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.

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Since the policies are defined by you, the customer, Altify code cannot be tested against them and we therefore do not support restriction 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 Activity 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.

Encrypted fields

A SOQL query fails when there is an encrypted field in the 'WHERE' or 'ORDER BY' clause. In Altify software, this means that a search using a field that has been encrypted would normally fail. To avoid this problem, you can set your Altify software to Salesforce Shield-Enabled mode. Click on the relevant link below to see the fields that remain searchable even when they are encrypted using Salesforce Shield:

- Opportunity Manager
- Opportunity Manager
- Account Manager

Fields accessed by Altify

The following standard Salesforce fields are accessed by Altify:

Object	Fields (API names)
Account	Id, Name, ParentId, Owner, LastModifiedDate, UserRecordAccess

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Object	Fields (API names)
Attachment	Id, ParentId, Name, ContentType
CollaborationGroup	Id, Name, CollaborationType
CollaborationGroupMember	memberId, CollaborationGroupId
Contact	Id, Name, Account, Department, Email, MobilePhone, Title, phone, ReportsTo, Owner, LastModifiedBy, LastModifiedDate, UserRecordAccess
ContentDocumentLink	Id, ContentDocumentId, LinkedEntityId, ShareType, Visibility
ContentVersion	ContentDocumentId, FileType, Id, Title,FileExtension
CurrencyType	id, IsoCode, ConversionRate, IsCorporate, isActive
DatedConversionRate	IsoCode, StartDate, NextStartDate, ConversionRate
Document	Id, Name, Type, ContentType, Body, Keywords, folderId
FeedLikes	Id, CreatedById
GroupMember	id, memberId
Opportunity	Id, Account, Amount, CloseDate, CreatedDate, Probability, StageName, Type, Owner, UserRecordAccess, CurrencyISOCode [in Multi-currency org]
OpportunityCompetitor	CompetitorName, Strengths, Weaknesses, OpportunityId
OpportunityContactRole	id, contactid, opportunityid
OpportunityLineItem	Id, Name, OpportunityId, Product2, TotalPrice
OpportunityStage	id, MasterLabel, SortOrder
Organization	FiscalYearStartMonth, UsesStartDateAsFiscalYearName
PermissionSet	id, Name, Label
PermissionSetAssignment	PermissionSetId, AssigneeId
PermissionSetTabSetting	Id, Name, ParentId, Visibility
Product	Id, Name
Profile	Id, Name
Report	Id, Name, OwnerId, IsDeleted
Task	Id, ActivityDate, Description, Owner, Priority, Status, Subject, WhoId, WhatId, UserRecordAccess, LastModifiedDate, UserRecordAccess
Topic	Id, Name
User	Id, Name, email, isActive, Title, IsProfilePhotoActive, SmallPhotoUrl, FullPhotoUrl, LanguageLocaleKey, LocaleSidKey, TimeZoneSidKey, Manager, UserType
UserLicense	id, name
UserPreference	Id, Preference, UserId, Value
UserRecordAccess	UserId, RecordId, HasReadAccess, HasEditAccess, HasDeleteAccess
UserRole	Id, ParentRoleId

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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.

Sandbox support

Altify only supports full copy sandbox orgs. We do not support partial copy sandboxes because they do not guarantee the integrity of the data used by the Altify package - which can lead to errors in the application.

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* in the Altify online help.

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