	Language	picklist
ALTF_Qualifier_c	Qualifier	reference
ALTF_Quicklink_c	Quicklink	reference

Drag the Salesforce fields down to the column mapping. To remove a mapping, select a row and click Delete.

File Column Header	Name
ALTF_REFTEXT1_C	ALTF_RefText1_c
ALTF_REFTEXT2_C	ALTF_RefText2_c
ALTF_REFTEXT3_C	ALTF_RefText3_c
ALTF_REFTEXT4_C	ALTF_RefText4_c
ALTF_REFTEXT5_C	ALTF_RefText5_c
ALTF_REFTEXTLONG1_C	ALTF_RefTextLong1_c
ALTF_REFTEXTRICH1_C	ALTF_RefTextRich1_c
ALTF_REFTEXTRICH2_C	ALTF_RefTextRich2_c
ALTF_REFURL1_C	ALTF_RefURL1_c
ALTF_TEXT1_C	ALTF_Text1_c

7. Specify the folder where you want the success/failure report file to be saved.
8. Click **Finish**.
9. Click **Yes** to confirm that you want to proceed with the update operation.

When the update is complete, you should get a success message:

Operation Finished ✕

The operation has fully completed. There were 216 successful updates and 0 errors.

An Altify user set to Brazilian Portuguese will now see the translated text rather than the default English text.

Existe uma oportunidade? ✓✓□□ ✓✗□□

1. Projeto ou aplicação do cliente ⓘ ☰ 🗑️ ✓ Sim ▼ ✓ Sim ▼
Este é um projeto autorizado financiado e prioritário para a empresa?

2. Perfil do negócio do cliente ⓘ ☰ 🗑️ ✓ Sim ▼ ✗ No ▼
Você tem um bom entendimento sobre o negócio do cliente (seus Objetivos, Pressões, Iniciativas e Obstáculos) relativa a esta oportunidade.

Email Encoding

When email templates are translated into certain languages, it may be necessary for the Email Encoding setting to be changed on each relevant user record.

1. Open the user record.
2. Click **Edit**.
3. In the **Email Encoding** drop-down, select the encoding that matches the user's language.
4. Click **Save**.

Translating Altify Max Insights and Email Notifications

You can translate Altify Max insights and email notifications. This means that, for example, Brazilian users get insights and Max emails in Brazilian Portuguese rather than in English.

Translating insights and Max emails involves the use of Max Translation records.

The process is very similar to that of [sales methodology text translation](#).

Prerequisite

Before you begin, ask Altify for the SOQL query and the "field mappings" file.

Note: The Max Translation records have IDs specific to the org you are working in. This means that the entire translation process must be carried out in your production org. You can't generate translation records in sandbox and then import them into production.

Enabling a Language for Max Translation

To enable Altify Max to generate Max Translation records for a particular language:

1. In **Setup**, go to the **Max Content Translation** custom object.
2. In the Fields & Relationships section, open the object's **Language** picklist.
3. The picklist contains languages supported by Salesforce. It also includes the *Translation off* value.

When you **Activate** a language in the picklist, it becomes available for selection on the **Max Content Translation** tab.

If you don't want any languages to be available, make sure they're all inactive in the picklist, and activate *Translation off* instead.

In this example, Brazilian Portuguese is active.

Values		
Action	Values	API Name
Edit	Portuguese (Brazil)	pt_BR

Inactive Values		
Action	Values	
Del Activate	Translation off	
Del Activate	Arabic	
Del Activate	Bulgarian	
Del Activate	Chinese (Simplified)	
Del Activate	Chinese (Traditional)	
Del Activate	Croatian	

4. Click **Save**.

The languages you activate become available for selection on the **Max Content Translation** tab:

Pick Language

Pick Language: Pick Language ▼

Pick Language
 Portuguese (Brazil) (pt_BR)

Generate the Max Translation Records

To generate Max Translation records for Brazilian Portuguese translations of Altify sales methodology text:

1. Open the **Max Content Translations** tab.
2. Select **pt_BR** in the Language drop-down. (The languages available here are the ones you enabled in the previous section.)
3. Click **Go**.
4. The page lists all the relevant Altify custom objects, and specifies how many "missing" Max Content Translation records there are for Brazilian Portuguese. Click **Generate**.

When the records have been generated, the number of 'missing translations' for each type changes to 0. This means that all the necessary Max Content Translation records for Brazilian Portuguese have been built.

Pick Language

Pick Language: Portuguese (Brazil) (pt_BR) ▼ Go

Missing Translations for 'pt_BR'

Class	5
Insight	158

Generate

Note: The "class" type is for Max email-notification templates.

You have generated a full set of translation records for Brazilian Portuguese. These can now be exported from the org and then translated.

Exporting the Max Translation Records

Initially, the Max Translation records contain the default English text.

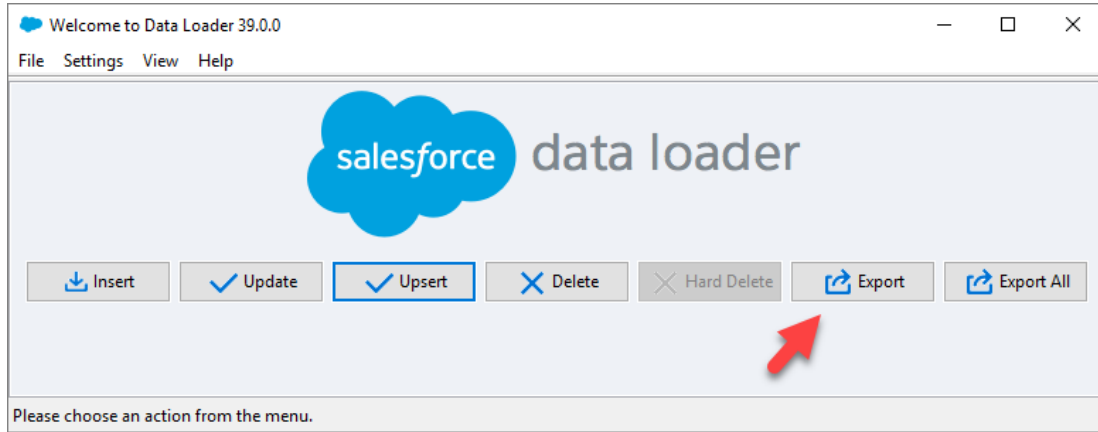
So at this stage a Brazilian Altify user continues to see English text. For a Brazilian user to see the text in Portuguese, translated text must be added to each Max Translation record, and then these must be imported back into the org.

To export all the translation records to a single CSV file:

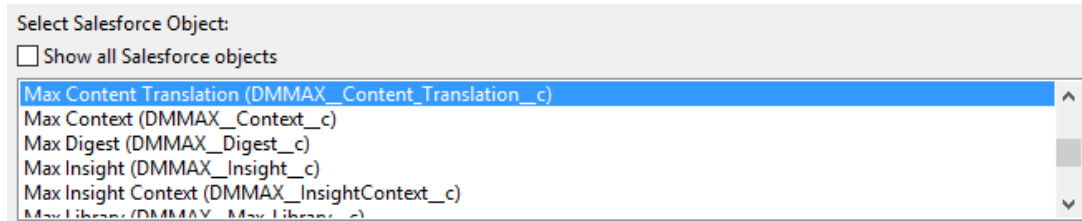
1. Open the Salesforce Data Loader app.

Note: You'll need to install this on your computer if you have not done so already. It's available for download from **Setup** in your org.

2. Click **Export**.



3. Log into the Data Loader with System Administrator credentials.
4. Click **Next**.
5. In the Select Salesforce Object list, select **Max Content Translation**.



6. Specify the location and name of the CSV file to export Max Translation records to.
7. Click **Next**.
8. Paste the SOQL query shown below into the query field. This tells the Data Loader which data to extract from the records.

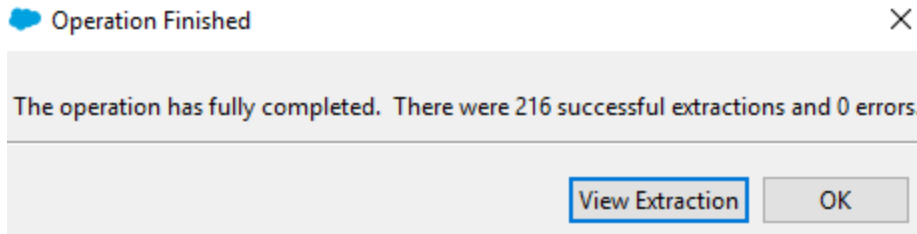
Note: You can obtain the query from Altify or copy it from below. Note, however, that if you copy it from below the query may include a number of end-of-line markers that need to be removed before you run it.

In the query's WHERE clause, specify the language code that's relevant to you. In this example, the language code is for Brazilian Portuguese, so the WHERE clause ends with `= 'pt_BR'`

```
SELECT Id, DMMAX__Type__c, DMMAX__Text1__c, DMMAX__RefText1__c, DMMAX__Text2__c, DMMAX__RefText2__c, DMMAX__Text3__c, DMMAX__RefText3__c, DMMAX__TextLong1__c, DMMAX__RefTextLong1__c, DMMAX__Version__c, DMMAX__TargetVersion__c FROM DMMAX__Content_Translation__c WHERE DMMAX__Language__c = 'pt_BR'
```

9. Click **Finish**.

10. Click **Yes**.
11. When the export is complete, click **OK**.



12. Review the CSV file to make sure that you're happy with the content it includes. We recommend OpenOffice as the best software to use for this.

Note: Do not open the file in Microsoft Excel. This may add extraneous characters that corrupt the file.

Viewed in a spreadsheet, you can see that there are a number of columns in the CSV file.

Each record has its own row, and each column represents a field in the record. For each field that needs to be translated, there's also a "ref" column where you can always see the default English text.

In this example, the TEXT1 column must be translated, and the REFTEXT1 column shows the English default text.

	B	C	D	
	DMMAX_TYPE_C	DMMAX_TEXT1_C	DMMAX_REFTEXT1_C	DMMAX_TEXT2_C
1	Class	Insights - \${classname}	Insights - \${classname}	Insights - \${classname}
4	Class			
4	Class			
	Class	Insights - \${classname}	Insights - \${classname}	Insights - \${classname}
	Class			
1	Insight	Conflict: Competitive Strategy and Decision Criteria	Conflict: Competitive Strategy and Decision Criteria	
1	Insight	Criteria: Solid competitive position with decision criteria	Criteria: Solid competitive position with decision criteria	
1	Insight	Criteria: Evaluate your competitive position with decision criteria	Criteria: Evaluate your competitive position with decision criteria	
1	Insight	Insight Map: Built out well	Insight Map: Built out well	
1	Insight	Insight Map: Time it was built out	Insight Map: Time it was built out	
0	Insight	Insight Map: Unclear on business challenge or compelling reason to buy	Insight Map: Unclear on business challenge or compelling reason to buy	
1	Insight	Insight Map: What is the customer's business challenge	Insight Map: What is the customer's business challenge	
1	Insight	Conflict: Mismatch between people on Relationship Map and Insight Map	Conflict: Mismatch between people on Relationship Map and Insight Map	
1	Insight	Decision Criteria: Good level of completion	Decision Criteria: Good level of completion	
1	Insight	Decision Criteria: Importance needed by Key Player	Decision Criteria: Importance needed by Key Player	
1	Insight	Questionable: Decision Criteria prioritized for Key Players with low contact	Questionable: Decision Criteria prioritized for Key Players with low contact	
1	Insight	Relationship Map: Majority of contacts are Supporters	Relationship Map: Majority of contacts are Supporters	
1	Insight	Relationship Map: Majority of people are Non-Supporters	Relationship Map: Majority of people are Non-Supporters	
1	Insight	Relationship Map: Majority of Decision Makers on your side	Relationship Map: Majority of Decision Makers on your side	
1	Insight	Relationship Map: Decision Makers are not on your side	Relationship Map: Decision Makers are not on your side	
1	Insight	Relationship Map: Preference with Key Players - that's great!	Relationship Map: Preference with Key Players - that's great!	
1	Insight	Relationship Map: Key Player problem	Relationship Map: Key Player problem	
1	Insight	Relationship Map: The number of buyers seems unusually high	Relationship Map: The number of buyers seems unusually high	
1	Insight	Relationship Map: Great to have a mentor early in the process!	Relationship Map: Great to have a mentor early in the process!	
1	Insight	In Synch: Assessment / Decision Criteria / Solution Fit	In Synch: Assessment / Decision Criteria / Solution Fit	

13. Provide the CSV file to the translator. Make sure they're clear about which columns need to be translated.

Where fields include HTML markup tags, ensure that these are retained in the translation so that formatting is preserved.

"Numeric character references" such as `'`, which represents an apostrophe character, should also be preserved.

The "class" rows in the CSV file provide the HTML structure of Max notification emails. Within these tables, the entities listed below must be preserved in the translated text. Do not edit anything between the \$ and the } in any of these entities. (When the text is rendered in an email, these entities are replaced by information from your org):

- `${classname}` : Name of the relevant class, such as "Opportunities".
- `${username}` : Name of the user the insights are being sent to.
- `${managename}` : The user's manager's name.
- `${firstname}` : The user's first name.

Tags with the format `{!value}` must also be preserved. These map to object signals, and so are integral to the insights shown to the user.

14. Instruct the translator that when each row in the CSV file is translated, they must change the value in the "Version" column to match the value in the "Target Version" column. This number is how the software detects whether the translation is for the current English version of the insight. (In the Insight Editor tab, an insight translation that's not for the current English version gets a red tag, and a translation for the current English version gets a green tag.)

Import the Translated Content

When the translator returns the CSV file to you with all the translations completed, you are ready to import it into your org.

1. In the Data Loader, click **Update**.
2. Select the **Max Content Translation** object.
3. Select the CSV file you received back from the translator.
4. Click **Next**.
5. You should see an 'initialization succeeded' message. Click **OK**.
6. Now you need to map the fields in the CSV file to the fields in the Altify Translation object. To do this, we recommend selecting **Choose an Existing Map**. Then you can browse to the .SDL mapping file provided by Altify. When you select it, the field mappings specified in the .SDL file are listed.

Alternatively, you can choose to "auto-match" the fields. As long as the columns in your CSV file are correctly titled, this should map the fields successfully.

Mapping Dialog

Match the Salesforce fields to your columns.

Name	Label	Type
DMMAX_Class_c	Class	reference
DMMAX_DealmakerID_c	DealmakerID	string
DMMAX_Insight_c	Insight	reference
DMMAX_Language_c	Language	picklist
DMMAX_Uniqueness_c	Uniqueness	string
Name	Content Translation Name	string
OwnerId	Owner ID	reference

Drag the Salesforce fields down to the column mapping. To remove a

File Column Header	Name
DMMAX_REFTEXT1_C	DMMAX_RefText1_c
DMMAX_REFTEXT2_C	DMMAX_RefText2_c
DMMAX_REFTEXT3_C	DMMAX_RefText3_c
DMMAX_REFTEXTLONG1_C	DMMAX_RefTextLong1_c
DMMAX_TARGETVERSION_C	
DMMAX_TEXT1_C	DMMAX_Text1_c
DMMAX_TEXT2_C	DMMAX_Text2_c
DMMAX_TEXT3_C	DMMAX_Text3_c
DMMAX_TEXTLONG1_C	DMMAX_TextLong1_c
DMMAX_TYPE_C	

7. Specify the folder where you want the success/failure report file to be saved.
8. Click **Finish**.
9. Click **Yes** to confirm that you want to proceed with the update operation.

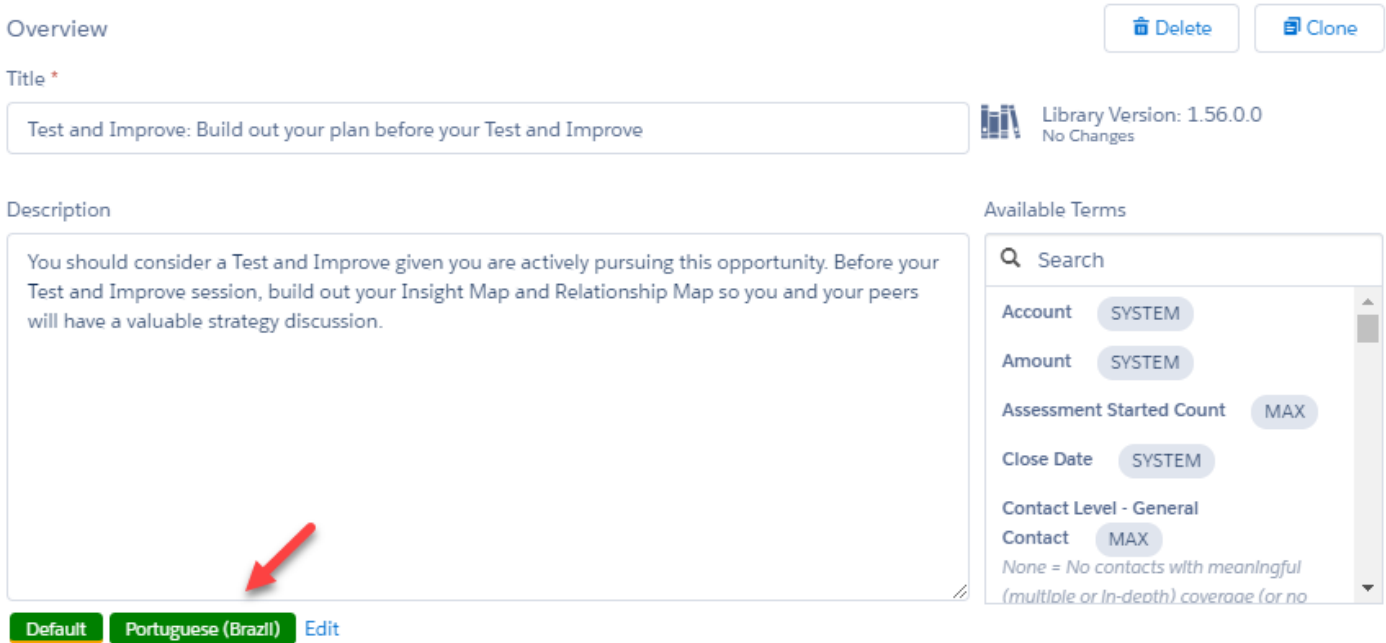
When the update is complete, you should get a success message:

🔔 Operation Finished ✕

The operation has fully completed. There were 216 successful updates and 0 errors.


In the Insight Editor, each insight now has a tag showing that it has a Brazilian Portuguese translation. When the tag is green, it means there is a translation for the most recent revision of the default English version of the insight. When the tag is red, it means the translation has not been updated since the last time the English version was revised.

You can click the tag to see the Brazilian Portuguese version of the insight.



Overview [Delete](#) [Clone](#)

Title *

Test and Improve: Build out your plan before your Test and Improve  Library Version: 1.56.0.0
No Changes

Description

You should consider a Test and Improve given you are actively pursuing this opportunity. Before your Test and Improve session, build out your Insight Map and Relationship Map so you and your peers will have a valuable strategy discussion.

Available Terms

Search

- Account SYSTEM
- Amount SYSTEM
- Assessment Started Count MAX
- Close Date SYSTEM
- Contact Level - General Contact MAX

None = No contacts with meaningful (multiple or in-depth) coverage (or no

Default Portuguese (Brazil) Edit

A Brazilian user will see the Portuguese version of this Max insight whenever it is triggered.

Email Encoding

When email templates are translated into certain languages, you may need to change the Email Encoding setting on each relevant user record.

1. Open the user record.
2. Click **Edit**.
3. In the **Email Encoding** drop-down, select the encoding that matches the user's language.
4. Click **Save**.

Translating a Custom Object Name

A custom object's name determines both the name of its custom tab and the name of the associated **New** button.

(The **New** button appears on both the tab and the custom object related list.)

In Altify software, this is relevant to:

- The Altify Account Plan custom object, which determines the name of the **Altify Account Plans** tab and the **New Account Plan** button.
- The Call Plan custom object, which determines the name of the **Call Plans** tab and the **New Call Plan** button.


If your users are licensed to use either of these custom objects, and you are translating your Altify software, you also need to translate the name of the object.

To translate the object name into Brazilian Portuguese:

1. In **Setup**, go to **Rename Tabs and Labels**.
2. Select the language.
3. Click **Edit** beside the tab's name.


Rename Tabs and Labels

Make salesforce.com match your organization's terminology by renaming tab and field labels. Use the lists below to select the tab you want to have created containing the original name.

Select Language 

Standard Tabs

Action	Tab Name	Display Label
Edit	Accounts	Contas
Edit	Activities	Atividades

Edit	 Altify Account Plan Roll Up Values
Edit	 Altify Account Plan Rows
Edit	 Altify Account Plans
Edit	 Altify Account Plan Solutions 
Edit	 Altify Account Plan Test And Improves
Edit	 Altify Account Plan Types
Edit	 Altify Account Plan Type Solutions
Edit	 Altify Account Questions

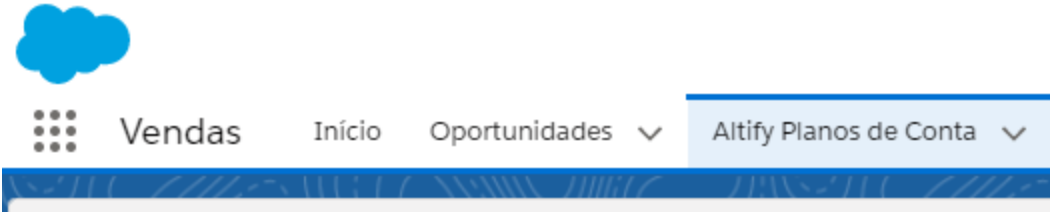
4. Provide the necessary translation.

Rename Tabs and Labels

Enter the new tab names and field labels to display in the selected language.

		Save	Cancel
Tab	Altify Account Plans		
Language	Portuguese (Brazil)		
Record Name	<input type="text" value="Plan Name"/>		
Gender	<input type="text" value="Feminine"/>		
Singular	<input type="text" value="Altify Plano de Conta"/>	Example:	Conta
Plural	<input type="text" value="Altify Planos de Conta"/>	Example:	Contas
		Save	Cancel

5. Click **Save**.



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.