Upland Altify SDO Setup

Quick Links

For Reference:

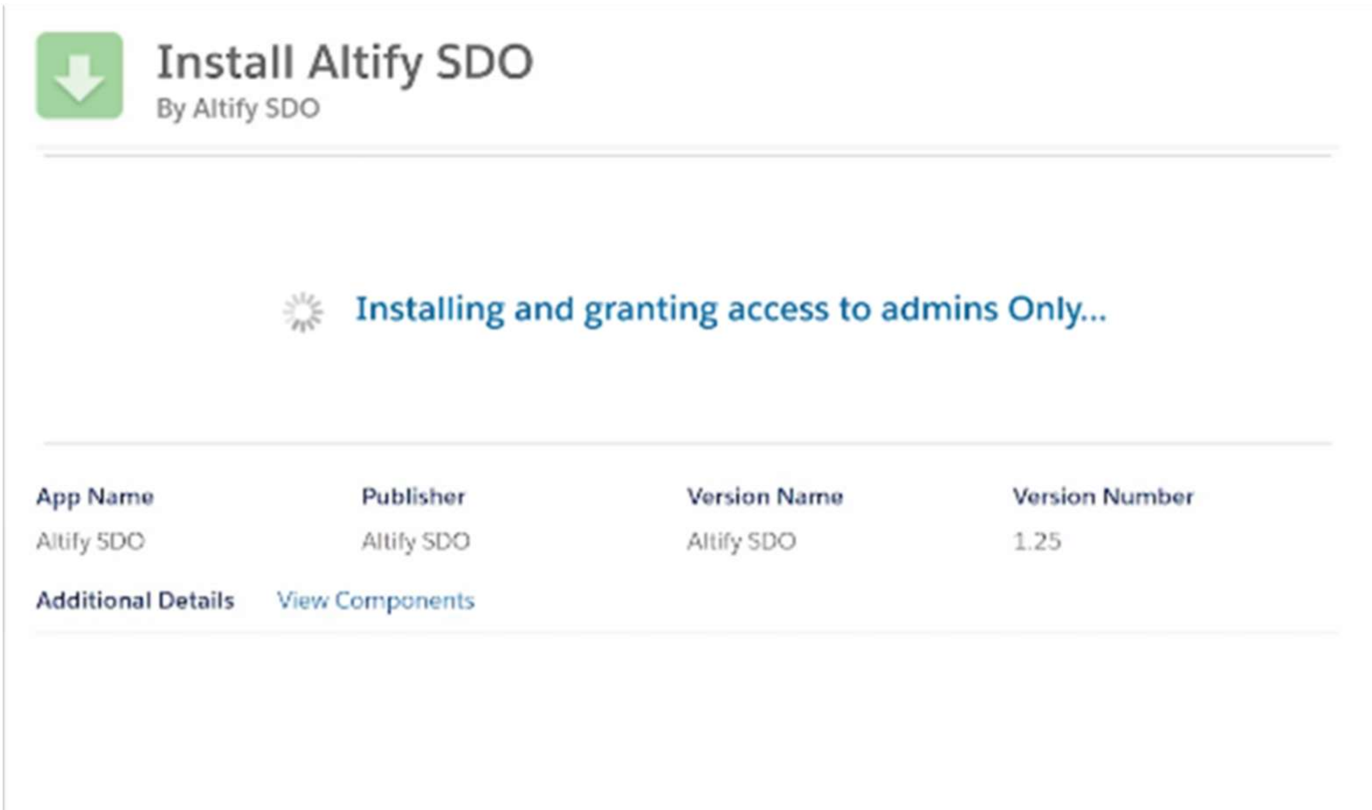
- Upland Altify Relationship Map AppExchange
- Upland Altify Relationship Map SDO landing page

Installation Instructions:

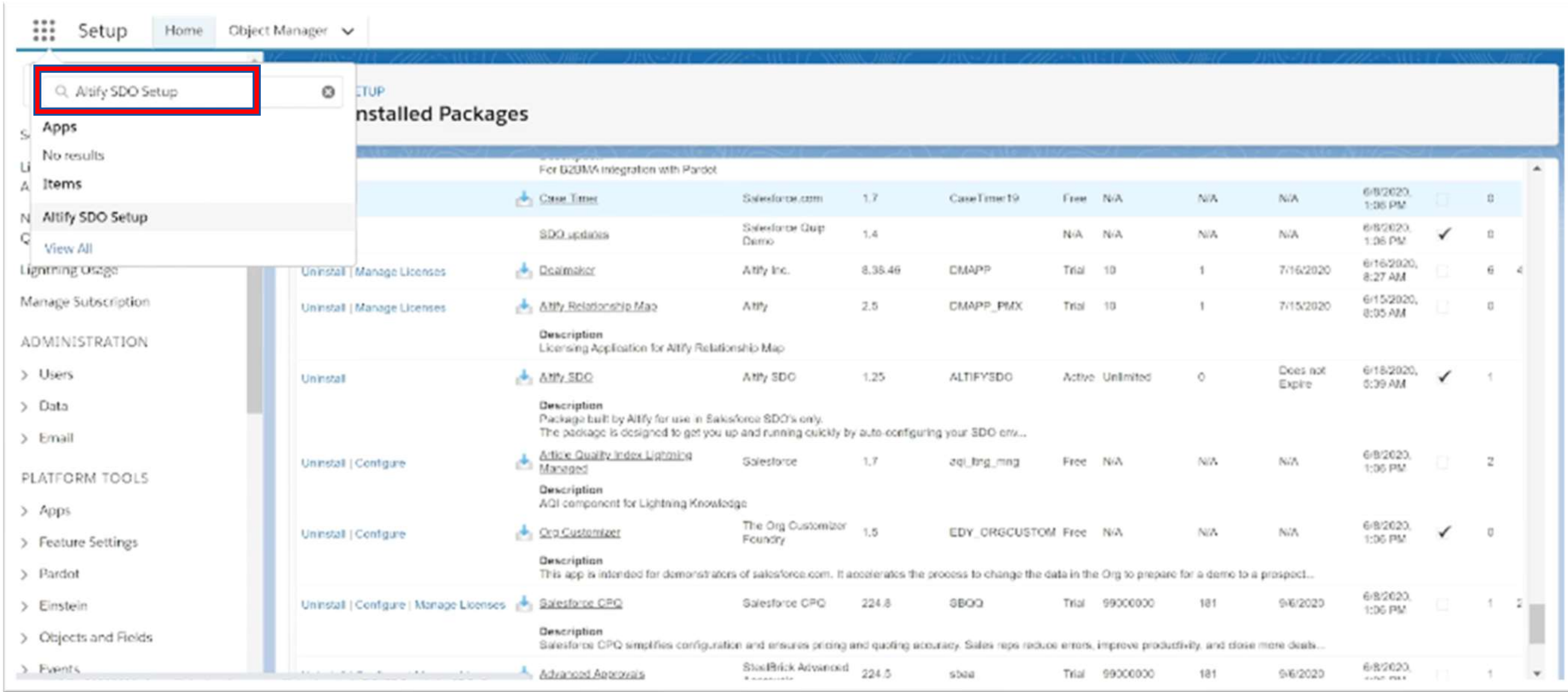
1. Altify Core Installation Package
2. Relationship Map License Package
3. Altify SDO Configuration Package
    - Password: asH82Bfs7F%

How to Install Altify SDO

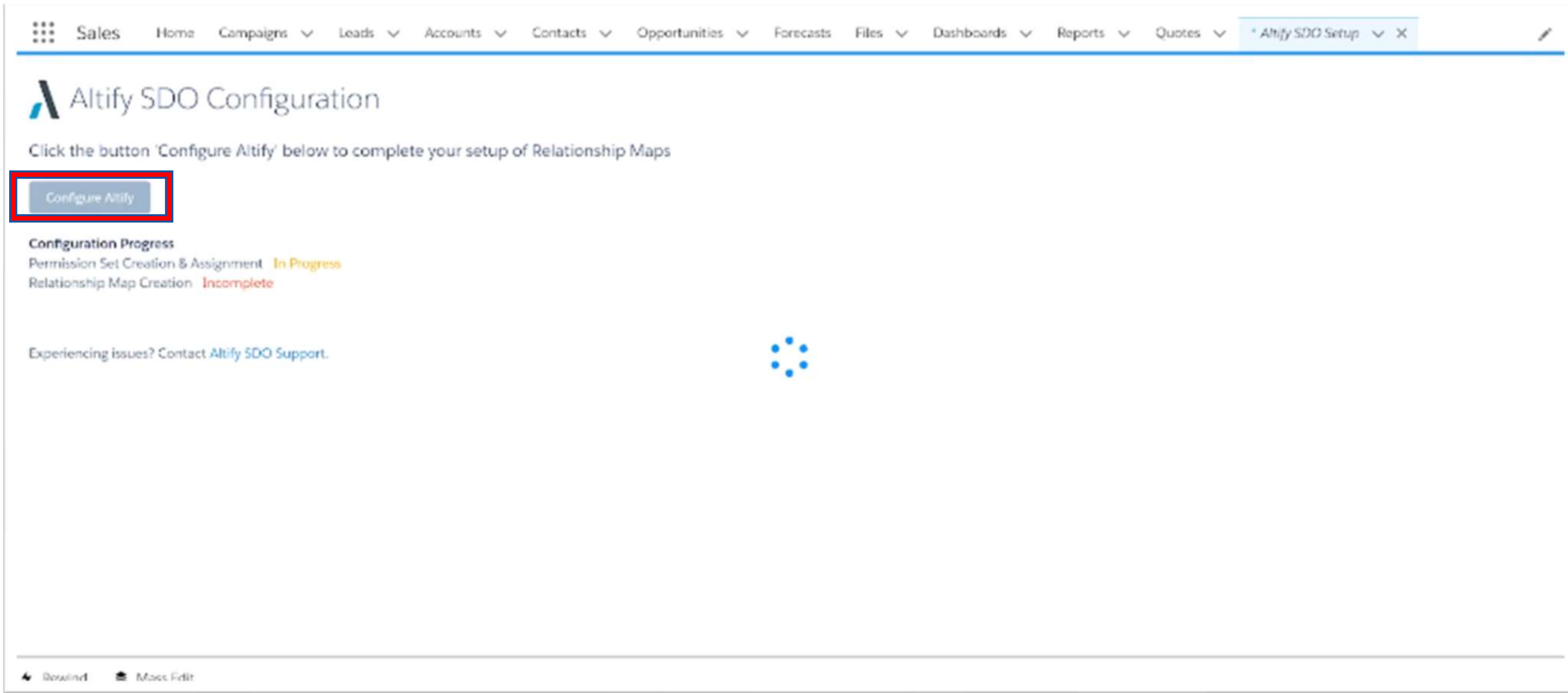
Step 1: Install Altify SDO



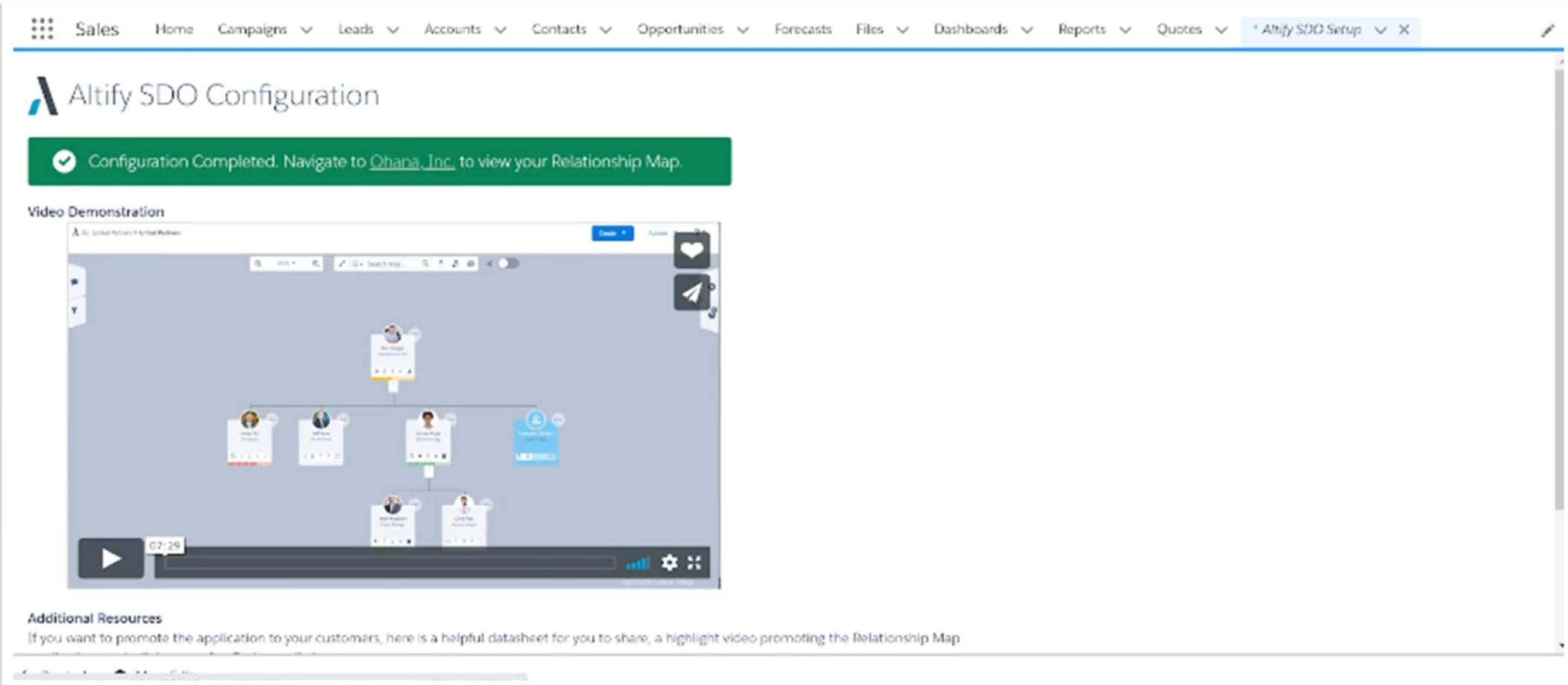
Step 2: Look up “Altify SDO Setup”



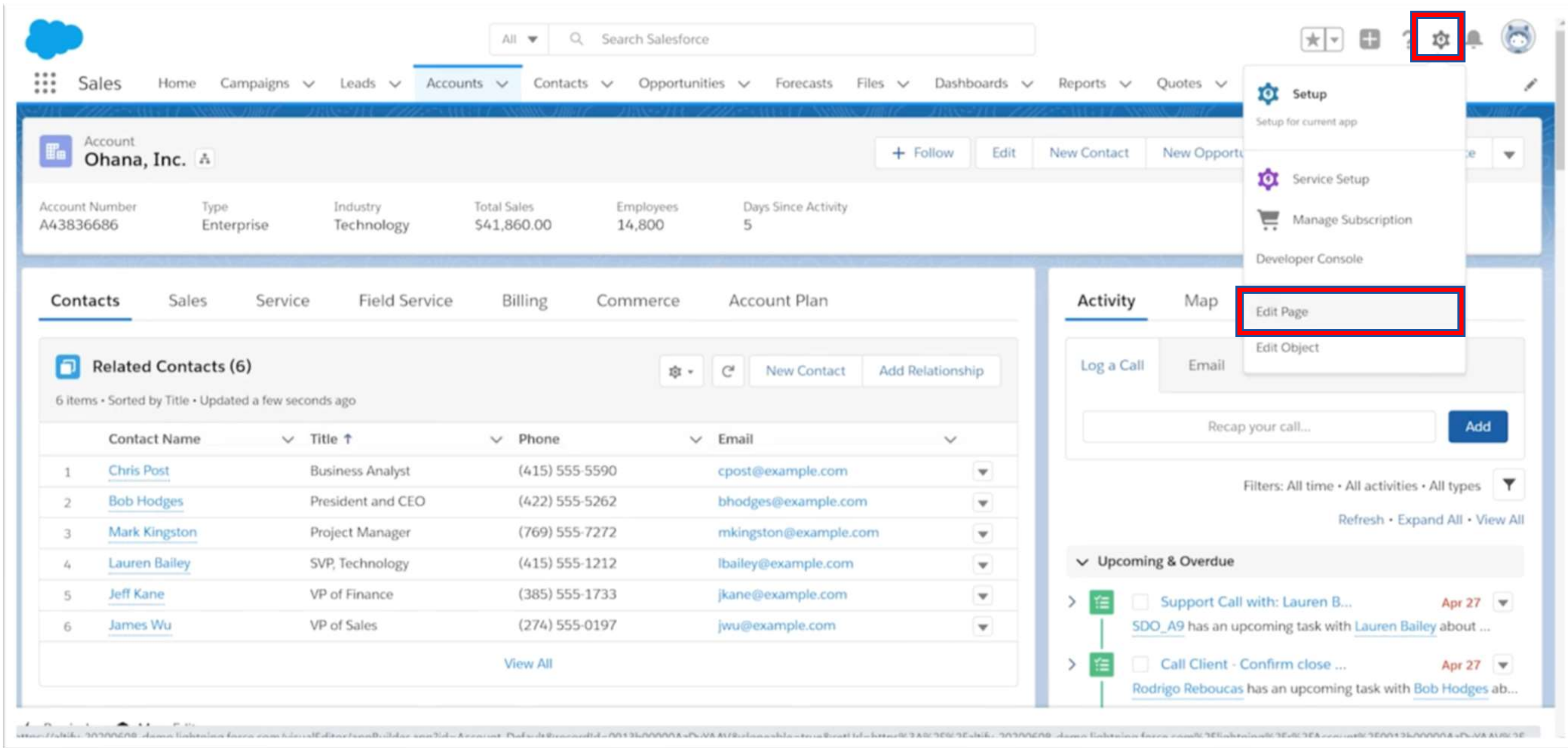
Step 3: Configure Altify – Progress will show when ‘Complete' in Green



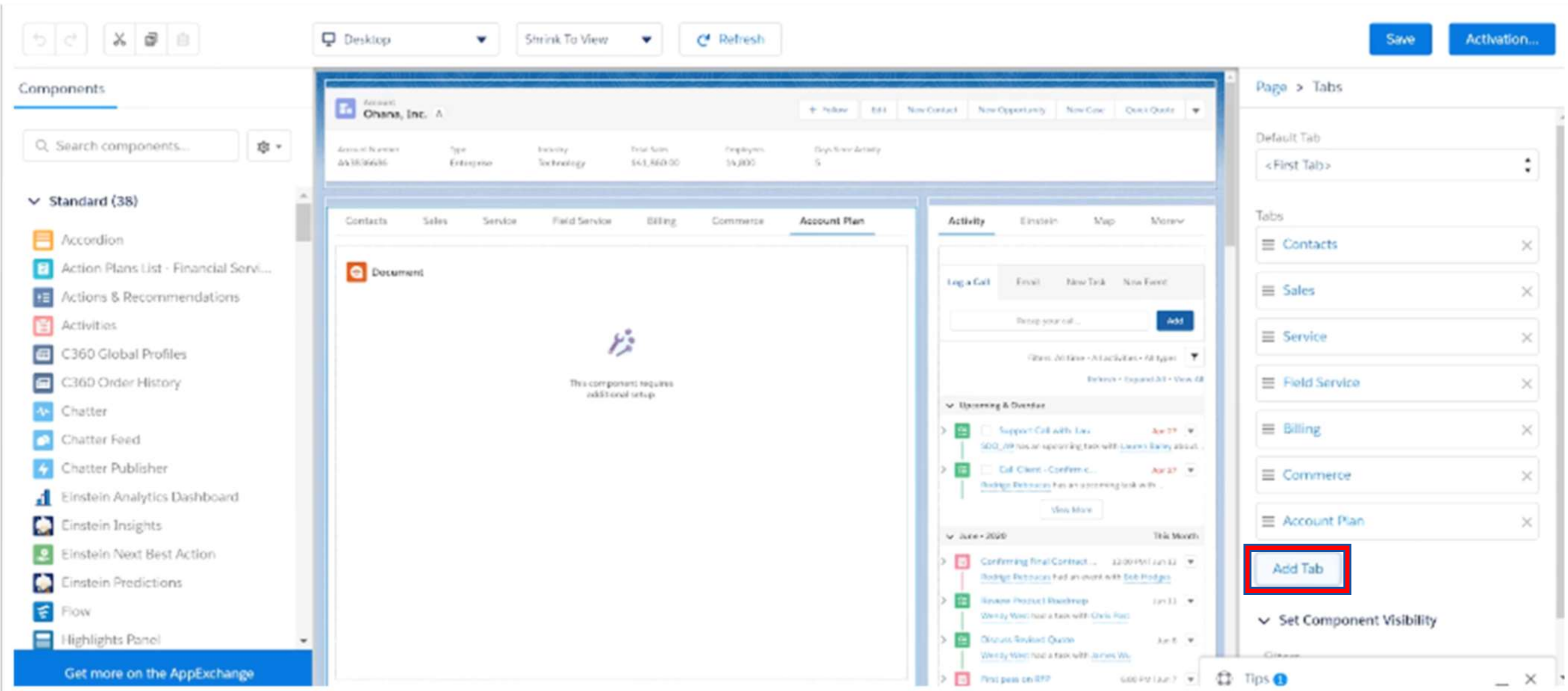
Step 4: Configuration Completed



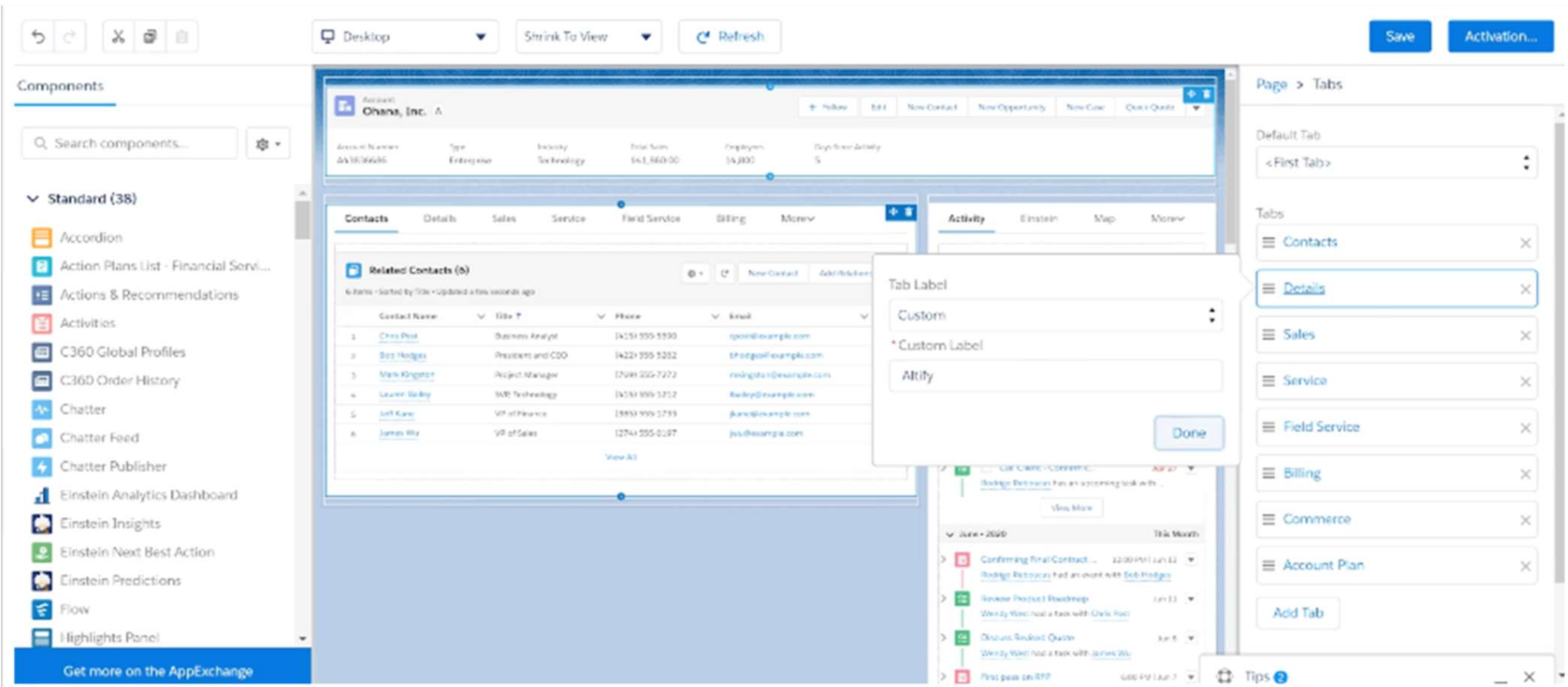
Step 5: Go to an Account. On the top right, click “Setup” and “Edit Page”



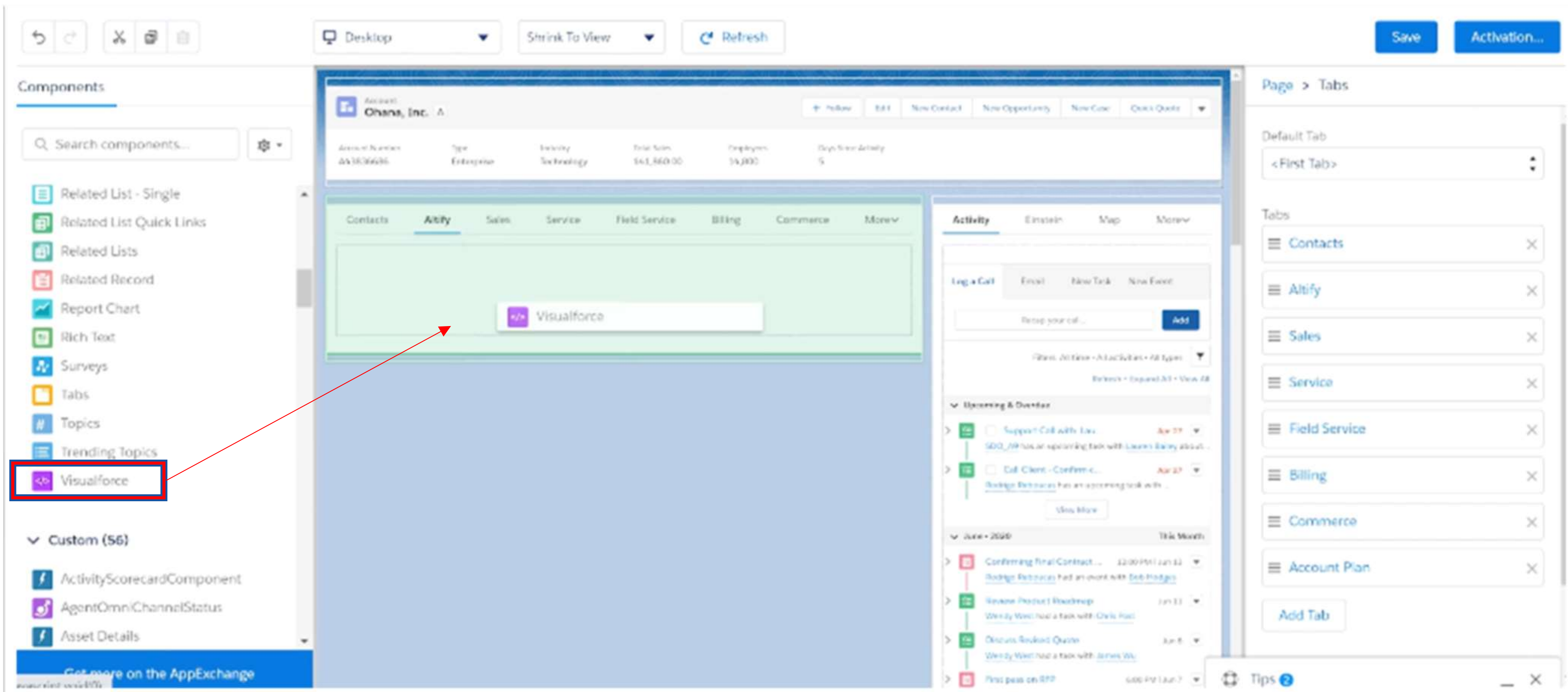
Step 6: On the right, you'll see Page > Tabs. Scroll down to "Add Tab"



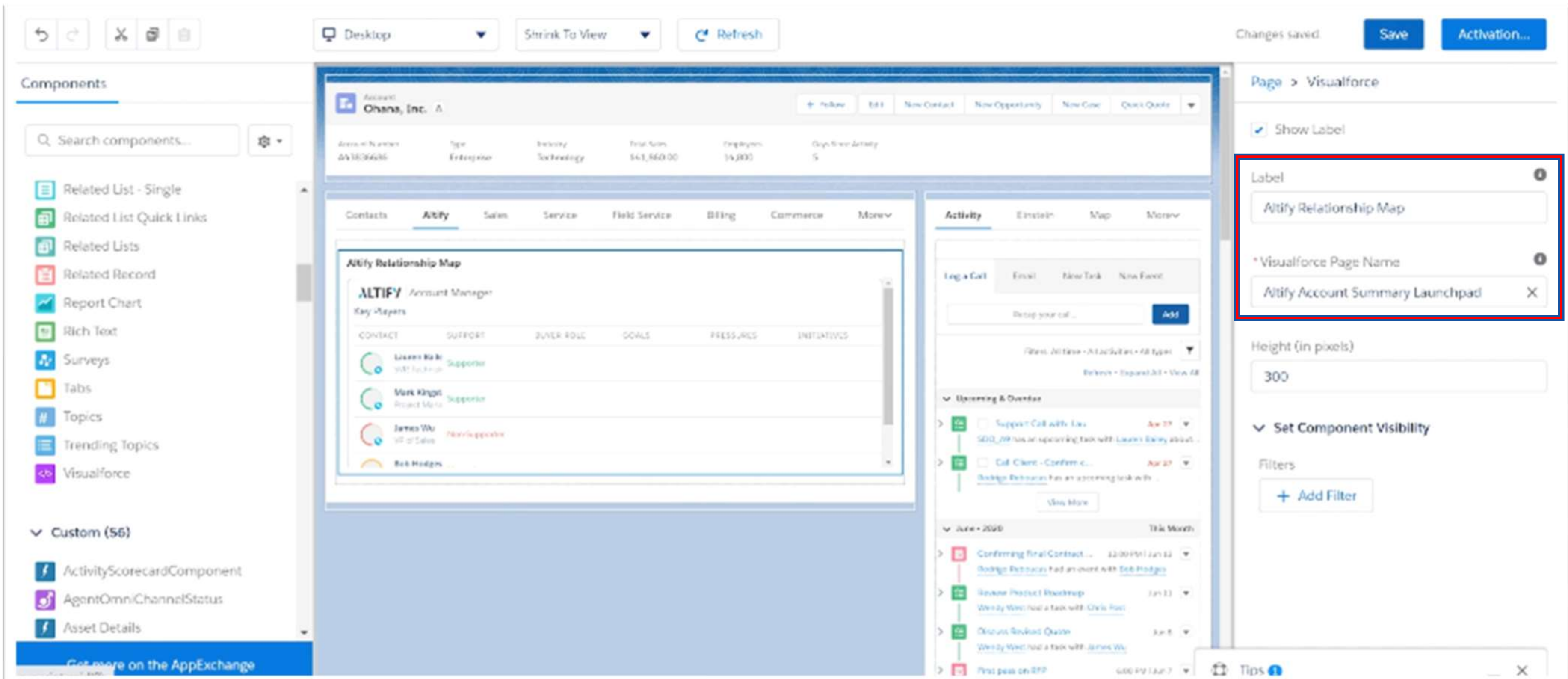
Step 7: New Tab title will default to “Details”. Rename to “Altify”



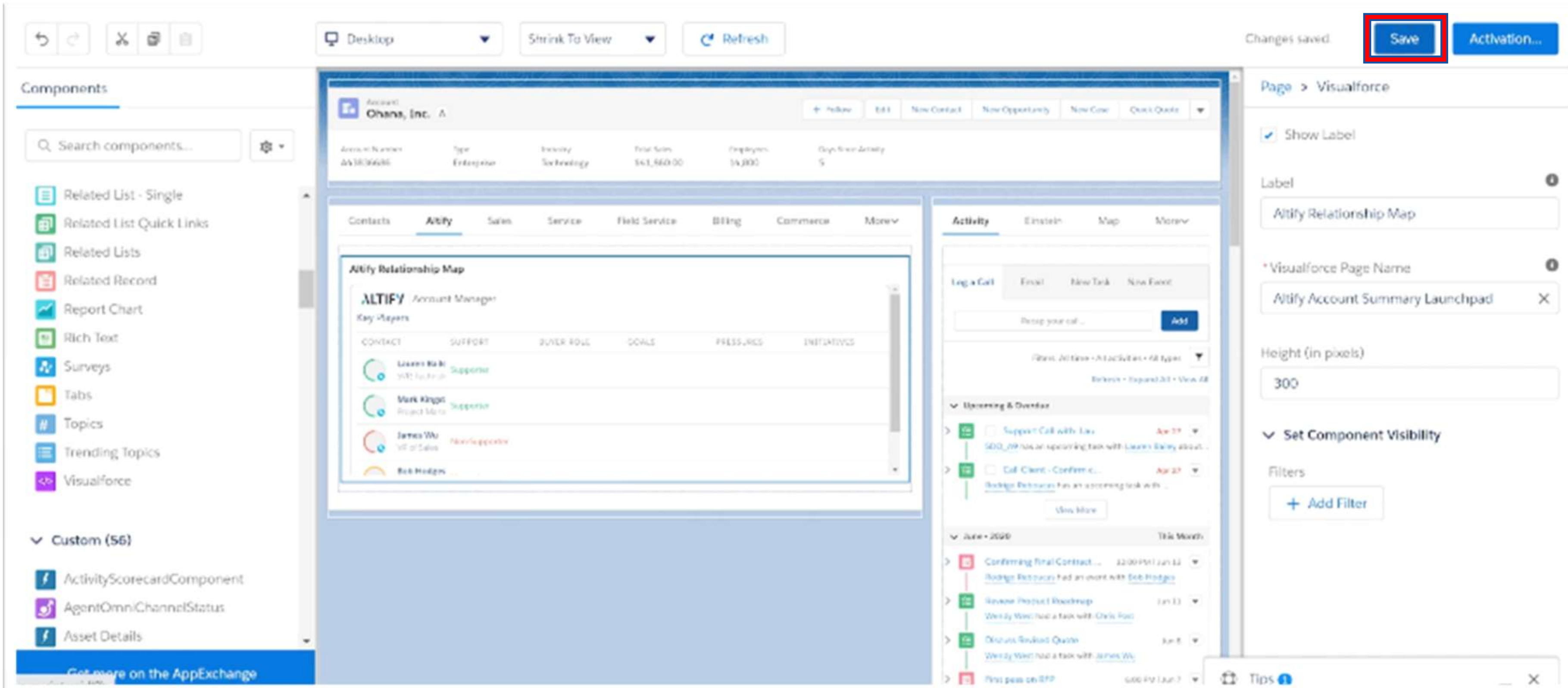
Step 8: On the left under “Components”, Drag and Drop “Visualforce”



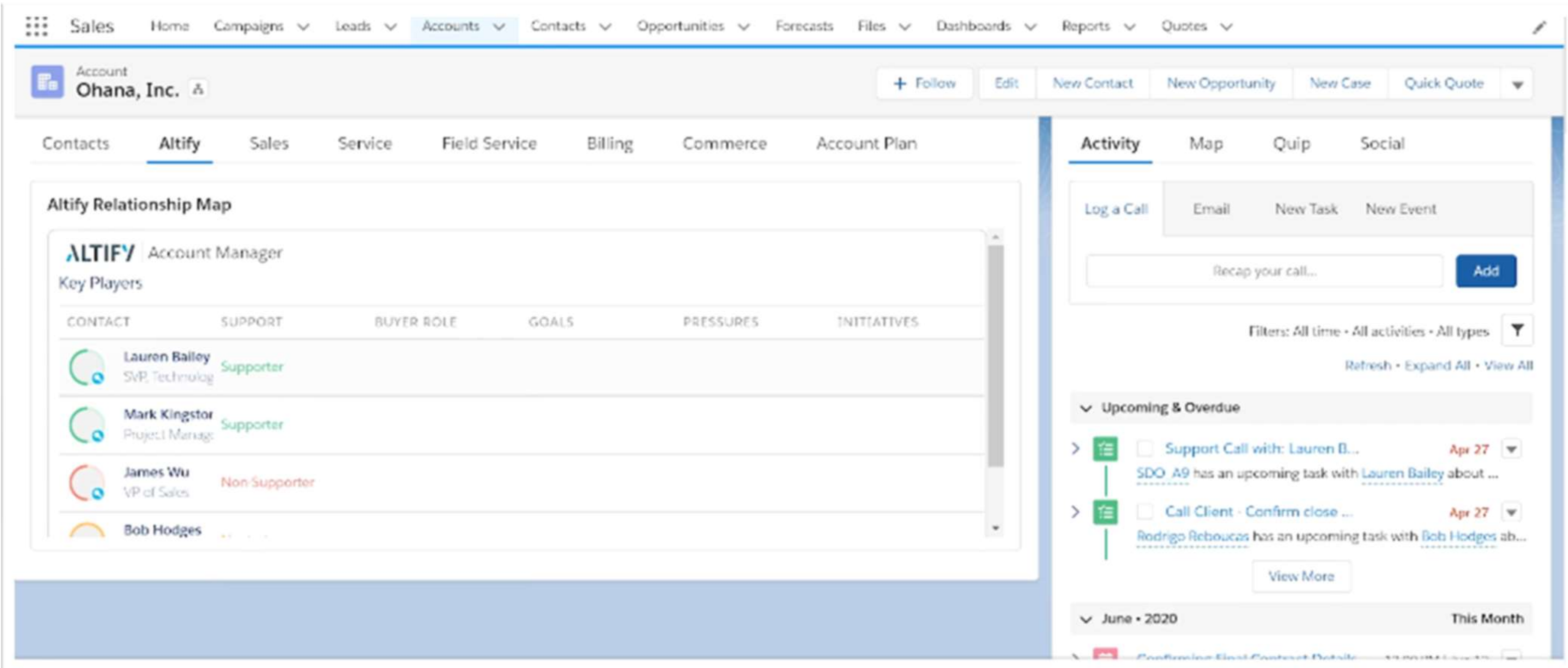
Step 9: On the right, you'll see Page > Visualforce. Rename Label & Page Name



Step 10: Hit “Save”



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



Next Steps

- View demo guidance provided on the [Altify SDO Page]

Altify