



9.10 to 9.12 Altify Insights Upgrade Guide



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Introduction

This guide describes the procedure for upgrading from Altify Insights 9.10 to Altify 9.12.

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.

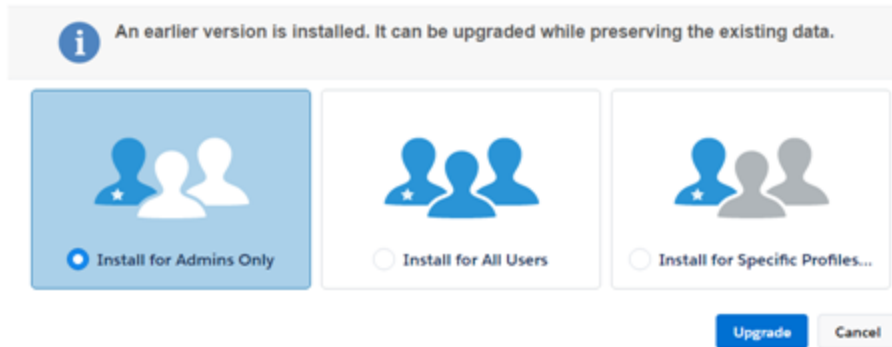
This URL is supplied by Altify.

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 9.12 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.

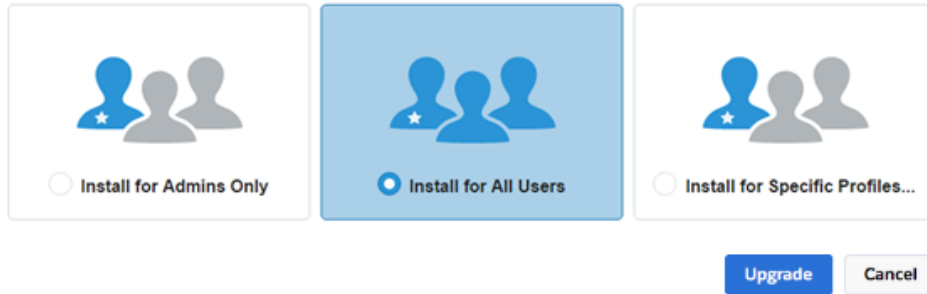
2. Log into Salesforce.com with your administration username and password.
3. Copy and paste the Altify Output Extension App installation URL into the browser.

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**.



The image shows a user interface for selecting installation options. There are three radio button options, each with an icon of three people. The first option is 'Install for Admins Only', the second is 'Install for All Users' (which is selected and highlighted with a blue background), and the third is 'Install for Specific Profiles...'. Below these options are two buttons: 'Upgrade' and 'Cancel'.

☐ Install for Admins Only

☒ Install for All Users

☐ Install for Specific Profiles...

Upgrade Cancel

5. Click **Upgrade**.

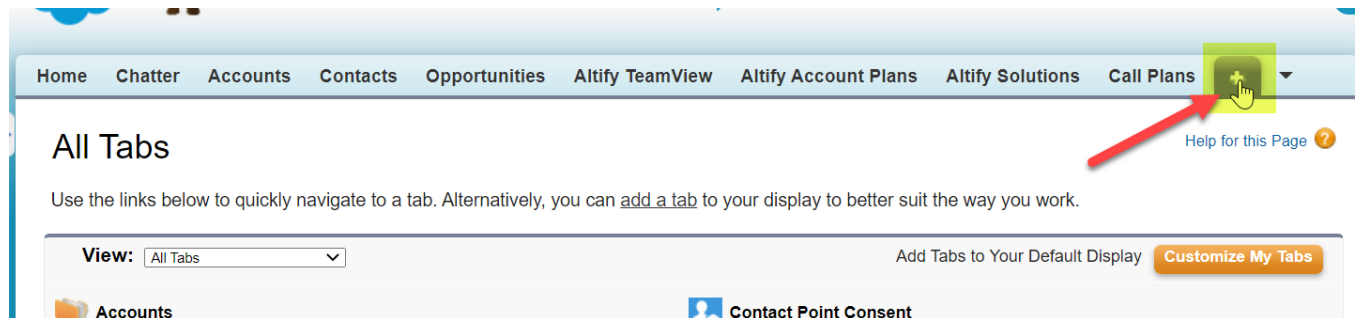
When the installation is complete, a confirmation page is displayed.

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.)

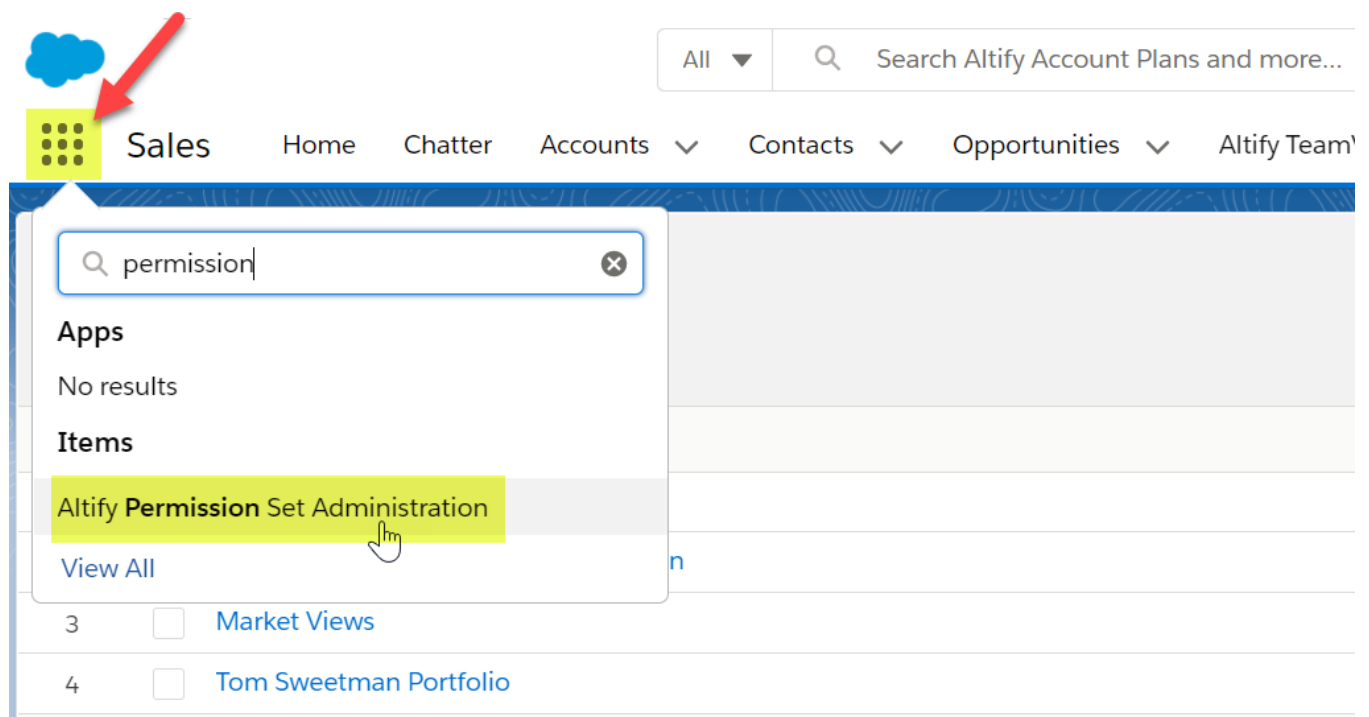
Altify Permission Set

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



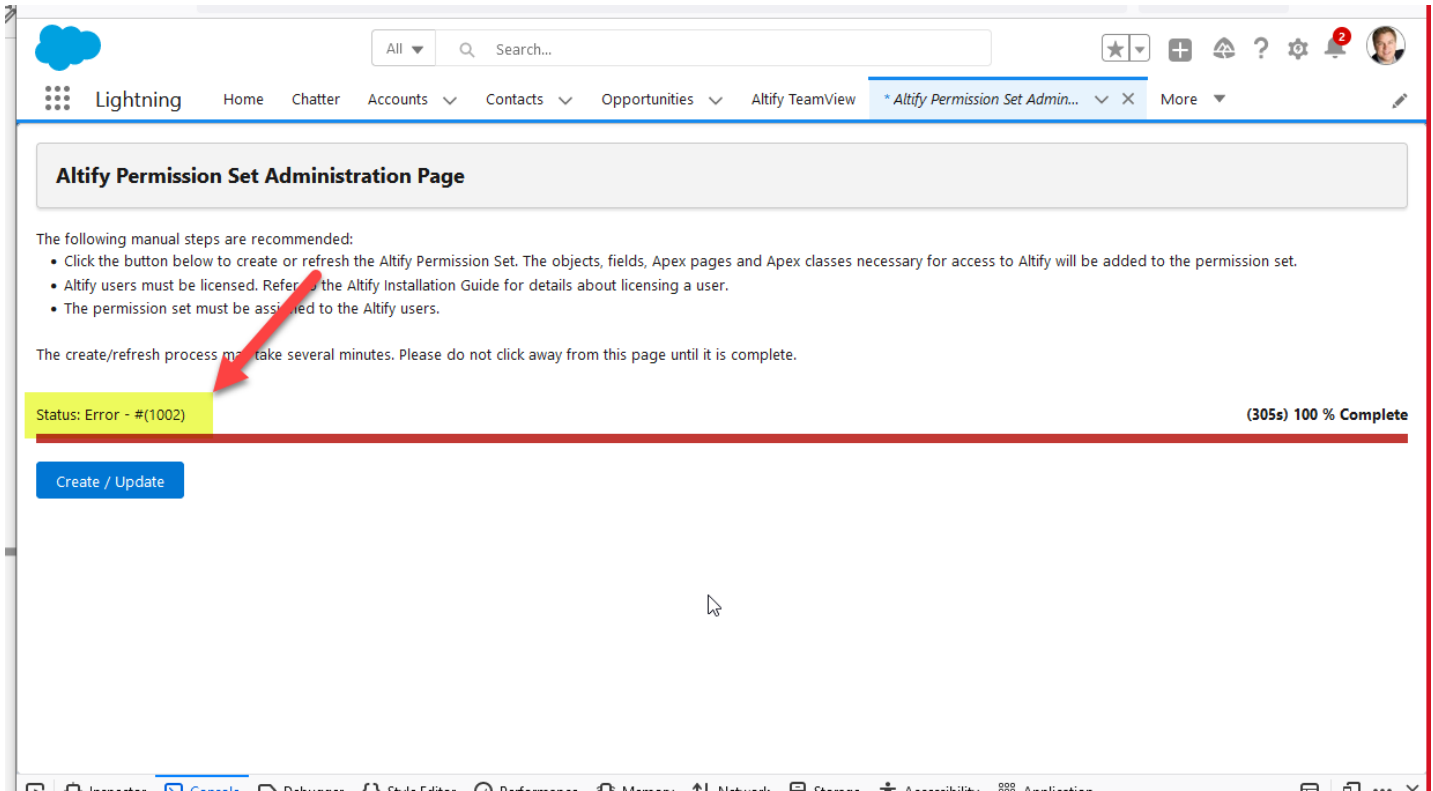
When that has completed successfully, you will see a confirmation message.

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).

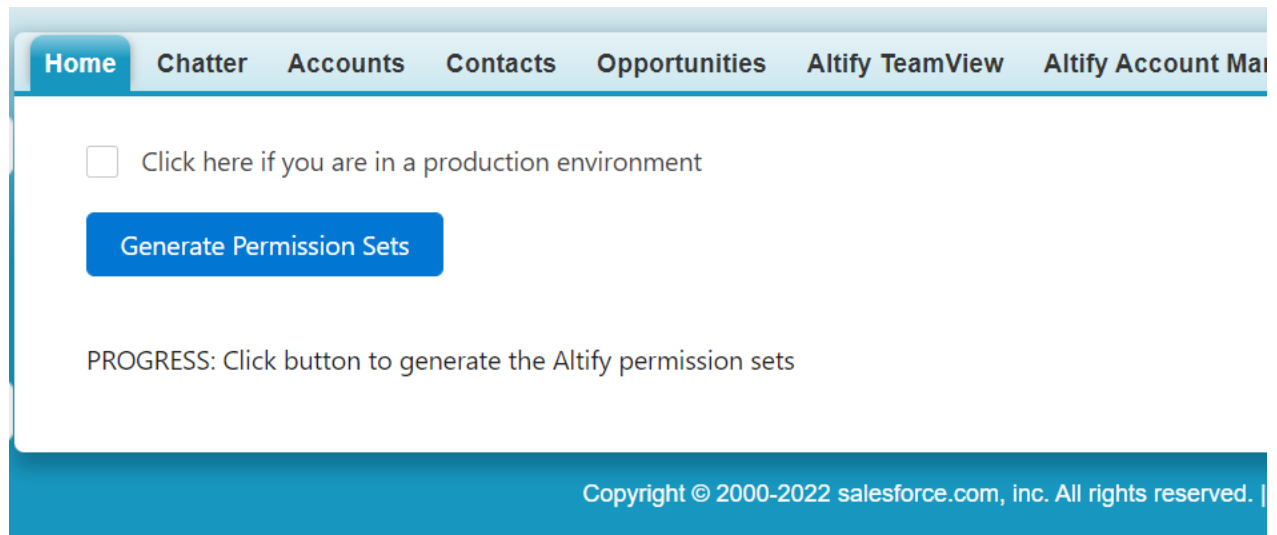


To resolve this issue, do the following:

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>

Note: the above URLs are for example purposes only. The domain part ('uplandaltify--altf' above) should reference your own domain.

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.*

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 9.10 to 9.12, the following temporary setting values are moved.

Altify Insights Settings

- *Disable Print Button* is moved from Altify Relationships Settings (where it is deprecated) to Altify Insights Settings.

(In this case, a custom setting is being moved rather than made permanent. However, the same principle applies in that Altify automatically populates the new setting with the value that was set before upgrading).

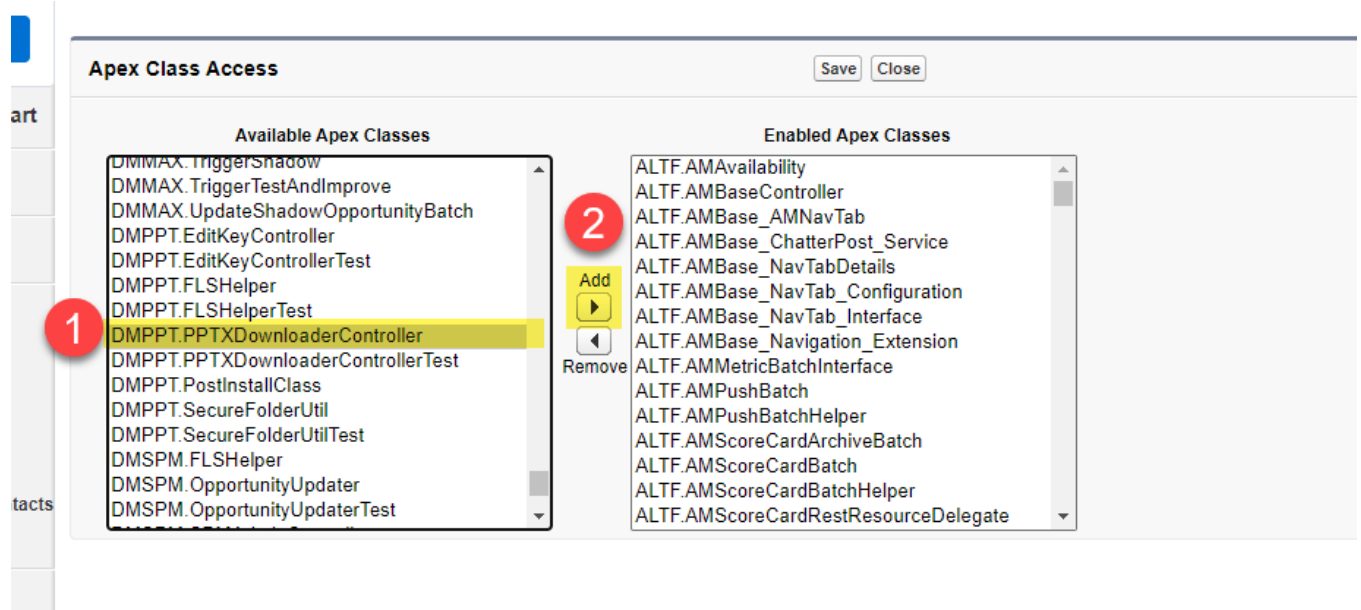
Enabling PowerPoint Export

If your org is licensed for the 'Altify Output Extension', you need to enable Altify to export to PowerPoint.

Note: The following may already be configured correctly in your org.

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**.

New Account Launchpad


Altify 9.12 introduces a revamped *Altify Insights* launchpad (shown below) that offers more high level account data and amalgamates with the *Altify Account Summary Launchpad*.


Altify Insights

Assess Your Current Position

Relationships






Mentors	2
Key Players	13
Non Supportive	9

Insights


Goals Confirmed	2
Key Player Insights	14
Initiatives Confirmed	1

Welcome

Key Players

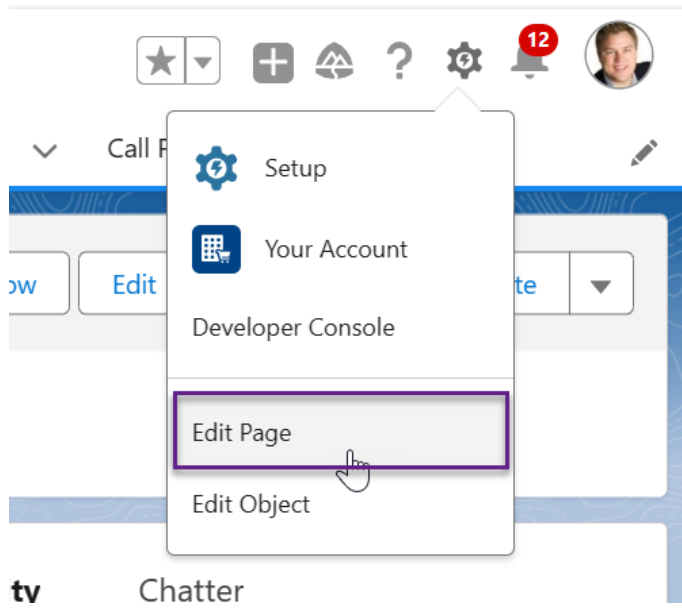
Contact	Support	Decision Orientation	Goals	Pressures	Initiatives
 Duncan Dredge VP Information Security	Supporter	Technical	Increase Rep Productivity Achieve 10% uplift in top-lin...	Market share dropping	
 Ahmad Rishad SVP Product Developm...	Supporter	Business	Customer Engagement		Strategic Opportunity Mana... New sales methodology
 Jean Winston VP Wireless Dev	Neutral	Technical			
 Lisa Leung VP Broadcast Dev	Mentor	Technical	Achieve 10% uplift in top-lin...		

To configure your Salesforce Account records to accommodate the new launchpad, you need to remove the Altify Account Summary Launchpad (as it is no longer required) and expand the Altify Insights launchpad to accommodate the new functionality. Guidance is provided for doing this task using [Lightning App Builder](#) and using [page layouts](#).

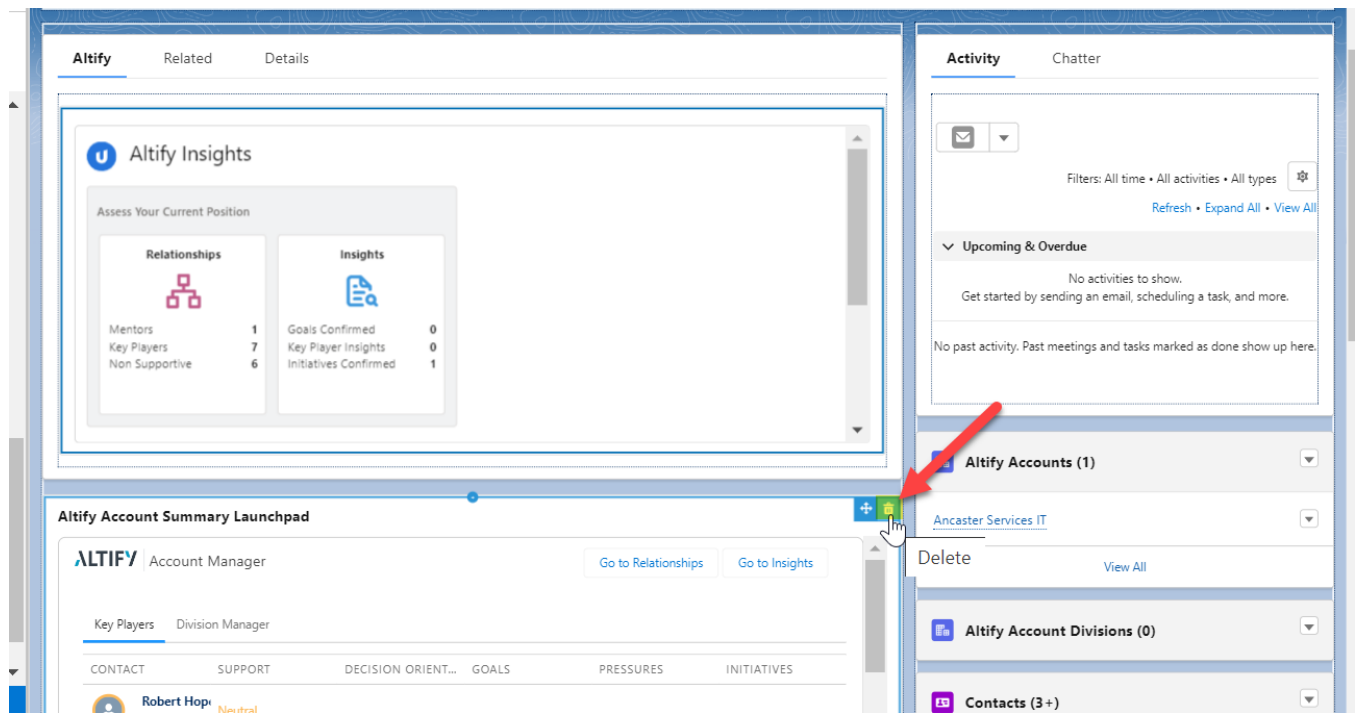
Removing the superfluous launchpad and expanding the Altify Insights launchpad

To perform these tasks using the Lightning App Builder, do the following (guidance is also provided for performing this task via [page layouts](#)):

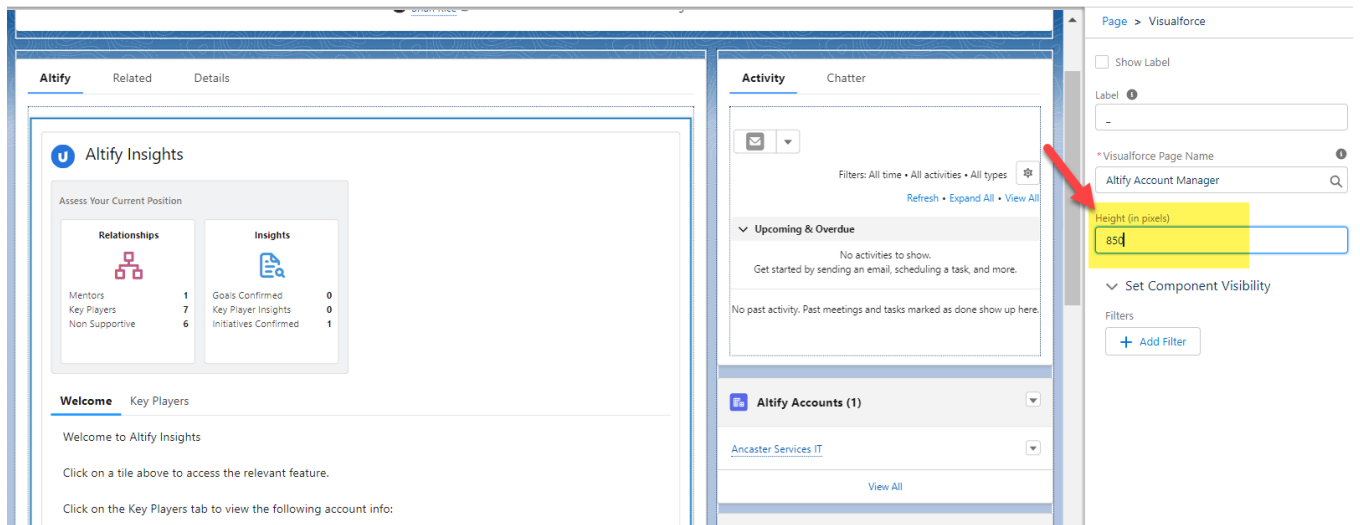
1. Go to an account record where the launchpads are displayed, and in the **Setup** menu (shown below), select **Edit Page**.



2. In the Lightning App Builder, select the **Altify** tab (or whichever tab that displays the launchpads) and click the **Delete** icon (as indicated below) for the following component: Altify Account Summary Launchpad.



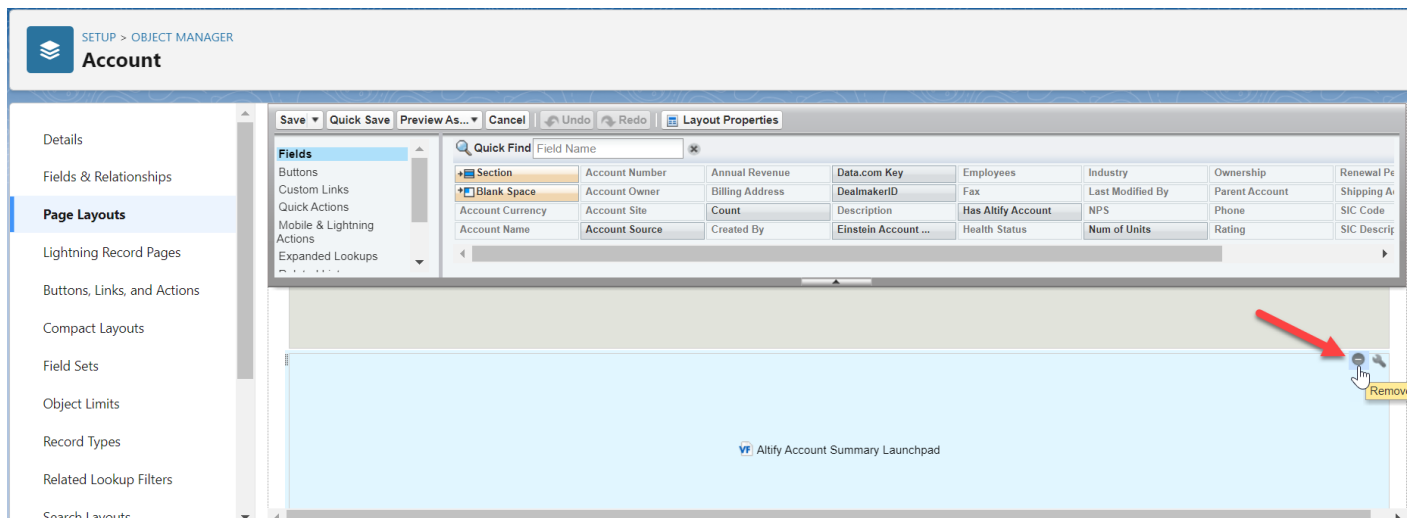
3. Next, click the remaining launchpad ('Altify Account Manager' Visualforce component) and enter a **Height (in pixels)** of '850' in the panel on the right.



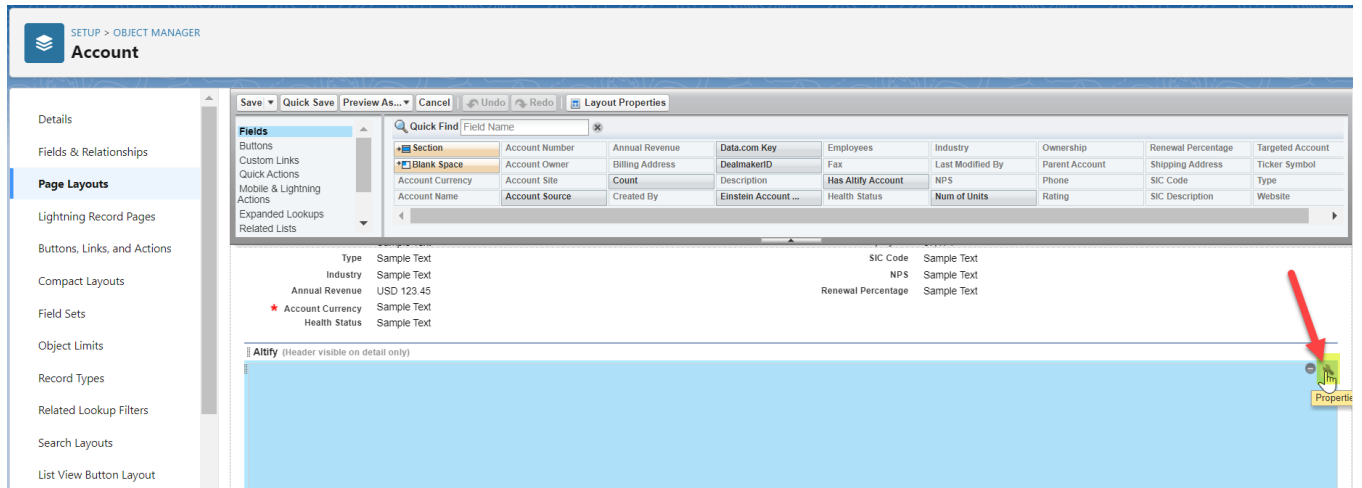
4. Click the **Save** button.

To remove the superfluous launchpads via the page layout of the standard Account object, do the following:

1. In **Setup** go to **Object Manager**.
2. Find and select the (standard) **Account** object.
3. Select **Page Layouts** in the sidebar and then select the relevant layout on the subsequent screen.
4. On the Account page layout, scroll down the page and click the **Remove** icon (as indicated below) for the following launchpad: Altify Account Summary Launchpad



5. Next, click the **Properties** icon for the Altify Account Manager launchpad (as indicated below).



6. In the *Visualforce Page Properties* dialog, enter a **Height (in pixels)** of '850' and click **OK**.

7. Click **Save**.

Updating Page Layouts

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

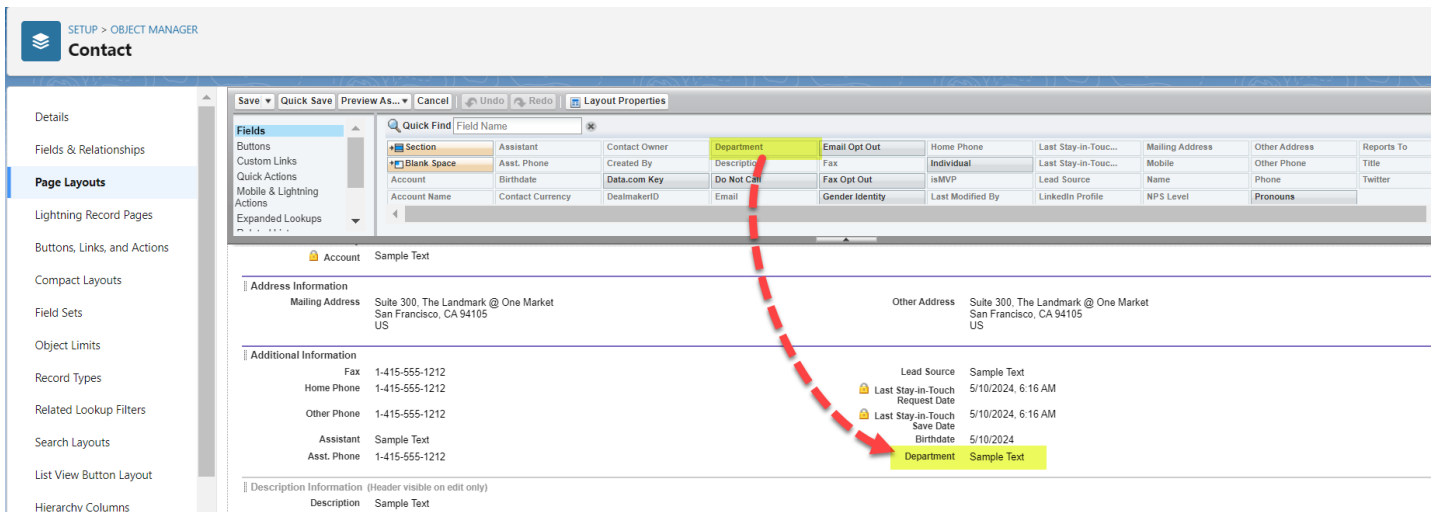
To access page layouts of an object, do the following (in Lightning mode):

1. Go to **Setup**.
2. Go to **Object Manager**.
3. Click on the relevant object.
4. Click **Page Layouts** in the sidebar and then select the relevant layout on the subsequent screen.

Salesforce Contact [for Relationship Maps]

If you want the *Department* field to be displayed on the contact information panel of your relationship maps (for accounts and opportunities), you need to ensure that the field is included in the layout of the standard Contact object.

In the example below, the Department field is added to the *Additional Information* section of the Contact record.



SETUP > OBJECT MANAGER

Contact

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Hierarchy Columns

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

Quick Find Field Name

Fields	Assistant	Contact Owner	Department	Email Opt Out	Home Phone	Last Stay-in-Touch...	Mailing Address	Other Address	Reports To
Blank Space	Asst. Phone	Created By	Description	Fax	Individual	Last Stay-in-Touch...	Mobile	Other Phone	Title
Account	Birthdate	Data.com Key	Do Not Call	Fax Opt Out	isMVP	Lead Source	Name	Phone	Twitter
Account Name	Contact Currency	DealmakerID	Email	Gender Identity	Last Modified By	LinkedIn Profile	NPS Level	Pronouns	

Account Sample Text

Address Information

Mailing Address Suite 300, The Landmark @ One Market
San Francisco, CA 94105
US

Other Address Suite 300, The Landmark @ One Market
San Francisco, CA 94105
US

Additional Information

Fax 1-415-555-1212

Home Phone 1-415-555-1212

Other Phone 1-415-555-1212

Assistant Sample Text

Asst. Phone 1-415-555-1212

Lead Source Sample Text

Last Stay-in-Touch Request Date 5/10/2024, 6:16 AM

Last Stay-in-Touch Save Date 5/10/2024, 6:16 AM

Birthdate 5/10/2024

Department Sample Text

Description Information (Header visible on edit only)

Description Sample Text

On a relationship map, the field is shown on the blue heading of a contact's information panel.

The screenshot shows the LinkedIn profile of Luke Walker, an Executive. The profile is set to 'Executive' and 'Adaptability' is set to 'No'. The 'Department' field is highlighted with a red box and a red arrow pointing to it. The profile is last updated by Donal Kavanagh a few seconds ago. The 'DETAILS' tab is selected, showing 'CONTACT DETAILS'.

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.

Post Upgrade Checklist

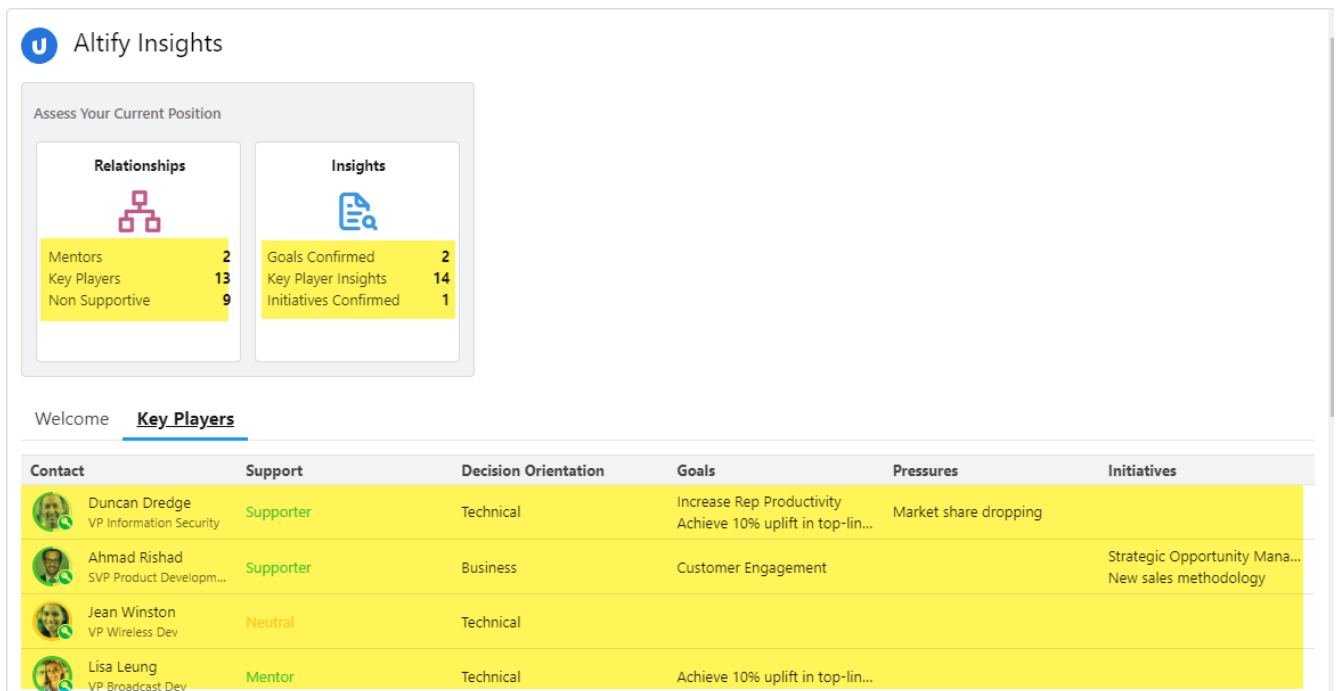
Following your upgrade of Altify Insights, you can do the following to perform a quick sanity check of the product:

Updated fields on page layouts

Revisit the section "[Updating Page Layouts](#)" on [page 15](#) and confirm that all relevant fields (you can ignore launchpads for the moment) are added or removed from page layouts as directed.

Account launchpad and functions

1. Create a test account record and ensure the *Altify Insights* launchpad is displaying correctly.
2. Click each tile, tab, button and link on the launchpad to ensure the pages load successfully.
3. Using your test account, create some simple test data for the account plan via the *Altify Insight* launchpad: [relationships](#) and [insights](#), and check to see that your test data is displayed correctly on the launchpad (as highlighted in the example below).



The screenshot shows the Altify Insights launchpad interface. At the top, there's a header with the Altify logo and the text "Altify Insights". Below this, there's a section titled "Assess Your Current Position" which contains two cards: "Relationships" and "Insights".

The "Relationships" card displays a tree icon and a table with the following data:

Relationships	Count
Mentors	2
Key Players	13
Non Supportive	9

The "Insights" card displays a document icon and a table with the following data:

Insights	Count
Goals Confirmed	2
Key Player Insights	14
Initiatives Confirmed	1

Below these cards, there's a "Welcome" section with a tab labeled "Key Players". Under this tab, there's a table with the following data:

Contact	Support	Decision Orientation	Goals	Pressures	Initiatives
Duncan Dredge VP Information Security	Supporter	Technical	Increase Rep Productivity Achieve 10% uplift in top-lin...	Market share dropping	
Ahmad Rishad SVP Product Developm...	Supporter	Business	Customer Engagement		Strategic Opportunity Mana... New sales methodology
Jean Winston VP Wireless Dev	Neutral	Technical			
Lisa Leung VP Broadcast Dev	Mentor	Technical	Achieve 10% uplift in top-lin...		

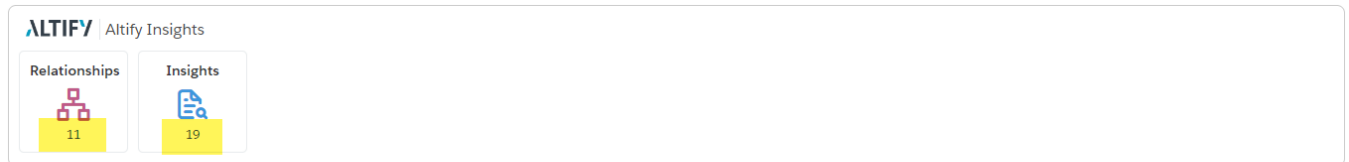
4. If you have installed our Altify Output Extension app, test the output by [exporting the account data](#).





Opportunity launchpads and functions

1. Create a test opportunity record and ensure the Altify launchpads (that your organization uses) are displaying correctly:

- *Altify Insights*
- *Key Players*

- Click each tile, button and link on the launchpads to ensure the pages load successfully.
- Using your test opportunity, create some simple test data on the [insight map](#) and [relationship map](#).
- Check to see that the test data you have entered is reflected on the launchpads - as highlighted in the example below:



ALTIFY Altify Insights					
Key Players					
CONTACT	SUPPORT	BUYING ROLE	GOALS	PRESSURES	INITIATIVES
 Charles Underwood President & CEO	Neutral	Approver	Grow revenue 15% in next 6 quarters		
 Toni Wise VP Marketing	Mentor	User			
 Mitch Brown Director Global Sales Operations	Mentor	Evaluator	Grow revenue 15% in next 6 quarters	Better Informed Buyers / Competiti...	Maximize Revenue in Key Accounts
 Patti Miller SVP Operations	Supporter	Evaluator			
 Clara Wilson EVP Global Sales	Neutral	Decision Maker		High Cost of Sales: CAC at 14 mont... Poor balanced rep performance - le...	Sales Process and Playbooks
 Mark Garcia SVP Marketing	Enemy	User			

- If you have installed our Altify Output Extension app, test the output by [exporting the opportunity data](#).

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.