# Altify

# 9.10 to 9.13 Altify Insights Upgrade Guide

# CONTENTS

# Introduction

This guide describes the procedure for upgrading from Altify Insights 9.10 to 9.13.

# 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.
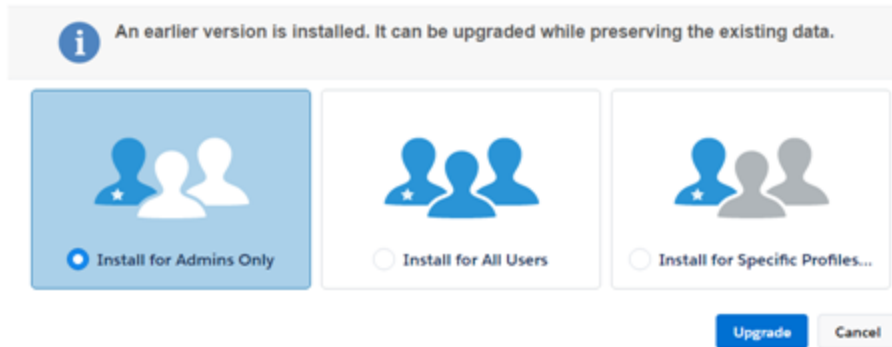


4. Click **Upgrade**.

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 9.13 is installed in the org.

# Upgrade the Altify Output Extension App

This section only applies if you have the Altify Output Extension App installed. This app is used to export to PowerPoint files, Microsoft Word, or Quip. If you have the Altify Output Extension app installed, you must ensure you have the latest version, which is 1.35.

In Opportunity Manager and Account Manager, installing v1.35 of the **Altify Output Extension App** has the following benefits:

- It gives you the latest PowerPoint Export feature enhancements.
- It facilitates the generation of Executive Briefing documents in Microsoft Word format and Quip online document format.

If a version of the Extension App is not already installed, the full installation procedure is required, rather than the steps in this upgrade guide.

See the Altify *Installation Guide* to get details of the full procedure.

To check the number of your currently installed version, in **Setup** go to **Installed Packages** and note the version number.

If you already have v1.35, you can skip the steps described in this section.

To upgrade the Extension App:

1. Ensure that **Files Connect** is enabled in your org. The extension app can't install otherwise.

   To enable it, go to **Setup > Files Connect**, and then select the **Enable Files Connect** checkbox.
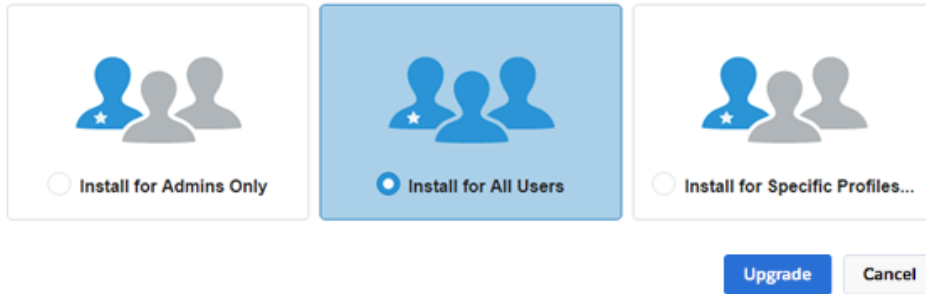
2. Log into Salesforce.com with your administration username and password.

3. Copy and paste the Altify Output Extension App installation URL into the browser.

   This URL is supplied by Altify.

   For production Salesforce environments, the URL starts with `https://login.salesforce.com/`

   For sandbox environments, the URL starts with `https://test.salesforce.com/`

4. The installation page opens. Select **Install for All Users**.

5.  Click **Upgrade**.

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

> **Note:** You can use an EU-hosted service for PowerPoint Export, rather than the normal USA-based ser-vice. (Typically, you would do this for GDPR reasons.)

# Refreshing the Altify Permission Set

Following the upgrade, you must refresh the Altify Permission Set.
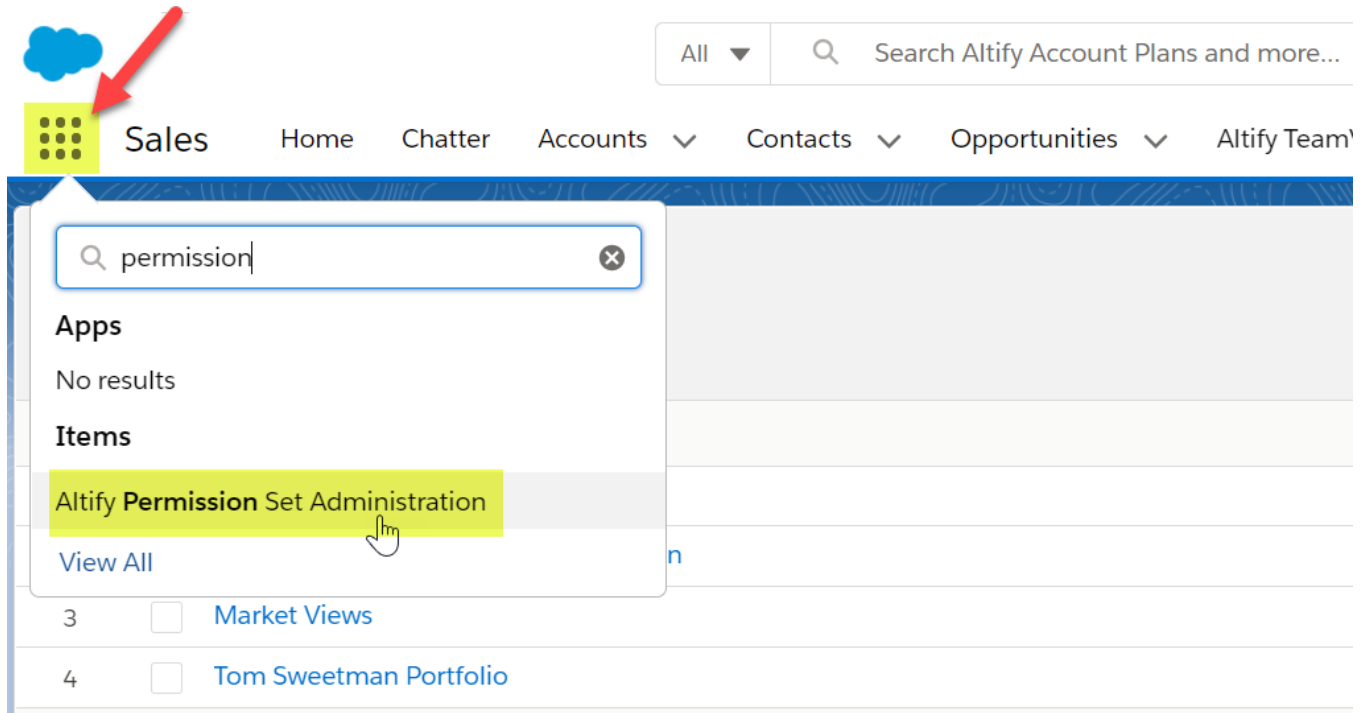
> **Note:** We recommend that you do not make changes to the Altify Permission Set. However, if you have made changes, these will need to be reapplied after completing the following steps (as any edits are lost when the permission set is refreshed).

There are two ways to go about refreshing the permission set, a safer approach recommend by Altify ([refresh in sandbox before deploying to your production org](#)) and a quicker method that is not recommended ([refreshing directly in your production org](#)).

## Refreshing in sandbox before deploying to production (Altify's recommended approach)

Altify strongly recommends that you perform this task in a sandbox environment before deploying a change set to your production org.

1. In your sandbox environment, search for and select **Altify Permission Set Administration** in the App Launcher menu.
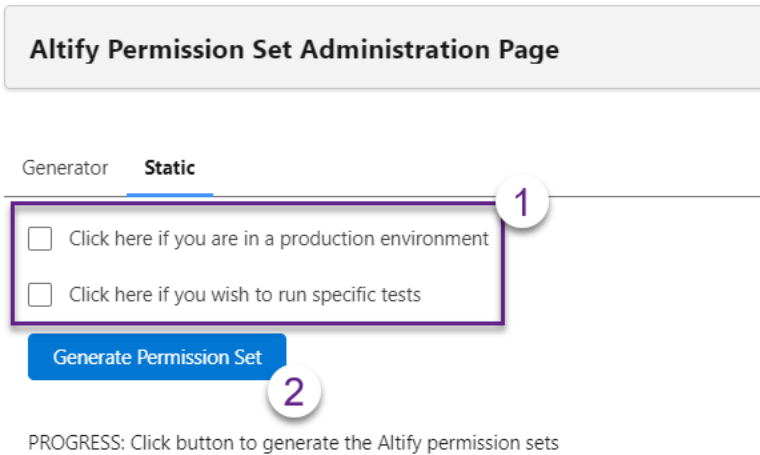


(In Classic mode, click the **All Tabs** button and select **Altify Permission Set Administration** in the displayed list.)

2. On the *Altify Permission Set Administration Page*, select the **Static** tab - as shown below.

**Altify Permission Set Administration Page**

Generator  **Static**
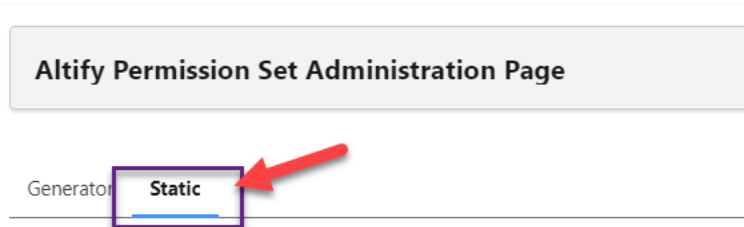
3. Clear the two check boxes that are displayed (see **1** below) and then click **Generate Permission Set** (**2**).

**Altify Permission Set Administration Page**

Generator  **Static**

1

☐ Click here if you are in a production environment

☐ Click here if you wish to run specific tests

**Generate Permission Set**

2

PROGRESS: Click button to generate the Altify permission sets

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.

4. Deploy the change set into your production org. For assistance, please see the [Salesforce Help](#).

## Refreshing directly in production org (not recommended)

If you choose to refresh your permission set directly in your production org (i.e. not taking Altify's recommended approach described above), these are the steps you should take:

1. In your production environment, search for and select **Altify Permission Set Administration** in the App Launcher menu.
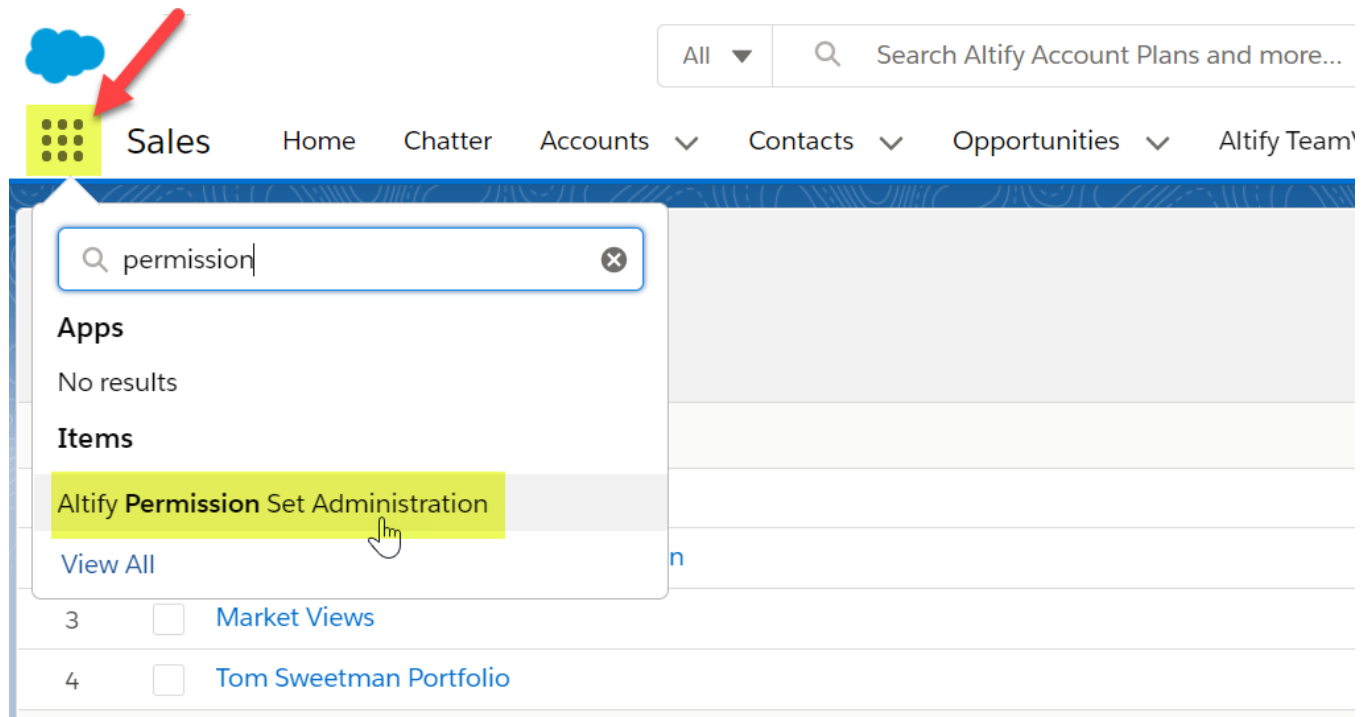
(In Classic mode, click the **All Tabs** button and select **Altify Permission Set Administration** in the displayed list.)

2. On the *Altify Permission Set Administration Page*, select the **Static** tab - as shown below.
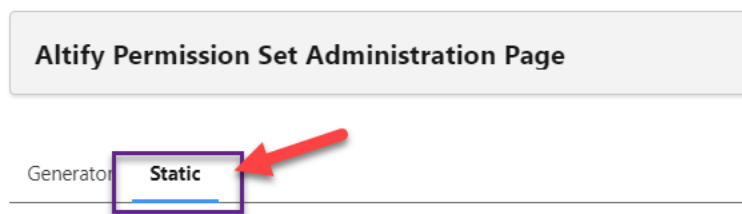


3. Select the two check boxes that are displayed (as shown in the example below):

- **Click here if you are in a production environment**
- **Click here if you wish to run specific tests**

**Altify Permission Set Administration Page**

Generator   **Static**

☑ Click here if you are in a production environment
☑ Click here if you wish to run specific tests

Classes

Enter the test classes you wish to run.  One class per line

4. In the **Classes** text box, enter a test class - this is a validation step required by Salesforce.

5. Click **Generate Permission Set**.

> **Caution:** The create/update process can take a few minutes. Don't browse away from the page while the refresh is in progress.

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

# 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 9.13, 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.
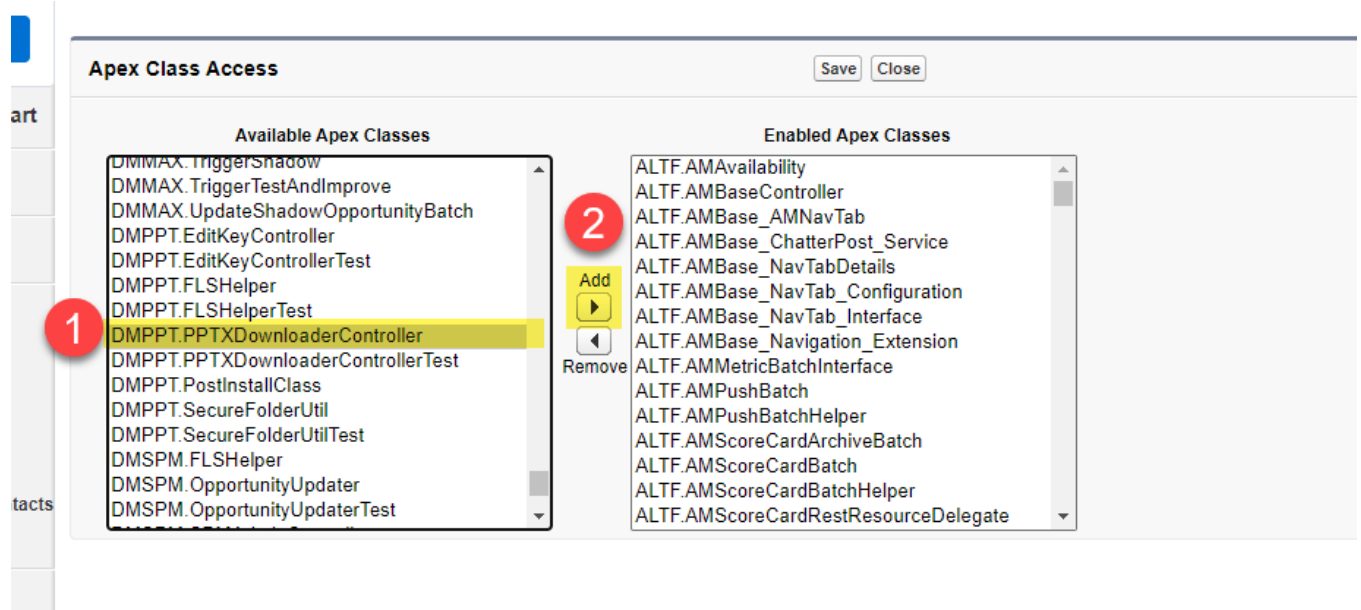


6. Click **Save**.

# 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*.



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.
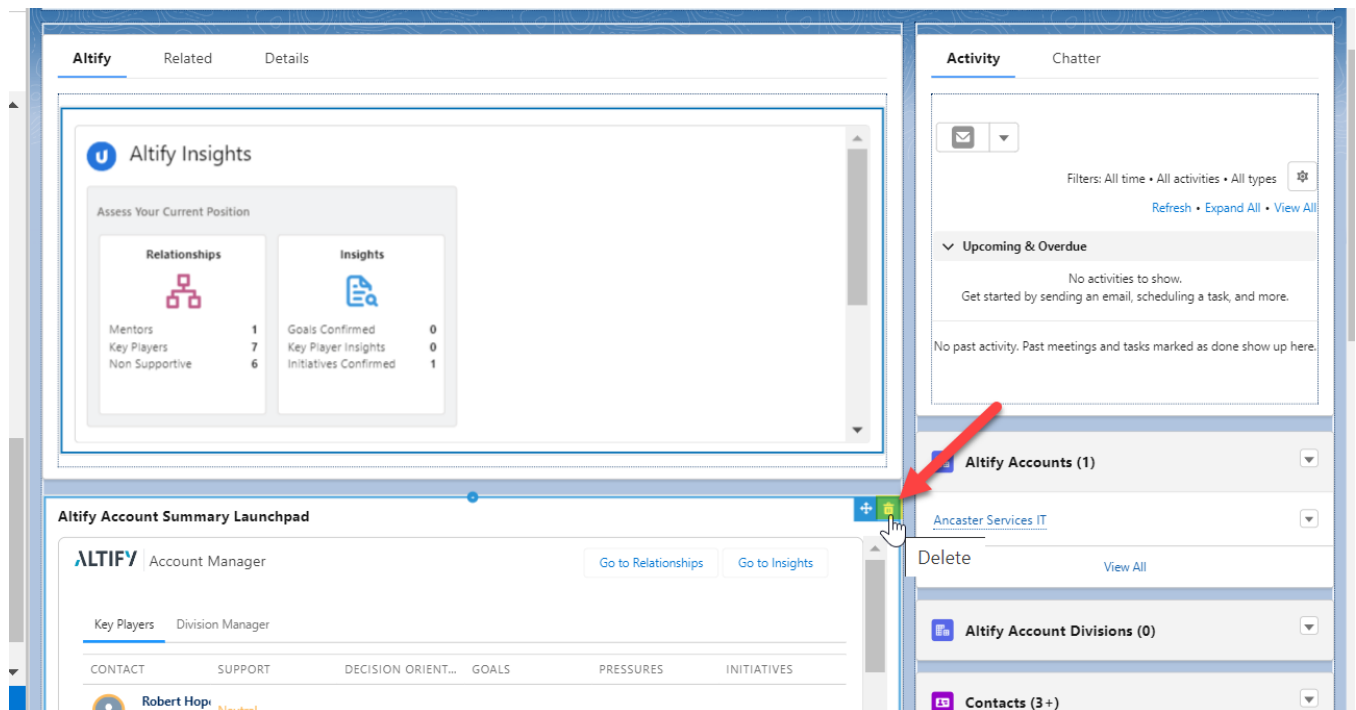
## Removing the superfluous launchpad and expanding the Altify Insights launchpad

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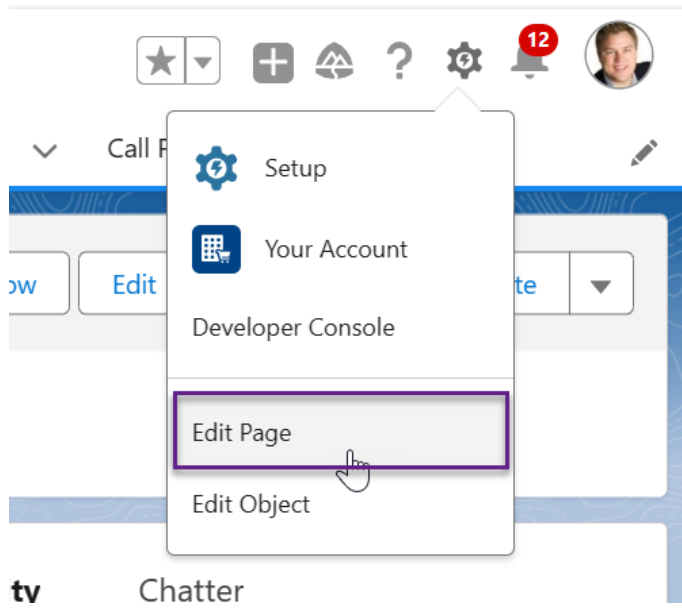
2. In the Lightning App Builder, select the **Altify** tab (or whichever tab that displays the launchpads) and click the **Delete** icon (as indicated below) for the following component: Altify Account Summary Launchpad.



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.
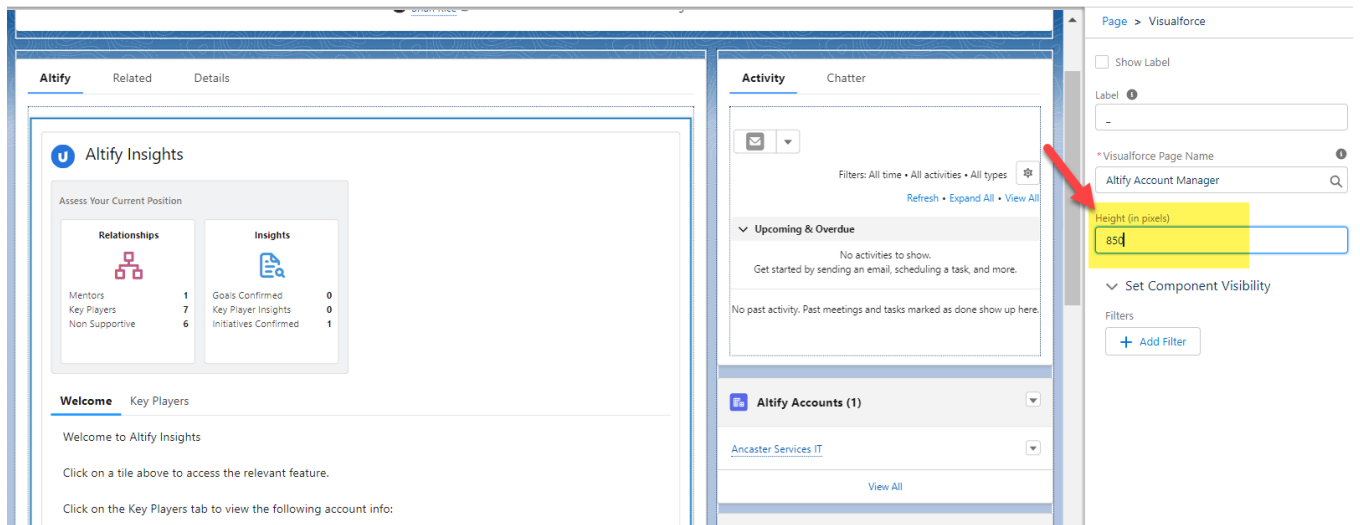
4. Click the **Save** button.

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
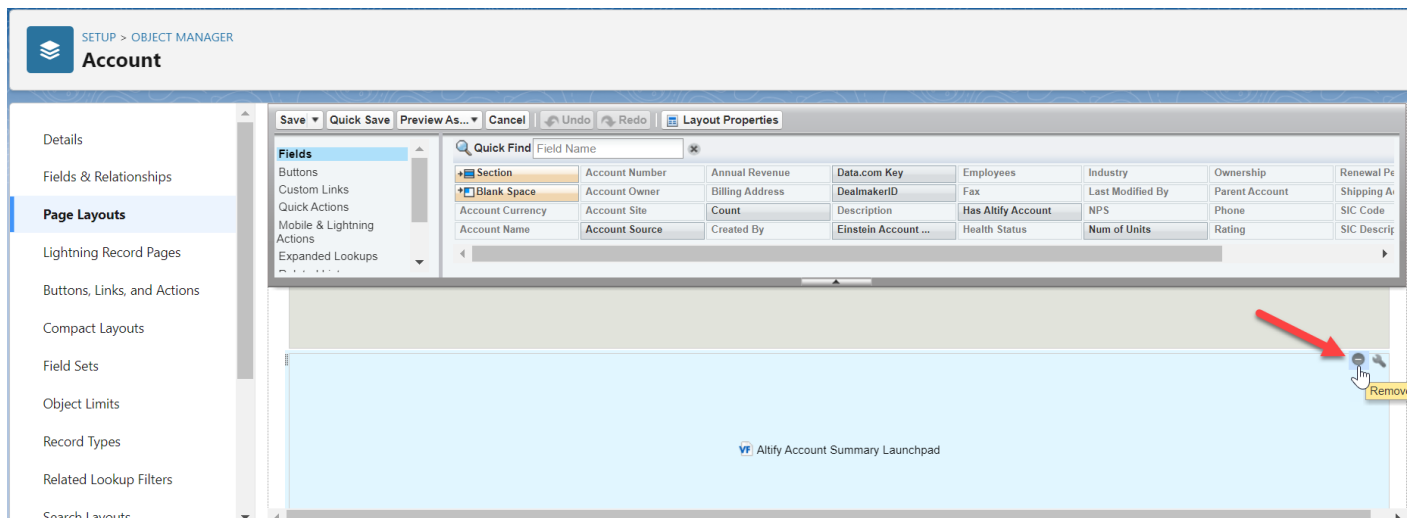


5. Next, click the **Properties** icon for the Altify Account Manager launchpad (as indicated below).
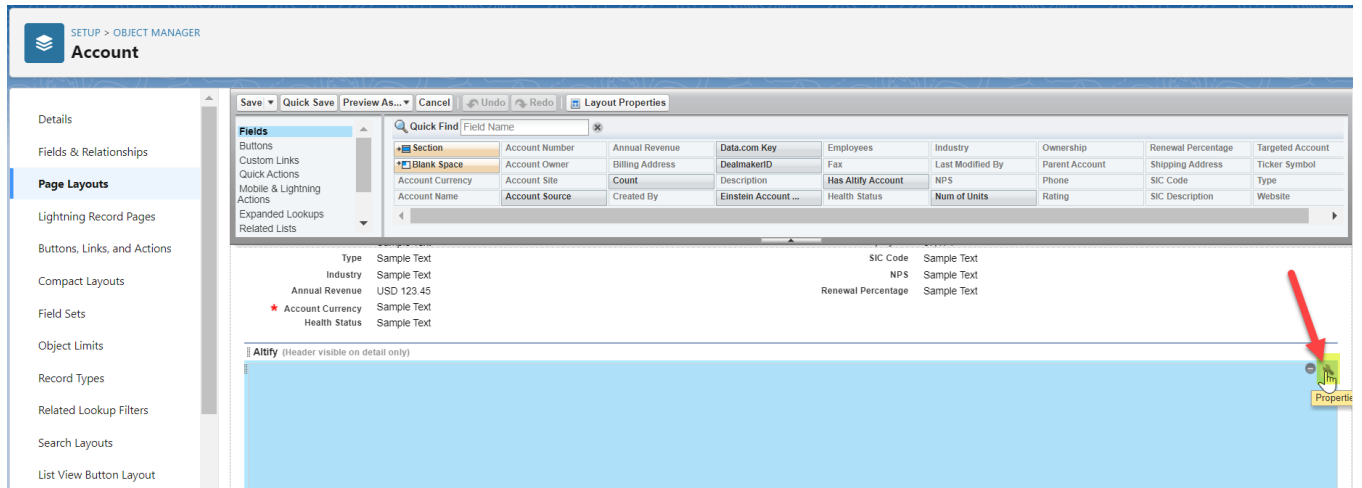
6. In the *Visualforce Page Properties* dialog, enter a **Height (in pixels)** of '850' and click **OK**.

7. Click **Save**.

# Updating Page Layouts

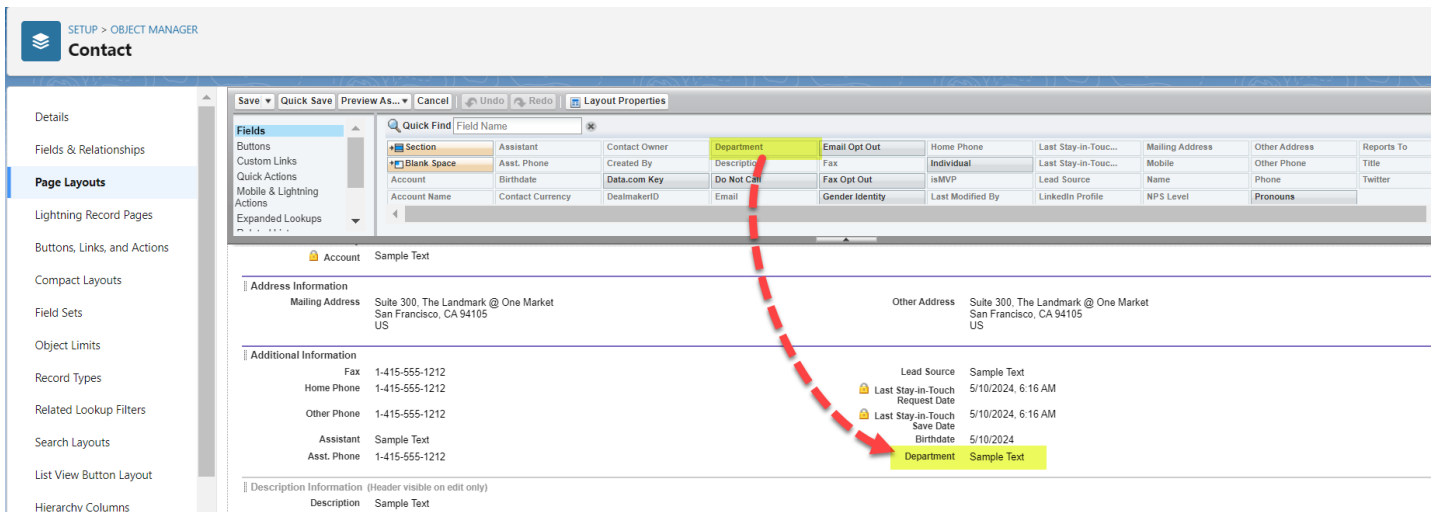The page layouts of the following objects require updating after you upgrade.

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.



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

Test & Improve

75%  ⊕  Influer

... ✕

in

**Luke Walker** ✏

Executive

| Department | Adaptability | Persona | External |
|---|---|---|---|
| | | | No |

✕ ✓

Last updated by Donal Kavanagh a few seconds ago

**DETAILS**   ACTIONS (0)   INSIGHT (0)   TEAM RELATIONSHIPS   DECISION CRITERIA (0)

**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.
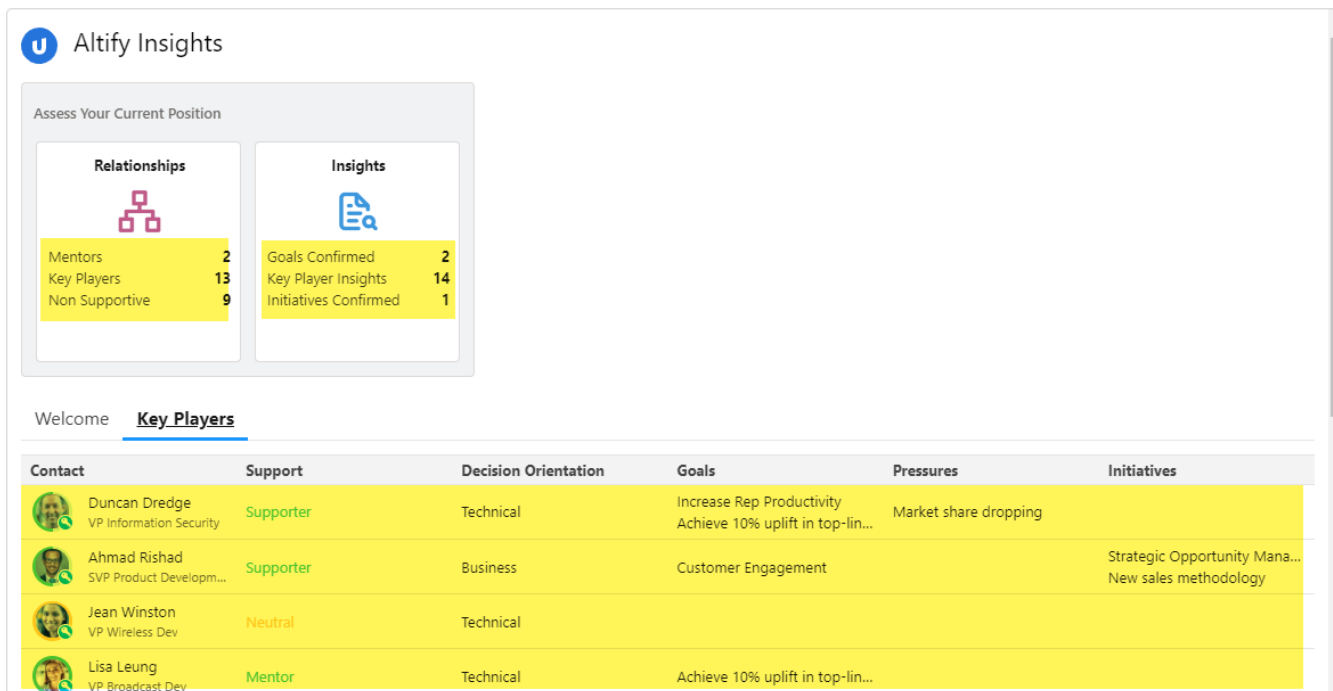
# Post Upgrade Checklist

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).
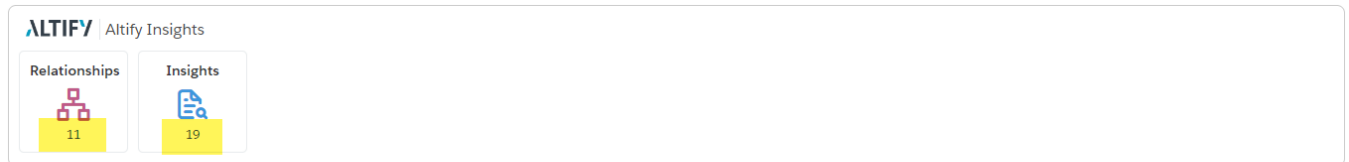


4. If you have installed our Altify Output Extension app, test the output by exporting the account data.

## 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:





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.<br>• Hourly status updates. |
| Urgent (Business Critical) | • Production system defect that prevents business critical work from being done and no workaround exists.<br>• Defect causes a material loss of data in the production system.<br>• Security-related defect. | 1 business hour | • Immediate and continuous effort to resolve the defect or provide a workaround.<br>• 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.<br>• 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. |