9.13 Installation Guide (Altify Insights)

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.

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.

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.

Static resources

A Salesforce org has a static resource limit of 250MB. Installing Altify requires the following:

- 20MB for installing Altify
- an additional 5MB if you are installing Altify Max.

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 the online help for Altify Insights.

Installing Altify Insights

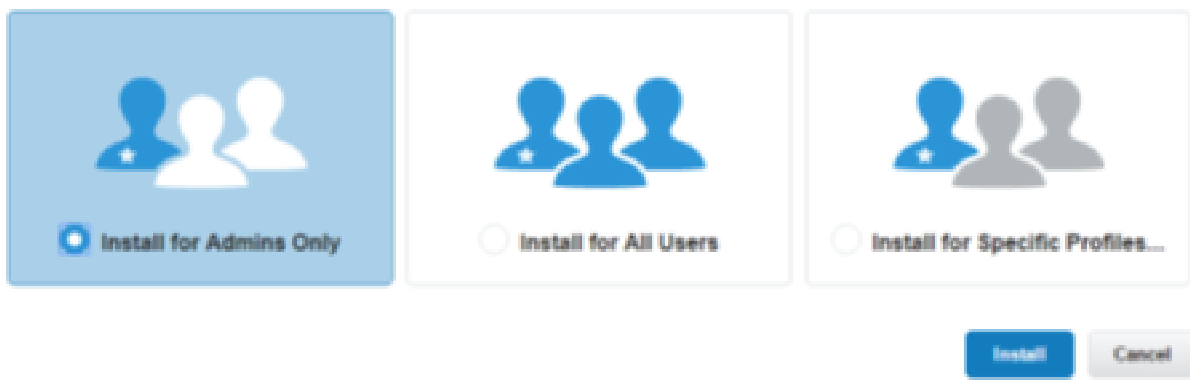
You will install two packages:

(1) Altify Core which provides the required functionality.

(2) the Licensing Package, needed to activate Altify Insights.

Follow these steps:

1. Log in to your accounts as a Salesforce administrator.
2. Install Altify Core: [Install In Sandbox] or [Install In Production].
3. The Install window opens. Select **Install for Admins Only**.



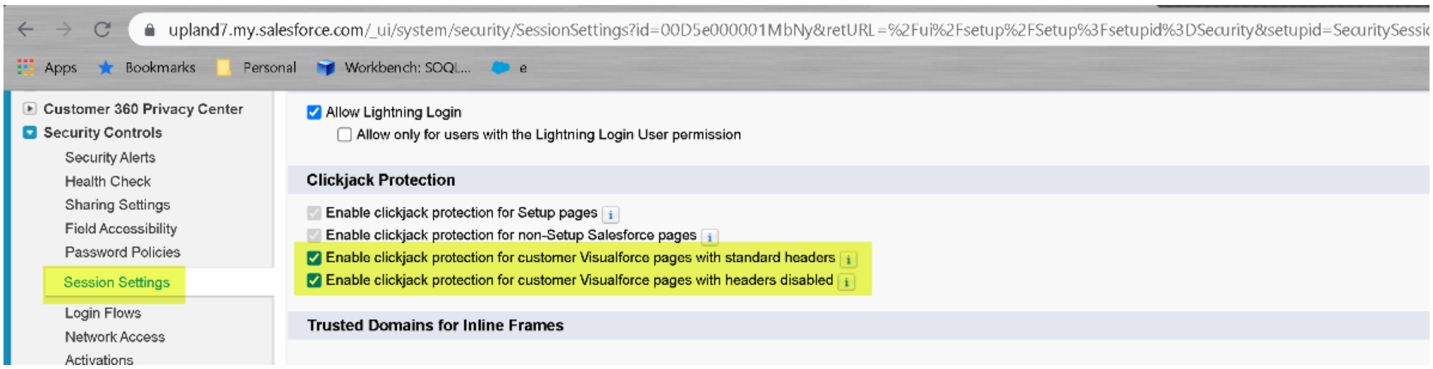
4. Click **Install**.
5. After a short interval, you should see a confirmation that the package has been installed. Click **Done**. You should also receive a confirmation email from support@salesforce.com.

   Next, you need to install the licensing package.
6. Install the Altify Insights Licensing Package: [Install In Sandbox] or [Install In Production].
7. The Install window opens. Enter the following installation password: Qi5ZiWmtYyp7Lzh.
8. Select **Install for Admins Only**.
9. Click **Install**.
10. Read the confirmation message and click **Done**.
11. The Installed Packages window opens. Confirm that the package you have installed is listed.

Ensuring Access with Clickjack Protection or API Access Control Enabled

Clickjack Protection

If your org has Clickjack Protection enabled for Visualforce pages in the SFDC Session Settings (as shown in the example below), you need to take additional steps to ensure your users can access Altify.



1. In **Setup**, go to **Session Settings**.
2. In the section Trusted Domains for Inline Frames, click the **Add Domain** button.
3. Add each of the following domains with an **IFrame Type** of 'Visualforce Pages'.
   - '<*instantDomain*>.lightning.force.com'
   - '<*instantDomain*>--c.lightning.force.com'
   - '<*instantDomain*>--altf.visualforce.com'

   '<*instantDomain*>' in each case is the Org instance domain name from your Salesforce Domain, e.g. 'upland7' in the Salesforce Domain https://upland7.lightning.force.com/.

API Access Control

If API Access Control is enabled in your org, you need to ensure that the setting *Allow Visualforce pages to access APIs* is also enabled.

For more information, see [Restrict Customers and Partners from Accessing APIs] in Salesforce Help.

Setting up Altify Insights Launchpads

Once the packages have been installed, you can add the relevant launchpads providing access to Altify Insights from your Opportunity and Account records. These launchpads also provide high-level Altify Insights data for the relevant opportunity/account.

Updating launchpad labels to 'Altify Insights'

Before adding the launchpads, we recommend that you update the following custom labels to 'Altify Insights'.

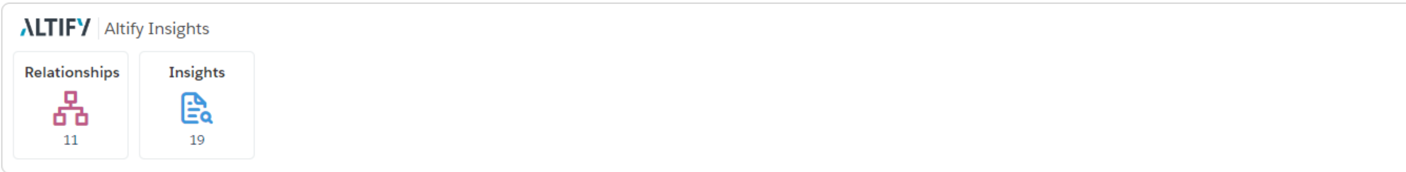
- SINGLE_ACCOUNT_PLAN
- APP_NAME
- COMMON_ACCOUNT_MANAGER
- COMMON_OPPORTUNITY_MANAGER

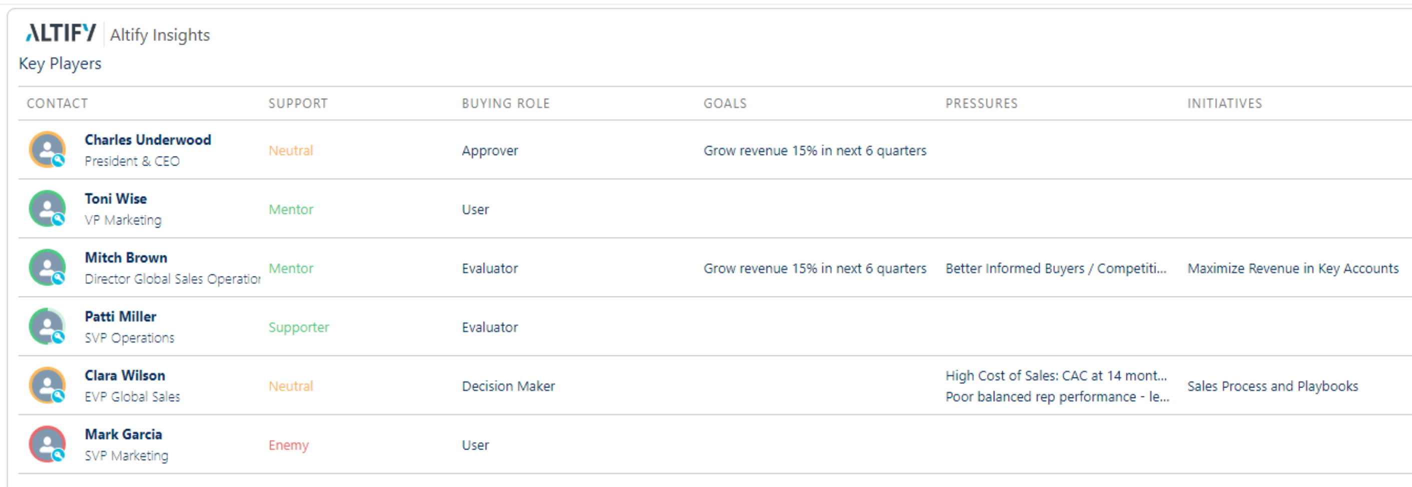
For help with translating see Translate Custom Labels in the Salesforce online help.

Adding Opportunity Launchpads

The launchpads (shown below) are Visualforce pages that provide high level opportunity information and links to pages within Altify software.

- *Altify Insights* - provides access to opportunity relationship and insight maps (and, respectively, the current number of contacts and insights)
- *Key Players* - lists the details of the key players on the opportunity relationship map along with the goals and initiatives they are responsible for, and the pressures impacting upon them.





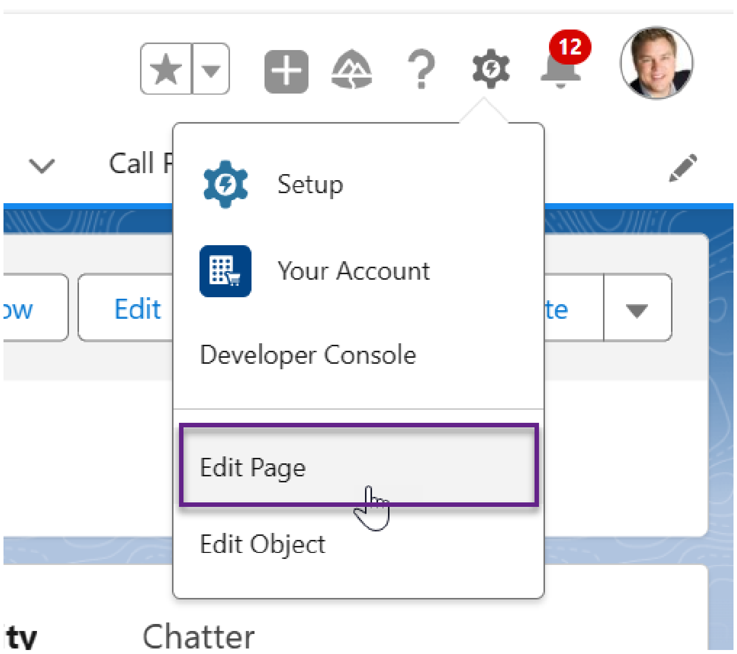
ALTIFY | Altify Insights

Key Players

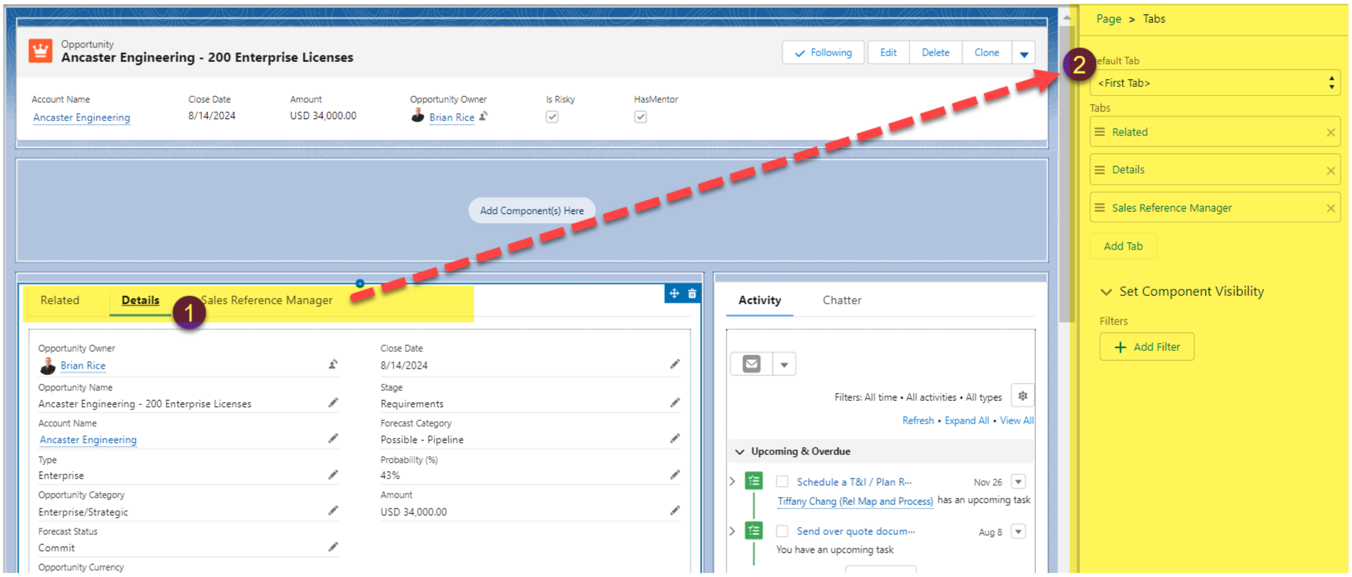
CONTACT	SUPPORT	BUYING ROLE	GOALS	PRESSURES	INITIATIVES
Charles Underwood President & CEO	Neutral	Approver	Grow revenue 15% in next 6 quarters		
Toni Wise VP Marketing	Mentor	User			
Mitch Brown Director Global Sales Operatio	Mentor	Evaluator	Grow revenue 15% in next 6 quarters	Better Informed Buyers / 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			

The following instructions are for Lightning mode, and document how to create an Altify tab on the opportunity record and populate the tab with the two launchpads described above.

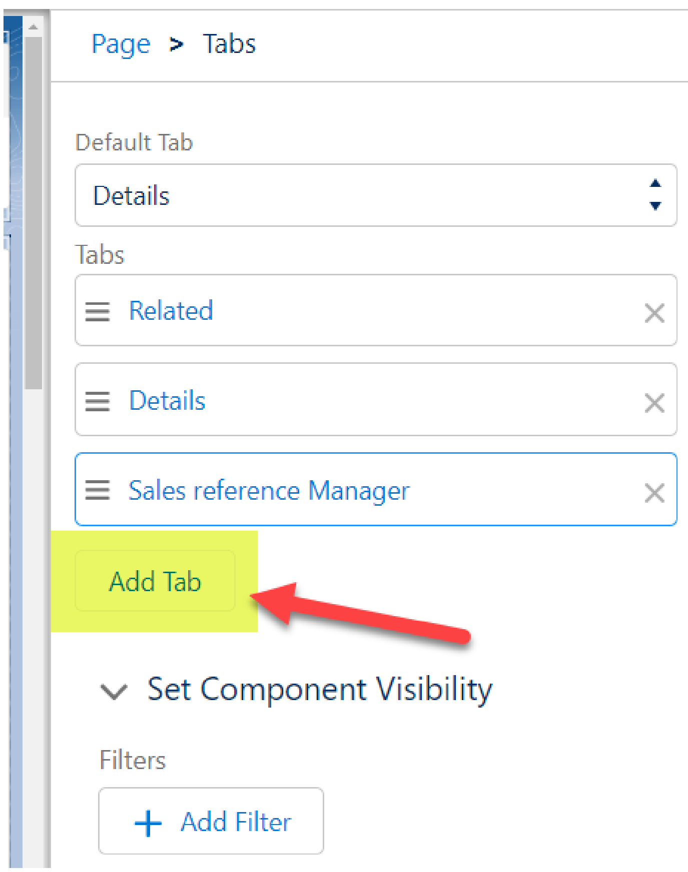
1. On an Opportunity record, click **Edit Page** in the **Setup** menu (indicated in the example below).



2. In the opportunity preview, click anywhere in the tabs area (**1** in the example below) to open the Tabs section in the right-hand sidebar (**2**).

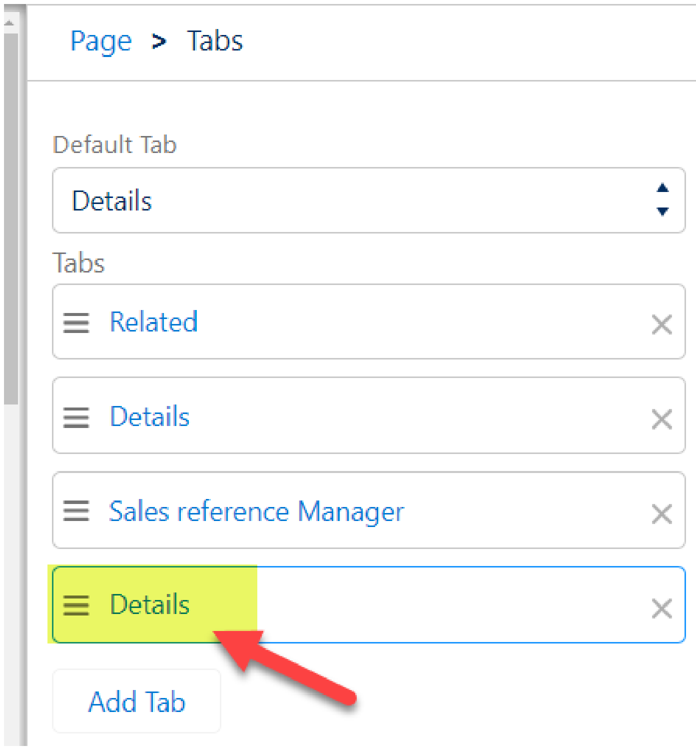


3. Click the **Add Tab** button (highlighted below).

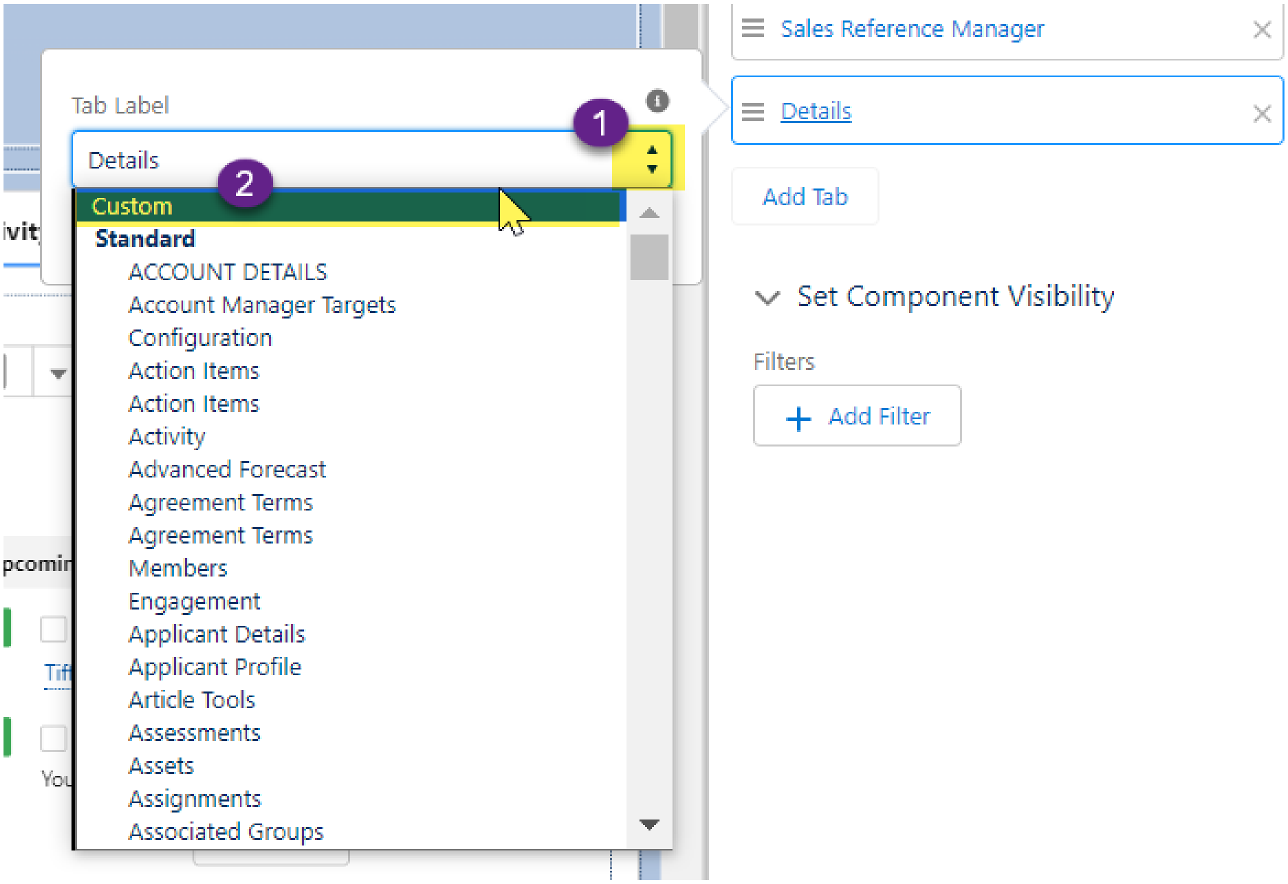


A new Details tab is created that you need to configure.

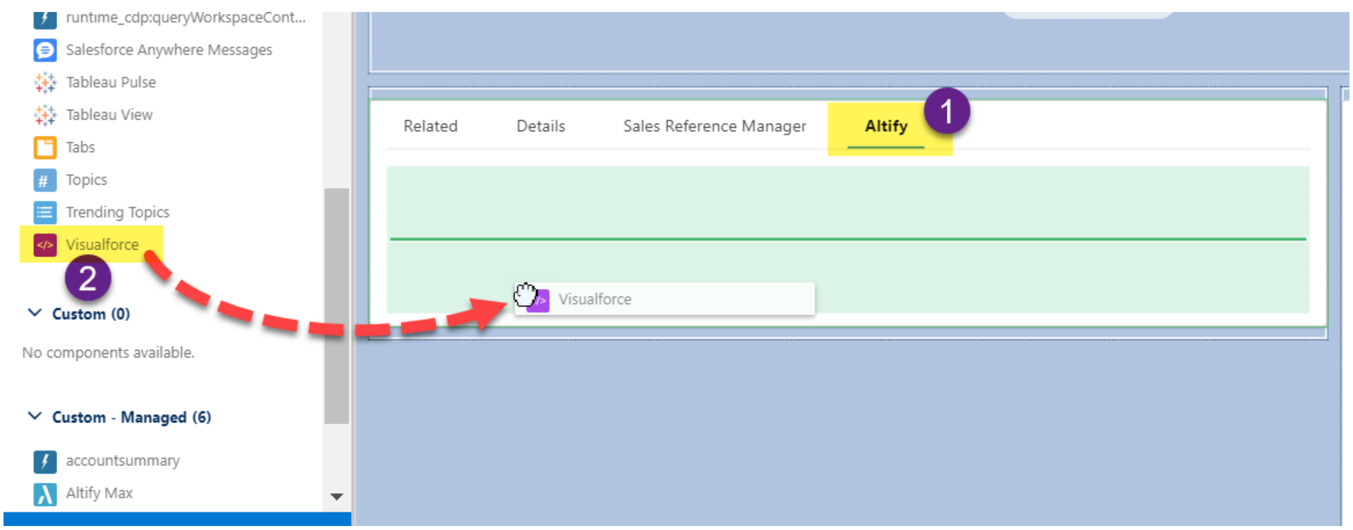
4. Click the **Details** hypertext (highlighted below) in the newly created tab to open the Tab Label dialog.



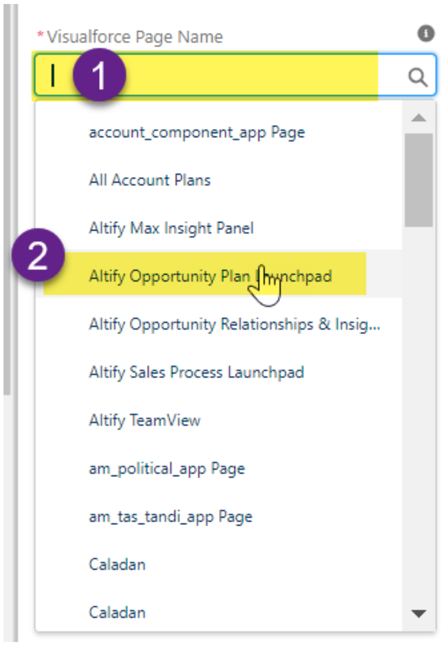
5. Click the vertical arrows (see **1** below) and select the option **Custom** at the top of the list (**2**) .



6. Enter 'Altify' in the **Custom Label** field that is displayed and click **Done**.
7. Click the **Altify** tab you just created in the preview area (see **1** below) and then drag the **Visualforce** component from the left-hand sidebar to the new tab area (**2**).

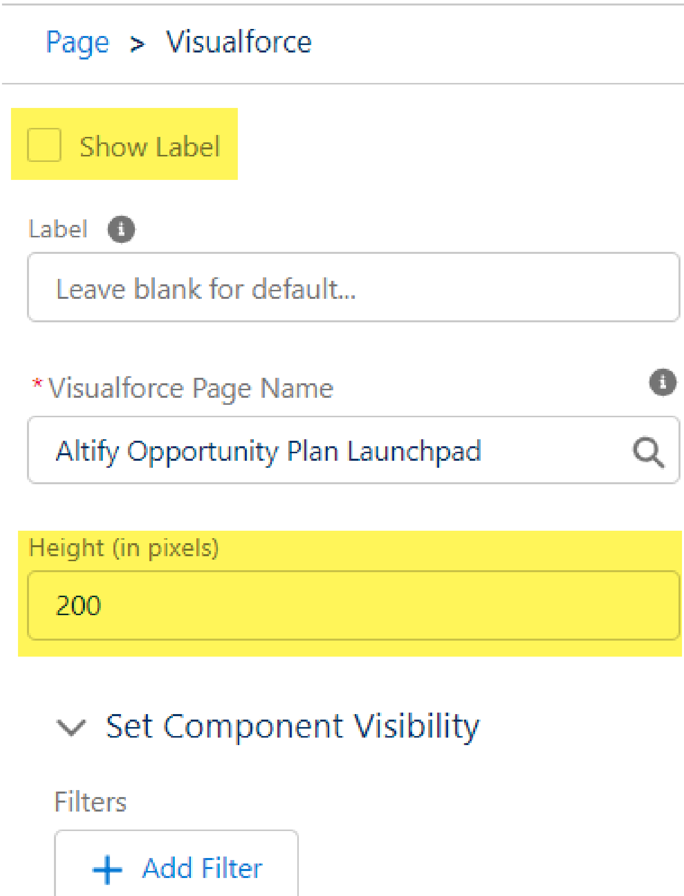


8. Clear the **Visualforce Page Name** field in the right-hand sidebar (see **1** below) and then select 'Altify Opportunity Plan Launchpad'.

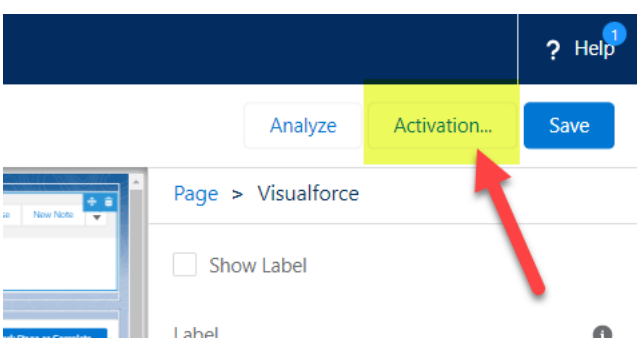


The new launchpad is displayed in the preview area.

9. Enter a **Height (in pixels)** of '200' (as highlighted below) and clear the **Show Label** checkbox (also highlighted below).



10. Repeat steps 7-9 for the Key Players launchpad - entering the following information:
    - **Visualforce Page Name**: 'Altify Opportunity Relationships & Insight Launchpad'
    - **Height (in pixels)** '450'
11. Click the **Activation** button (highlighted below) to set this Opportunity page layout as the default option for your org or a specific app, or define a combination of app/record type/user profile for whom this new Opportunity page layout is displayed.

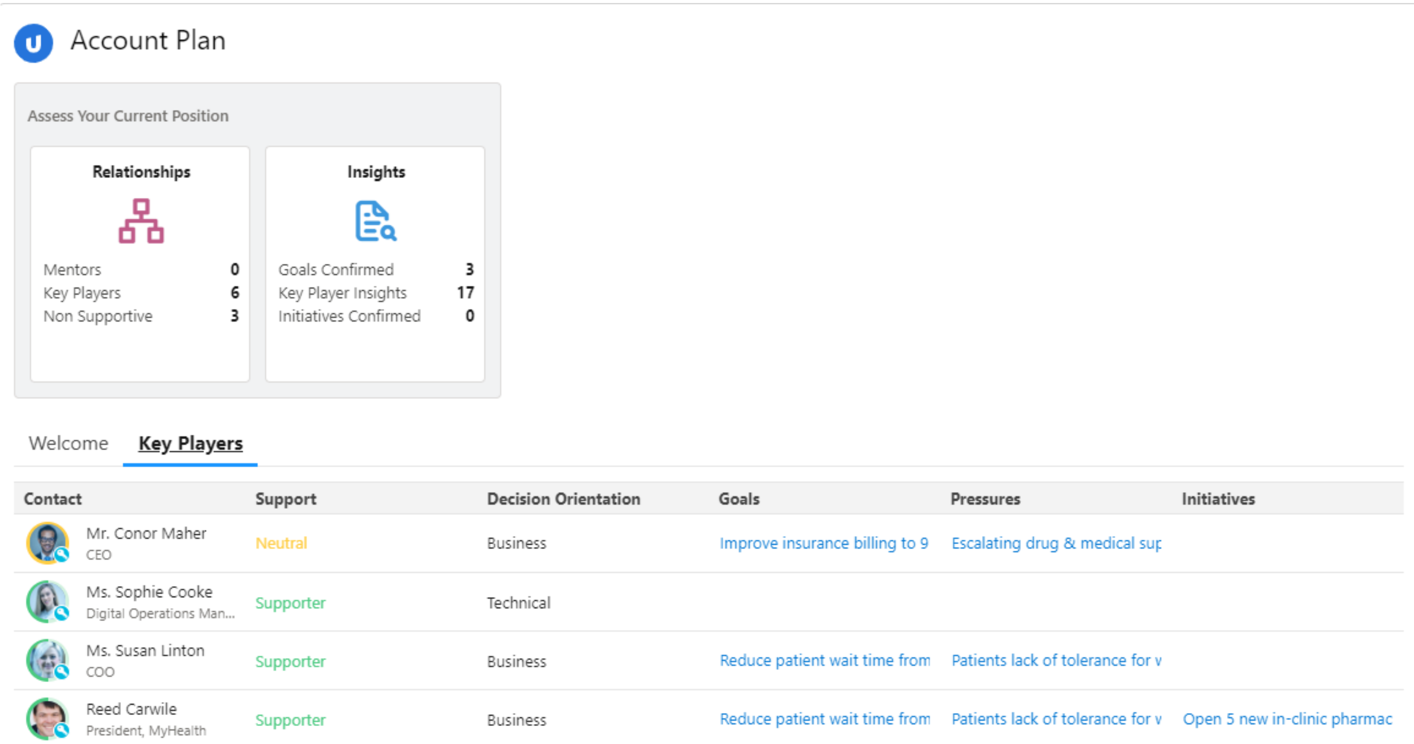


On-screen instructions are provided for each option.

12. Click **Save**.

Adding Account Launchpad

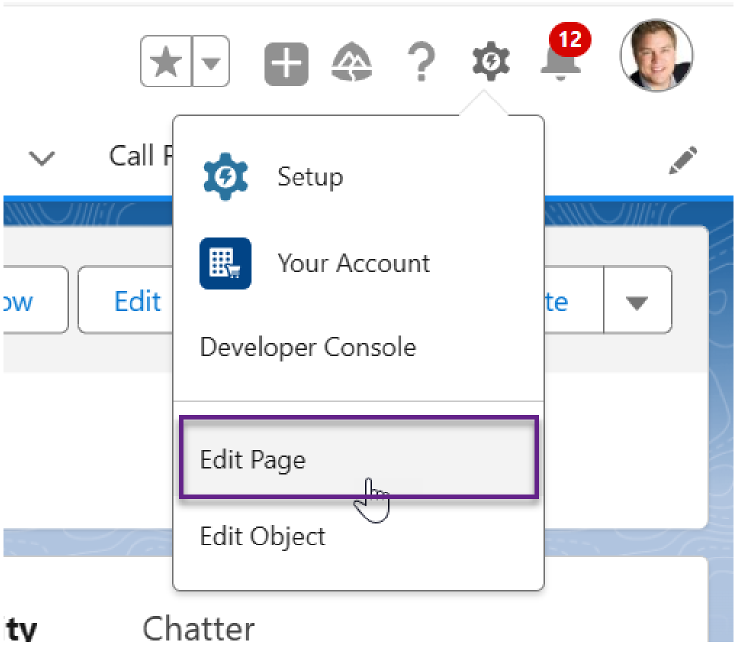
The *Altify Insights* launchpad (shown below) is a Visualforce page that provides high level account information and links to pages within Altify software.



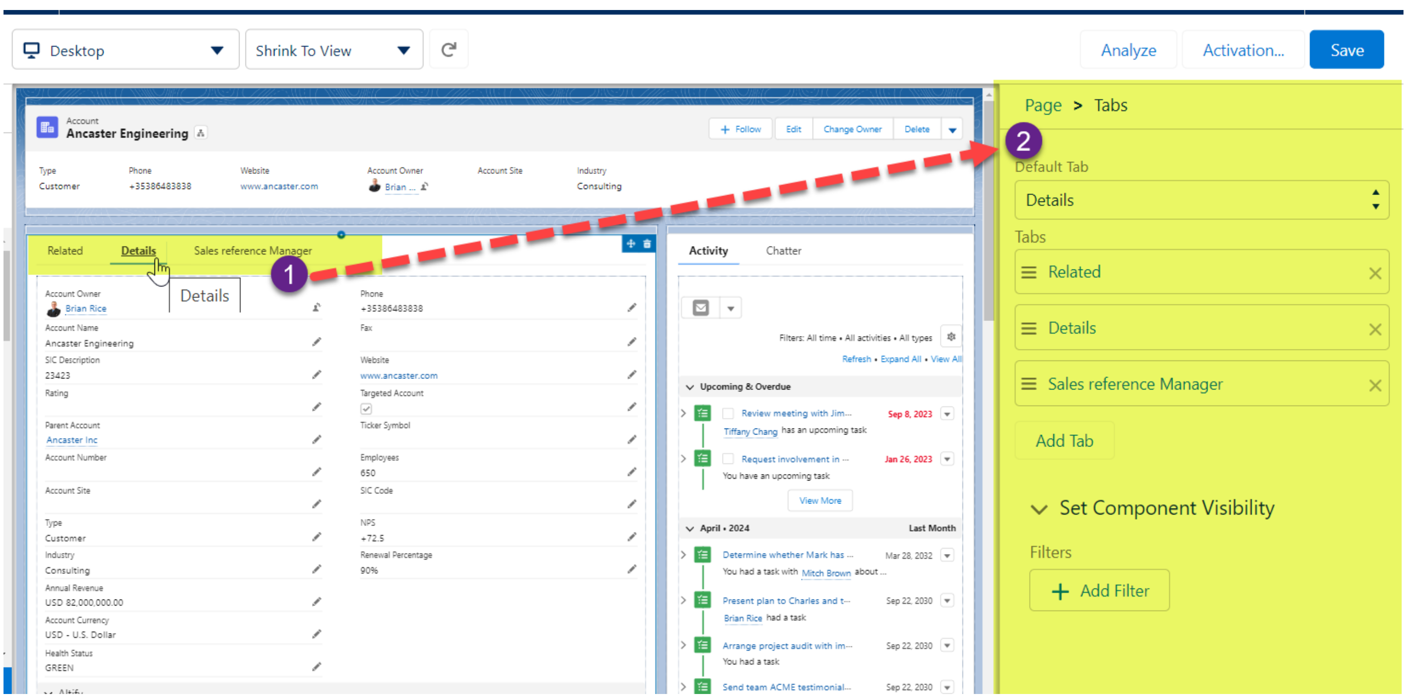
- The **Relationships** and **Insights** tiles provide access to the account's relationship and insight maps (along with key data from each map).
- The **Key Players** tab lists the details of the key players on the account relationship map along with the goals and initiatives they are responsible for, and the pressures impacting upon them.

The following instructions are for Lightning mode, and document how to create an Altify tab on the account record and populate the tab with the launchpad described above.

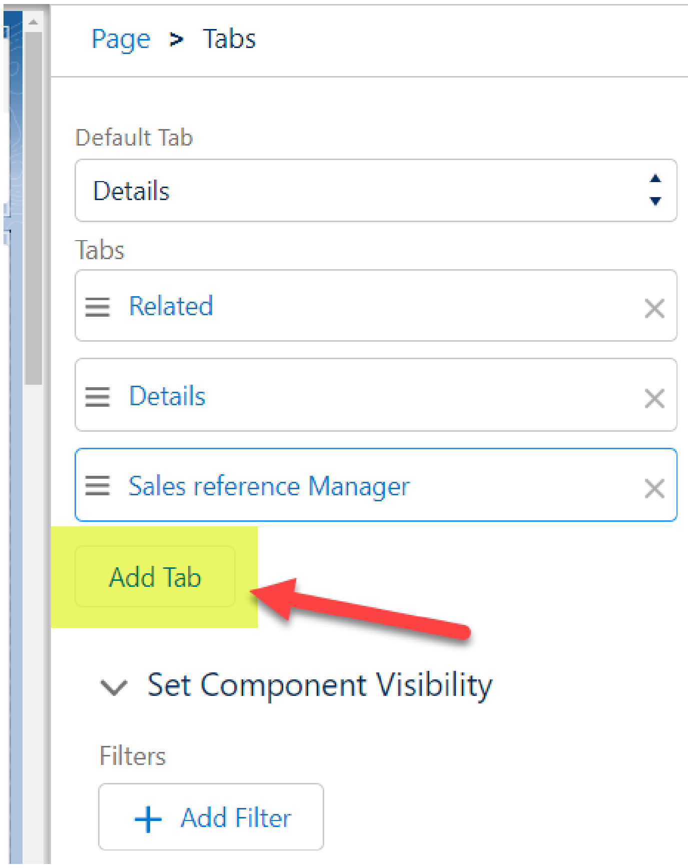
1. On an Account record, click **Edit Page** in the **Setup** menu (indicated in the example below).



2. In the account preview, click anywhere in the tabs area (**1** in the example below) to open the Tabs section in the right-hand sidebar (**2**).

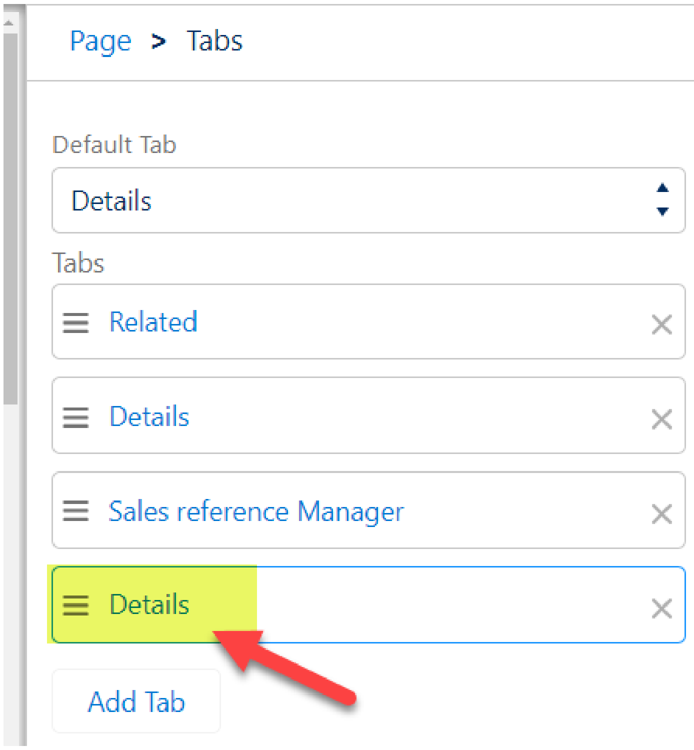


3. Click the **Add Tab** button (highlighted below).

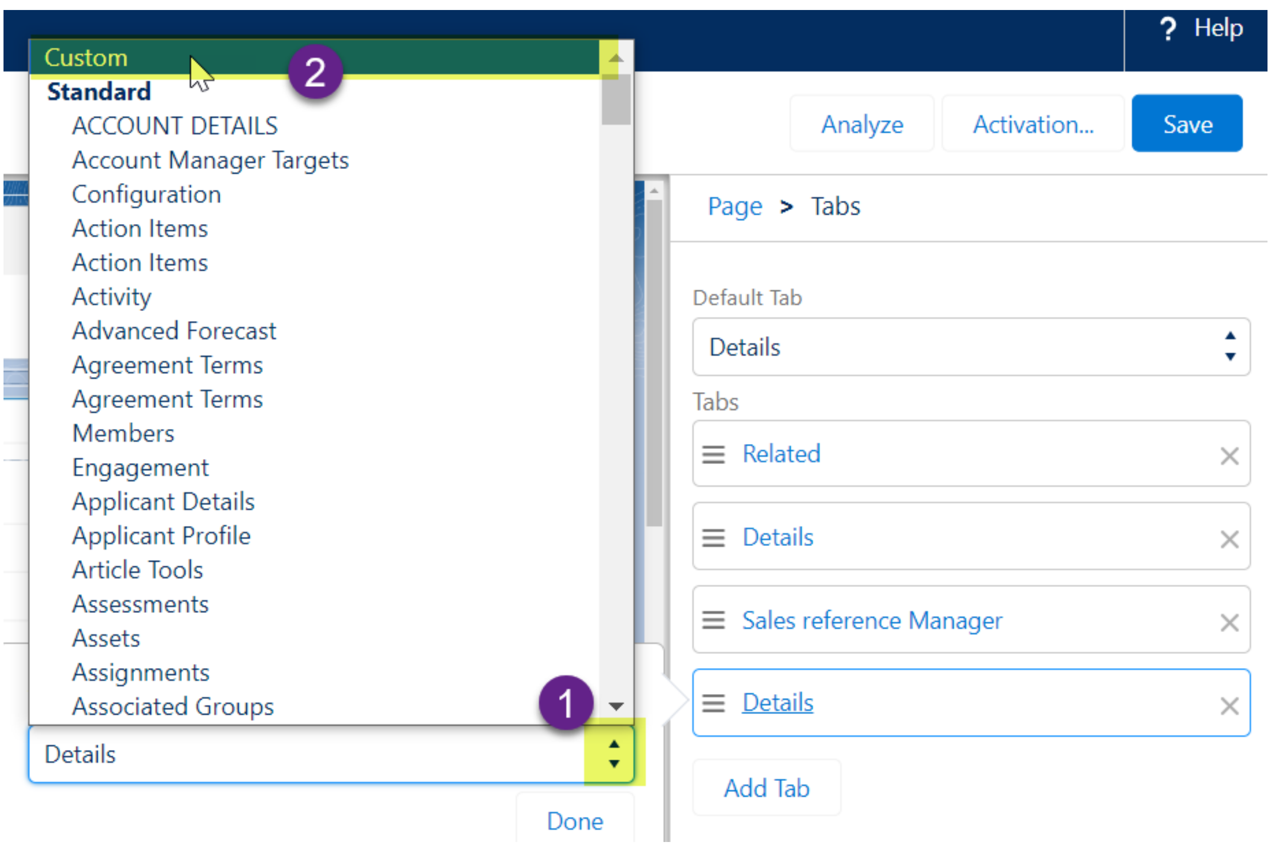


A new Details tab is created that you need to configure.

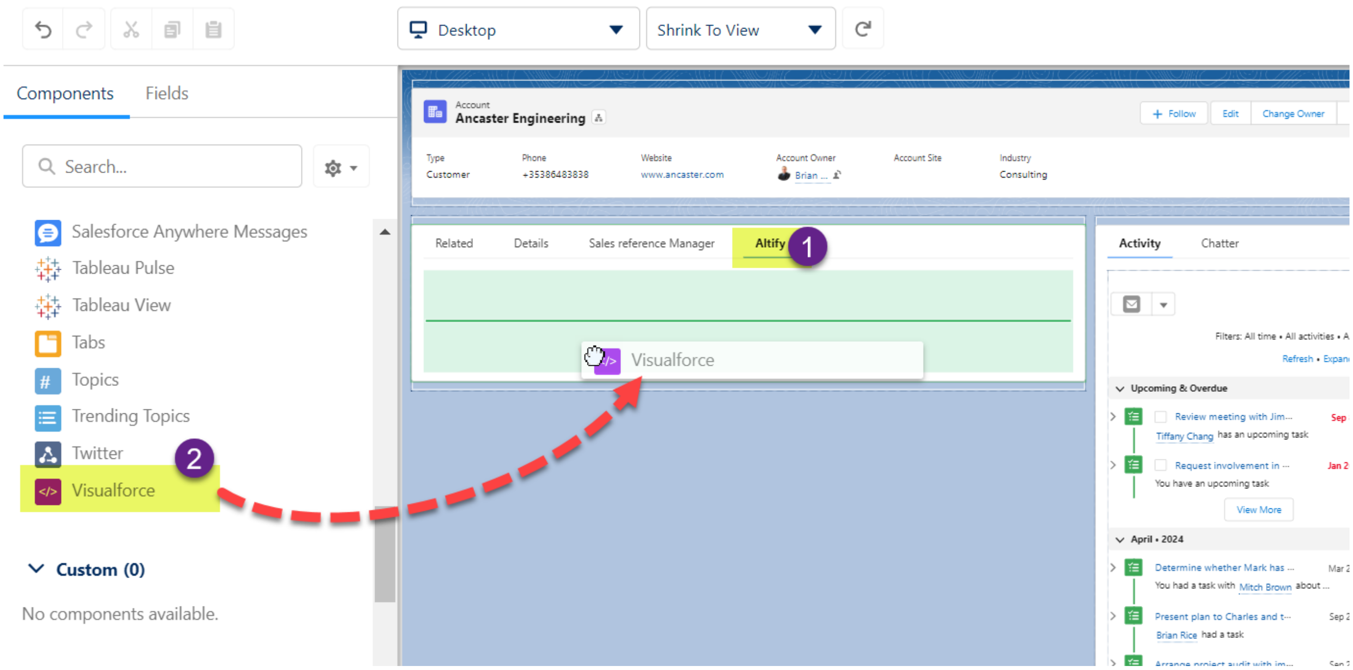
4. Click the **Details** hypertext (highlighted below) in the newly created tab to open the Tab Label dialog.



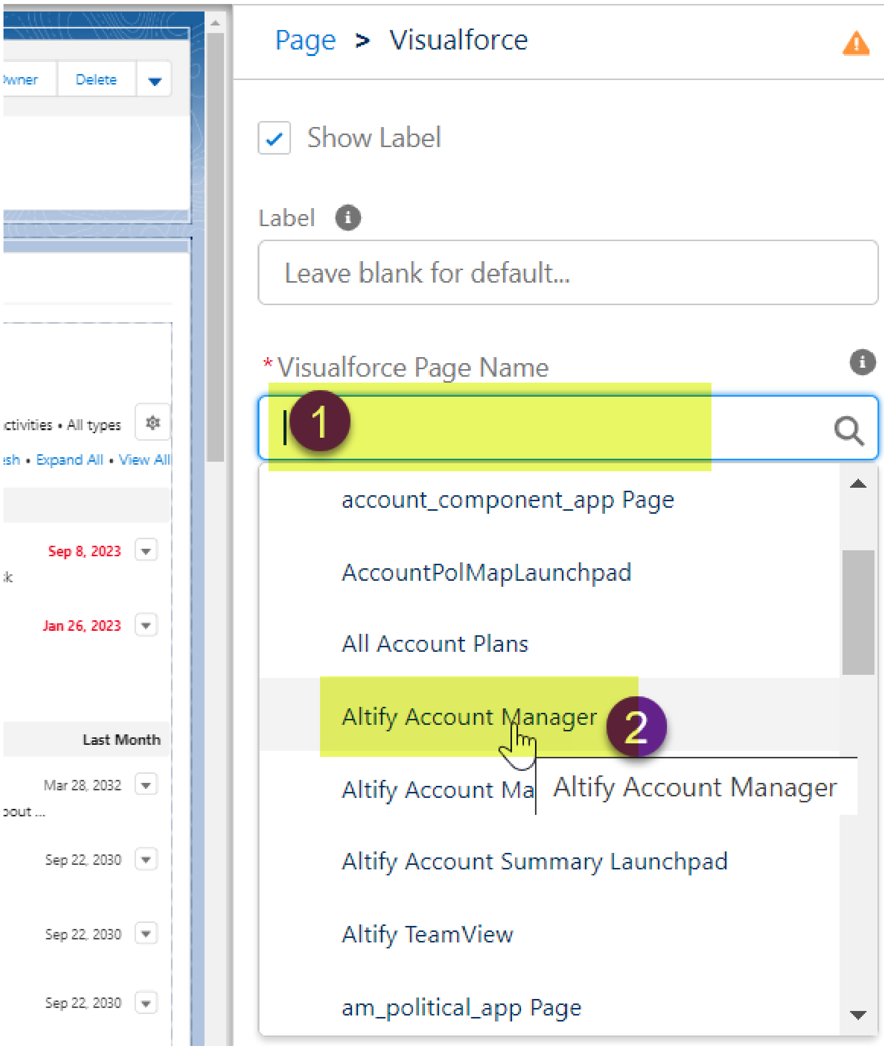
5. Click the vertical arrows (see **1** below) and select the option **Custom** at the top of the list (**2**) .



6. Enter 'Altify' in the **Custom Label** field that is displayed and click **Done**.
7. Click the **Altify** tab you just created in the preview area (see **1** below) and then drag the **Visualforce** component from the left-hand sidebar to the new tab area (**2**).

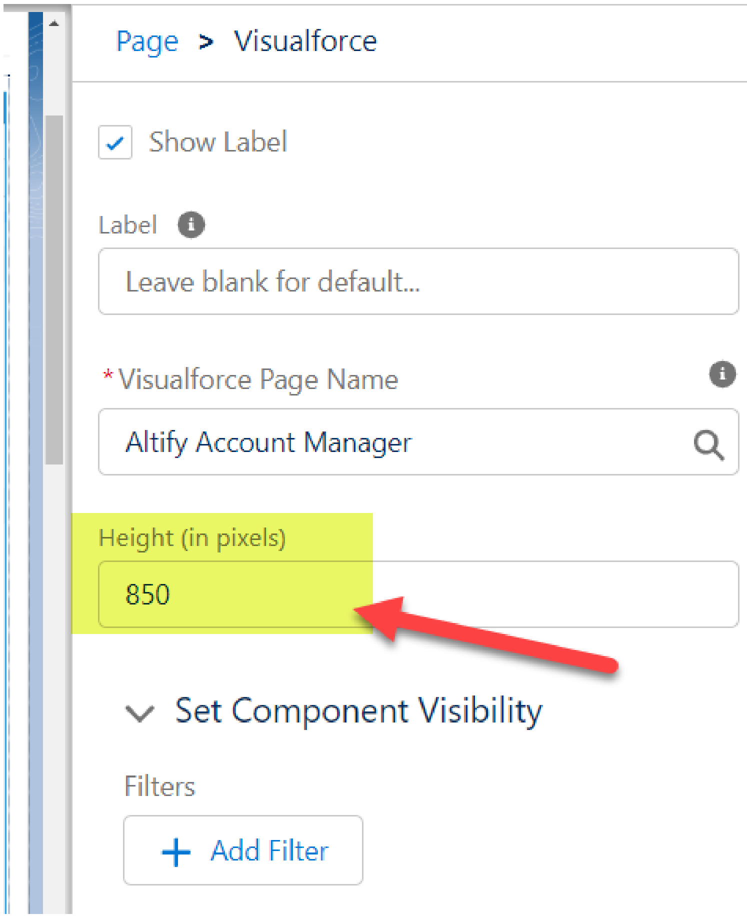


8. Clear the **Visualforce Page Name** field in the right-hand sidebar (see **1** below) and then select 'Altify Account Manager'.

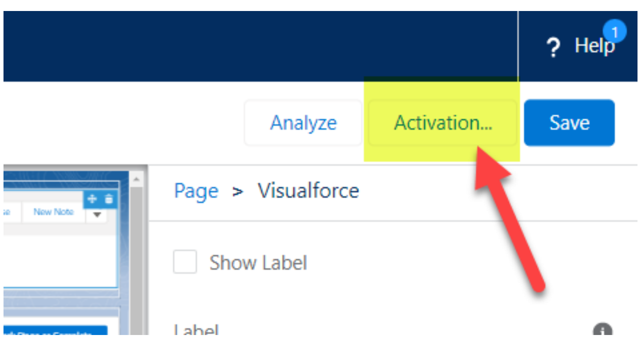


The new launchpad is displayed in the preview area.

9. Enter a **Height (in pixels)** of '850' (as highlighted below).



10. Click the **Activation** button (highlighted below) to set this Account page layout as the default option for your org or a specific app, or define a combination of app/record type/user profile for whom this new Account page layout is displayed.



On-screen instructions are provided for each option.

11. Click **Save**.

Licensing Your Users for Altify Insights

Altify uses permission sets to provide standard users with access to product functions.

To make Altify available to your users, you must create a permission set and then assign the permission set and allocate licenses to users.

Create the Permission Set

1. In Classic mode, go to the **Altify Permission Set Administration** tab.
2. Click on the **Create/Update** button to create a permission set for Altify. If you've just installed Altify, a new permission set is created for access to Altify. If there's already a version of the Altify permission set in your org, this is updated.

Note: do not refresh or close the tab while the permission set job is running.

Assign the Permission Set

1. In **Setup**, open your list of **Users**.
2. Click into the relevant user.
3. In the Permission Set Assignments section, click **Edit Assignments**.
4. Select the relevant permission set in the Available Permission Sets panel and move it to the Enabled Permission Sets list box.
5. Click **Save**.

Allocate Licenses to Users

All Altify users need to be licensed for the Altify installed package.

1. In **Setup**, go to **Installed Packages**.
2. Your org's installed packages are listed. Click **Manage Licenses** beside the license package *Altify*.

   The *Package Details* page opens. Here you can see how many licenses you're allowed for the package, and how many are currently used.
3. Click **Add Users** to assign licenses to users.
4. Repeat these steps for another installed package: *Altify Insights*.

To verify your installation of Altify Insights, log in as a licensed user and check that the launchpads you have added to the Opportunity and Account page layouts are displaying correctly.

Congratulations! You are now ready to use Altify Insights.

Scheduled Jobs for Completeness

Configure the following scheduled jobs to generate completeness records on a weekly basis. You can use these records to create completeness reports. Specific jobs need to be created for completeness of account relationship and insight maps and completeness of opportunity relationship and insight maps.

Note: the scheduled jobs outlined below also generate account and opportunity data on your Altify launchpad(s).

1. In **Setup**, go to **Apex Classes**
2. On the Apex Classes page, click the **Schedule Apex** button.
3. Enter a **Job Name** of 'Altify Opportunity Completeness Job' or 'Altify Account Completeness Job' as appropriate.
4. Set the **Apex Class** to 'ScheduledOpportunityCompleteness' or 'ScheduledAccountCompleteness' as appropriate.
5. Select a **Frequency** of *Weekly*.
6. Select the day that you want the job to run on.
7. Enter the date range (**Start** date and **End** date) over which you want the job to run.
8. Select a **Preferred Start Time**.
9. Click **Save**.

Initial Runs

The following instructions are for one-off runs of the above batch jobs:

1. Open the **Developer Console**.
2. Click **Debug** and select **Open Execute Anonymous Window**.
3. Run the appropriate code from the following two options:

```
new ALTF.ScheduledAccountCompleteness().execute(null);
```

```
new ALTF.ScheduledOpportunityCompleteness().execute(null);
```

For more information on how completeness scores are calculated, and how to customize the batch size of the above jobs, see Completeness Scoring.

Enabling Export of Altify Data

If users are exporting from Altify to PowerPoint, Microsoft Word or PDF, they will need Create, Read and Delete permissions on the Documents object.

We strongly recommend that this is implemented in Salesforce administration, e.g. by editing the user profile, and not by updating the Altify Permission Set.

If you want your users to be able to export opportunity/account relationship and insight maps in a PowerPoint format, further configuration is necessary - continue on to the next section: "Output Extension Application (Optional)" on page 23.

Output Extension Application (Optional)

If you need Powerpoint export capability for opportunity/account relationship maps and insight maps, you need to install the latest version of the **Altify Output Extension Application** (previously known as the Power-point Extension Application).

This section contains the following:

Installing the Extension Application

Before you install the extension app, ensure that Files Connect is enabled in your org. The installation will fail otherwise. Go to **Setup > Files Connect**, and select the **Enable Files Connect** checkbox.

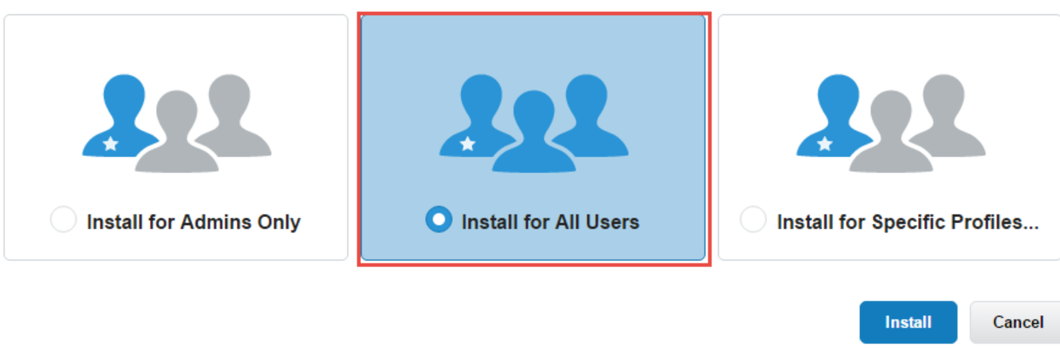
To install the Output Extension Application in Salesforce:

1. Copy and paste the Extension App package installation URL into the browser.

   Note: This URL is supplied by Altify. For production Salesforce environments the URL provided will start with 'https://login.salesforce.com/'. For sandbox environments, the URL will start with 'https://test.salesforce.com/'.

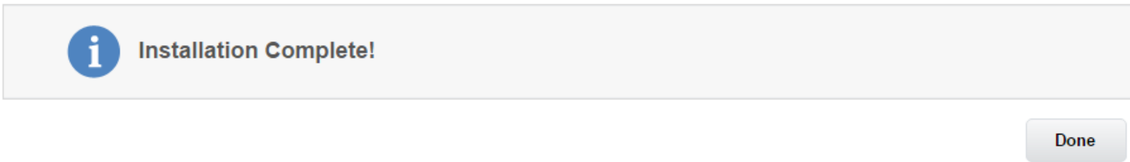
2. Log into Salesforce.com with your administration username and password.
3. The installation page opens. Select **Install for All Users**.

   Note: This option makes the extension application available to all users and is the preferred approach for most Altify customers. However, you can install for admins only and thereafter manually assign licenses to specific users. For more information, see "Installing for admins and specific users" on the next page.



4. Click **Install**.
5. Select the **Yes** checkbox to grant access to the site for the output generation service.
6. Click **Continue**.

The package is installed, When the process is complete, this page is displayed:



Installing for admins and specific users

It is possible to install the Altify Output Extension for admins only and assign licenses individually.

To do this, you must first raise a ticket with the Altify "Support" on page 32 team signaling your intention. In response, they will change the Altify Output Extension license from a site license to a standard license.

Once that is done, you can follow the above process - selecting **Install for Admins Only** in step 3.

Once the extension app is installed, you can assign the licenses to specific users by following these steps:

1. In **Setup**, go to **Installed Packages**.
2. On the Altify Output Extension row, click the link **Manage Licenses**.
3. On the Package Details screen, click the **Add Users** button in the Licensed Users section to allocate an Altify Output Extension license to specific users in your org.

Using the EU-Hosted Service for Powerpoint Export

Note: This task is **optional**.

The default remote site providing the Powerpoint generation service is hosted in the United States. However, for GDPR compliance you can use the service hosted in the EU instead.

Add the EU-Hosted Remote Site

1. In **Setup**, go to **Remote Site Settings**.
2. Click **New Remote Site**.
3. Specify the following details:

Field	Value
Remote Site Name	Heroku_PPTX_EU
Remote Site URL	https://pptgen-eu.herokuapp.com

4. Select the **Active** checkbox.
5. Click **Save**.

You have added the EU-hosted service to your org.

Set Altify to Use the EU-Hosted Service

1. In **Setup**, go to **Custom Settings**.
2. Click **Manage** beside **Altify Powerpoint Customization**.
3. Click **New** at the top of the page.
4. Enter *https://pptgen-eu.herokuapp.com/* in the Heroku URL field.
5. Click **Save**.

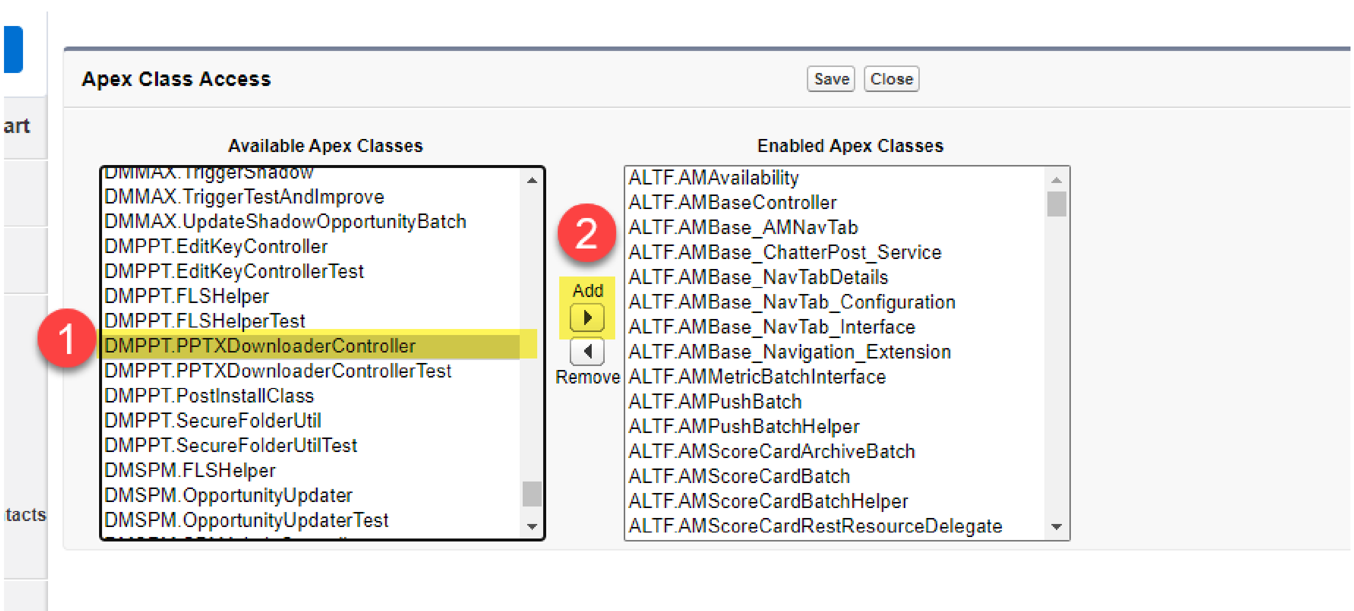
You have configured Altify Powerpoint Export to use the EU-hosted service.

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**.

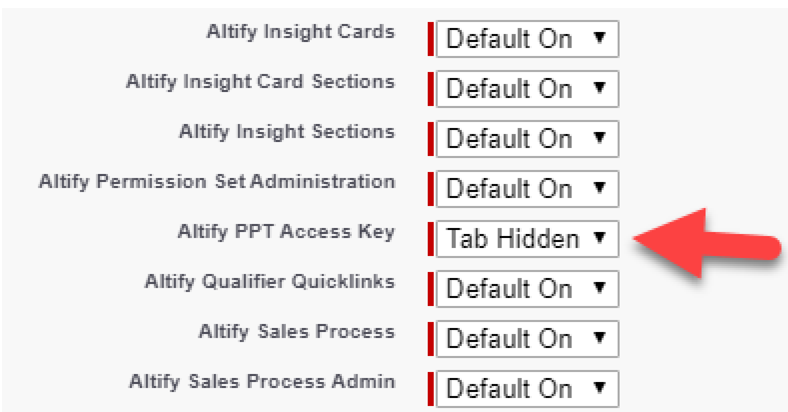
Entering the Access Key

1. Open the **Altify PPT Access Key** tab in Salesforce.
2. Click **Edit**.
3. Enter the access key provided by Altify.
4. Click **Save**.

Hiding the Access Key Page from Users

To prevent users from accidentally overwriting the access key for the Extension App, we recommend that you hide this page from all non-admin users.

1. In **Setup**, go to **Profiles**.
2. Click **Edit** beside a profile that should not be able to access the **Altify PPT Access Key** tab.
3. In the Custom Tab Settings section, select **Tab Hidden** in the 'Altify PPT Access Key' picklist.



4. Click **Save**.

Repeat this for each profile that does not need access to this tab.

Configuring PowerPoint Custom Settings

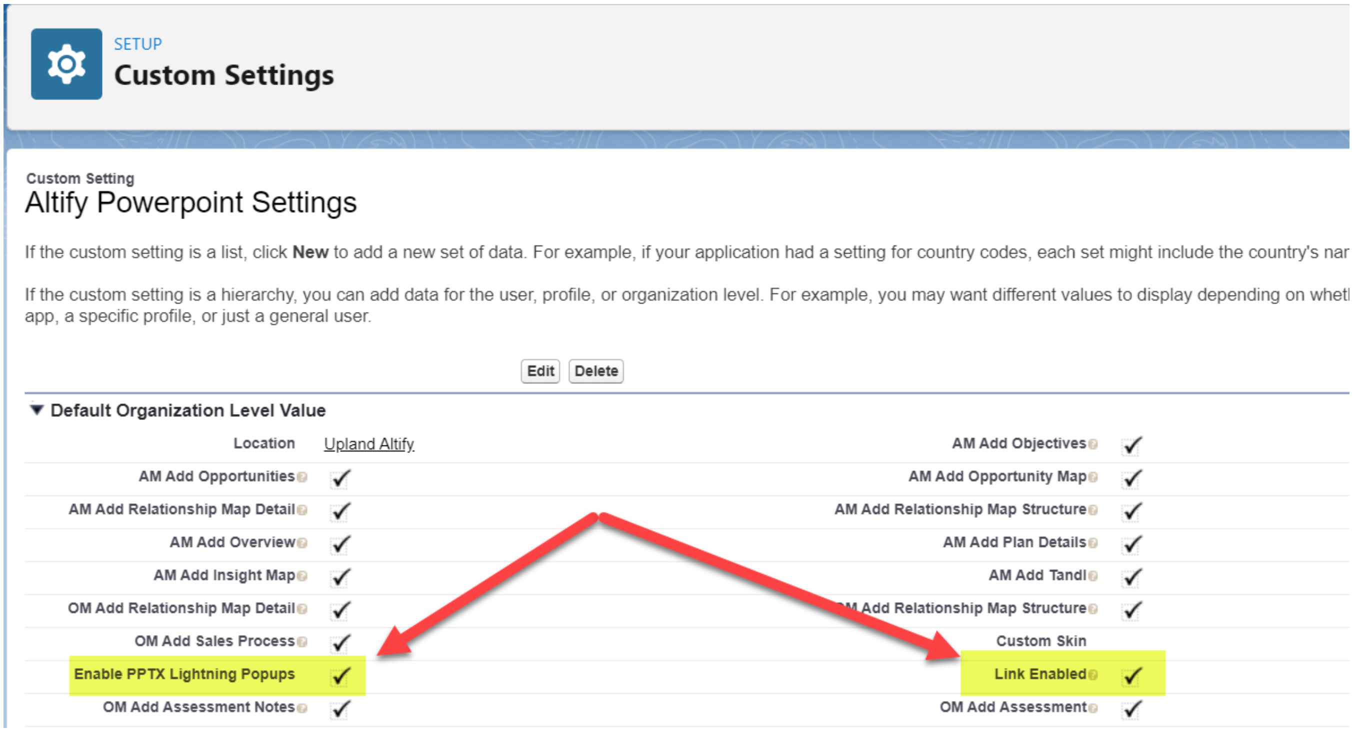
When the **Link Enabled** setting is enabled, the **Create > PPT Export** option becomes available in Altify Insights.

> **Note:** It also enables the **Export to Word** option in the Executive Briefing wizard in Opportunity Manager and Account Manager.

1. In **Setup**, go to **Custom Settings**.
2. Click **Manage** beside **Altify PowerPoint Settings**.
3. Click **Edit** and select the **Link Enabled** checkbox.

4. If your org employs clickjack protection, you also need to select the checkbox **Enable PPTX Lightning Popups** (otherwise PPT export will not function correctly).

   The settings *Link Enabled* and *Enable PPTX Lightning Popups* are checked and highlighted in the example below.



5. Click **Save**.

The *Altify Powerpoint Settings* in custom settings also enable you to configure the content and format of Powerpoint exports.

Audit Trail of Powerpoint Exports

Note: This task is **optional**.

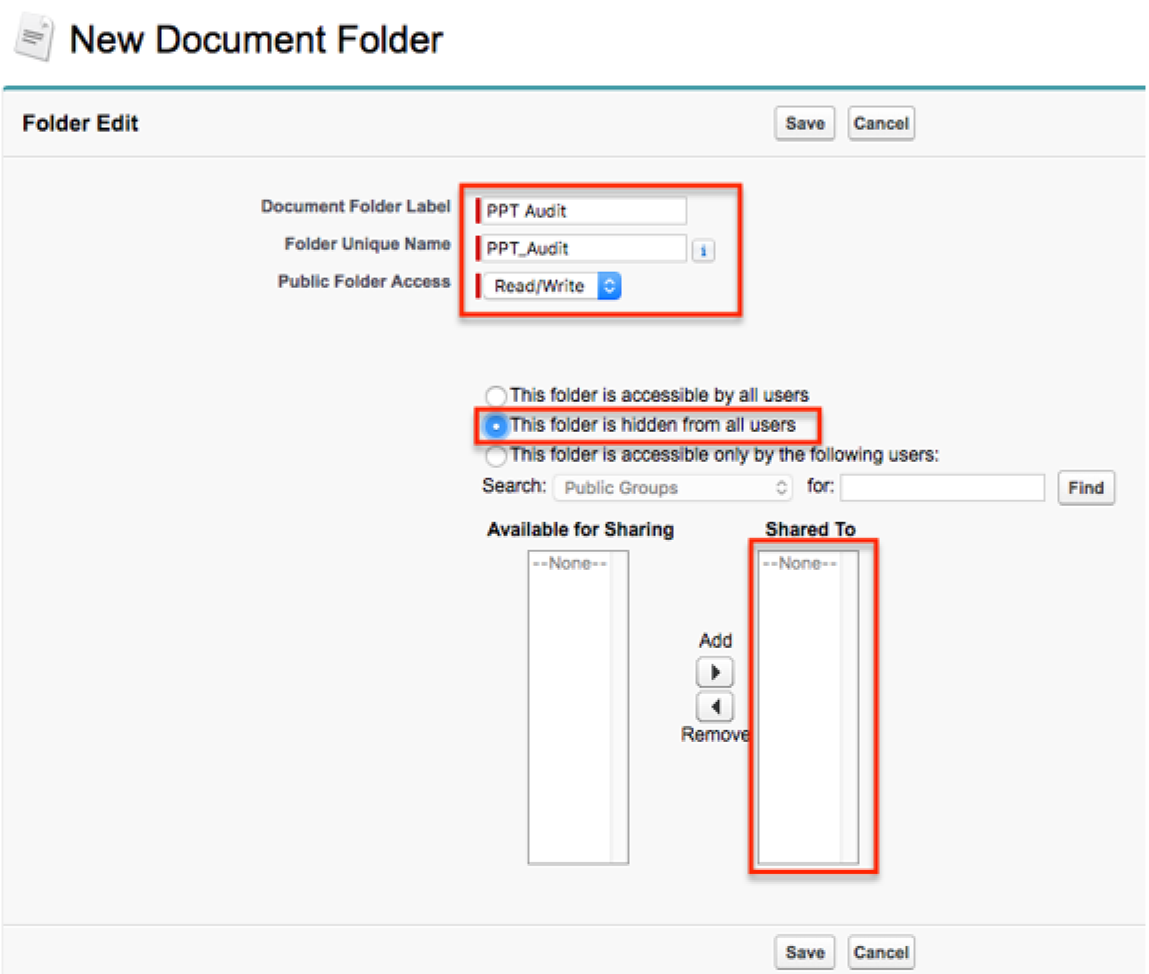
You can configure the Extension Application to record an audit trail of Powerpoint Export events. The audit trail is stored in a secure folder specifically created for this purpose. For each event, the folder provides the following event details:

- A link to the Powerpoint or JSON file generated by the event. (A JSON file with error details is generated for a failed export.)
- Powerpoint file size.
- File creation date.

- File type.
- The user who generated the export.

Create a Secure Folder to Store the Audit Trail Information

1. Open the **Documents** tab in Salesforce Classic mode.
2. Click **Create New Folder**.
3. Specify a folder label and name. Make a note of the Folder Unique Name. You'll need to specify this in Custom Settings. (Salesforce doesn't allow the unique name to have any spaces.)
4. Set it to *Read/Write* access.
5. Make sure it's hidden from all users.



6. Click **Save**.

The folder is accessible (to administrators only) in the **Documents** tab in Salesforce Classic mode. (It is not accessible in Salesforce Lightning mode.)

Specify the Folder's Unique Name in Custom Settings

1. In **Setup**, go to **Custom Settings**.
2. Click **Manage** beside **Altify Secure Folder Settings**.
3. Click **New** or **Edit**.
4. In the Secure Folder Name field, specify the Folder Unique Name of the folder you created.
5. Click **Save**.

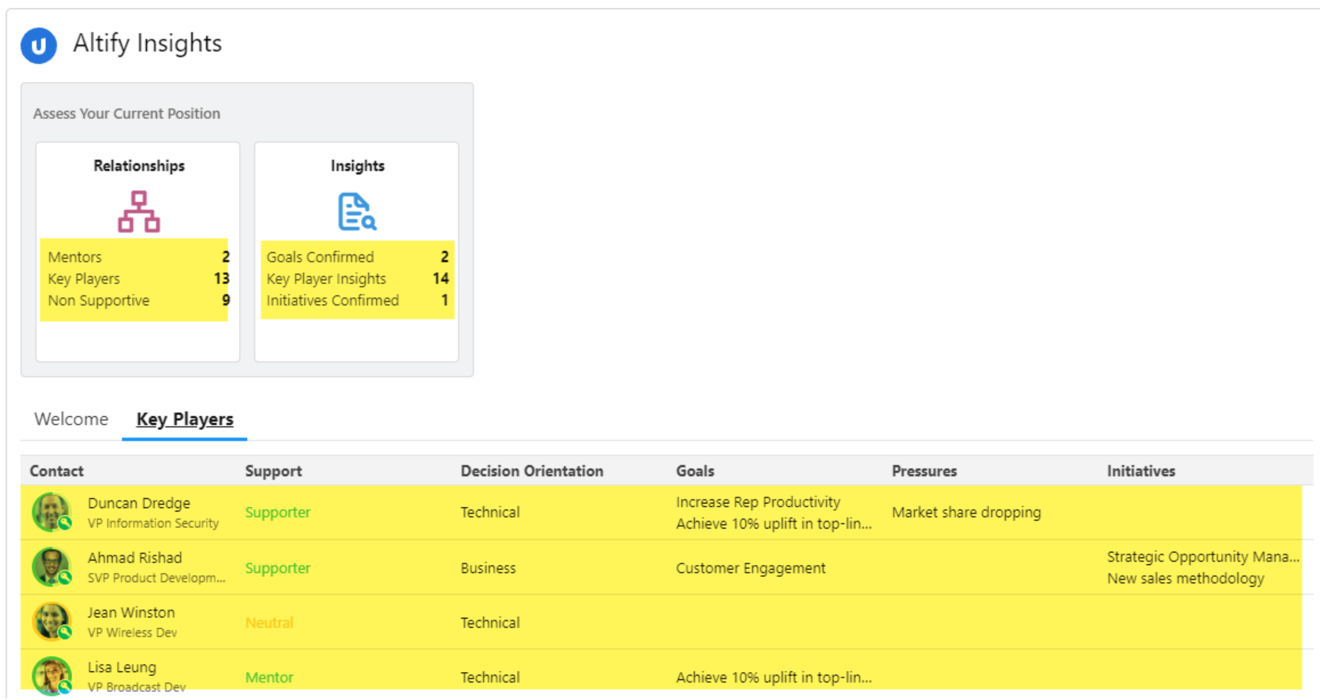
The folder is now configured to contain Powerpoint Export data, and has the required level of access. Only administrators can access the folder.

Post Install Checklist

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

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).

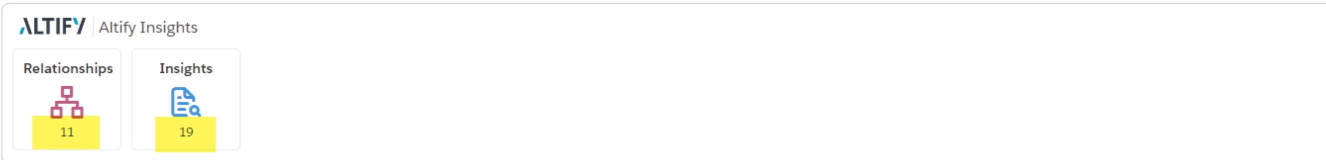


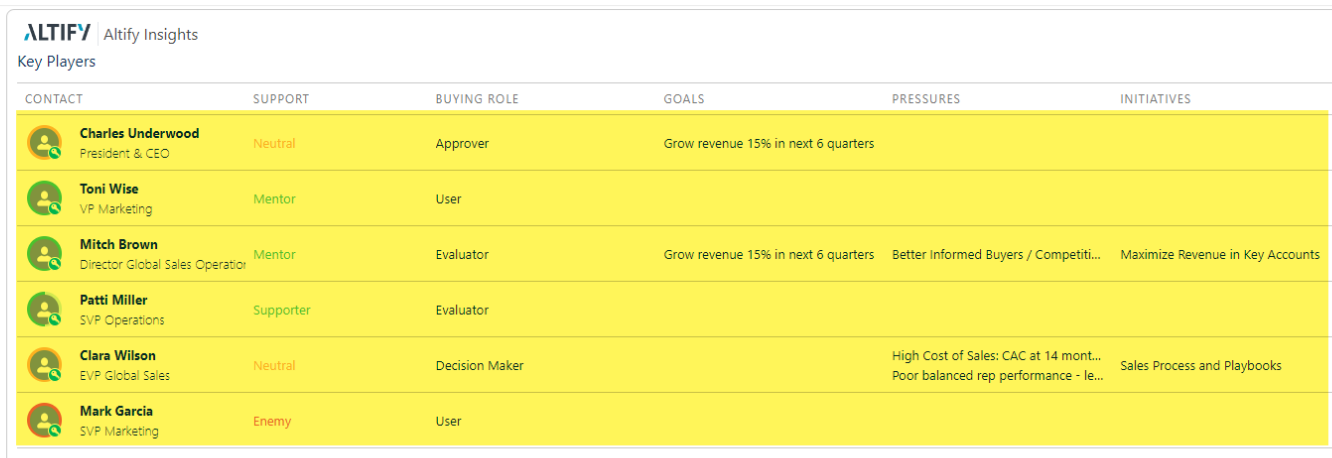
4. If you have installed our Altify Output Extension app, test the output by exporting the account data.

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*
2. Click each tile, button and link on the launchpads to ensure the pages load successfully.
3. Using your test opportunity, create some simple test data on the insight map and relationship map.

4. 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 Operatior	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			

5. 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)	• Immediate and continuous. • Hourly status updates.
Urgent (Business Critical)	• Production system defect that prevents business critical work from being done and no workaround exists. • Defect causes a material loss of data in the production system. • Security-related defect.	1 business hour	• Immediate and continuous effort to resolve the defect or provide a workaround. • Daily status updates until the defect is resolved or a workaround is provided.
High	• Production system defect that prevents business critical work from being done and a workaround does exist. • Defect violates the material specifications in the documentation and impacts your organization's production system.	4 business hours	Upland will use reasonable efforts to resolve the defect as rapidly as practical, but no later than the next update after reproduction of the defect.
Normal	All other defects	1 business day	Defects will be addressed in Upland's normal update.