



Altify SDO Setup

September 2025





Quick Links

- For Reference:
 - [Altify Relationship Map AppExchange](#)
 - [Altify Relationship Map SDO landing page](#)
 - Installation Instructions:
 1. [Altify Core Installation Package](#)
 2. [Relationship Map License Package](#)
 3. [Altify SDO Configuration Package](#)
- [Password: asH82Bfs7F%](#) (Highlight needs URL and verified)



How to Install Altify SDO

Step 1: Install Altify SDO



Install Altify SDO

By Altify SDO



Installing and granting access to admins Only...

App Name	Publisher	Version Name	Version Number
Altify SDO	Altify SDO	Altify SDO	1.25

Additional Details [View Components](#)



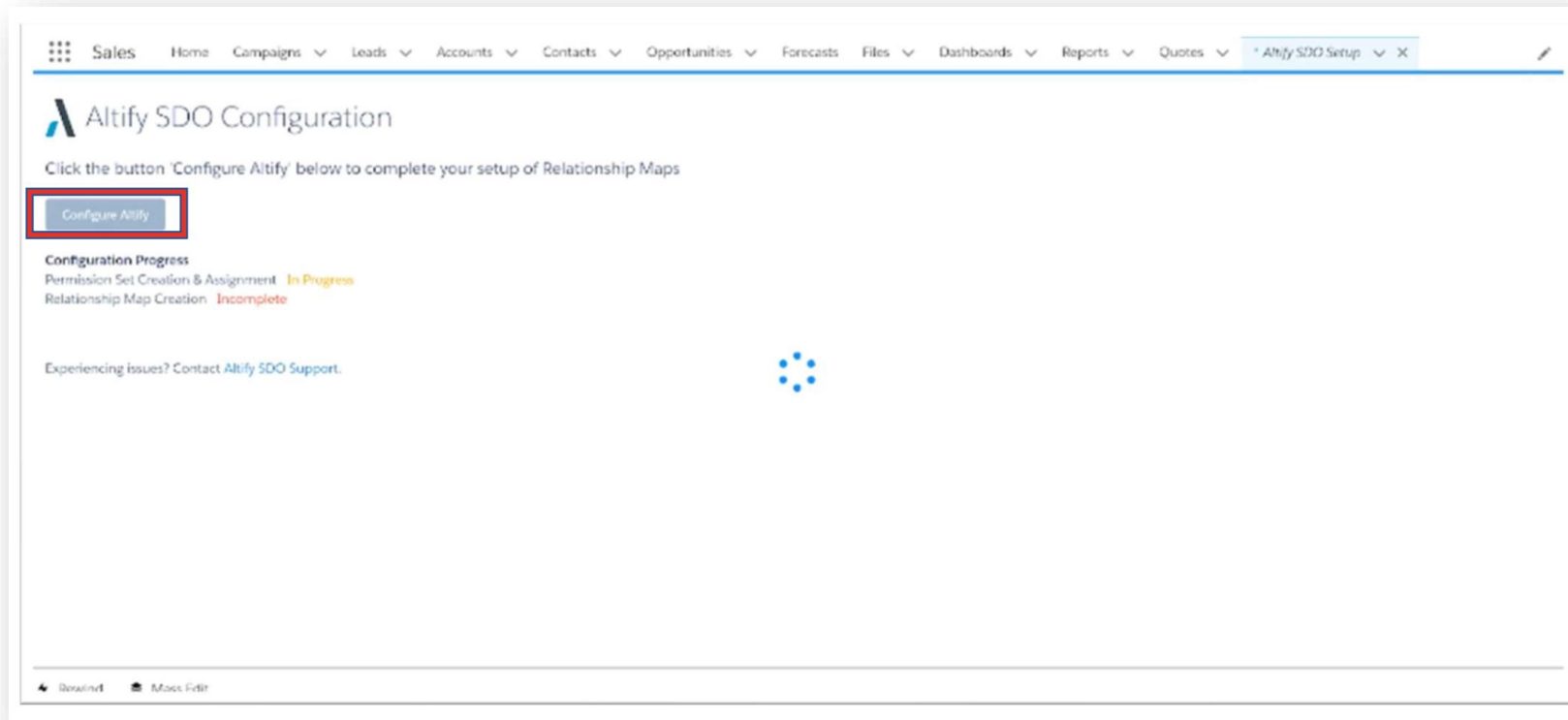
Step 2: Look up “Altify SDO Setup”

The screenshot shows the Salesforce Setup interface. In the top left, the 'Setup' tab is selected. A search bar is highlighted with a red box, containing the text 'Altify SDO Setup'. Below the search bar, a dropdown menu is open, showing 'Apps' with 'No results' and 'Items' with 'Altify SDO Setup' selected. The main content area displays a table of installed packages. The table has columns for Name, Version, Edition, Status, and Last Updated. The 'Altify SDO' package is highlighted in blue.

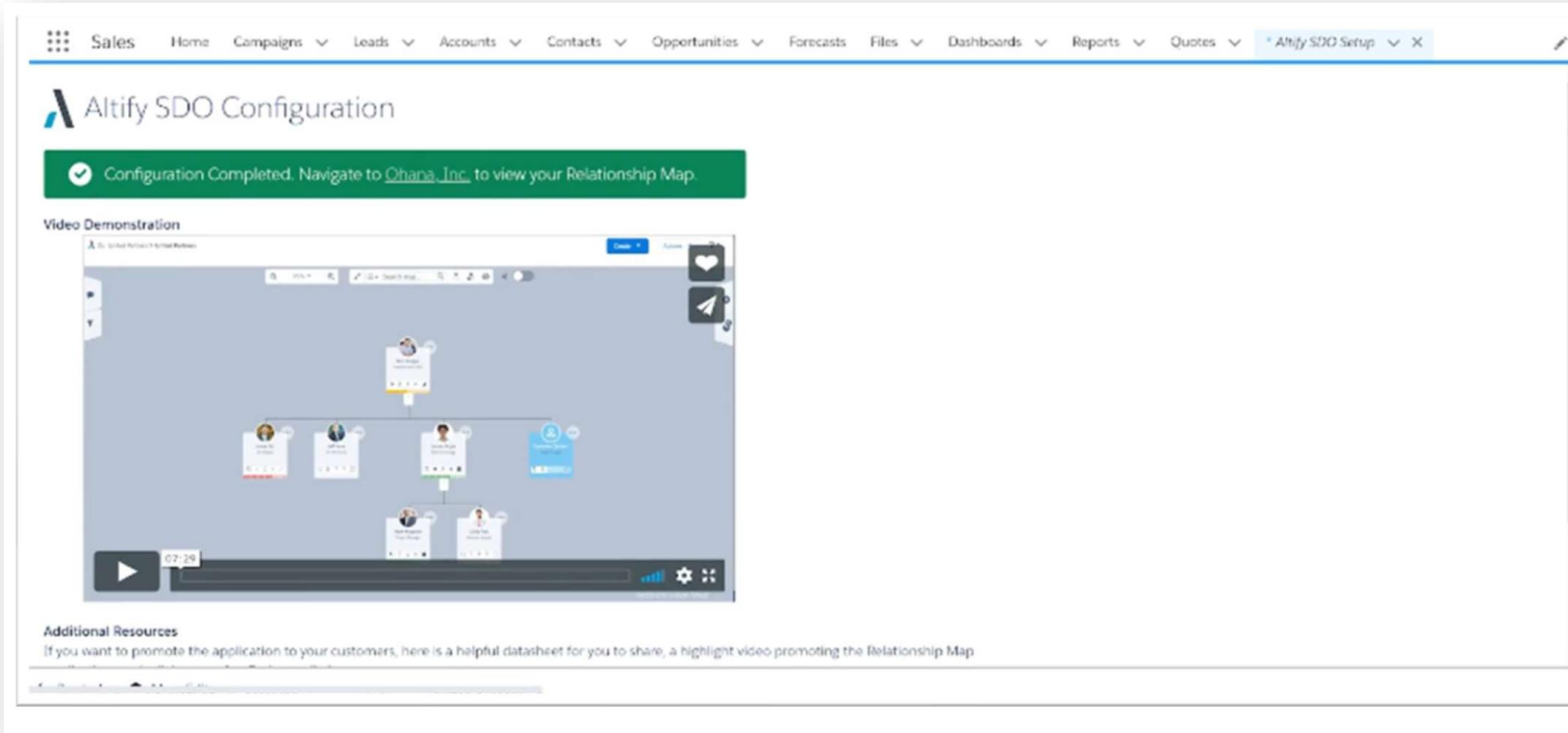
Name	Version	Edition	Status	Last Updated
Case Timer	1.7	Free	N/A	6/8/2020, 1:06 PM
SDO Updates	1.4	N/A	N/A	6/8/2020, 1:06 PM
Altify Relationship Map	2.5	CMAPP_PMX	Trial	7/15/2020, 8:27 AM
Altify SDO	1.25	ALTIFYSDO	Active	6/8/2020, 5:39 AM
Altify Quality Index Lightning Managed	1.7	Free	N/A	6/8/2020, 1:06 PM
Org Customizer	1.5	Free	N/A	6/8/2020, 1:06 PM
Salesforce CPQ	224.8	Trial	99000000	6/8/2020, 1:06 PM
Advanced Services	224.5	Trial	99000000	6/8/2020, 1:06 PM



Step 3: Configure Altify – Progress will show when ‘Complete’ in Green



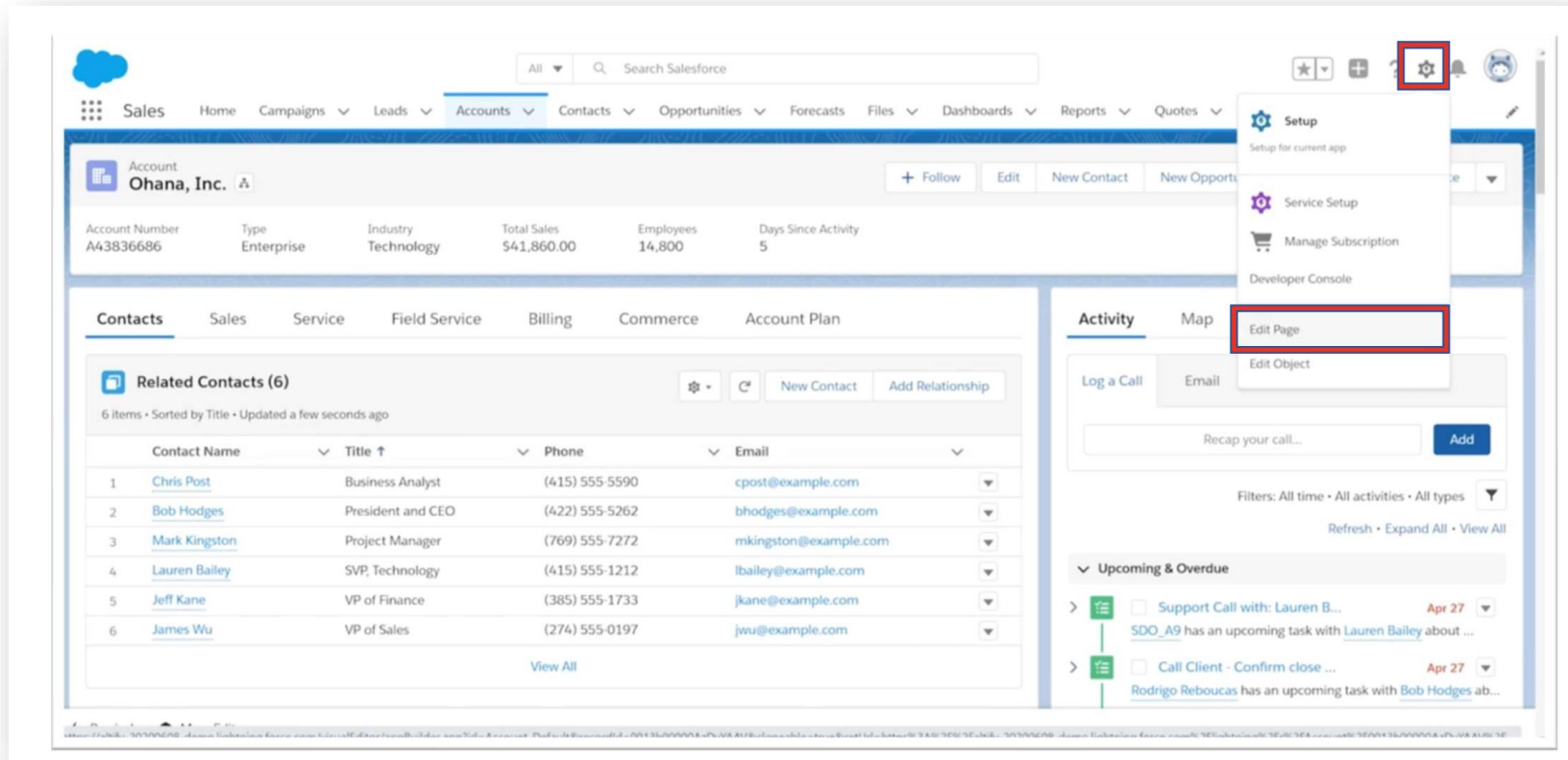
Step 4: Configuration Complete



The screenshot displays the Altify SDO Configuration interface. At the top, a navigation bar includes links for Sales, Home, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Files, Dashboards, Reports, Quotes, and Altify SDO Setup. A green banner with a checkmark icon and the text "Configuration Completed. Navigate to [Ohana, Inc.](#) to view your Relationship Map." is prominently displayed. Below this, a "Video Demonstration" section features a video player showing a hierarchical Relationship Map. The map illustrates a network of entities, with a central node at the top connected to several sub-nodes below it. The video player includes a play button, a progress bar, and a timestamp of 02:29. At the bottom, an "Additional Resources" section provides a link to a helpful datasheet for sharing and a highlight video promoting the Relationship Map.



Step 5: Go to an Account. On the top right, click “Setup” and “Edit Page”



The screenshot shows the Salesforce interface for an Account named "Ohana, Inc.". The top navigation bar includes tabs for Sales, Home, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Files, Dashboards, Reports, and Quotes. The "Accounts" tab is selected. The account details for "Ohana, Inc." are displayed, including Account Number A43836686, Type Enterprise, Industry Technology, Total Sales \$41,860.00, Employees 14,800, and Days Since Activity 5. Below the account details, there are tabs for Contacts, Sales, Service, Field Service, Billing, Commerce, and Account Plan. The "Contacts" tab is selected, showing a list of 6 related contacts. The right sidebar contains the "Activity" section with tabs for Log a Call, Map, and Email. The "Setup" menu is open in the top right corner, and the "Edit Page" option is highlighted.

Account: Ohana, Inc.

Account Number: A43836686 | Type: Enterprise | Industry: Technology | Total Sales: \$41,860.00 | Employees: 14,800 | Days Since Activity: 5

Contacts | Sales | Service | Field Service | Billing | Commerce | Account Plan

Related Contacts (6)

Contact Name	Title	Phone	Email
Chris Post	Business Analyst	(415) 555-5590	cpost@example.com
Bob Hodges	President and CEO	(422) 555-5262	bhodges@example.com
Mark Kingston	Project Manager	(769) 555-7272	mkingston@example.com
Lauren Bailey	SVP, Technology	(415) 555-1212	lbailey@example.com
Jeff Kane	VP of Finance	(385) 555-1733	jkane@example.com
James Wu	VP of Sales	(274) 555-0197	jwu@example.com

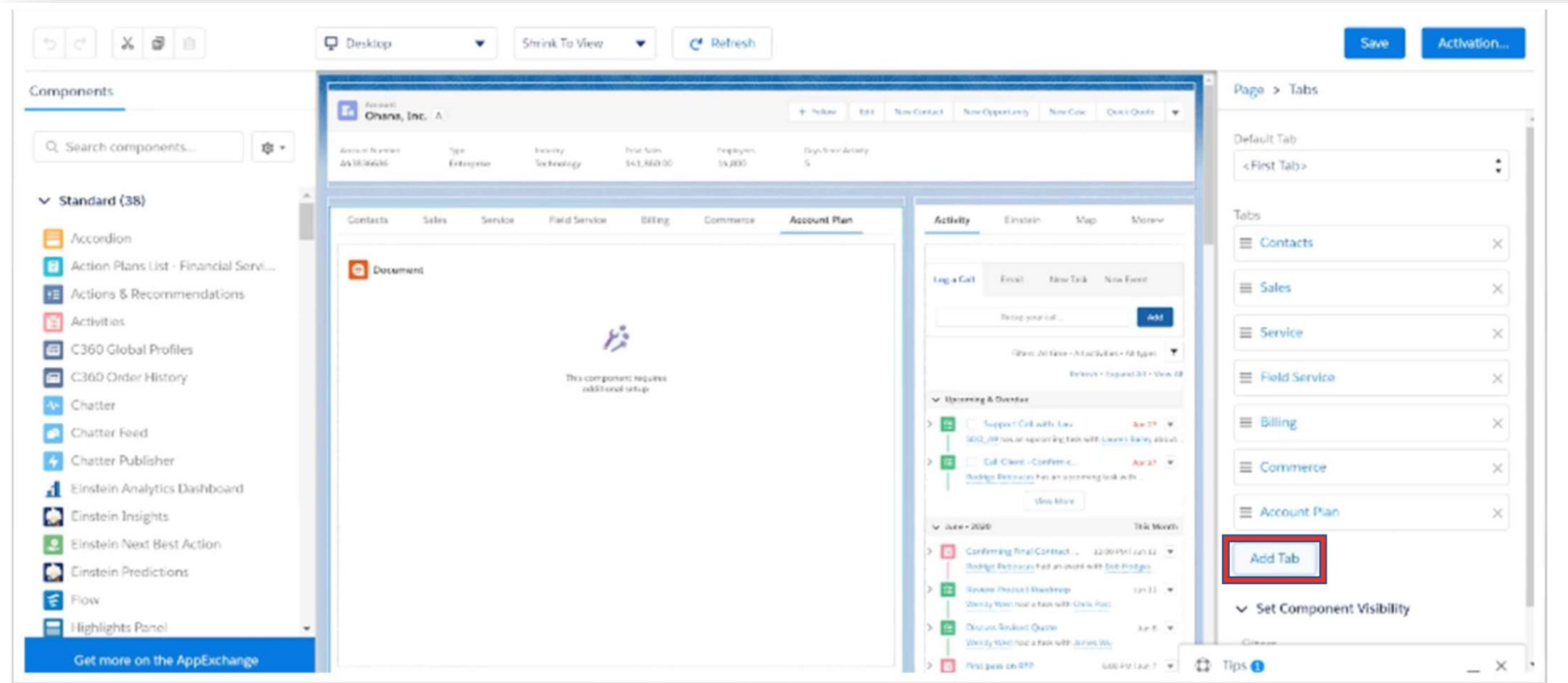
Activity | Map | Email

Upcoming & Overdue

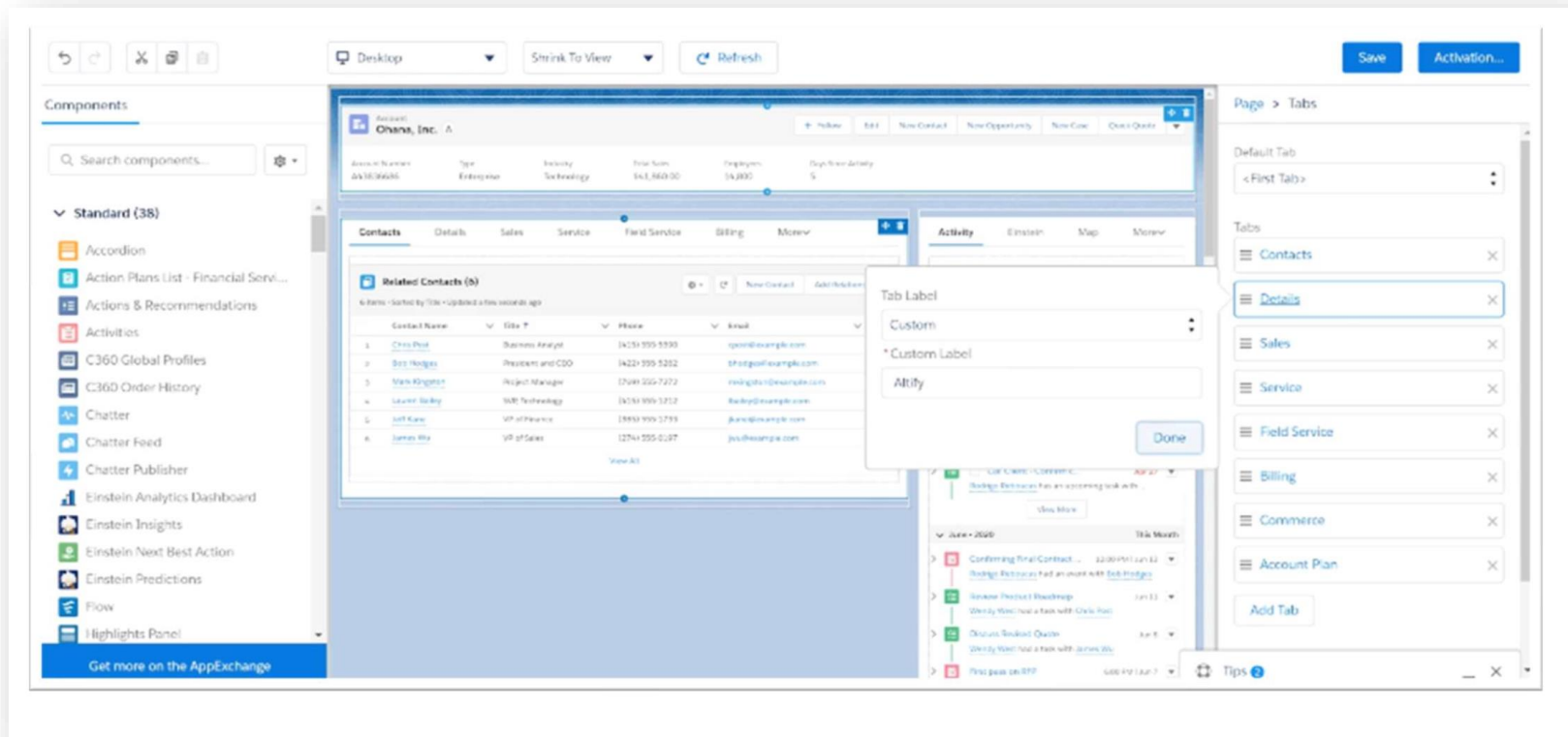
- Support Call with: Lauren B... Apr 27
- SDO_A9 has an upcoming task with Lauren Bailey about ...
- Call Client - Confirm close ... Apr 27
- Rodrigo Reboucas has an upcoming task with Bob Hodges ab...



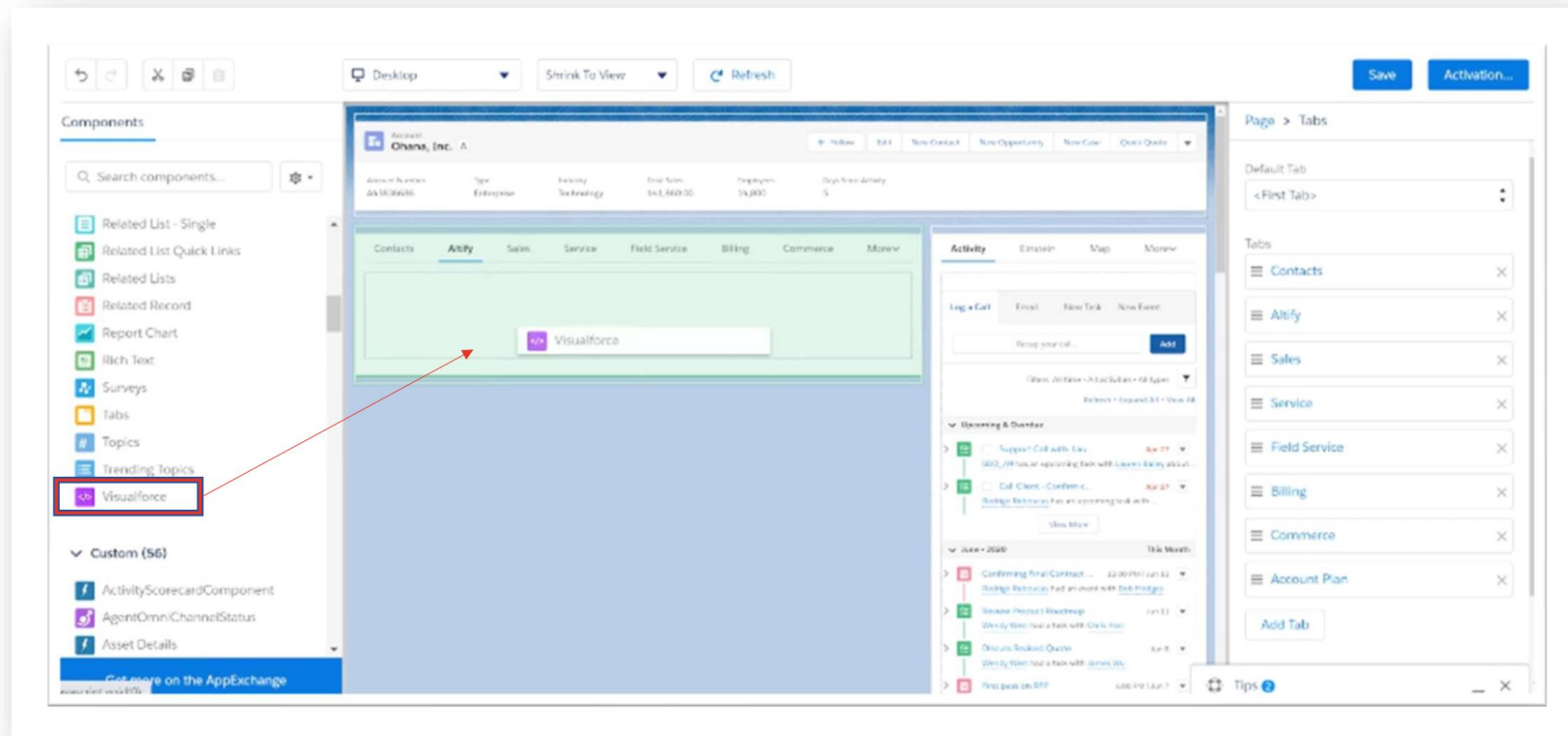
Step 6: On the right, you'll see Page > Tabs. Scroll down to "Add Tab"



Step 7: New Tab title will default to “Details”. Rename to “Altify”



Step 8: On the left under “Components”, Drag and Drop “Visualforce”



Step 9: On the right, you'll see Page > Visualforce. Rename Label & Page Name

Components

Search components...

Related List - Single

Related List Quick Links

Related Lists

Related Record

Report Chart

Rich Text

Surveys

Tabs

Topics

Trending Topics

Visualforce

Custom (56)

ActivityScorecardComponent

AgentOmniChannelStatus

Asset Details

Get more on the AppExchange

Desktop

Shrink To View

Refresh

Changes saved

Save

Activation...

Page > Visualforce

☒ Show Label

Label

Altify Relationship Map

* Visualforce Page Name

Altify Account Summary Launchpad

Height (in pixels)

300

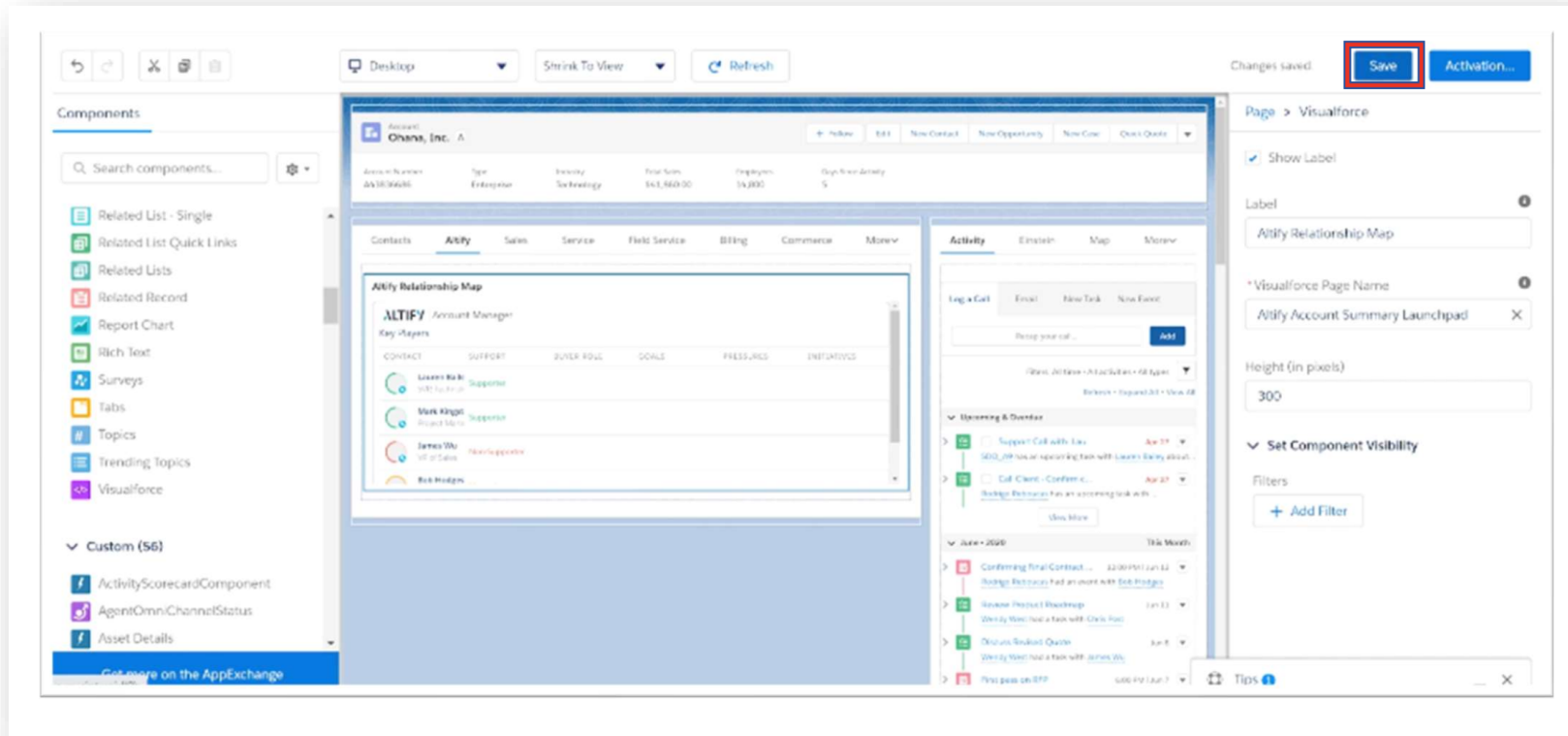
Set Component Visibility

Filters

+ Add Filter



Step 10: Hit “Save”



Step 11: Your Account should now have “Altify Relationship Map” appear

The screenshot displays the Altify Relationship Map for the account "Ohana, Inc.". The interface includes a top navigation bar with tabs for Sales, Home, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Files, Dashboards, Reports, and Quotes. Below this, a sub-navigation bar shows tabs for Contacts, Altify (selected), Sales, Service, Field Service, Billing, Commerce, and Account Plan. The main content area is divided into two sections. The left section, titled "Altify Relationship Map", features a table of key players. The right section, titled "Activity", includes a "Log a Call" form and a list of upcoming and overdue tasks.

Altify Relationship Map

ALTIFY Account Manager

Key Players

CONTACT	SUPPORT	BUYER ROLE	GOALS	PRESSURES	INITIATIVES
Lauren Bailey SVP, Technology	Supporter				
Mark Kingstor Project Manager	Supporter				
James Wu VP of Sales	Non-Supporter				
Bob Hodges					

Activity

Log a Call | Email | New Task | New Event

Recap your call... **Add**

Filters: All time • All activities • All types **Filter**

Refresh • Expand All • View All

Upcoming & Overdue

- ☐ **Support Call with: Lauren B...** Apr 27
SDO A9 has an upcoming task with Lauren Bailey about ...
- ☐ **Call Client - Confirm close ...** Apr 27
Rodrigo Reboucas has an upcoming task with Bob Hodges ab...

View More

June • 2020 **This Month**





Next Steps

View demo guidance provided
on the Altify SDO Page (this needs
the URL)

ALTIFY