Altify Upgrade Guide

v9.13 to v9.14

CONTENTS

Introduction

This guide describes the procedure for upgrading from Altify 9.13 to 9.14.

Upgrade the Altify Core Package

To upgrade the Altify core package to the latest version:

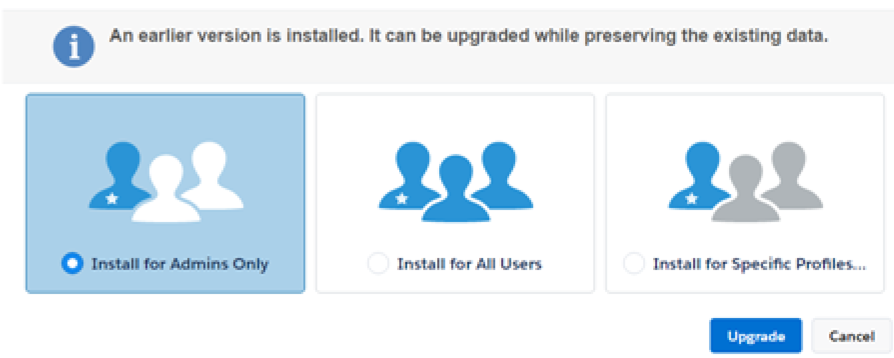
1. Log into Salesforce.com with your administration username and password.
2. Copy the package URL into your browser's address field.

   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 9.14 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 should ensure that you have the latest version, which is 1.36.

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 v1.36, you can skip the steps described in this section.

To upgrade the Extension App:

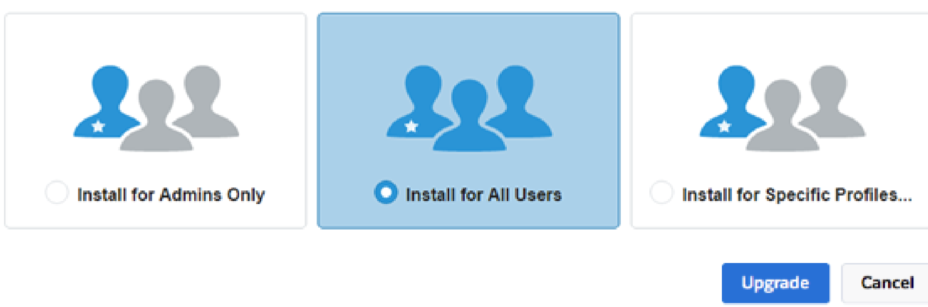
1. Ensure that **Files Connect** is enabled in your org. The extension app can't install otherwise.

   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.

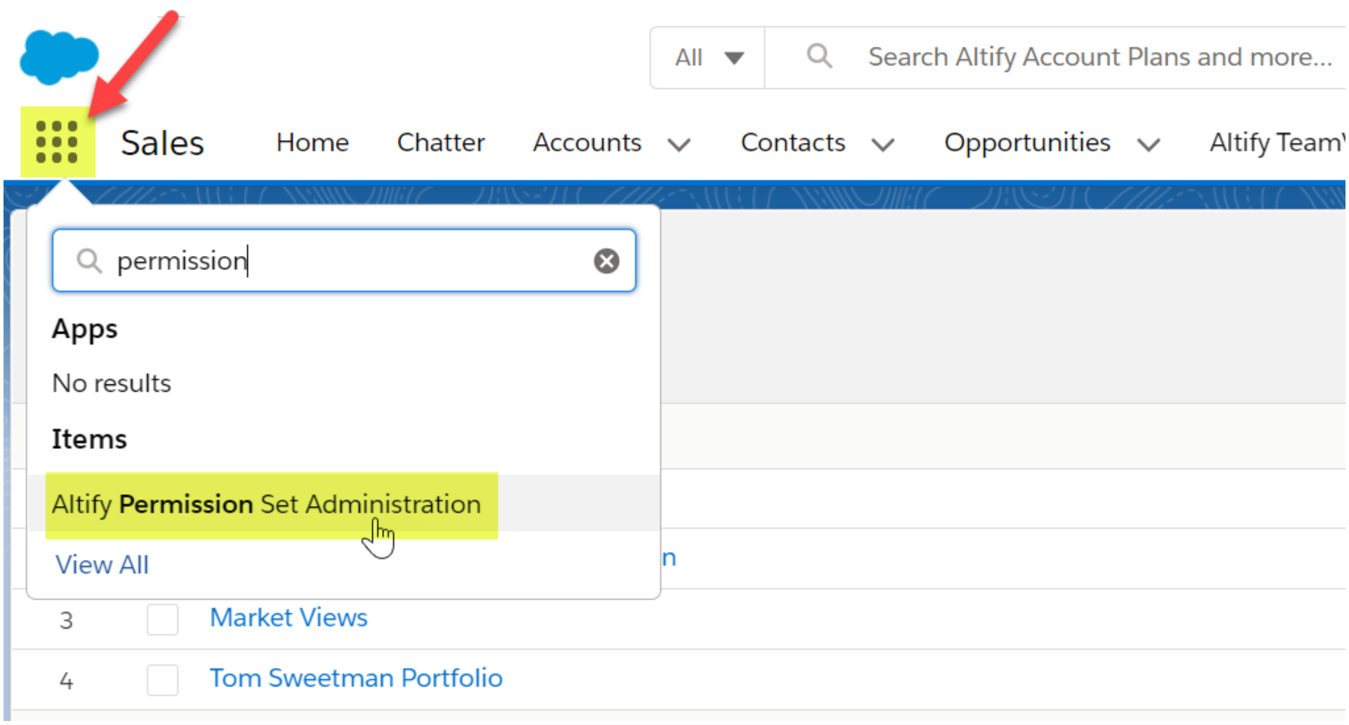
Note: We recommend that you do not make changes to the Altify Permission Set. However, if you have made changes, these will need to be reapplied after completing the following steps (as any edits are lost when the permission set is refreshed).

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)

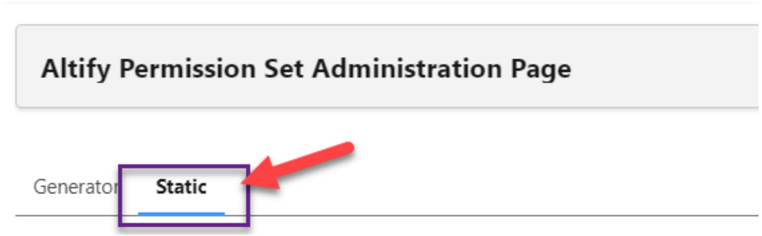
Altify strongly recommends that you perform this task in a sandbox environment before deploying a change set to your production org.

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

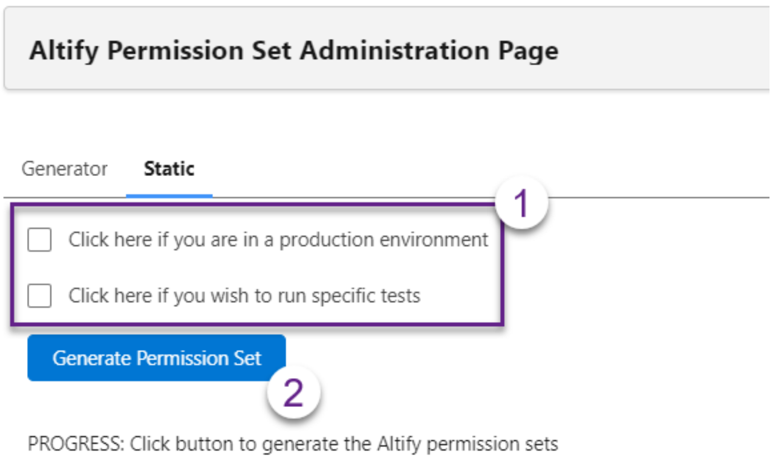


   (In Classic mode, click the **All Tabs** button and select **Altify Permission Set Administration** in the displayed list.)

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.

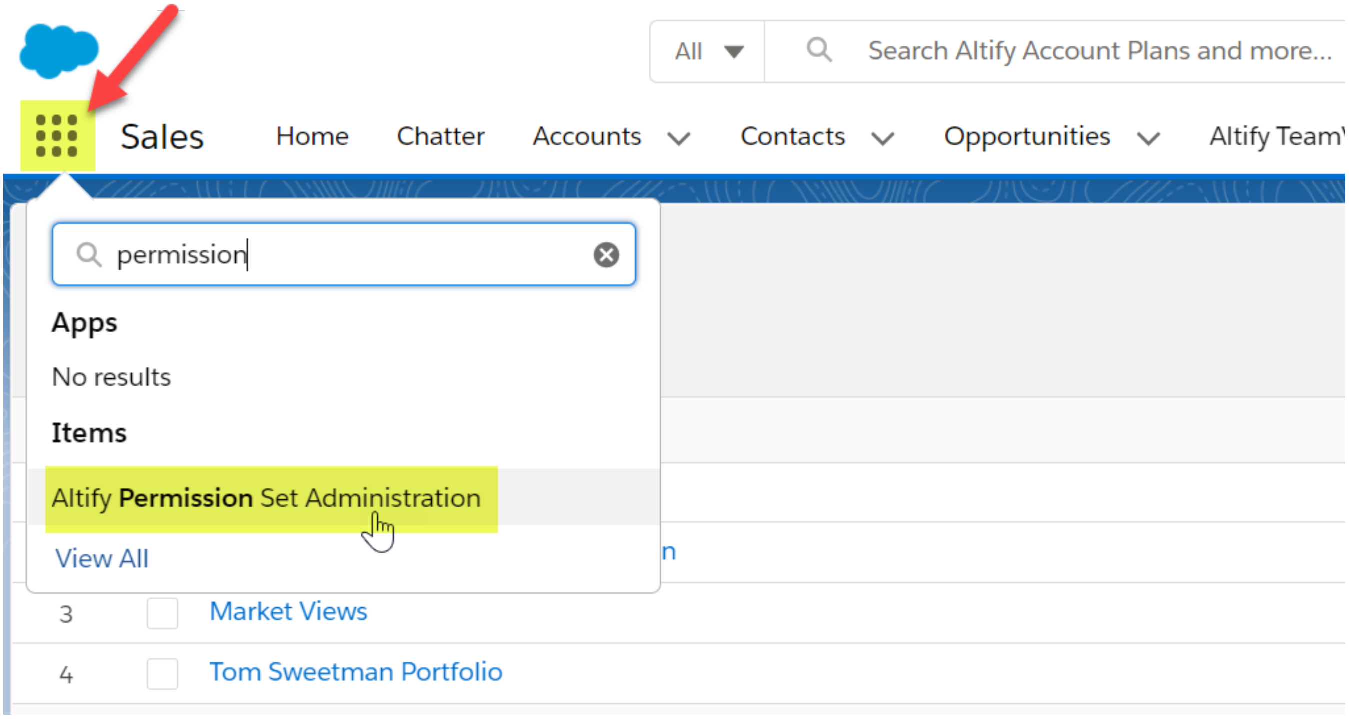
> **Caution:** The create/update process can take a few minutes. Don't browse away from the page while the refresh is in progress.

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

Refreshing directly in production org (not recommended)

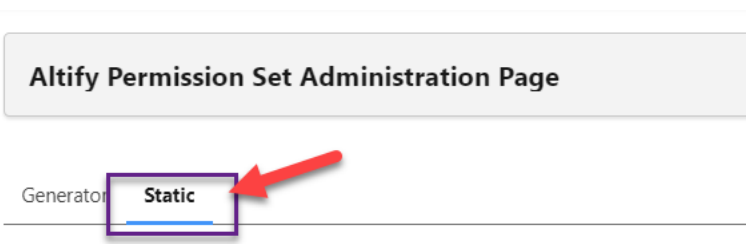
If you choose to refresh your permission set directly in your production org (i.e. not taking Altify's recommended approach described above), these are the steps you should take:

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

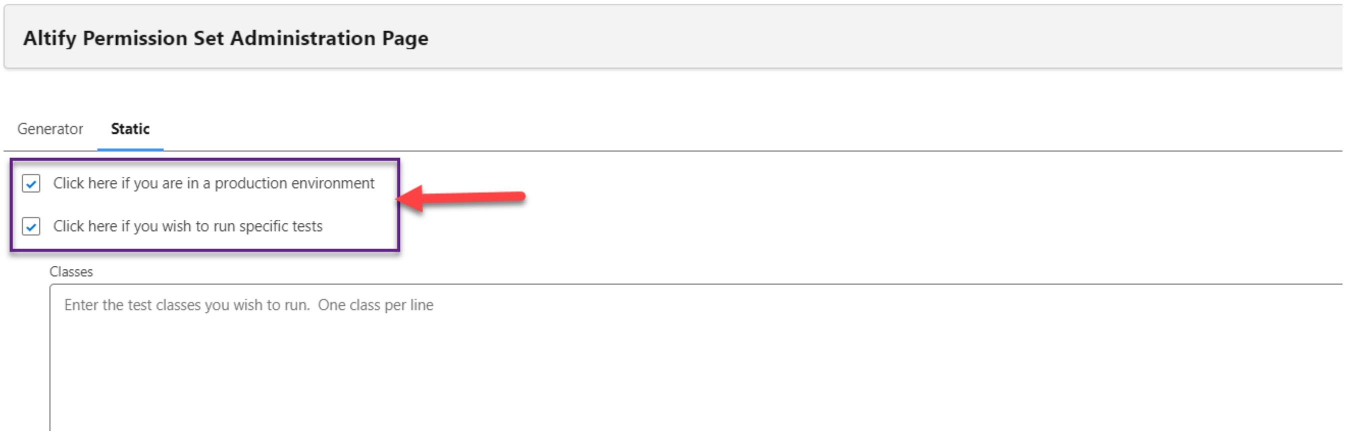


(In Classic mode, click the **All Tabs** button and select **Altify Permission Set Administration** in the displayed list.)

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 9.13 to 9.14, the following temporary setting values are moved.

Altify Account Manager Settings

- Temp1 is now *Enable Objective-Opportunity Linking*
- Temp2 is now *Disable Opp Creation in Account Manager*

Altify Relationships Settings

- Temp1 is now *Enable Photo Upload Disclaimer*
- TempStr1 is now *Recently Added Timeframe*
- TempStr2 is now *Custom Panel 1*
- TempStr3 is now *Custom Panel 2*
- TempStr4 is now *Custom Panel 3*
- TempStr5 is now *Custom Panel 4*
- TempStr6 is now *Custom Panel 5*
- TempStr7 is now *Custom Panel 1 Height*
- TempStr8 is now *Custom Panel 2 Height*
- TempStr9 is now *Custom Panel 3 Height*
- TempStr10 is now *Custom Panel 4 Height*
- TempStr11 is now *Custom Panel 5 Height*
- TempStr12 is now *Inactive Contact Field Name*

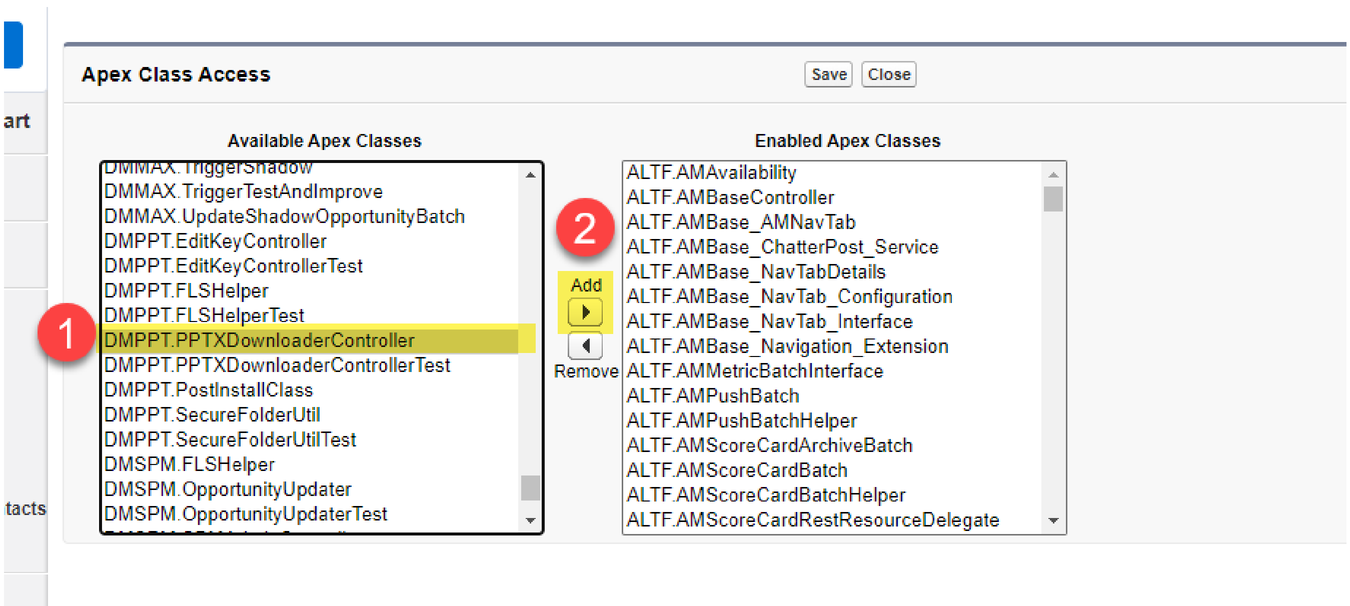
Enabling PowerPoint Export

If your org is licensed for the 'Altify Output Extension', you need to enable Altify to export to PowerPoint (and for the output of Executive Briefings in a MS Word format).

> **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.

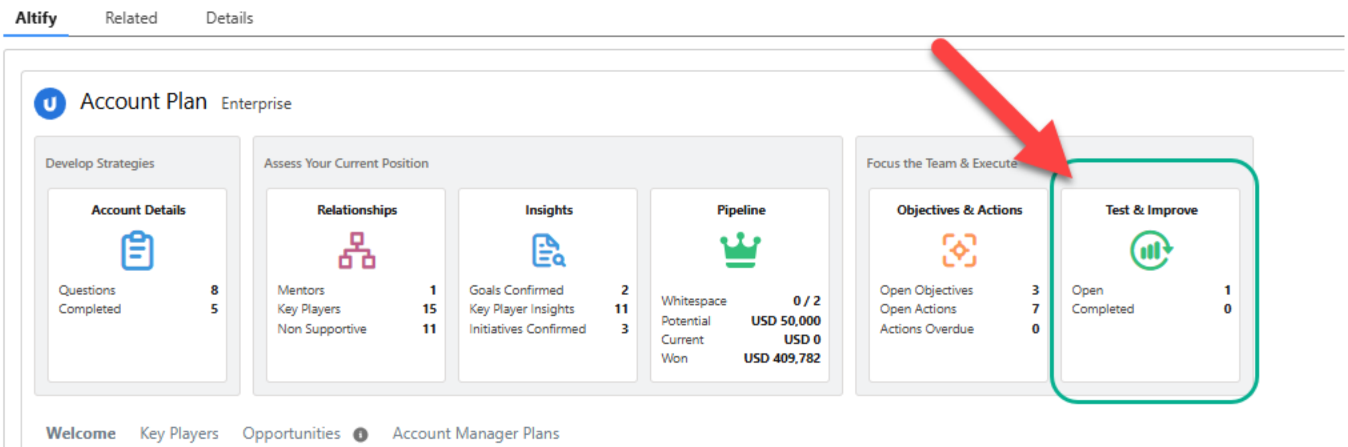


6. Click **Save**.

Enabling Test & Improve for Account Plans

Altify v9.14 saw the introduction of Test & Improve events for account plans. For further information, see the release notes.

To enable your users to access this functionality, Test & Improve needs to be enabled for the relevant plan types - meaning it will appear on the launchpad for those plan types, as shown in the example below.



To enable access for a particular plan type, do the following:

1. Select **Altify AM Plan Types** in the App Launcher (Lightning mode).
2. Select the **Edit** option for the relevant plan type.
3. In the **Account Plan Tab Name List** field, a comma-separated list defines the tiles that are displayed in the launchpad for the plan type (and the order in which they are displayed).

   Insert the term 'TestImprove' in your preferred location for the tile. For example, the following will generate a launchpad as pictured above:

   ```
   plandetails,relationships,insights,potential,objectives,testimprove
   ```
4. Click **Save**.

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 temporary 'placeholder' 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.

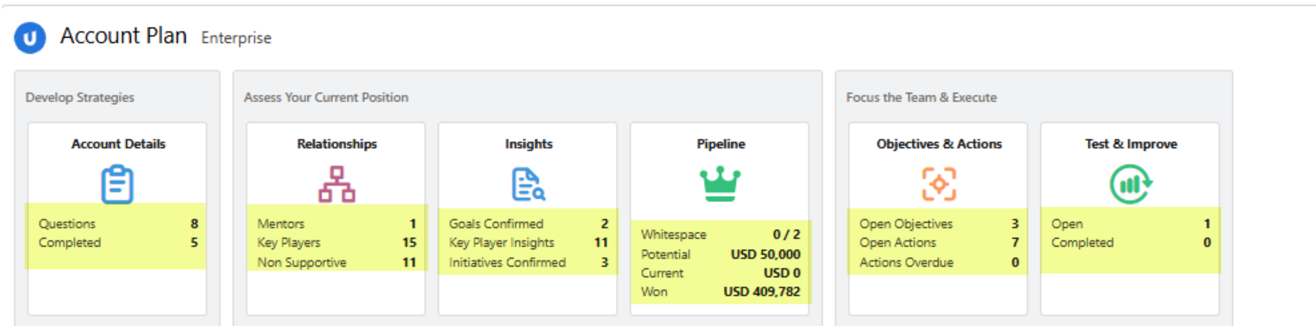
Post Upgrade Checklist

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

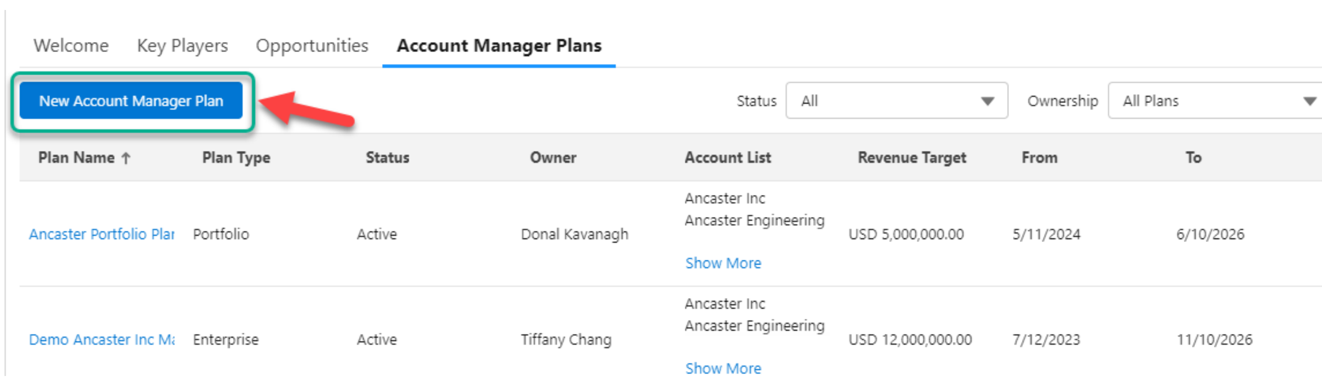
Account Plan launchpad and functions

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: pipeline, relationships, insights, account details, objectives & actions and test & improve.

   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).



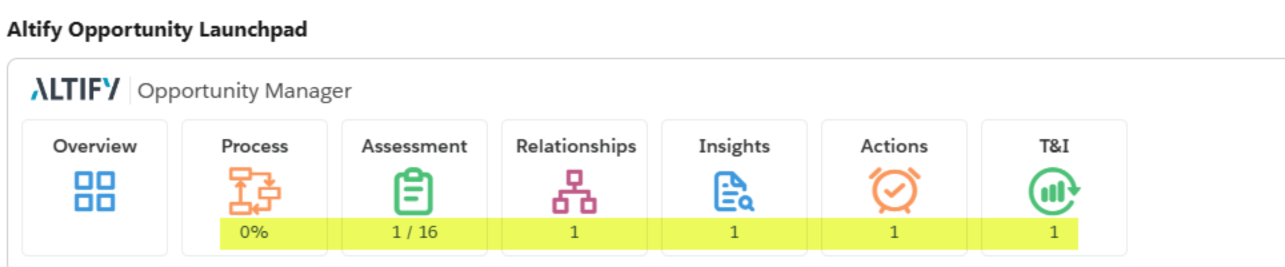
   Follow the setup wizard and enter data as desired. It's best if you have a test Altify Solution set up prior to commencing this step.

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 in the [actions](), [insight map](), [relationship map]() and [assessment]() (including [decision criteria]() on specific assessment questions) areas of Opportunity Manager.
4. [Schedule a test T&I]() for the opportunity, inviting at least two participants and checking to see that their emailed invitations were received.
5. Check to see that the test data you have entered is reflected on the *Altify Opportunity Launchpad* - as shown in the example below:



6. 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.