

Altify Technical Information & Prerequisites

Altify software helps your company to optimize revenue by guiding you to apply proven sales best practices. Altify is built natively on the Force.com platform, integrating tightly with customer data, and taking advantage of the capabilities of Force.com. It is delivered to you as a Salesforce.com "app" installed into your Salesforce.com "org".

There are no external dependencies on third-party web services or applications.

Altify is a managed-package application. This means that it doesn't count against your limits for custom apps, objects, and tabs.

Salesforce edition and licenses

The following Salesforce Editions are supported by Altify:

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

Altify users require a Salesforce license. Platform licenses are not sufficient.

Salesforce transaction security policies

Salesforce has an optional feature called 'Transaction Security Policy' which intercepts real-time events and applies appropriate actions to monitor and control user activity. These policies can be configured to restrict what your users can do in Salesforce and there are various types of policy available, as outlined on [Salesforce.com](#).

Since the policies are defined by you, the customer, Altify code cannot be tested against them and we therefore do not support transaction security policies. If you are applying transaction security policies, there are several ways to exempt your Altify users from the policies, as described in [Exempt Users from Transaction Security Policies](#) on Salesforce.com.

Salesforce restriction rules

Salesforce also has an optional feature called 'Restrictions Rules' which allow you to limit the number of records that users see in various pages (list views, lookups, related lists, etc).

These restrictions can be applied to any objects and fields and also apply to SOQL & SOSL queries: effectively filtering the records seen by a user. Read more on [Salesforce.com](https://www.salesforce.com).

Since the policies are defined by you, the customer, Altify code cannot be tested against them and we therefore do not support restrictions rules in general and more specifically with regard to Altify Custom Objects.

If restriction rules are defined on the Salesforce Tasks or any Altify custom objects this will restrict the records returned by Altify code and may limit or break functionality in the Altify Applications.

If you are applying restriction rules, you will need to exempt Altify users by setting User Criteria to apply the rules to a subset of users such as those in a given role or profile. Read more on [Salesforce.com](https://www.salesforce.com).

New fields

Installing Altify makes several changes to your org's configuration. Before you start the installation process, please verify that you want to go ahead with these:

- On the Opportunity object, a new Lookup field is added that references the Altify Opportunity custom object.
- On the Task object, two extra fields are added: "PRIME Action" and a Lookup field that references the Altify Account Objective custom object.
- On the Product object, a new Lookup field is added that references the Altify Solution custom object.

Please note that these fields will add to your Salesforce field count.

Custom objects

Altify accesses Salesforce standard objects (Accounts, Opportunities, Contacts, Tasks, Products and Users) and Altify custom objects within the Altify package. In general, however, the Altify application cannot be configured to use any custom objects outside the Altify package.

In particular, the Altify Relationship Map can only display Salesforce Contacts and associate with Salesforce Opportunities and/or Accounts. The relationship map cannot display information from any custom objects in your Salesforce org.

Implications for information technology and security

- You install Altify into your Salesforce.com org. All code and data resides solely in the org.
- Altify has passed the Force.com security review.
- As the Independent Software Vendor (ISV), Altify has no access to your org unless you explicitly grant access for the purposes of support.
- All Altify-related data resides at the same location as standard Salesforce CRM data (Salesforce.com). No copy of this data exists anywhere else unless you create it.

Installing upgrades

Periodically, as Altify extends application functionality, upgrades are made available to customers.

We recommend that you install these upgrades when they become available. This ensures that you always benefit from new features and enhancements.

For full details of how to upgrade Altify, please refer to the appropriate *Upgrade Guide*. These guides are available in [Altify's online help site](#).