



ALTIFY™

# Switching to Lightning Experience

Friday, June 15, 2018

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# 1 Introduction

When you switch from Salesforce Classic to Salesforce Lightning Experience, you may need to make some adjustments to ensure that you continue to enjoy the maximum possible benefit from your Altify software.

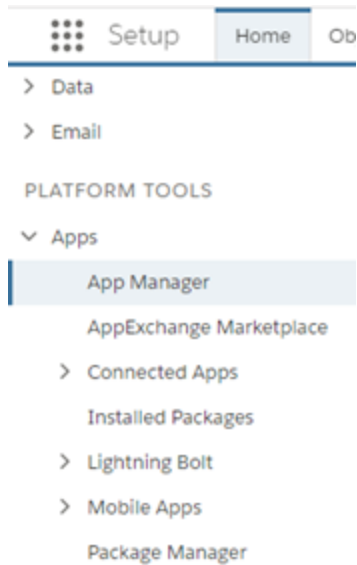
This guide explains the steps that you (as an administrator) may need to carry out.

## 2 Sales App in Salesforce Lightning

In Lightning, the **Sales** app does not automatically show Altify tabs.

To add Altify tabs to the Sales app in Lightning:

1. In Lightning Experience, go to **Setup > App Manager**.



2. Select the **LightningSales** app's **Edit** option.

23	Platform	Platform	The fundame...	6/11/2018 4:...	Classic	▼
24	Process Admin	Playbook_Ad...	Application t...	6/11/2018 4:...	Classic (Managed) ✓	▼
25	Sales	Sales	The world's ...	6/11/2018 4:...	Classic	▼
26	Sales	LightningSales	Manage your ...	6/12/2018 1...	Lightning ✓	▼
27	Salesforce Ch...	Chatter	The Salesforc...	6/11/2018 4:...	Classic	▼
28	Salesforce Files	Salesforce_C...	Manage and ...	6/11/2018 4:...	Connected (Ma	▼
29	Salesforce for...	Salesforce_for...	A powerful O...	6/11/2018 4:...	Connected (Managed)	▼

3. In the left-hand panel, click **Select Items**.
4. Use the horizontal arrow buttons to add and remove items from the Sales app. In particular, move your Altify tabs into the Selected tabs list.

## Select Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove items.

### Available Items

Q Type to filter list...

- Account Plans
- Account Plans**
- Account Relationship Maps
- Altify Settings
- Altify SPM
- Altify SPM Revenue Types
- Altify SPM Team Admin
- Altify SPM Teams
- Altify Team of Teams

### Selected Items

- Home
- Opportunities
- Leads
- Tasks
- Files
- Accounts
- Contacts
- Campaigns
- Dashboards
- Reports

5. Use the vertical arrow keys to arrange the selected items into the order you want.
6. Click **Save**.



### 3 Lightning Record Pages

In Salesforce Lightning Experience, a *record page* is a great way of giving users a customized view of an object's records.

With record pages, Altify launchpads can be shown front and center when a user opens an [opportunity](#) or [account](#).

Record pages offer better design options than the page layouts familiar from Salesforce Classic.

You can still make use of your existing page layouts. They can be incorporated into your record pages so that in Lightning users continue to see all the same information they see in Salesforce Classic.

(Record pages are not available in Salesforce Classic.)

## 3.1 Opportunity Record Page

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**Note:** This topic applies only if you have installed the **Opportunity Manager**, **Sales Process Manager**, or **Relationship Map** license package. It does not apply to any other Altify modules.

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When you are making the transition from Salesforce Classic to Lightning Experience, we strongly recommend that you set up an Opportunity record page that puts your Altify launchpads front and center.

That way, users will get instant access to Altify features when they open an opportunity.

Setting up the record page has three stages.

### 3.1.1 Open a New Record Page

1. In Salesforce Lightning Experience, go to **Setup > Object Manager**.
2. Click into the **Opportunity** object.
3. In the left-hand panel, click **Lightning Record Pages**.
4. Click **New**.
5. In the Create dialog box, select **Record Page** and click **Next**.

## Create a New Lightning Page

App Page

Home Page

Record Page

Customize Lightning Experience record pages.

Next

6. Give the new record page a suitable name, and associate it with the **Opportunity** object.

## Create a New Lightning Page

\* Label

Opportunity Record Page

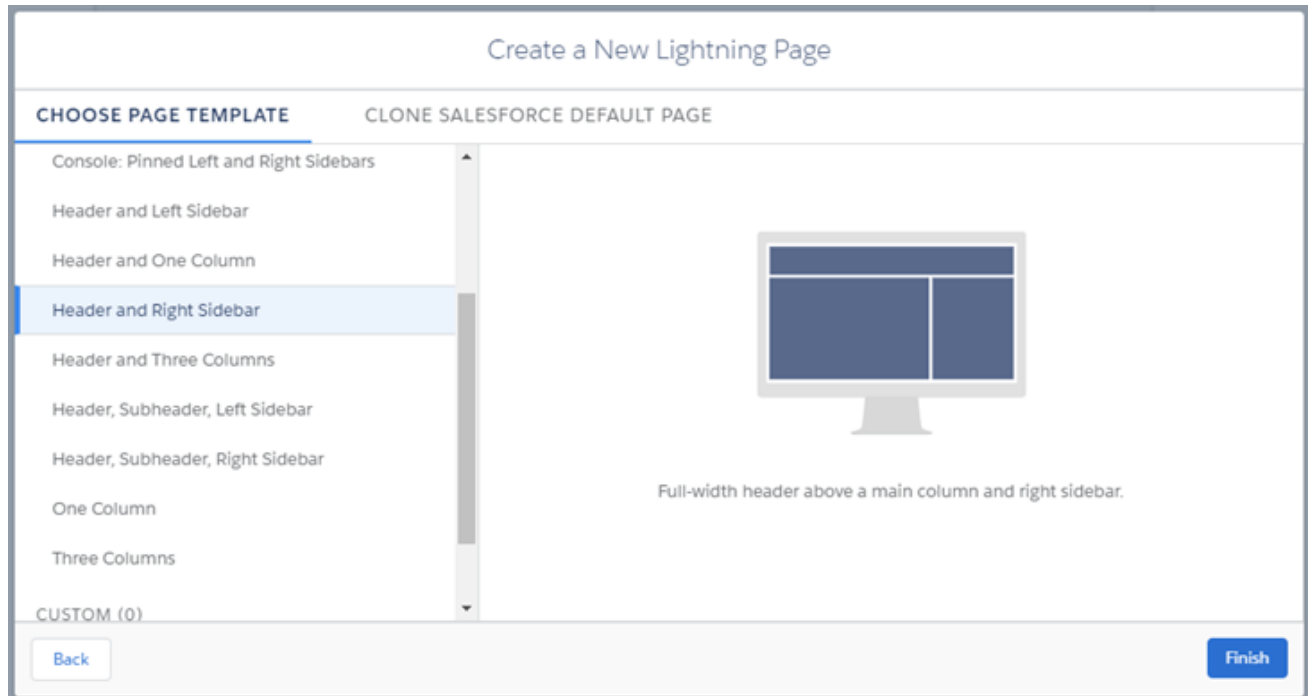
\* Object

Opportunity

Next

7. Click **Next**.
8. A template that often works well is **Header and Right Sidebar**, so we'll use it for this example.





9. Click **Finish**.

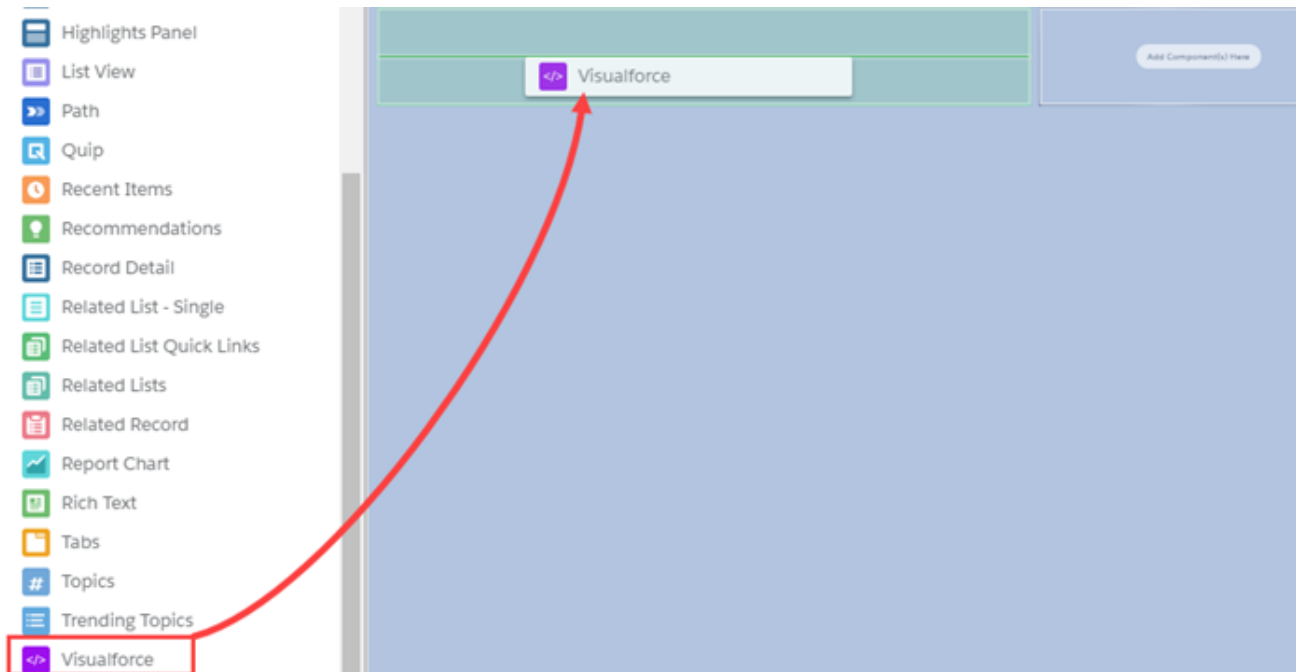
The record page builder opens. You are now ready to start adding components to the new record page.

### 3.1.2 Add Altify Launchpads to the Record Page

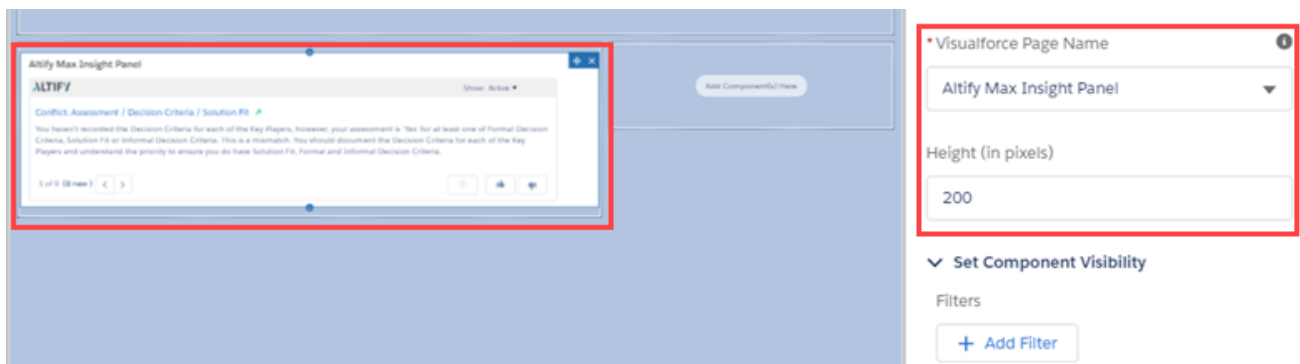
The steps that follow present a suggested format for your new record page.

**Note:** If you don't have Altify Max installed, you can skip the first three steps.

1. From the left-hand panel, drag **Visualforce** into the main body area.



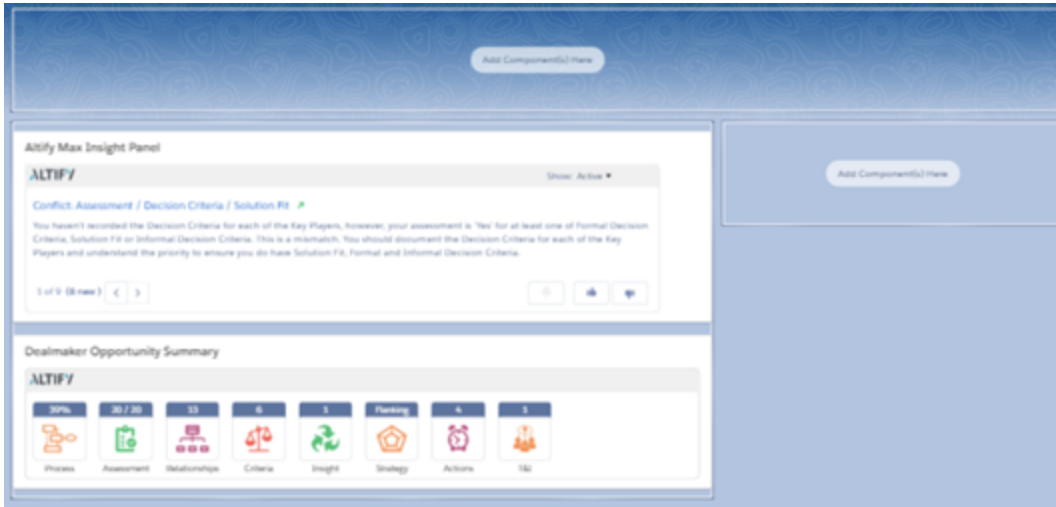
2. With this item selected in the main body, select **Altify Max Insight Panel** in the right-hand panel's Visualforce Page Name drop-down.
3. Set the height to 225 pixels.



4. From the left-hand panel, drag **Visualforce** into the main body area, and position it below the Max item (if you added this item).
5. With this item selected in the main body, select **Dealmaker Opportunity Summary** as the Visualforce Page Name.

- Set the height to 260 pixels.

The record page should now look like this:



Optionally, if users are suitably licensed, you can also add:

- **Playbook Launchpad** - also known as the 'Detailed Sales Process Manager Launchpad'
- **Summary Relationship Map Express** - also known as the 'Relationship Map Summary'

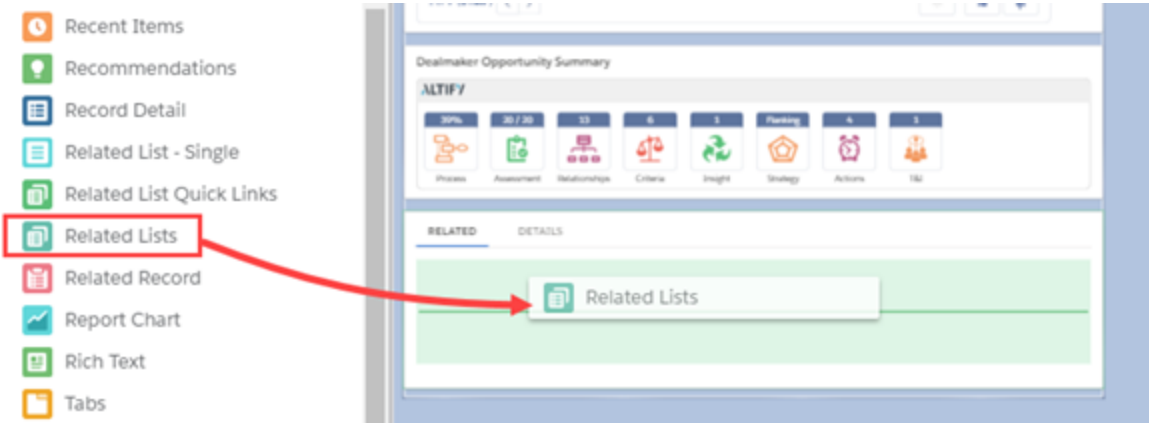
### 3.1.3 Add Other Components

You are now ready to add Salesforce components to the new record page to complete it.

The steps below provide some suggestions of what to add, but you can add whatever components are most appropriate to your needs.

- From the left-hand panel, drag **Highlights Panel** into the Header area.
- From the left-hand panel, drag **Tabs** into the main body area, and position it below the Altify components.
- With **Related** selected in the Tabs item, drag **Related Lists** into the item.

(This adds all information associated with the Related Lists section of the Opportunity page layout.)



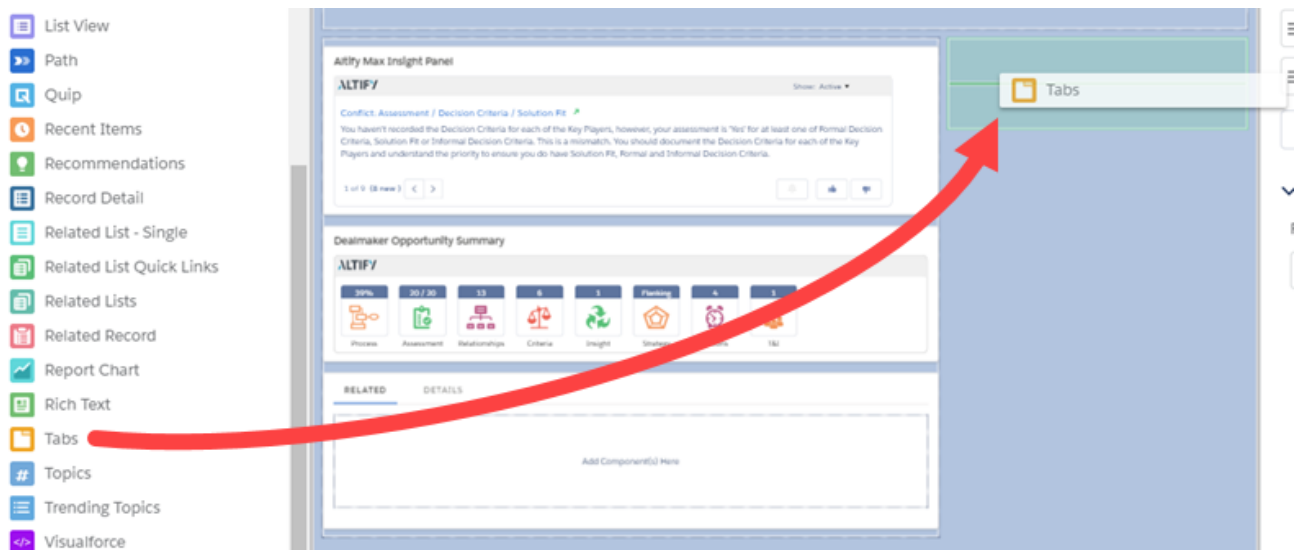
4. With **Details** selected, drag in **Record Detail**.

(This adds all information associated with the Opportunity Detail section of the Opportunity page layout.)

### Additional Side Panel Tabs

You may find it useful to add Activity and Chatter tabs to the right-hand panel:

1. Drag another **Tabs** item into the side-panel.



2. Change the default tabs in the Tabs item to **Activity** and **Chatter**.
3. Drag **Activities** into the **Activity** tab, and **Chatter** into the **Chatter** tab.

The record page should now look like this:

**Opportunity**  
Ancaster Engineering - 200 Enterprise Licenses

Account Name: Ancaster Engineering | Close Date: 7/23/2018 | Amount: \$850,000.00 | Opportunity Owner: Brian Rice | Is Risky:  | Has Mentor:

**Altify Max Insight Panel**  
ALTIFY | Show: Active

Conflict: Assessment / Decision Criteria / Solution Fit

You haven't recorded the Decision Criteria for each of the Key Players, however, your assessment is 'Yes' for at least one of Formal Decision Criteria, Solution Fit or Informal Decision Criteria. This is a mismatch. You should document the Decision Criteria for each of the Key Players and understand the priority to ensure you do have Solution Fit, Formal and Informal Decision Criteria.

1 of 9 (8 new) < >

**Dealmaker Opportunity Summary**  
ALTIFY

39% | 20 / 20 | 13 | 6 | 1 | Planning | 4 | 1

Process | Assessment | Relationships | Criteria | Insight | Strategy | Actions | %!

**RELATED DETAILS**

Opportunity Owner	Close Date
Brian Rice	7/23/2018
Opportunity Name	Stage
Ancaster Engineering - 200 Enterprise Licenses	Target Selected
Account Name	Probability (%)
Ancaster Engineering	39%
Type	Amount
Enterprise	\$850,000.00

**ACTIVITY CHATTER**

Post | Post

Share an update...

Search this feed...

Gareth Power updated this record. June 11, 2018 at 4:41 AM

Stage: Requirements to Target Selected

Like | Comment

Write a comment...

Gareth Power updated the Altify Relationship Map. June 11, 2018 at 4:22 AM

Like | Comment

Write a comment...

4. Click **Save** in the top right.

In Salesforce Lightning Experience, opportunity records now have the format defined by your new record page.

## 3.2 Account Record Page

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**Note:** This topic applies only if you have installed the **Account Manager** license package. It does not apply to any other Altify modules.

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When you are making the transition from Salesforce Classic to Lightning Experience, we strongly recommend that you set up an Account record page that puts your Altify launchpads front and center.

That way, users will get instant access to Altify features when they open an account.

Setting up the record page has three stages.

### 3.2.1 Open a New Record Page

1. In Salesforce Lightning Experience, go to **Setup > Object Manager**.
2. Click into the **Account** object.
3. In the left-hand panel, click **Lightning Record Pages**.
4. Click **New**.
5. In the Create dialog box, select **Record Page** and click **Next**.

## Create a New Lightning Page

App Page

Home Page

Record Page

Customize Lightning Experience record pages.

The screenshot displays a Salesforce Lightning Experience record page for an Opportunity. The page title is 'Presidio Technology & Anypoint Connectors'. The opportunity owner is Jeanette Gomez. The account name is Presidio Technology, with a close date of 11/6/2017 and an amount of \$230,000.00. The page layout includes a header with navigation tabs (Sales, Home, Chatter, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Groups, People, Dashboard), a search bar, and a main content area with tabs for ACTIVITY, CHATTER, and DETAILS. The DETAILS tab is active, showing a table of related records. A 'Next' button is visible at the bottom right.

Opportunity	Amount
Jeanette Gomez	\$230,000.00
Presidio Technology & Anypoint Connectors	Opportunity U.S. Dollar
Presidio Technology	Close Date 11/6/2017
Sales Account Type	Stage Needs Assessment

Contacts (3)

- Lei Chan, Role: Executive, Title: President
- Gwen Jones, Role: Executive, Title: CRO
- Adam Choi, Role: Marketing

Next

- Give the new record page a suitable name, and associate it with the **Account** object.

## Create a New Lightning Page

\* Label

Account Record Page

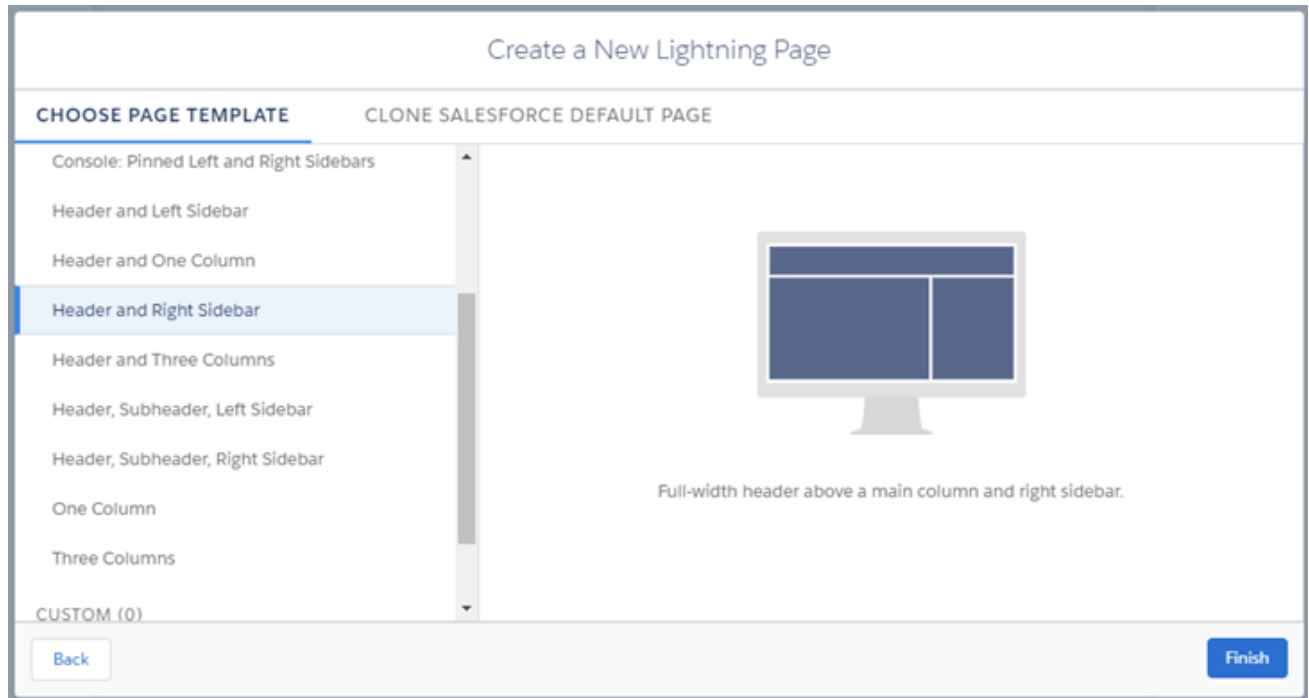
\* Object

Account

Back

Next

- Click **Next**.
- A template that often works well is **Header and Right Sidebar**, so we'll use it for this example.



9. Click **Finish**.

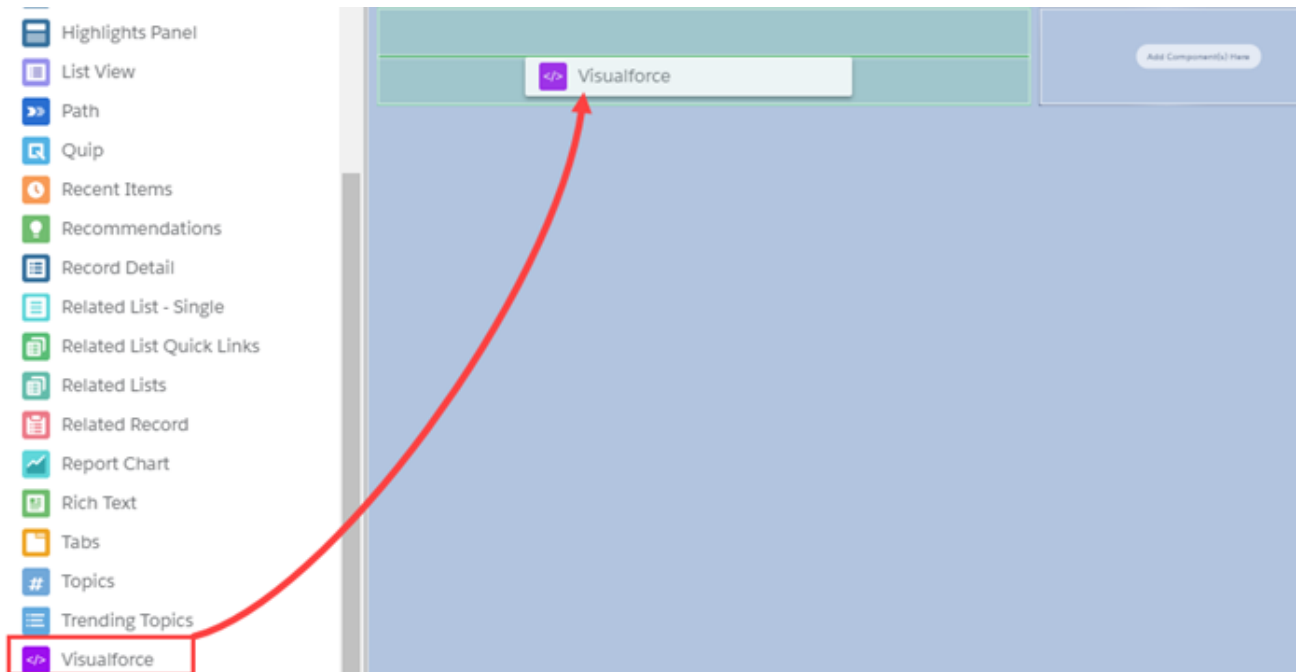
The record page builder opens. You are now ready to start adding components to the new record page.

### 3.2.2 Add Altify Launchpads to the Record Page

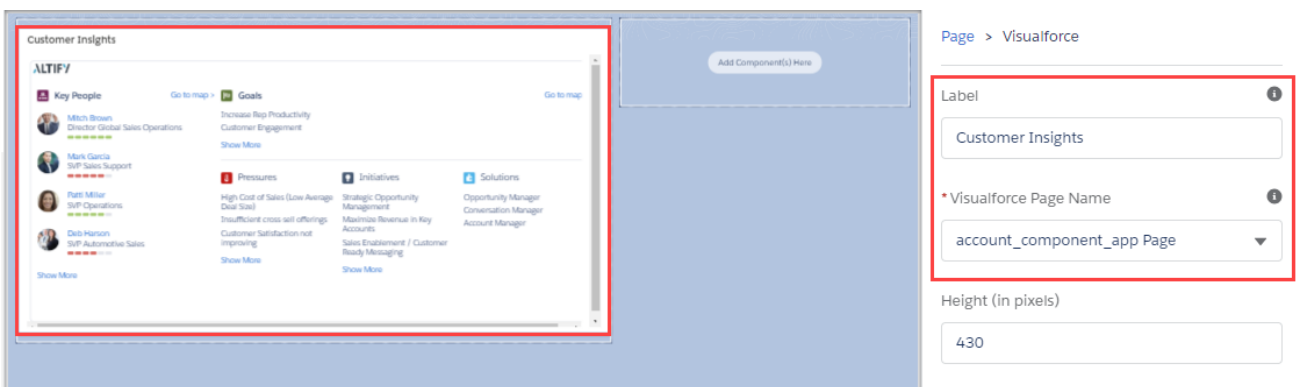
The steps that follow present a suggested format for your new record page.



1. From the left-hand panel, drag **Visualforce** into the main body area.



2. With this item selected in the main body, select **account\_component\_app Page** in the right-hand panel's Visualforce Page Name drop-down.
3. Set the height to 450 pixels.
4. Set the label to *Customer Insights*.



5. From the left-hand panel, drag **Visualforce** into the main body area, and position it below the Customer Insights item (if you added this item).

6. With this item selected in the main body, select **Account Plans** as the Visualforce Page Name.
7. Set the height to 300 pixels.

The record page should now look like this:

The screenshot displays a Salesforce Lightning record page for 'Customer Insights'. The page is divided into several sections:

- Customer Insights Header:** Includes a search bar and a button labeled 'Add Component(s) Here'.
- Customer Insights Content:**
  - Key People:** Lists individuals like Mitch Brown (Director Global Sales Operations), Mark Garcia (SVP Sales Support), Patti Miller (SVP Operations), and Deb Hanson (SVP Automotive Sales).
  - Goals:** Lists 'Increase Rep Productivity' and 'Customer Engagement'.
  - Pressures:** Lists 'High Cost of Sales (Low Average Deal Size)', 'Insufficient cross-sell offerings', and 'Customer Satisfaction not improving'.
  - Initiatives:** Lists 'Strategic Opportunity Management', 'Maximize Revenue in Key Accounts', and 'Sales Enablement / Customer Ready Messaging'.
  - Solutions:** Lists 'Opportunity Manager', 'Conversation Manager', and 'Account Manager'.
- Account Plans Section:**
  - Includes a 'New Account Plan' button and filters for 'Status: Active' and 'Ownership: All Plans'.
  - Contains a table with columns: PLANNAME, PLAN TYPE, STATUS, OWNER, ACCOUNT LIST, REVENUE TARGET, FROM, and TO.

PLANNAME	PLAN TYPE	STATUS	OWNER	ACCOUNT LIST	REVENUE TARGET	FROM	TO
[A] Demo Ancaster Inc Major Account Plan	Account Plan	Active	Brian Rice	Ancaster Inc, Ancaster Commodities, Ancaster Services, Ancaster Engineering	USD 12,000,000	10/22/2017	
[A3] Demo Ancaster Inc Complete Account Plan	Account Plan	Active	Gareth Power	Ancaster Inc, Ancaster Commodities, Ancaster Services, Ancaster Engineering	USD 8,820,000	1/22/2018	1/21/2022
[A2] Demo Ancaster Inc Account Plan - BASIC	Account Plan - Basic	Active	Gareth Power	Ancaster Inc, Ancaster Commodities, Ancaster Services, Ancaster Engineering	USD 5,000,000	1/22/2018	1/21/2022

Optionally, if users are suitably licensed, you can also add:

- **AccountPolMapLaunchpad** - also known as the 'Account Relationship Map Launchpad'

You may also want to add the following related lists to this area:

- **Account Relationship Maps**
- **Account Insight Maps**

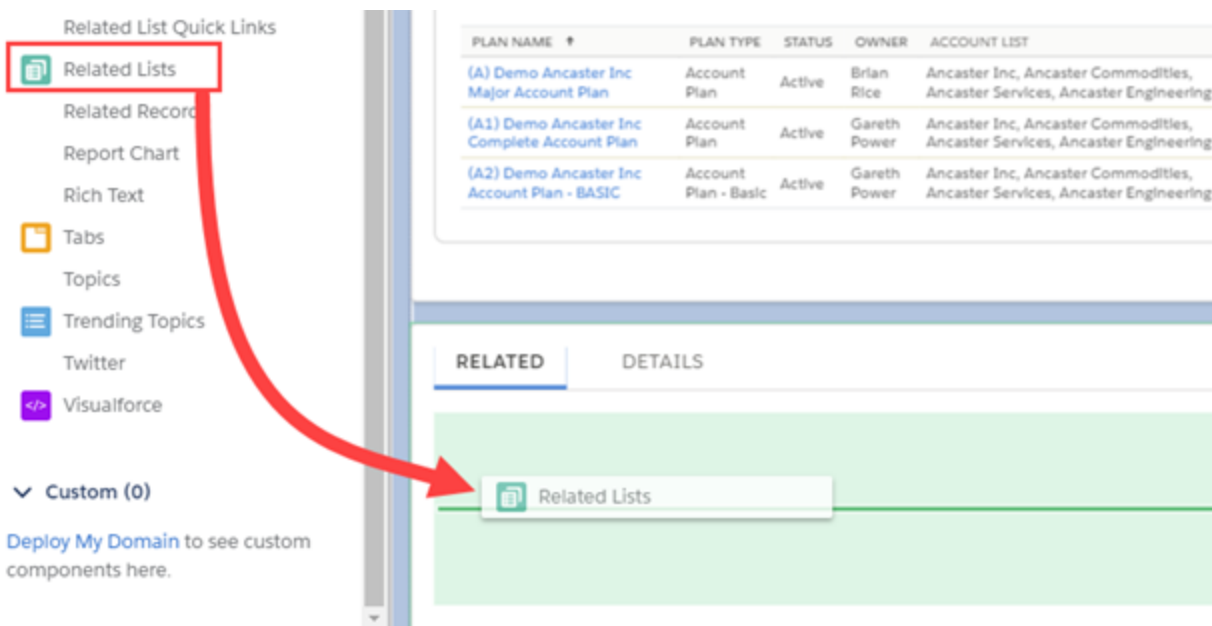
### 3.2.3 Add Other Components

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2. From the left-hand panel, drag **Tabs** into the main body area, and position it below the Altify components.
3. With **Related** selected in the Tabs item, drag **Related Lists** into the item.

(This adds all information associated with the Related Lists section of the Account page layout.)



4. With **Details** selected, drag in **Record Detail**.

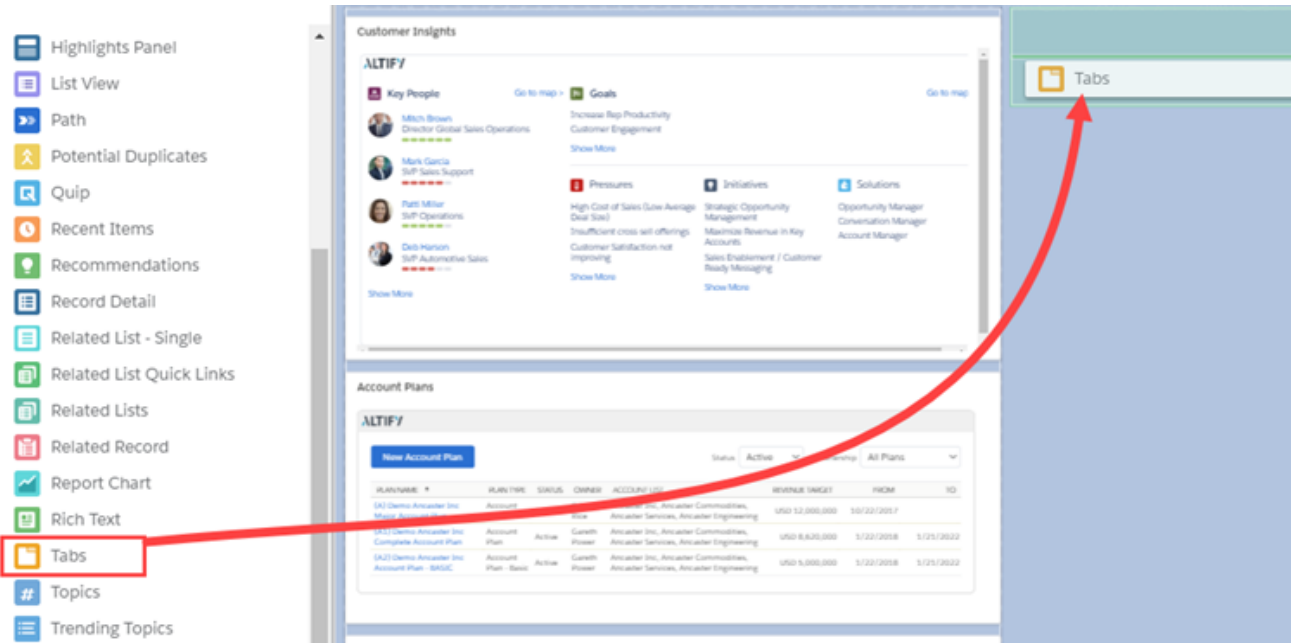
(This adds all information associated with the Account Detail section of the Account page layout.)

#### Additional Side Panel Tabs

You may find it useful to add Activity and Chatter tabs to the right-hand panel:



1. Drag another **Tabs** item into the side-panel.



2. Change the default tabs in the Tabs item to **Activity** and **Chatter**.
3. Drag **Activities** into the **Activity** tab, and **Chatter** into the **Chatter** tab.

The record page should now look like this:



**Customer Insights**

**Key People**

- Mitch Brown, Director Global Sales Operations
- Mark Garcia, SFP Sales Support
- Pats Miller, SFP Operations
- Deb Hanson, SFP Automotive Sales

**Goals**

- Increase Rep Productivity
- Customer Engagement

**Pressures**

- High Cost of Sales (Low Average Deal Size)
- Inefficient cross sell offerings
- Customer Satisfaction not improving

**Initiatives**

- Strategic Opportunity Management
- Maximize Revenue in Key Accounts
- Sales Enablement / Customer Ready Messaging

**Solutions**

- Opportunity Manager
- Conversation Manager
- Account Manager

**Account Plans**

PLAN NAME *	PLAN TYPE	STATUS	OWNER	ACCOUNT LIST	REVENUE TARGET	TERM	ID
(S0) Demo Ancaster Inc Major Account Plan	Account Plan	Active	Brian Rice	Ancaster Inc, Ancaster Commodities, Ancaster Services, Ancaster Engineering	USD 12,000,000	10/22/2017	
(S1) Demo Ancaster Inc Complete Account Plan	Account Plan	Active	Gareth Power	Ancaster Inc, Ancaster Commodities, Ancaster Services, Ancaster Engineering	USD 8,620,000	1/22/2018 - 1/25/2022	
(S2) Demo Ancaster Inc Account Plan - BASC	Account Plan - Basic	Active	Gareth Power	Ancaster Inc, Ancaster Commodities, Ancaster Services, Ancaster Engineering	USD 5,000,000	1/22/2018 - 1/25/2022	

**RELATED**

**Call Plans (1)**

CALL PLAN NAME	DISPLAY STATE	WHERE	START TIME
Explore new potential Op...	Plan	1750 Founders Parkway Alp...	7/3/2018 4:30 AM

4. Click **Save** in the top right.

In Salesforce Lightning Experience, account records now have the format defined by your new record page.