



# 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



### Install Altify SDO

By Altify SDO

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 **Installing and granting access to admins Only...**

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

**Additional Details** [View Components](#)

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## Step 2: Look up “Altify SDO Setup”

The screenshot shows the Salesforce Setup interface. In the top-left corner, there is a search bar with the text "Altify SDO Setup" entered and highlighted by a red rectangle. Below the search bar, a dropdown menu is visible, listing search results under the heading "Apps". The results include "No results", "Items", and "Altify SDO Setup" (which is highlighted). Other items in the list include "View All".

The main content area displays a table of installed packages. The table has columns for Name, Vendor, Version, Package Name, Status, License, and Last Updated. The "Altify SDO" package is highlighted in blue.

Name	Vendor	Version	Package Name	Status	License	Last Updated
Case Title	Salesforce.com	1.7	CaseTitle19	Free	N/A	6/8/2020, 1:06 PM
SDO_updates	Salesforce Gup Demo	1.4		N/A	N/A	6/8/2020, 1:06 PM
Documaker	Altify Inc.	8.38.46	DMAPP	Trial	10	7/16/2020, 8:27 AM
Altify Relationship Map	Altify	2.5	DMAPP_PMX	Trial	10	7/15/2020, 8:05 AM
Altify SDO	Altify SDO	1.25	ALTIFYSDO	Active	Unlimited	Does not Expire
Advice Quality Index Lightning Managed	Salesforce	1.7	zqj_brg_mng	Free	N/A	6/8/2020, 1:06 PM
Org Customizer	The Org Customizer Foundry	1.5	EDY_ORGCUSTOM	Free	N/A	6/8/2020, 1:06 PM
Salesforce CPQ	Salesforce CPQ	224.8	SBOQ	Trial	99000000	6/8/2020, 1:06 PM
Advanced Analytics	Shutterstock Advanced	224.5	sbaa	Trial	99000000	6/8/2020, 1:06 PM

## 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

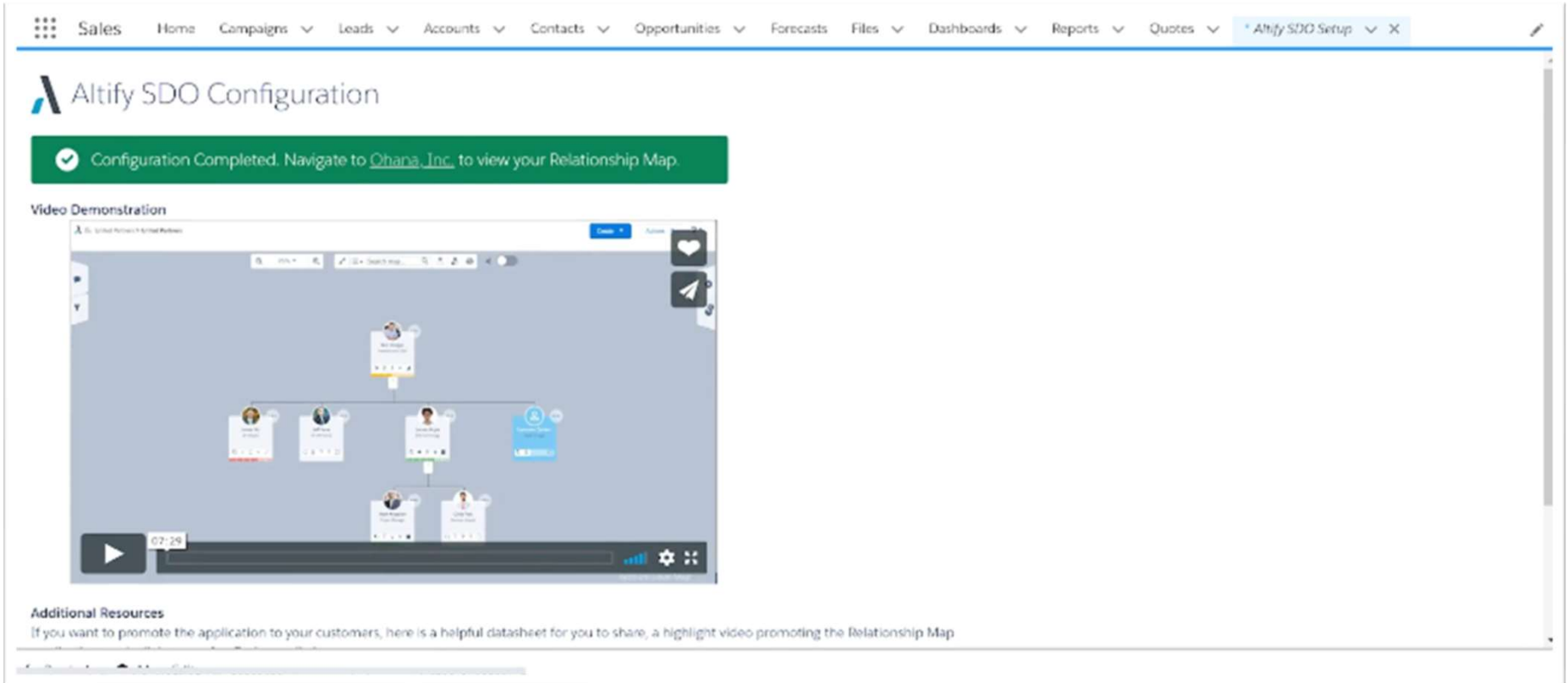
**Configure Altify**

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

Experiencing issues? Contact Altify SDO Support.

Reset Mass Edit

## Step 4: Configuration Completed



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 left 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. The map consists of several nodes representing individuals and their connections. A play button and a 02:29 duration are visible at the bottom of the video player. Underneath the video, an "Additional Resources" section provides a link to a helpful datasheet for sharing with customers.

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

### Altify SDO Configuration

Configuration Completed. Navigate to [Ohana, Inc.](#) to view your Relationship Map.

#### Video Demonstration

Additional Resources

If you want to promote the application to your customers, here is a helpful datasheet for you to share, 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 "Sales", "Home", "Campaigns", "Leads", "Accounts", "Contacts", "Opportunities", "Forecasts", "Files", "Dashboards", "Reports", and "Quotes". The "Accounts" tab is selected. 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, displaying a table of "Related Contacts (6)". The table has columns for "Contact Name", "Title", "Phone", and "Email". The contacts listed are Chris Post, Bob Hodges, Mark Kingston, Lauren Bailey, Jeff Kane, and James Wu. On the right side, there is an "Activity" section with a "Map" button and a "Log a Call" button. A dropdown menu is open in the top right corner, showing options: "Setup", "Service Setup", "Manage Subscription", "Developer Console", "Edit Page", and "Edit Object". The "Edit Page" option is highlighted with a red box. The "Setup" option is also highlighted with a red box.

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



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

The screenshot displays the Salesforce interface for configuring a page. On the left, the 'Components' panel is visible, showing a search bar and a list of 38 standard components. The main content area shows a preview of the 'Account Plan' page for 'Onans, Inc.', which includes a table with account details and a 'Document' component. On the right, the 'Page > Tabs' configuration panel is open, showing a 'Default Tab' dropdown set to '<First Tab>'. Below this, a list of tabs is shown, including 'Contacts', 'Sales', 'Service', 'Field Service', 'Billing', 'Commerce', and 'Account Plan'. The 'Add Tab' button at the bottom of this list is highlighted with a red box. At the very bottom of the configuration panel, there is a 'Set Component Visibility' section.

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

The screenshot displays the Salesforce CRM interface for a contact record. The main content area shows the contact details for 'Ohana, Inc.' with a 'Details' tab selected. A modal dialog is open for editing the tab label, with 'Altify' entered. The right sidebar shows a list of tabs including 'Details'.

**Account: Ohana, Inc. A**

Account Number	Type	Industry	Total Sales	Employees	Days from Activity
001836636	Enterprise	Technology	\$4,860,000	34,890	5

**Related Contacts (5)**

Contact Name	Title	Phone	Email
Chris Post	Business Analyst	(425) 555-5590	cpost@example.com
Bob Hodges	President and COO	(425) 555-5282	bhodges@example.com
Mark King	Project Manager	(708) 555-7272	mking@example.com
Lauren Bailey	Sr. Technology	(425) 555-3212	lbailey@example.com
Jeff Kane	VP of Finance	(888) 555-2799	jkane@example.com
James Wu	VP of Sales	(270) 555-0197	jwu@example.com

**Tab Label**

Custom

\* Custom Label

Altify

Done

**Page > Tabs**

Default Tab

< First Tab >

Tabs

- Contacts
- Details
- Sales
- Service
- Field Service
- Billing
- Commerce
- Account Plan

Add Tab

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

The screenshot displays the Salesforce Page Builder interface. On the left, the 'Components' panel is visible, listing various components such as 'Related List - Single', 'Report Chart', and 'Visualforce'. The 'Visualforce' component is highlighted with a red box, and a red arrow points from it to the main page editor. The main editor shows a page layout for 'Accounts: Ohana, Inc. A' with a 'Visualforce' component being added to the 'Activity' section. The right-hand side of the interface shows the 'Page > Tabs' configuration panel, which includes a 'Default Tab' dropdown and a list of tabs: 'Contacts', 'Altify', 'Sales', 'Service', 'Field Service', 'Billing', 'Commerce', and 'Account Plan'. The 'Add Tab' button is also visible at the bottom of this panel.

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

The screenshot displays the Salesforce Visualforce page editor interface. On the left, a 'Components' sidebar lists various components like 'Related List - Single', 'Report Chart', and 'Visualforce'. The main workspace shows a preview of a Visualforce page for 'Account: Ohana, Inc.' with a table of contacts and an activity feed. On the right, the 'Page > Visualforce' configuration panel is visible, containing a 'Show Label' checkbox and two input fields: 'Label' (containing 'Altify Relationship Map') and '\* Visualforce Page Name' (containing 'Altify Account Summary Launchpad'). A red rectangular box highlights these two fields. At the top right of the editor, there are 'Save' and 'Activation...' buttons, and a 'Changes saved' indicator.

## Step 10: Hit "Save"

The screenshot displays the Salesforce Visualforce page editor interface. At the top right, the text "Changes saved:" is followed by a blue "Save" button, which is highlighted with a red rectangular box, and a blue "Activation..." button. The main workspace shows a preview of a Visualforce page for the account "Onans, Inc.". The page includes a header with account details (Account Number: AA3036686, Type: Enterprise, Industry: Technology, Total Sales: \$41,560.00, Employees: 15,000, Days Since Activity: 5) and a navigation bar with tabs for Contacts, **Activity**, Sales, Service, Field Service, Billing, Commerce, and More. The "Activity" tab is active, showing an "Activity Relationship Map" for "ALTIFY Account Manager" with key players: Lauren Kalk (Support), Mark Knight (Support), James Wu (Sales), and Bob Hodges. An "Activity" list on the right shows tasks such as "Support Call with Eric" (Apr 27), "Call Client - Confirm...", "Confirming final Contract...", "Review Product Roadmap", and "Discuss Product Quote".

On the left side, the "Components" panel is visible, featuring a search bar and a list of components including "Related List - Single", "Report Chart", "Surveys", "Visualforce", and "Custom (56)".

On the right side, the "Page > Visualforce" configuration panel is open, showing settings for "Show Label", "Label" (set to "Altify Relationship Map"), "Visualforce Page Name" (set to "Altify Account Summary Launchpad"), "Height (in pixels)" (set to 300), and "Set Component Visibility" with an "Add Filter" button.

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

The screenshot displays a 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". The account name "Ohana, Inc." is prominently displayed, along with action buttons for "Follow", "Edit", "New Contact", "New Opportunity", "New Case", and "Quick Quote".

The main content area is divided into several tabs: "Contacts", "Altify", "Sales", "Service", "Field Service", "Billing", "Commerce", and "Account Plan". The "Altify" tab is active, showing the "Altify Relationship Map". This map is titled "ALTIFY Account Manager" and lists "Key Players" in a table:

CONTACT	SUPPORT	BUYER ROLE	GOALS	PRESSURES	INITIATIVES
Lauren Bailey SVP, Technolog	Supporter				
Mark Kingstar Project Manag	Supporter				
James Wu VP of Sales	Non-Supporter				
Bob Hodges					

The right sidebar, titled "Activity", includes options for "Log a Call", "Email", "New Task", and "New Event". It features a "Recap your call..." input field with an "Add" button. Below this, there are filters for "All time", "All activities", and "All types", along with "Refresh", "Expand All", and "View All" options. A section for "Upcoming & Overdue" tasks is visible, listing items like "Support Call with: Lauren B..." and "Call Client - Confirm close ..." with due dates of "Apr 27".



## Next Steps

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

