9.10 to 9.13 Upgrade Guide

Altify

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Introduction

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

If you are upgrading to Altify 9.13 from version 9.9 you should refer to the appropriate Upgrade Guide.

If you are running an earlier version than 9.9, you should first upgrade to 9.9 with the assistance of the appropriate Upgrade Guide, before upgrading to v9.13.

Upgrade the Altify Core Package

To upgrade the Altify core package to the latest version:

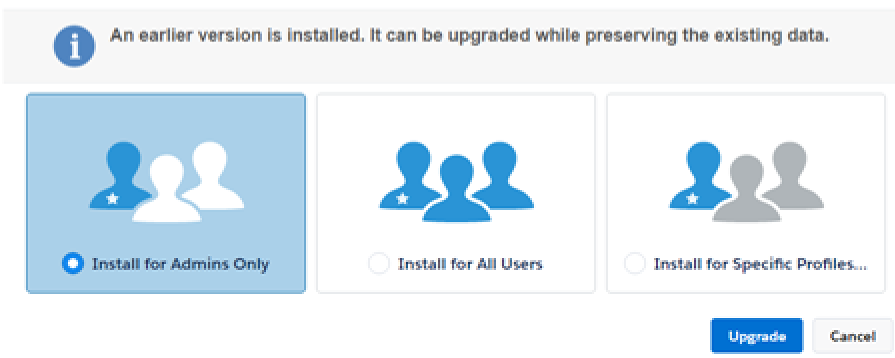
1. Log into Salesforce.com with your administration username and password.
2. Copy the package URL into your browser's address field.

   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:

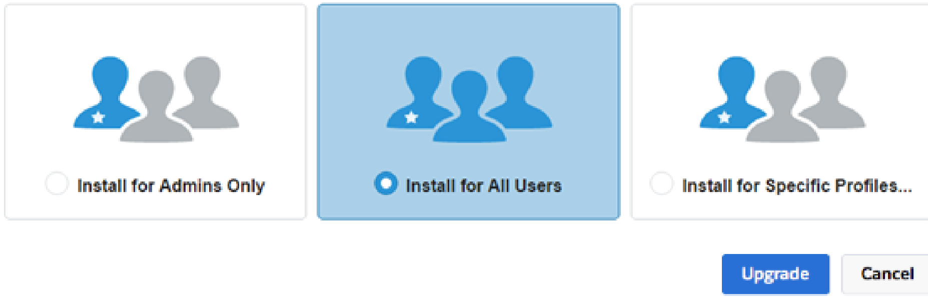
1. Ensure that **Files Connect** is enabled in your org. The extension app can't install otherwise.

   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 service. (Typically, you would do this for GDPR reasons.)

Refreshing the Altify Permission Set

Following the upgrade, you must refresh the Altify Permission Set.

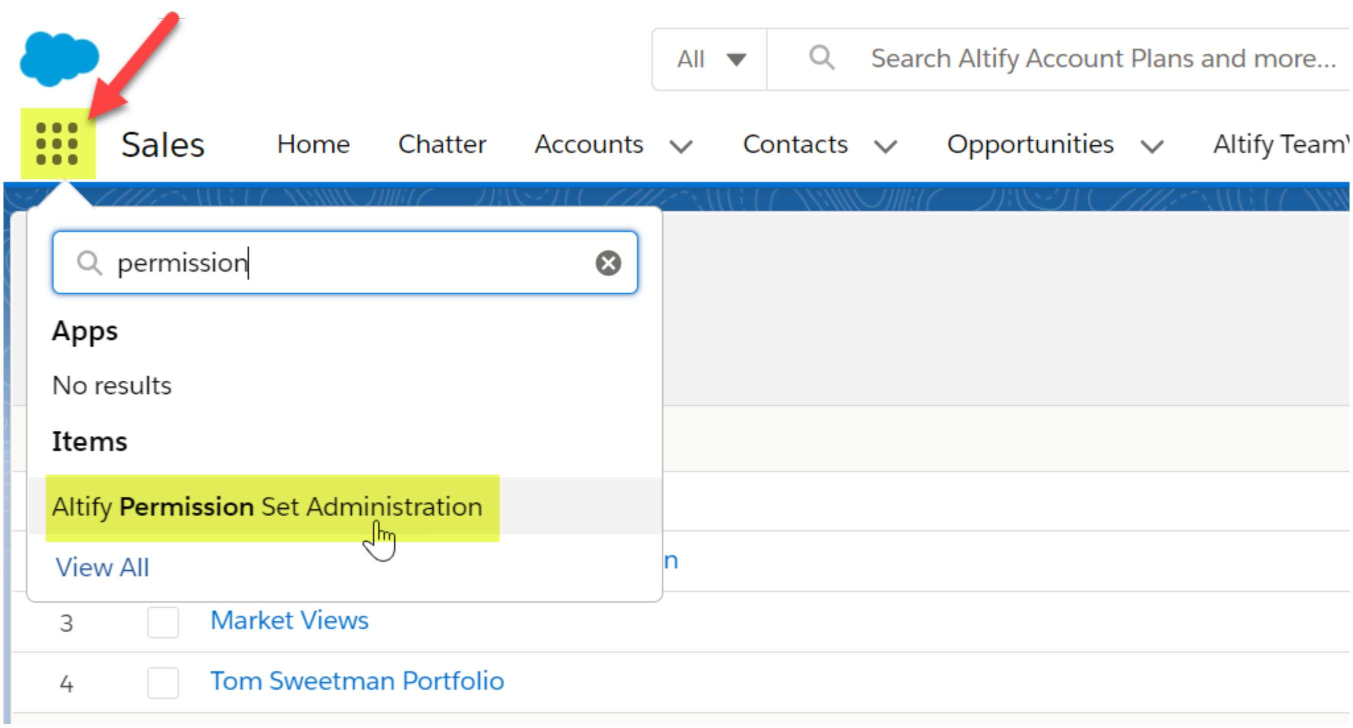
> **Note:** We recommend that you do not make changes to the Altify Permission Set. However, if you have made changes, these will need to be reapplied after completing the following steps (as any edits are lost when the permission set is refreshed).

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)

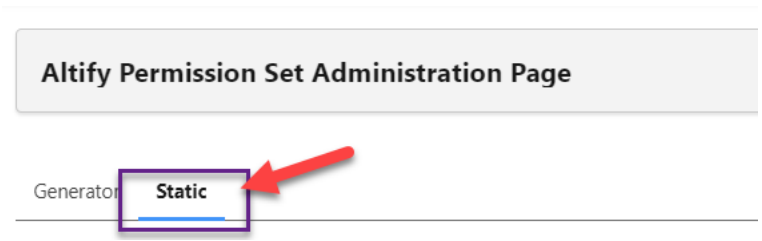
Altify strongly recommends that you perform this task in a sandbox environment before deploying a change set to your production org.

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

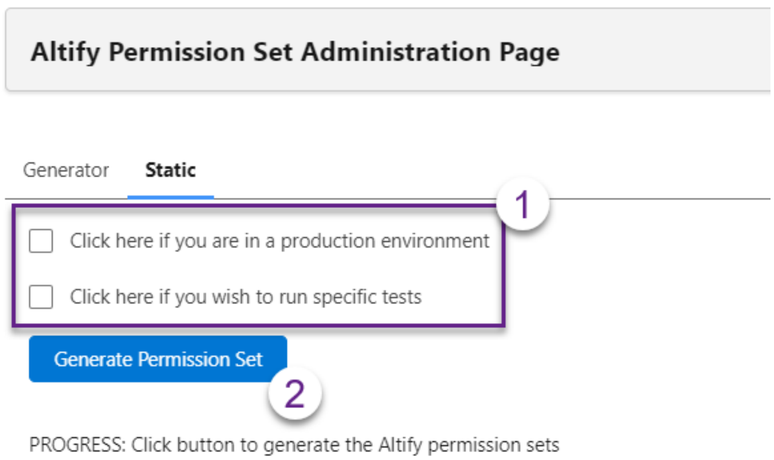


   (In Classic mode, click the **All Tabs** button and select **Altify Permission Set Administration** in the displayed list.)

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



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



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

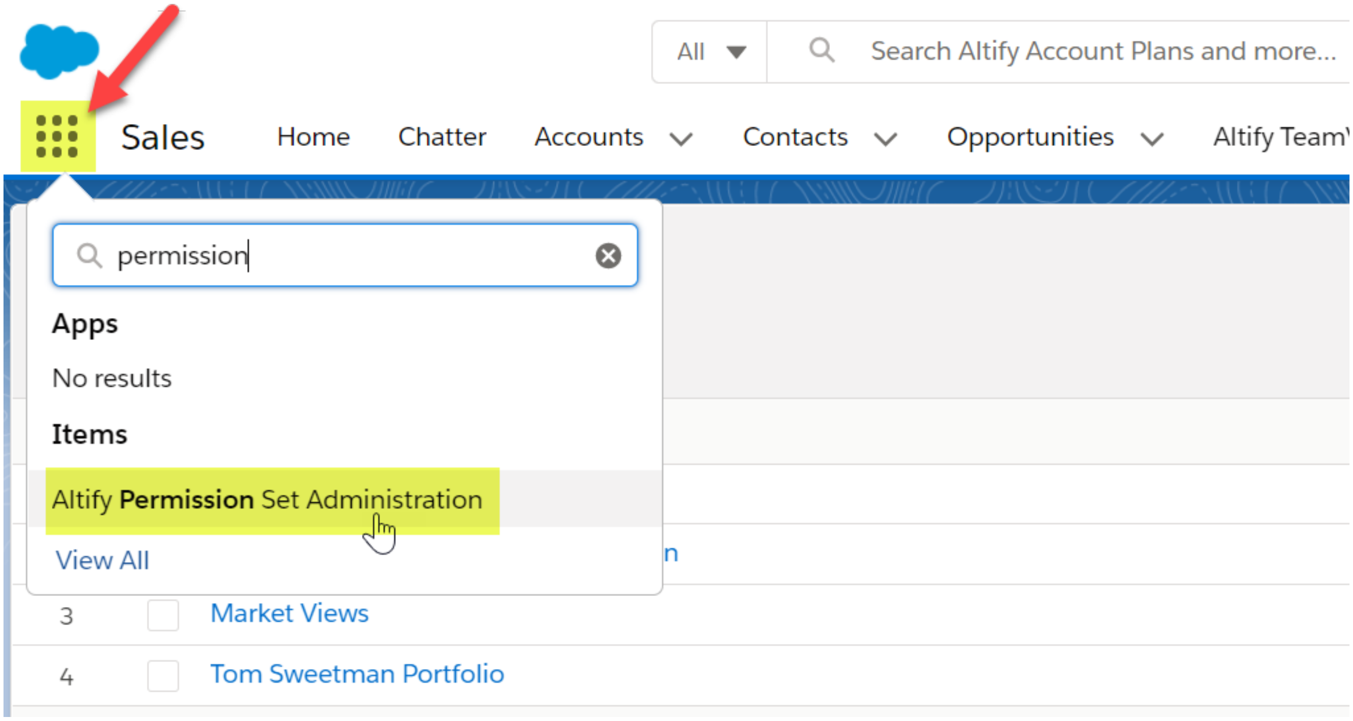
Caution: The create/update process can take a few minutes. Don't browse away from the page while the refresh is in progress.

4. Deploy the change set into your production org. For assistance, please see the Salesforce Help.

Refreshing directly in production org (not recommended)

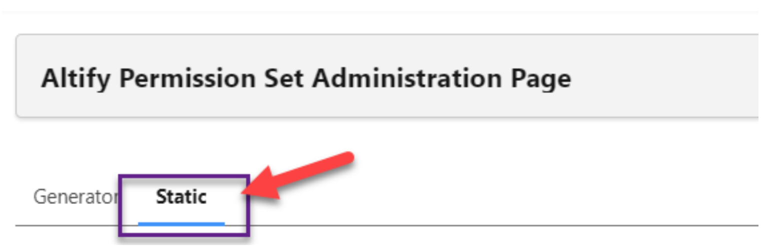
If you choose to refresh your permission set directly in your production org (i.e. not taking Altify's recommended approach described above), these are the steps you should take:

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

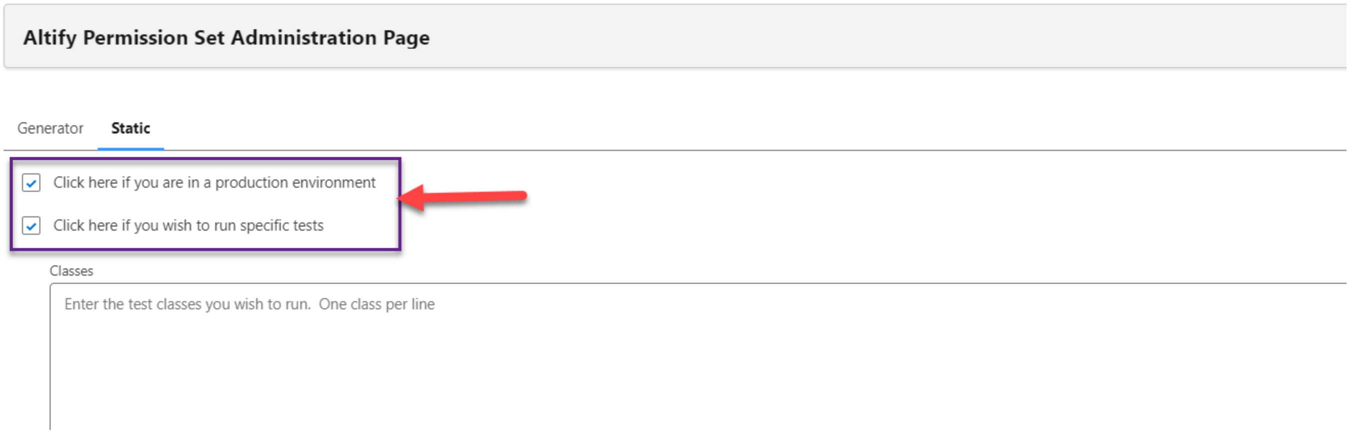


(In Classic mode, click the **All Tabs** button and select **Altify Permission Set Administration** in the displayed list.)

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**



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 Account Manager Settings

- Temp1 is now *Use SF Hierarchy Precedance*

Altify Opportunity Manager Settings

- Temp1 is now *Enable Prime Action Email Notification*

Altify Core Settings

- Temp1 is now *Opportunity dialogs respect page layout*
- Temp2 is now *Account dialogs respect page layout*

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).

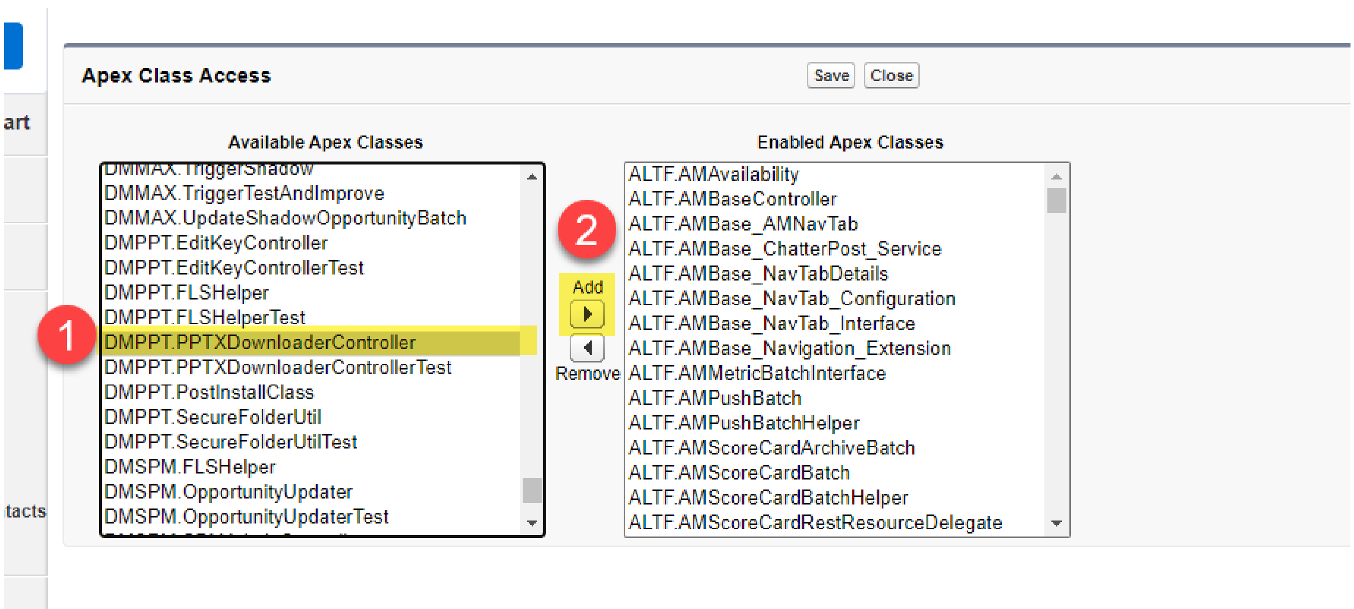
Enabling PowerPoint Export

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:

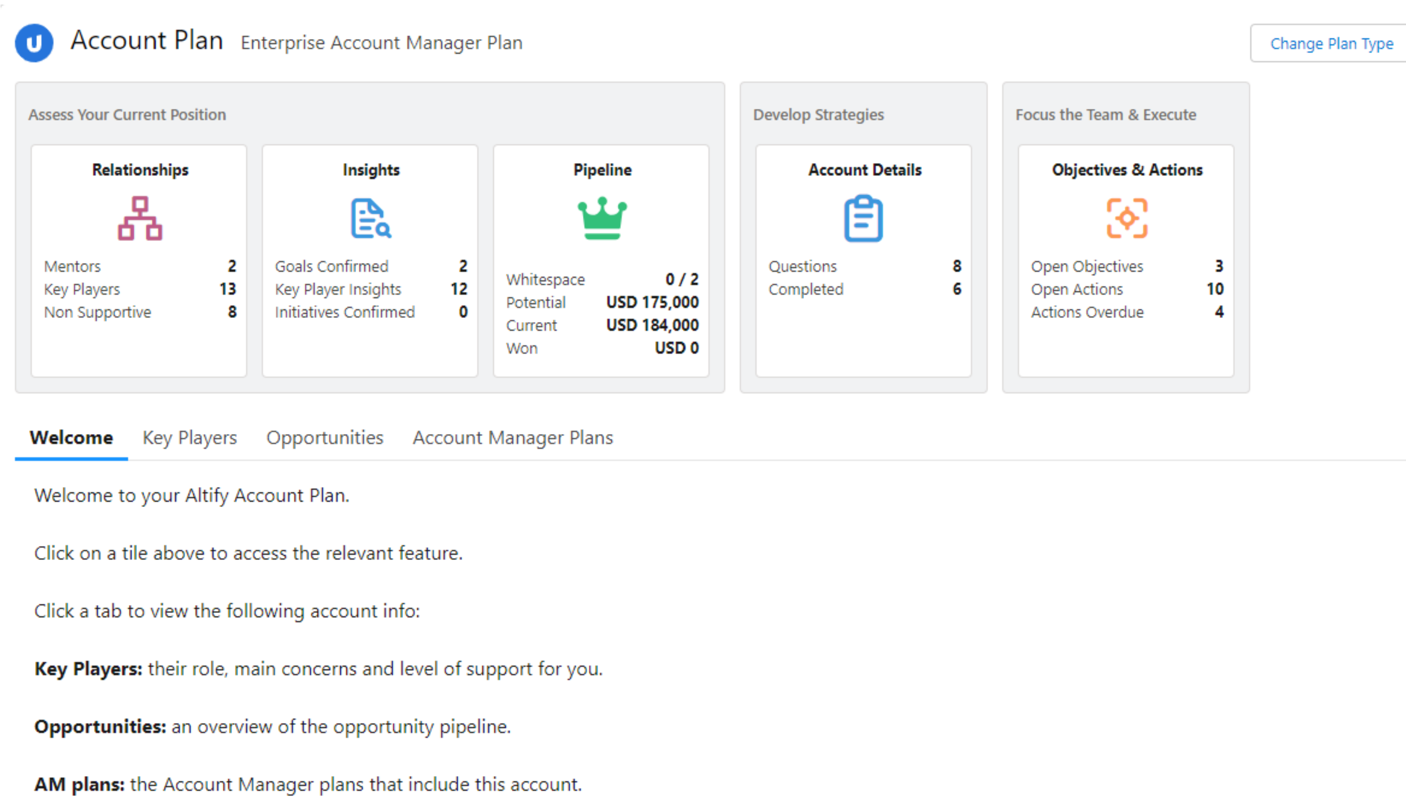
1. In **Setup**, go to **Permission Sets**.
2. Click **Altify Permission Set**.
3. Click **Apex Class Access** in the Apps section.
4. Click the **Edit** button in the Apex Class Access section.
5. Find and select **DMPPT.PPTXDownloaderController** in Available Apex Classes (**1**) and click **Add** (**2**) to move it to Enabled Apex Classes.



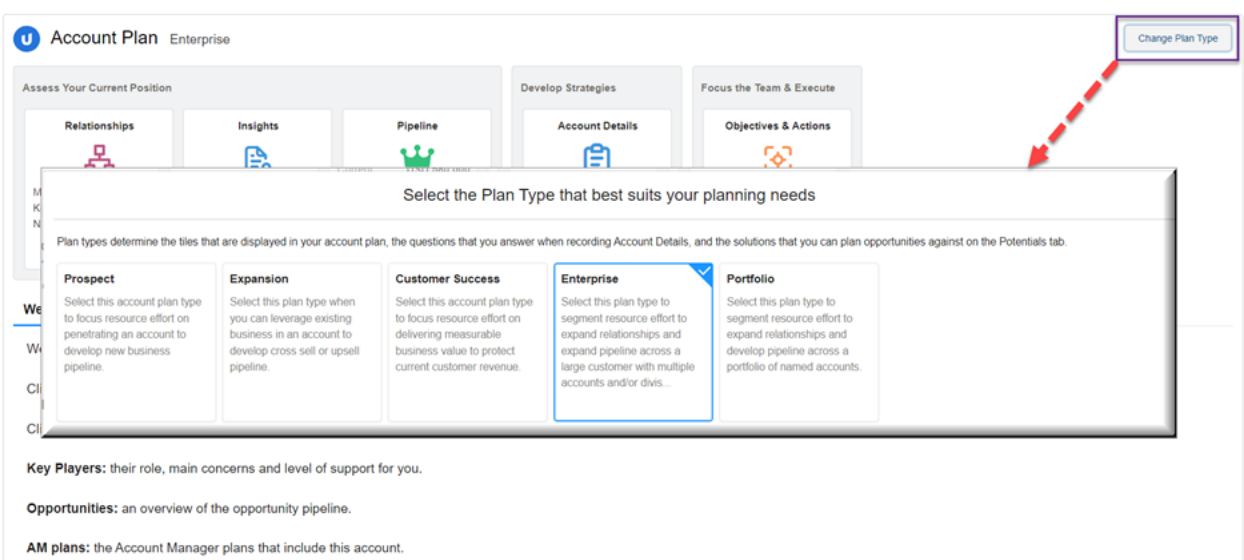
6. Click **Save**.

New Account Launchpad

Altify 9.12 introduced a revamped *Altify Account Plan* launchpad (shown below) that offers more high level account data and amalgamates the Altify Account Manager Plans and Altify Summary Launchpads.



Also introduced in Altify 9.12 are descriptions for plan types that your users can select via the new launchpad - as shown in the example below.



Upgrading Altify customers need to manually enter the descriptions for the default options pictured above, and for any custom plan types that currently exist in their org.

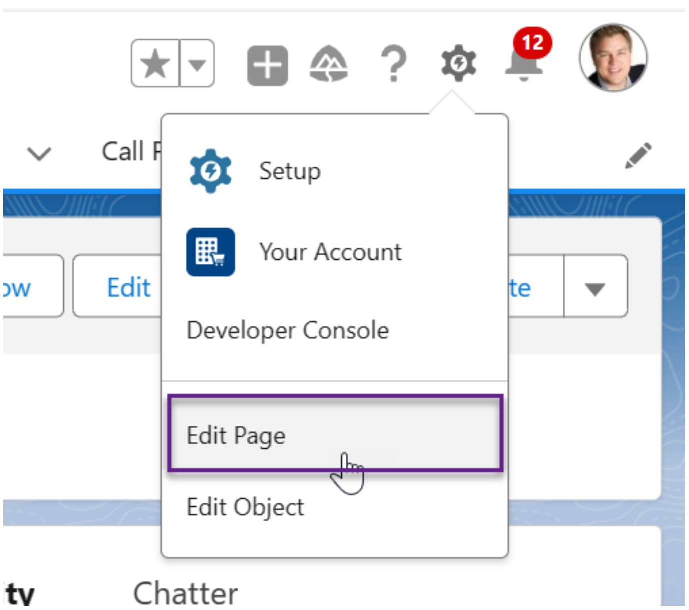
To configure your Salesforce Account records to accommodate the new launchpad, do the following:.

1. Remove the Altify Account Manager Plans and Altify Summary launchpads (as they are no longer required) and expand the Altify Account Plan launchpad to accommodate the new functionality. Guidance is provided for doing this task using Lightning App Builder and using page layouts.
2. Populate the Altify AM Plan Type descriptions.

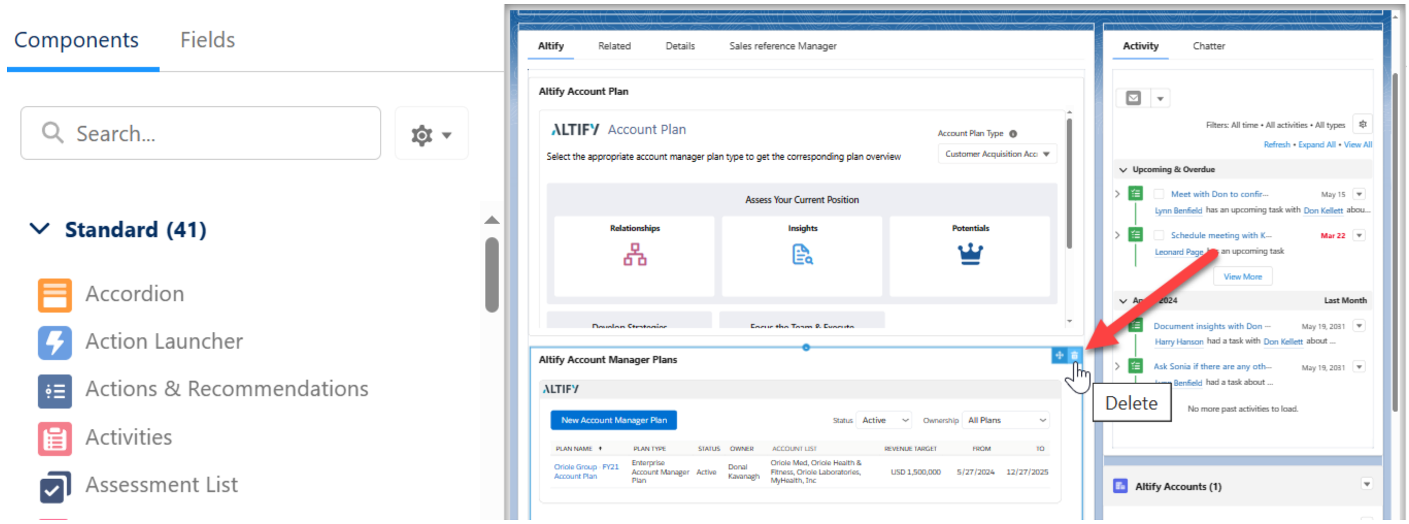
Removing the superfluous launchpads and expanding the Account Plan launchpad

To remove the superfluous launchpads and increase the size of the remaining launchpad 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**.



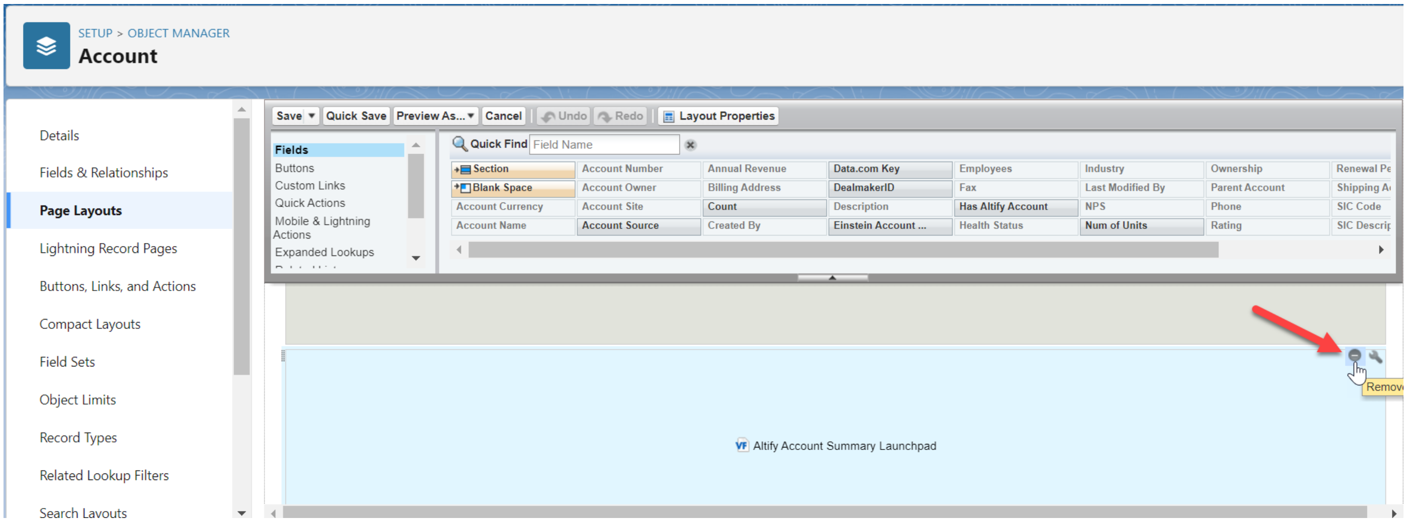
2. In the Lightning App Builder, select the **Altify** tab (or whichever tab that displays the launchpads) and click the **Delete** icon (as indicated below) for the following components:
   - Altify Account Manager Plans
   - Altify Summary Launchpad



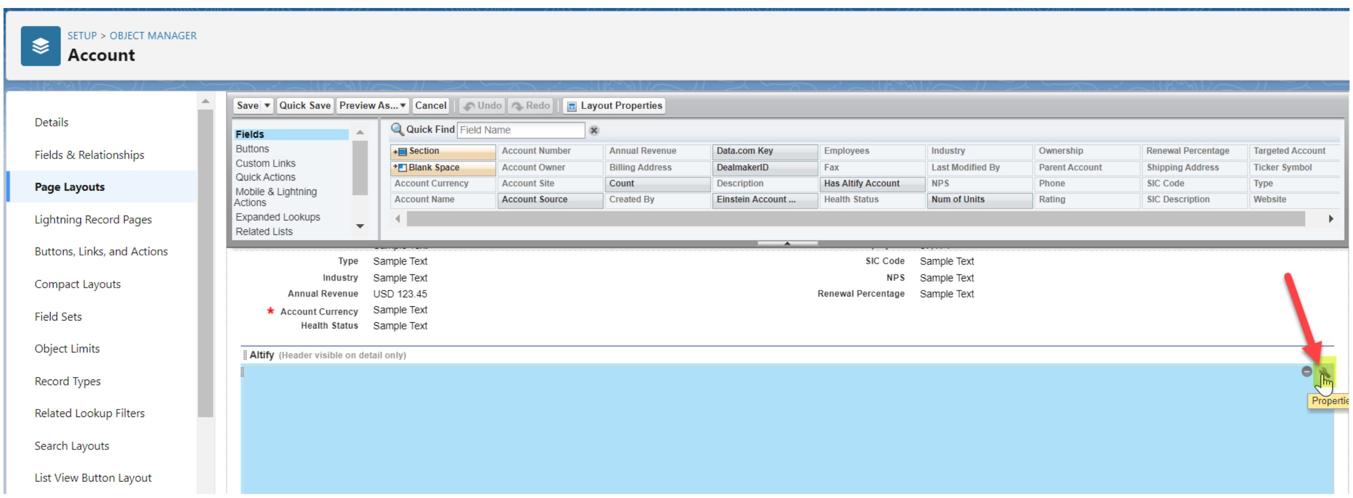
3. Next, click the remaining launchpad ('Altify Account Manager' Visualforce component) and enter a **Height (in pixels)** of '850' in the panel on the right.
4. Click the **Save** button.

To remove the superfluous launchpads and increase the size of the remaining launchpad 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 launchpads:
   - Altify Account Manager Plans
   - 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**.

Populating plan type descriptions

These descriptions will provide guidance to your users when they are selecting a plan type for their account plan.

1. In the App Launcher, select the item **Altify AM Plan Types**.
2. Click on the plan type 'Customer Success' to open it.
3. On the Altify AM Plan Type record, click the **Edit** button.
4. On the *Edit Customer Success* dialog, enter the following in the **Description** field:

```
Select this plan type to focus resource effort on delivering measurable
business value to protect current customer revenue.
```

> **Note:** the *Description* field may need to be added to the page layout.

5. Click **Save**.
6. Repeat steps 2-5 for each of the default plan types, entering the appropriate description in each case:
   - 'Enterprise'

     ```
     Select this plan type to segment resource effort to expand rela-
     tionships and expand pipeline across a large customer with multiple
     accounts and/or divisions, i.e. global, multi-national, or multi-
     regional customers, customers with multiple business units or lines of
     business.
     ```
   - 'Expansion'

     ```
     Select this plan type when you can leverage existing business in an
     account to develop cross sell or upsell pipeline.
     ```
   - 'Portfolio'

     ```
     Select this plan type to segment resource effort to expand rela-
     tionships and develop pipeline across a portfolio of named accounts.
     ```
   - 'Prospect'

     ```
     Select this plan type to focus resource effort on penetrating an
     account to develop new business pipeline.
     ```
7. Repeat steps 2-5 for any custom plan types in your org - entering a useful description in each case.

Updating Page Layouts

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

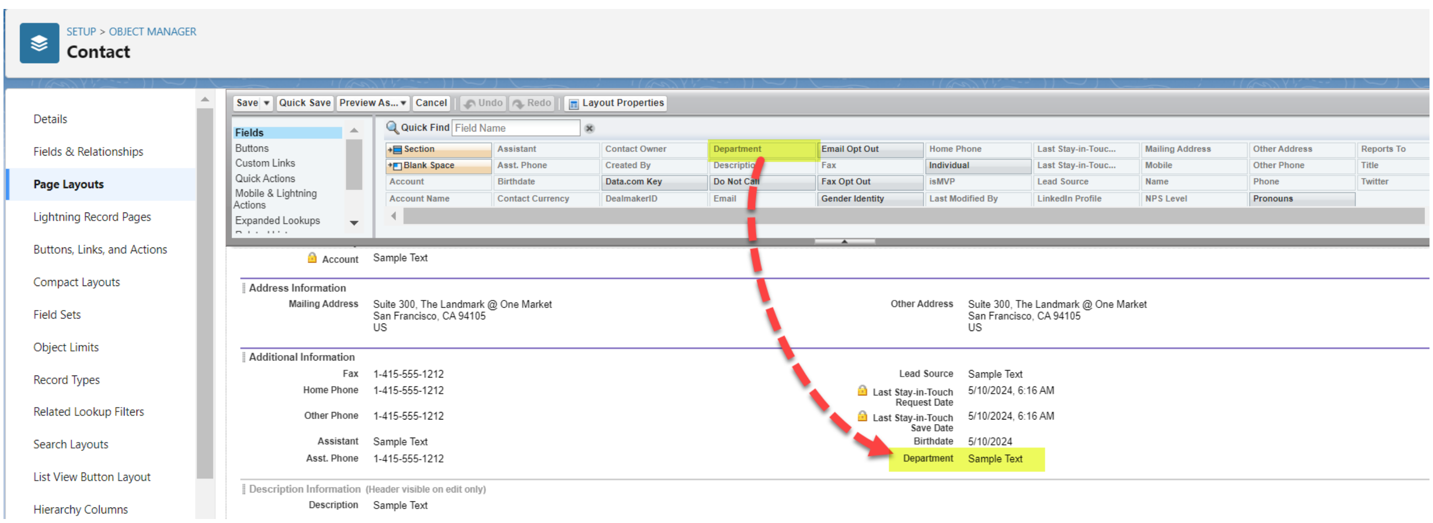
To access page layouts of an object, do the following (in Lightning mode):

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.

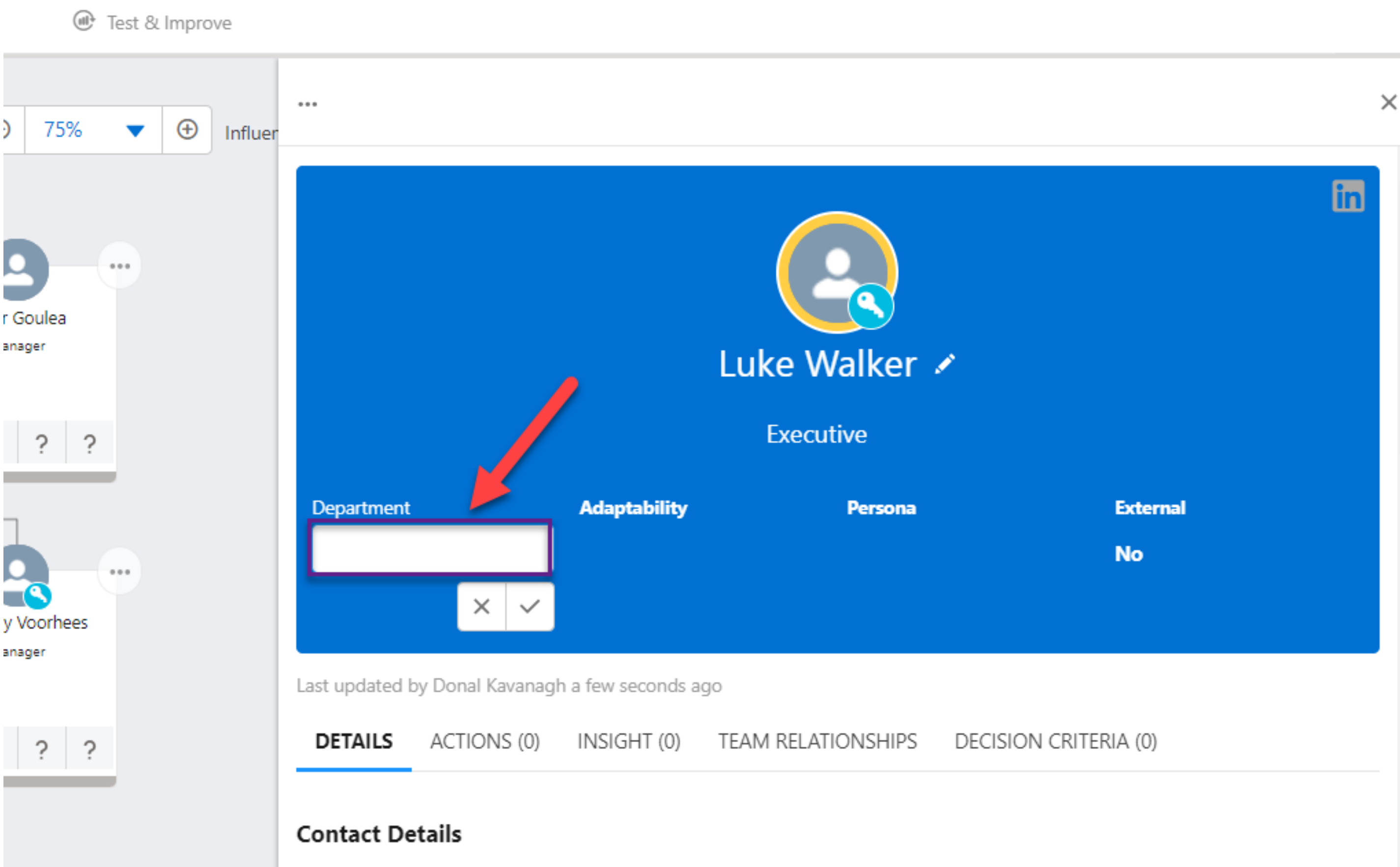
Salesforce Contact [for Relationship Maps]

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%
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Luke Walker
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Department
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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

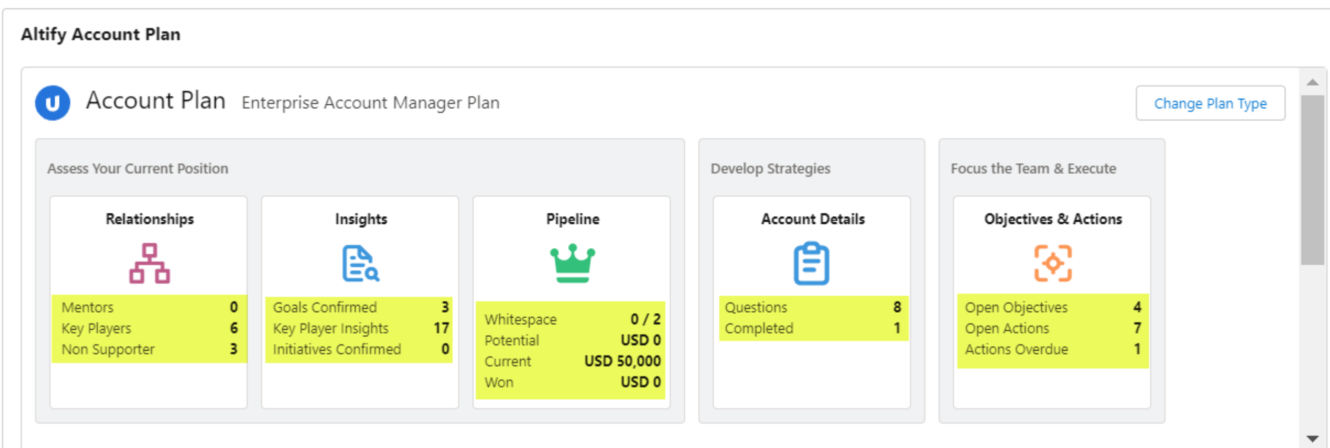
Following your upgrade of Altify, you can do the following to perform a quick sanity check of the product:

Updated fields on page layouts

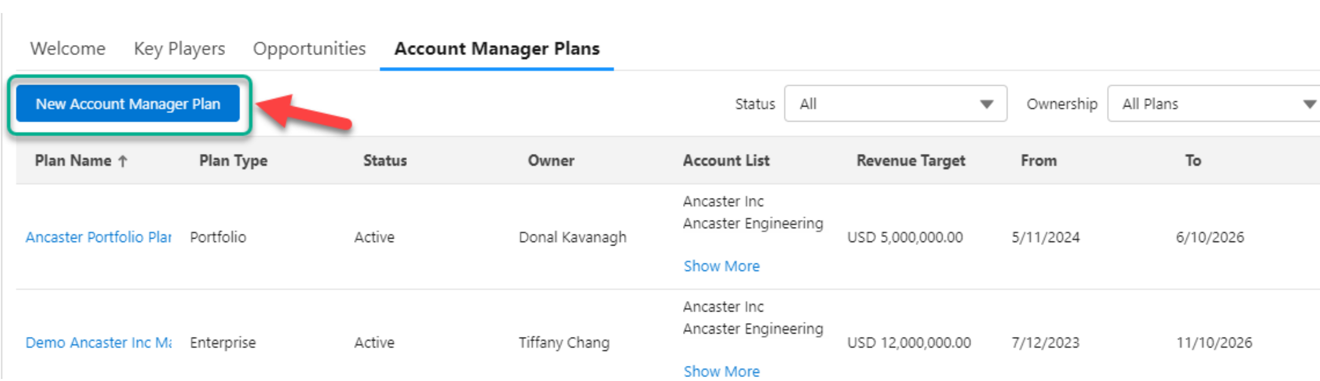
Revisit the section "Updating Page Layouts" on page 16 and confirm that all relevant fields (you can ignore launch-pads for the moment) are added or removed from page layouts as directed.

Account Plan launchpad and functions

1. Create a test account record and ensure the *Altify Account Plan* 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 Account Plan* launchpad: relationships, insights, account details and objectives and check to see that your test data is displayed correctly on the launchpad (as highlighted in the example below).



4. Create a simple Account Manager plan, using your test account, via the *Altify Account Plan* launchpad (as shown below).

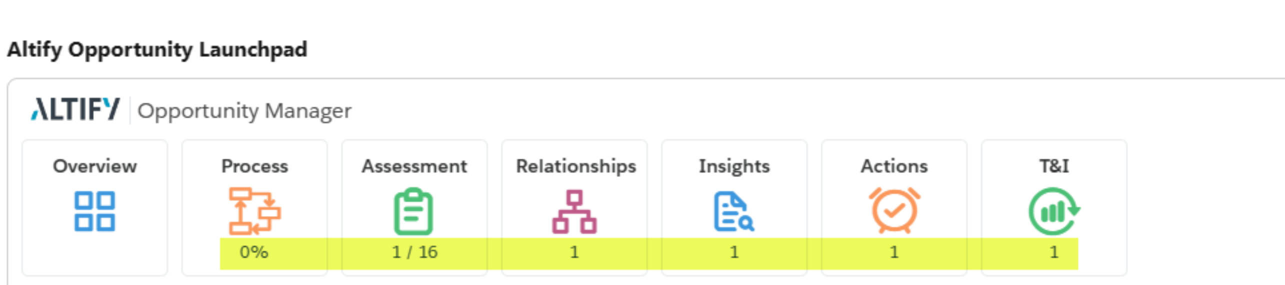


Follow the setup wizard and enter data as desired. It's best if you have a test Altify Solution set up prior to commencing this step.

5. Check to see that the account details you entered for the account plan are displayed on the Plan Details tab (under Row Details).
6. Add further test data (Plan Details and Objectives) to your Account Manager plan.
7. Create and import a current opportunity for your test account on the opportunity map of the Account Manager plan.
8. Schedule a test T&I for the Account Manager plan, inviting at least two participants and checking to see that their emailed invitations were received.
9. If you have installed our Altify Output Extension app, test the output by exporting the Account Manager Plan.

Opportunity Manager launchpads and functions

1. Create a test opportunity record and ensure the Altify launchpads are displaying correctly:
    - *Altify Opportunity Plan Launchpad*
    - *Altify Opportunity Relationships & Insight Map Launchpad*
    - *Altify Sales Process Launchpad*
    - *Altify Max Insight Panel*
2. Click each tile, button and link on the launchpads to ensure the pages load successfully.
3. Create some simple test data for actions, insight map and relationship map for the opportunity.
4. Create some simple test data for assessment (including decision criteria on specific assessment questions).
5. Schedule a test T&I for the opportunity, inviting at least two participants and checking to see that their emailed invitations were received.
6. Check to see that the test data you have entered is reflected on the *Altify Opportunity Plan Launchpad* - as shown in the example below:



7. If you have installed our Altify Output Extension app, test the output by exporting the opportunity.

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.