



Altify SDO Setup

September 2025





Quick Links

- For Reference:
 - [Altify Relationship Map AppExchange](#)
 - [Altify Relationship Map SDO landing page](#)
- Installation Instructions:
 - [Altify Core Installation Package](#)
 - [Relationship Map License Package](#)
 - [Altify SDO Configuration Package](#)

Password: asH82Bfs7F%



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. A search bar at the top left contains the text "Altify SDO Setup", which is highlighted with a red box. Below the search bar, a dropdown menu lists search results, with "Altify SDO Setup" selected. The main content area displays a table of installed packages. The table has columns for Name, Version, Status, and other details. The "Altify SDO" package is highlighted in blue, indicating it is selected. The table also shows other installed packages like "Case Times", "SDO Updates", "Dialmshcr", "Altify Relationship Map", "Active Quality Index Lightning Managed", "Org Customizer", "Salesforce CPQ", and "Advanced Services".

Name	Version	Status	Other Details
Case Times	1.7	Free	Case Time 19
SDO Updates	1.4	N/A	SDO Updates
Dialmshcr	8.35.46	Trial	CMAPP
Altify Relationship Map	2.5	Trial	CMAPP_PMX
Altify SDO	1.25	Active	ALTIFYSDO
Active Quality Index Lightning Managed	1.7	Free	eqi_lng_mng
Org Customizer	1.5	Free	EDY_ORGCUSTOM
Salesforce CPQ	224.8	Trial	99000000
Advanced Services	224.5	Trial	99000000



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

Sales Home Campaigns Leads Accounts Contacts Opportunities Forecasts Files Dashboards Reports Quotes Altify SDO Setup X

Altify SDO Configuration

Click the button 'Configure Altify' below to complete your setup of Relationship Maps

Configure Altify

Configuration Progress

- Permission Set Creation & Assignment **In Progress**
- Relationship Map Creation **Incomplete**

Experiencing issues? Contact Altify SDO Support.

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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 notification banner at the top center states: "Configuration Completed. Navigate to [Ohana, Inc.](#) to view your Relationship Map." Below this, a "Video Demonstration" section features a video player showing a hierarchical Relationship Map with nodes for individuals and organizations. The video player includes a play button, a progress bar at 02:29, and control icons. Underneath the video, an "Additional Resources" section provides a link to a helpful dataset for sharing with customers.



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

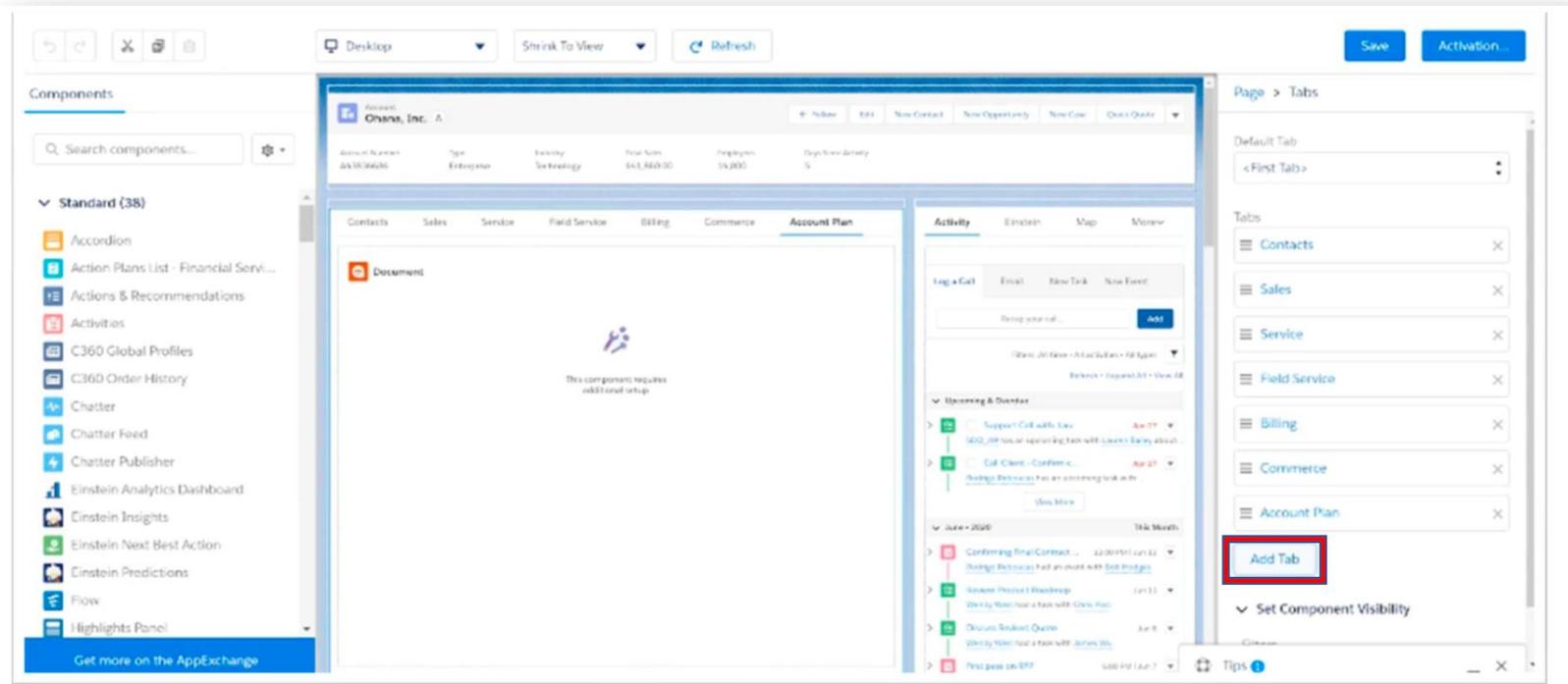
The screenshot shows the Salesforce interface for an Account named "Ohana, Inc.". The top navigation bar includes "Sales", "Home", "Campaigns", "Leads", "Accounts", "Contacts", "Opportunities", "Forecasts", "Files", "Dashboards", "Reports", and "Quotes". The account details section shows "Account Number A43836686", "Type Enterprise", "Industry Technology", "Total Sales \$41,860.00", "Employees 14,800", and "Days Since Activity 5". Below this, there are tabs for "Contacts", "Sales", "Service", "Field Service", "Billing", "Commerce", and "Account Plan". The "Contacts" tab is active, showing a list of "Related Contacts (6)". The list includes:

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

On the right side, the "Activity" tab is active, showing a "Log a Call" form and a list of "Upcoming & Overdue" tasks. A red box highlights the "Setup" gear icon in the top right corner, and another red box highlights the "Edit Page" option in the dropdown menu that appears when the gear icon is clicked.



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



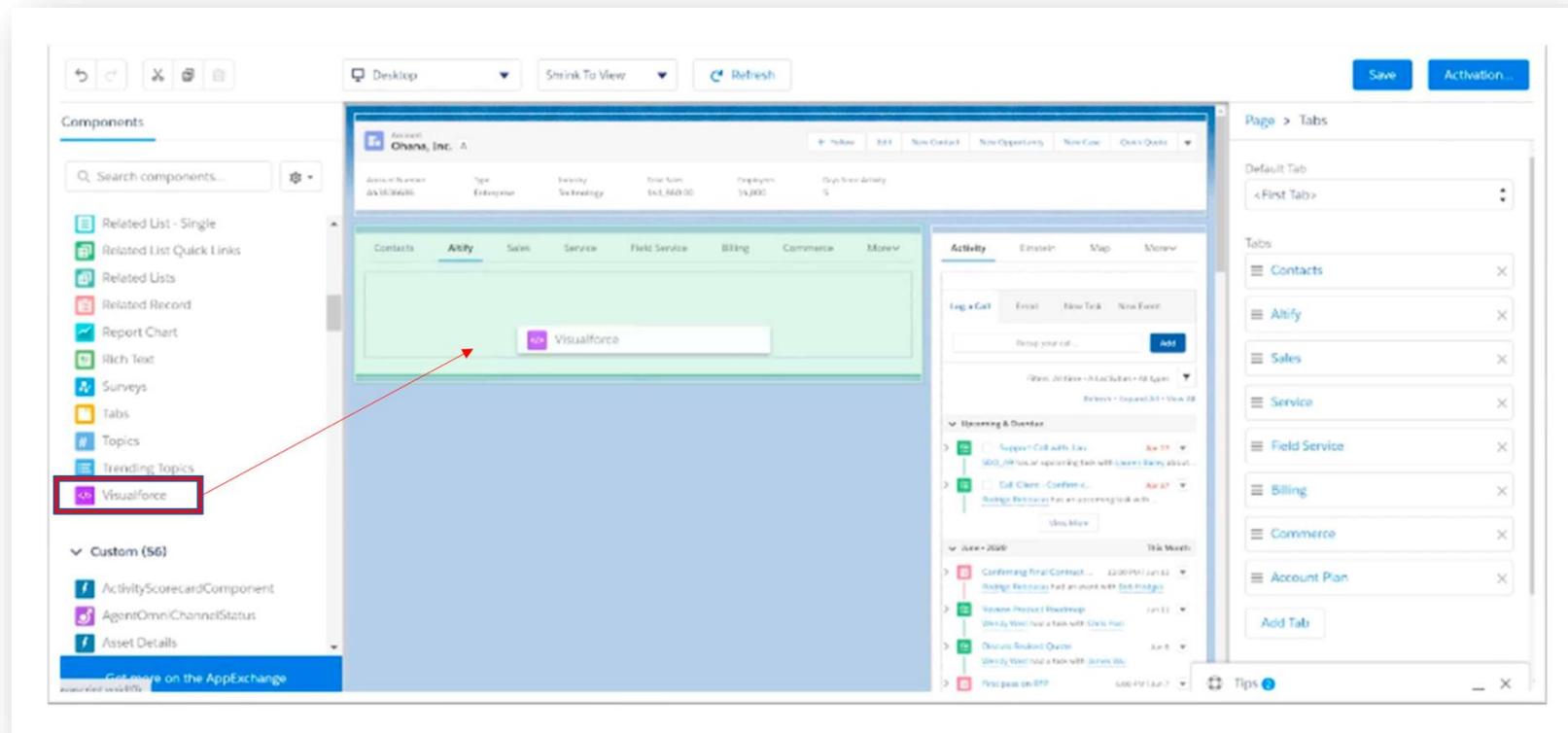
Step 7: New Tab title will default to “Details”. Rename to “Altify”

The screenshot displays the Salesforce CRM interface for a contact record. The contact is 'Ohans, Inc.' with account number '001600000000000000000000'. The 'Details' tab is active, showing a list of 'Related Contacts (6)'. A 'Tab Label' dialog box is open, showing the current tab label 'Details' and the new label 'Altify'. The dialog box has a 'Done' button. On the right side, the 'Page > Tabs' panel shows the 'Details' tab selected in the 'Tabs' list. The 'Default Tab' is set to '<First Tab>'. The 'Add Tab' button is visible at the bottom of the tabs panel.

Contact Name	Title	Phone	Email
Chris Post	Business Analyst	34234 333 5555	cpost@example.com
Ben Hodges	Operations and COO	34221 333 5222	bhodges@example.com
Mark Kingston	Project Manager	37991 333 7222	mkkingst@example.com
Lauren Bailey	SMB Technology	34333 333 5722	lbailey@example.com
Jeff Kane	SF of Finance	38933 333 5793	jkane@example.com
James Wu	VP of Sales	32544 333 2122	juwu@example.com



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

The screenshot displays the Salesforce Lightning App Builder interface. The main workspace shows a preview of a Visualforce page for the account 'Onans, Inc. A'. The page layout includes a header with navigation links (Home, Edit, New Contact, New Opportunity, New Case, Open Quota), a table of key players, and an activity feed. The right-hand configuration pane is titled 'Page > Visualforce' and contains the following settings:

- Show Label
- Label: Atity Relationship Map
- * Visualforce Page Name: Atity Account Summary Launchpad
- Height (in pixels): 300
- Set Component Visibility: (Expanded)
- Filters: + Add Filter

The 'Label' and '* Visualforce Page Name' fields are highlighted with a red box. The 'Visualforce' component is selected in the left-hand 'Components' list.



Step 10: Hit "Save"

The screenshot displays the Salesforce Visualforce page editor interface. At the top right, the text "Changes saved" is visible, followed by a blue "Save" button and a blue "Activation..." button. The "Save" button is highlighted with a red rectangular box. The main editor area shows a preview of a Visualforce page for "Chana, Inc. A", featuring an "Activity Relationship Map" and an "Activity" section. On the left, a "Components" sidebar lists various components like "Related List - Single", "Report Chart", and "Visualforce". On the right, a configuration panel for the "Visualforce" component is visible, showing settings for "Show Label", "Label" (set to "Aldy Relationship Map"), "Visualforce Page Name" (set to "Aldy Account Summary Launchpad"), and "Height (in pixels)" (set to 300). The "Set Component Visibility" section is also expanded, showing a "Filters" section with an "Add Filter" button.



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

The screenshot displays the Altify CRM interface for the account "Ohana, Inc.". The top navigation bar includes "Sales", "Home", "Campaigns", "Leads", "Accounts", "Contacts", "Opportunities", "Forecasts", "Files", "Dashboards", "Reports", and "Quotes". Below this, the account name "Ohana, Inc." is shown with a search icon and a dropdown menu containing "+ Follow", "Edit", "New Contact", "New Opportunity", "New Case", and "Quick Quote".

The main content area is divided into two sections. On the left, the "Altify Relationship Map" is displayed, featuring the Altify logo and the role "Account Manager". Underneath, the "Key Players" section contains a table with the following data:

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					

On the right side of the interface, the "Activity" section is visible, with tabs for "Activity", "Map", "Quip", and "Social". The "Activity" tab is active, showing a "Log a Call" button and a form with a text input field labeled "Recap your call..." and an "Add" button. Below the form, there are filters for "All time", "All activities", and "All types", along with "Refresh", "Expand All", and "View All" options. The "Upcoming & Overdue" section lists two tasks:

- Support Call with: Lauren B... Apr 27
- Call Client - Confirm close ... Apr 27

Each task includes a checkbox and a brief description of the task. A "View More" button is located below the task list. At the bottom, there is a section for "June • 2020" and "This Month".





Next Steps

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

ALTIFY