ALTIFY™

Switching to Lightning Experience

Friday, June 15, 2018

Contents

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.

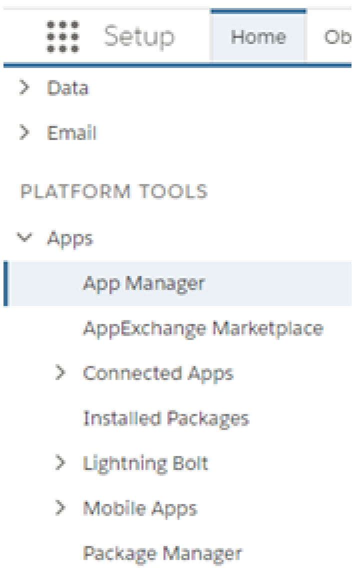
This guide explains the steps that you (as an administrator) may need to carry out.

2 Sales App in Salesforce Lightning

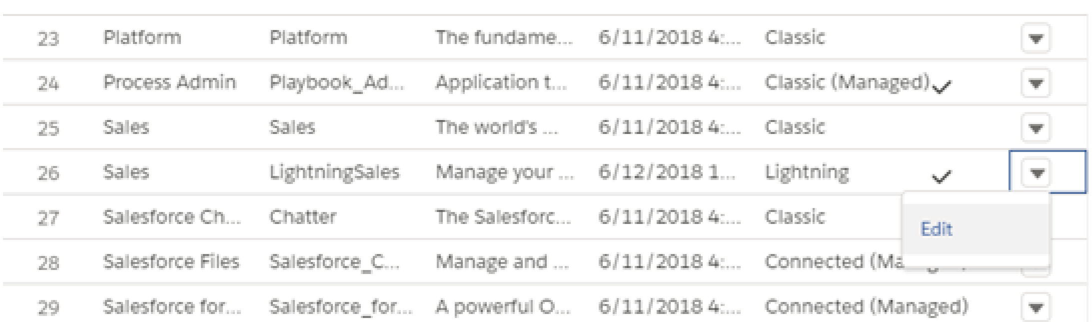
In Lightning, the **Sales** app does not automatically show Altify tabs.

To add Altify tabs to the Sales app in Lightning:

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

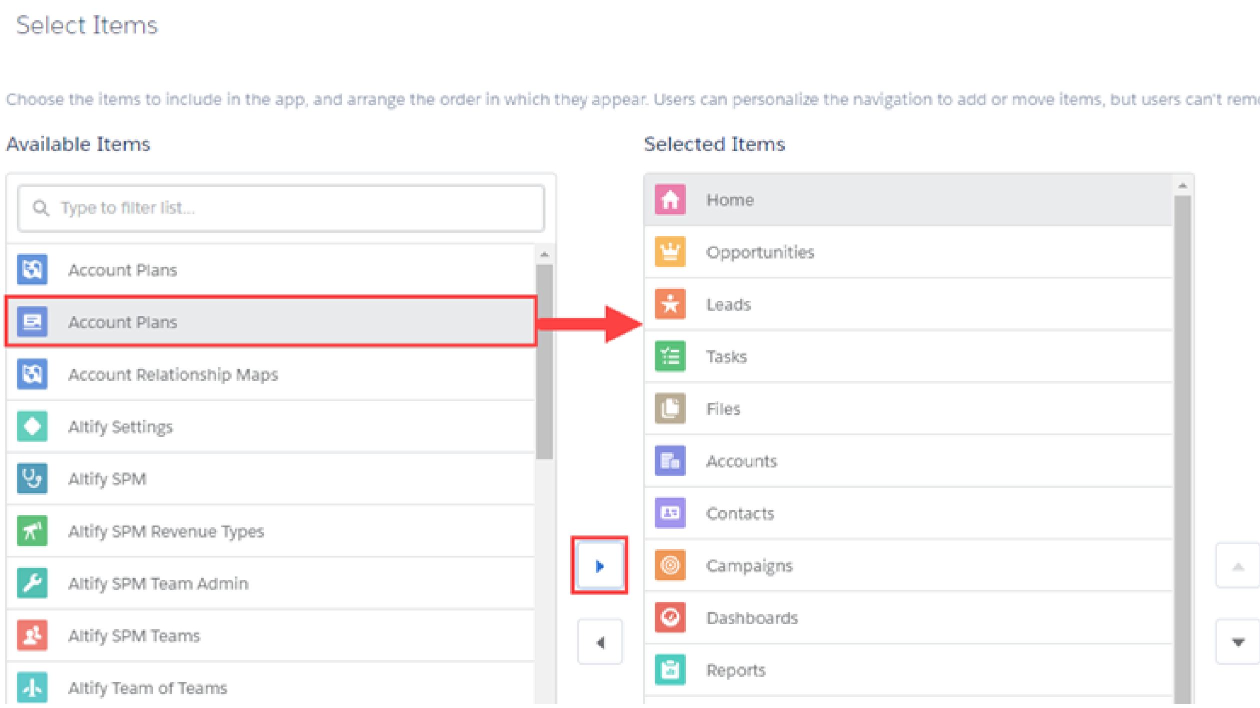


2. Select the **LightningSales** app's **Edit** option.



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.



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

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.

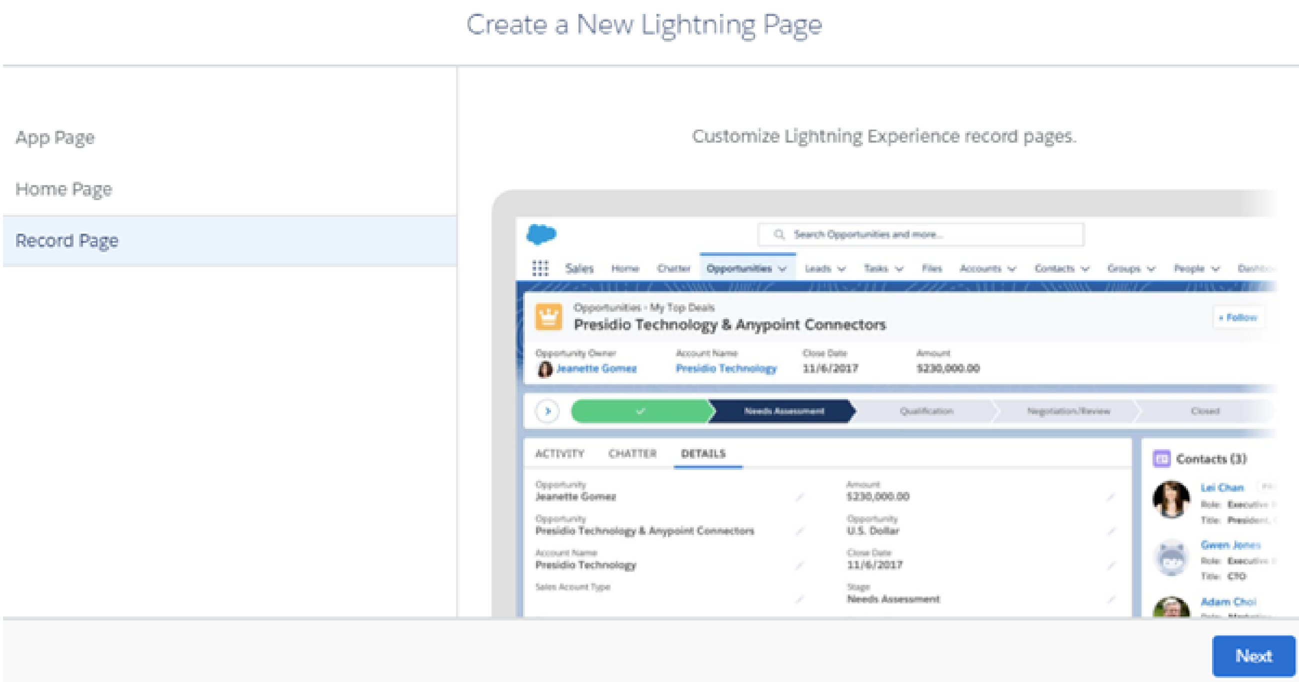
When you are making the transition from Salesforce Classic to Lightning Experience, we strongly recommend that you set up an Opportunity record page that puts your Altify launchpads front and center.

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

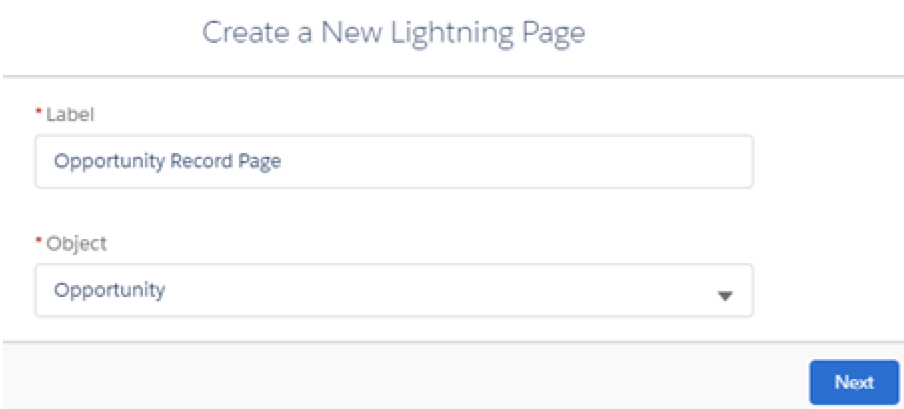
Setting up the record page has three stages.

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**.

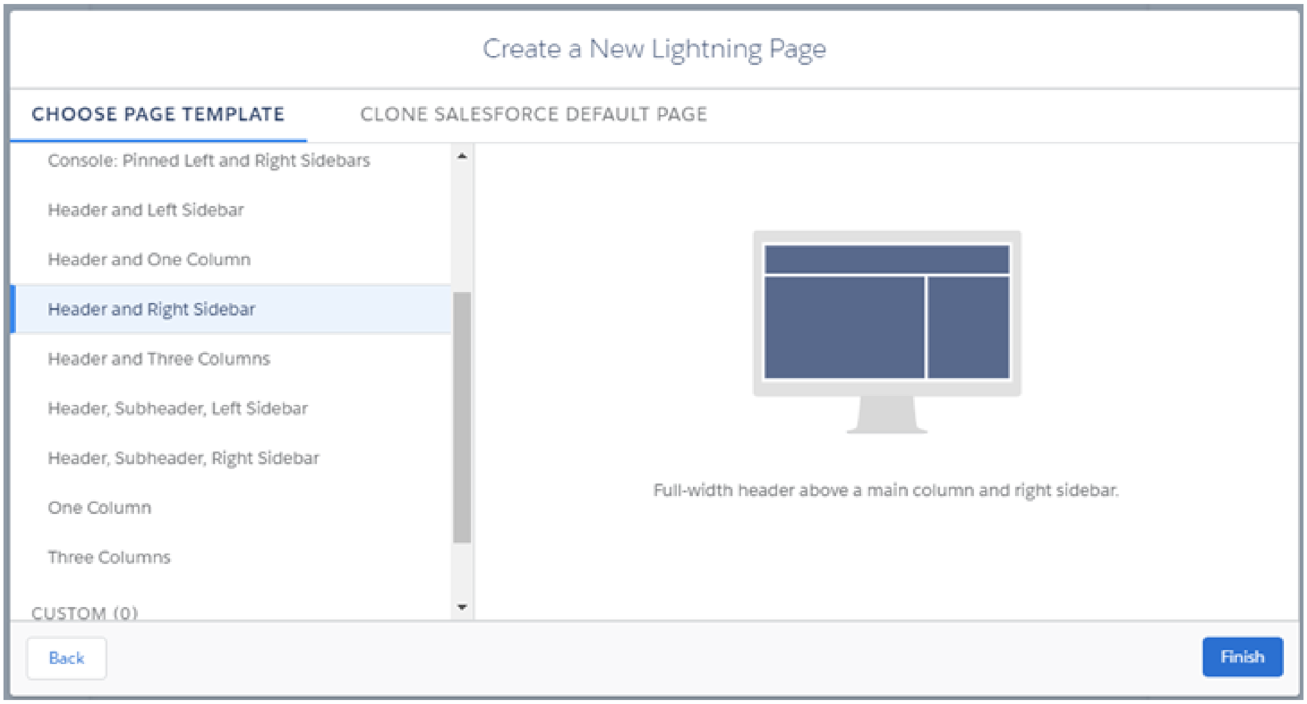


6. Give the new record page a suitable name, and associate it with the **Opportunity** object.



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**.

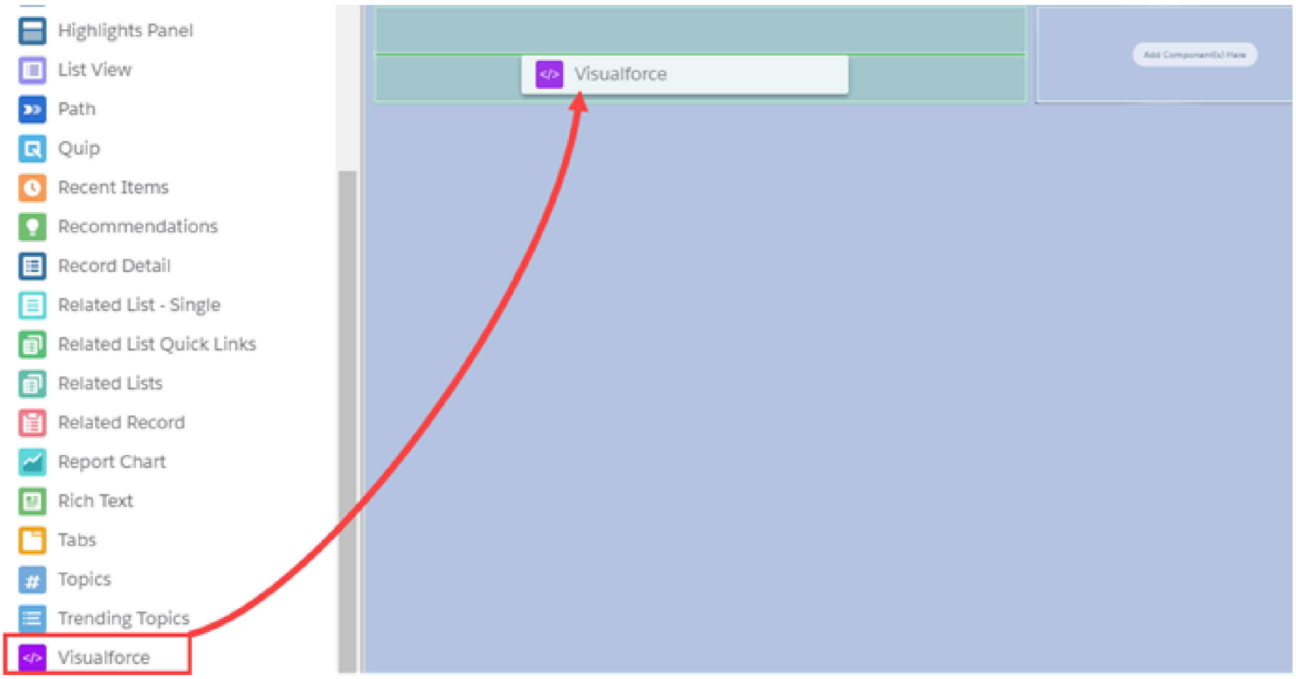
The record page builder opens. You are now ready to start adding components to the new record page.

3.1.2 Add Altify Launchpads to the Record Page

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

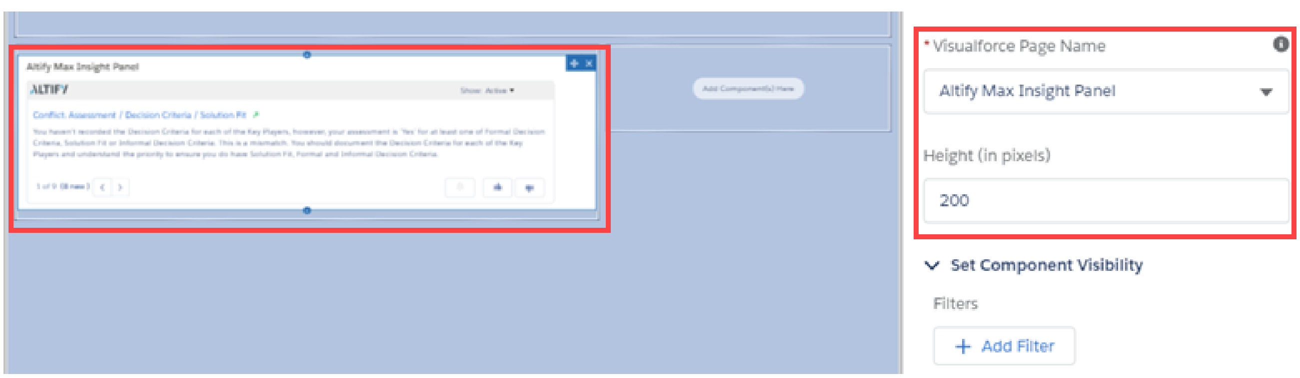
Note: If you don't have Altify Max installed, you can skip the first three steps.

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.

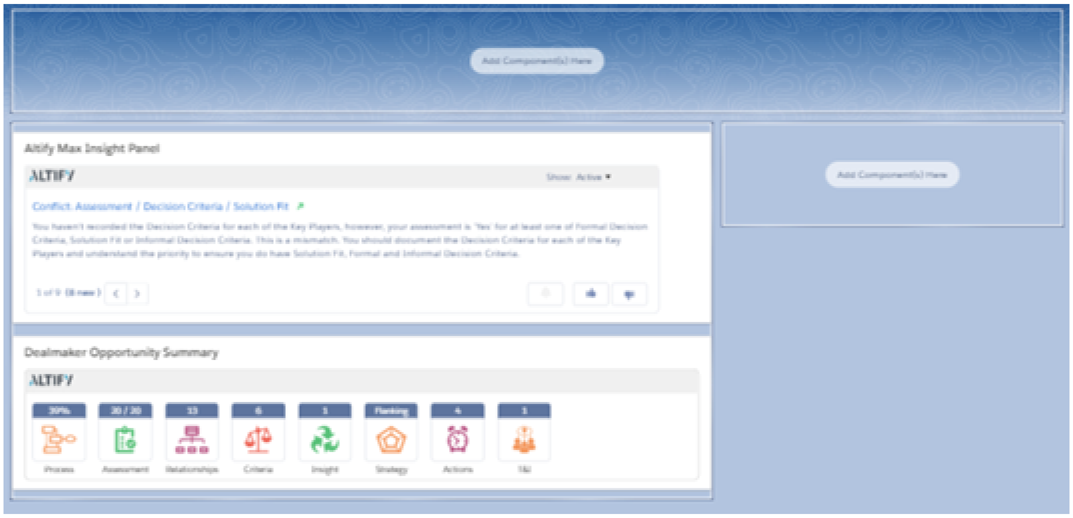


4. From the left-hand panel, drag **Visualforce** into the main body area, and position it below the Max item (if you added this item).

5. With this item selected in the main body, select **Dealmaker Opportunity Summary** as the Visualforce Page Name.

6. 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'

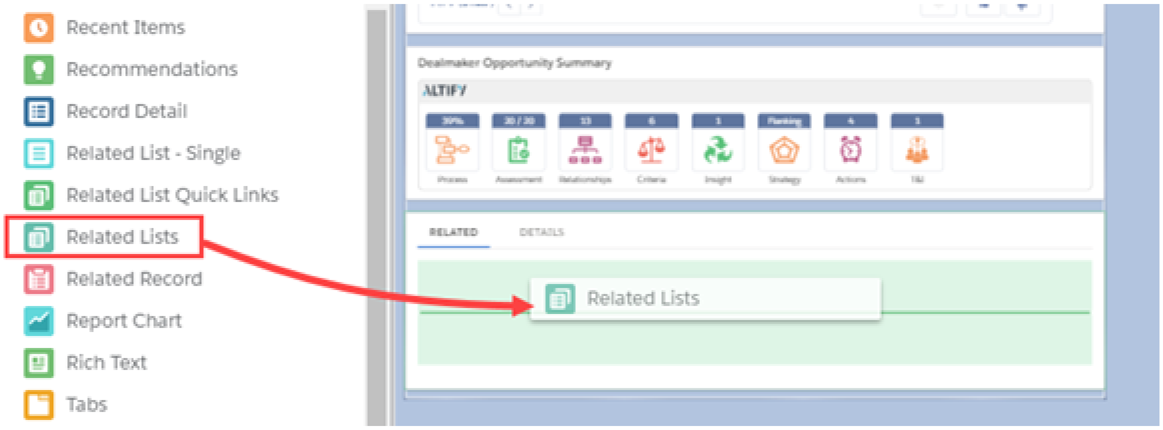
3.1.3 Add Other Components

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.

1. From the left-hand panel, drag **Highlights Panel** into the Header area.
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 Opportunity page layout.)



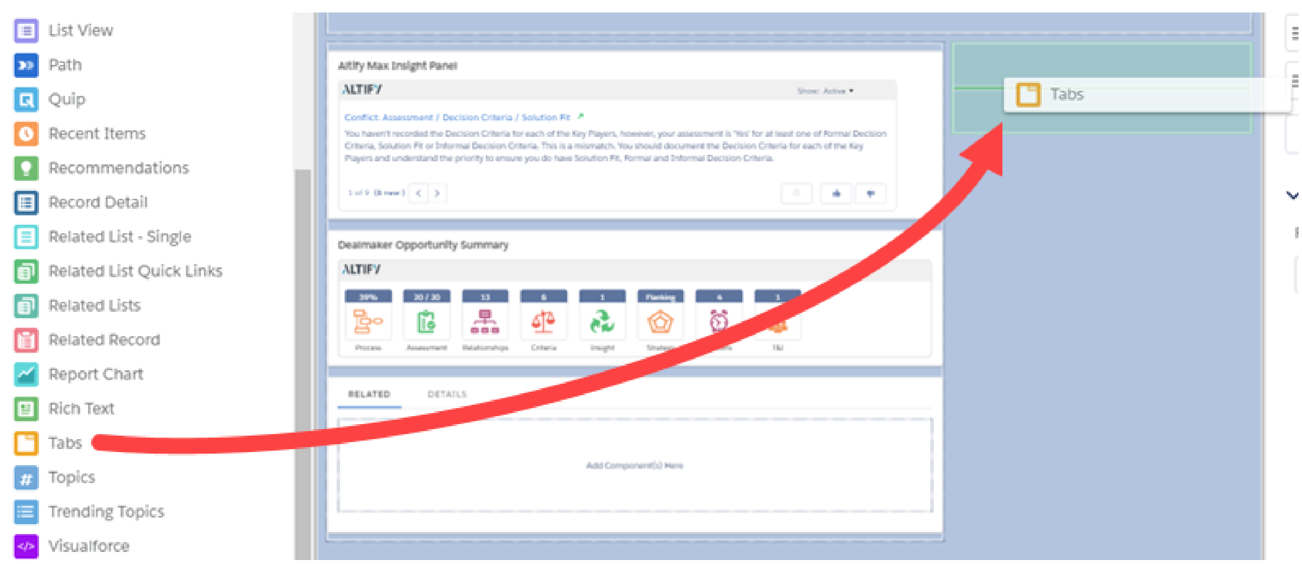
4. With **Details** selected, drag in **Record Detail.**

   (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:

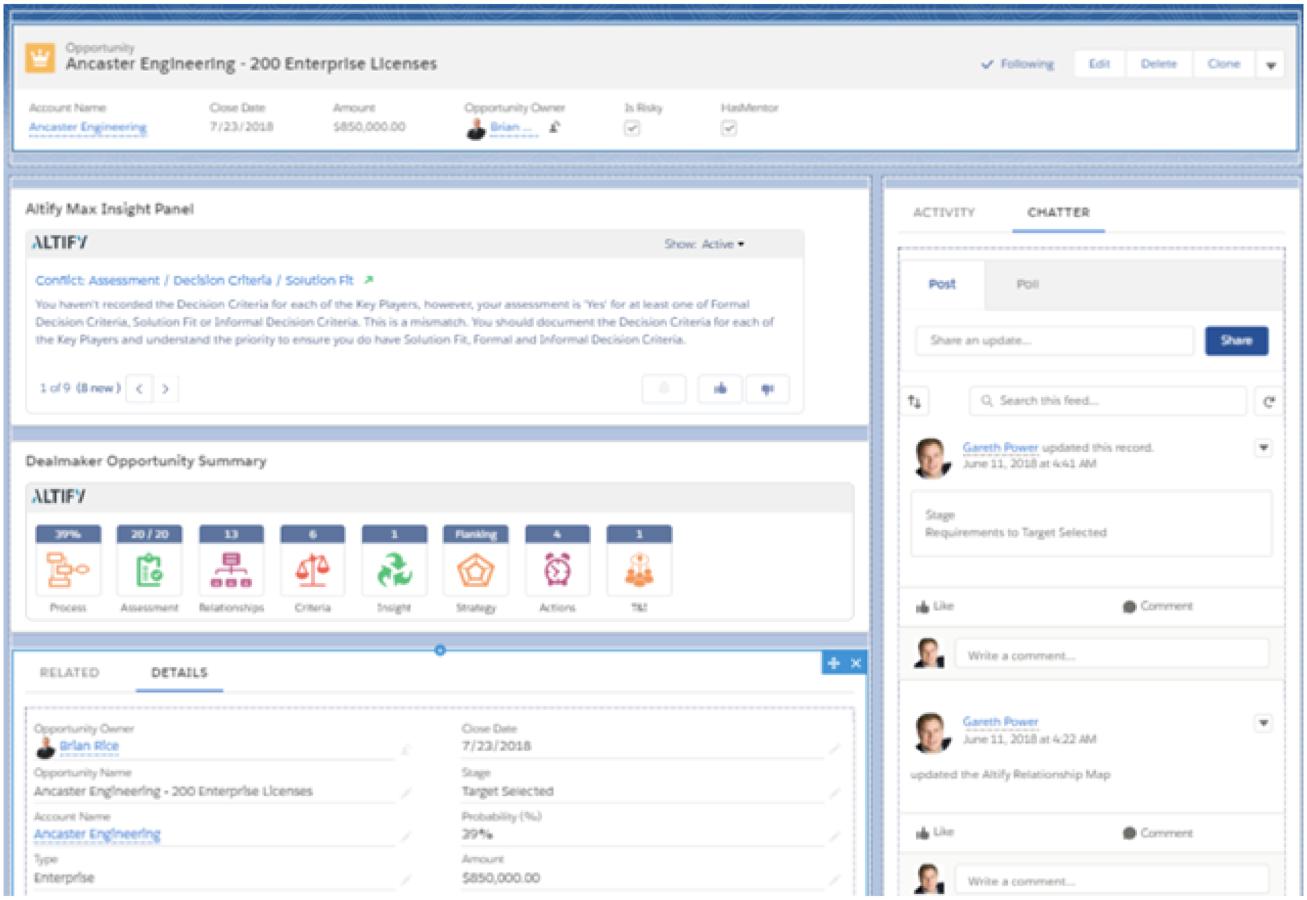
1. Drag another **Tabs** item into the side-panel.



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:



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

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

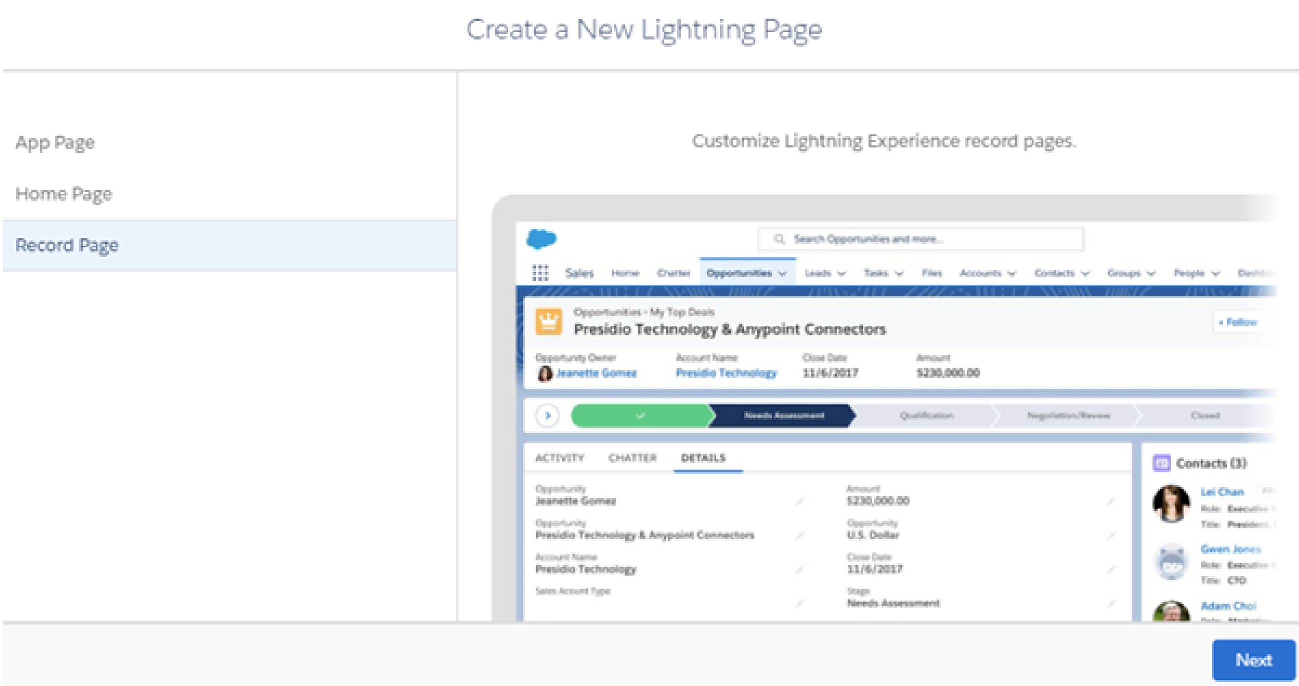
When you are making the transition from Salesforce Classic to Lightning Experience, we strongly recommend that you set up an Account record page that puts your Altify launchpads front and center.

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

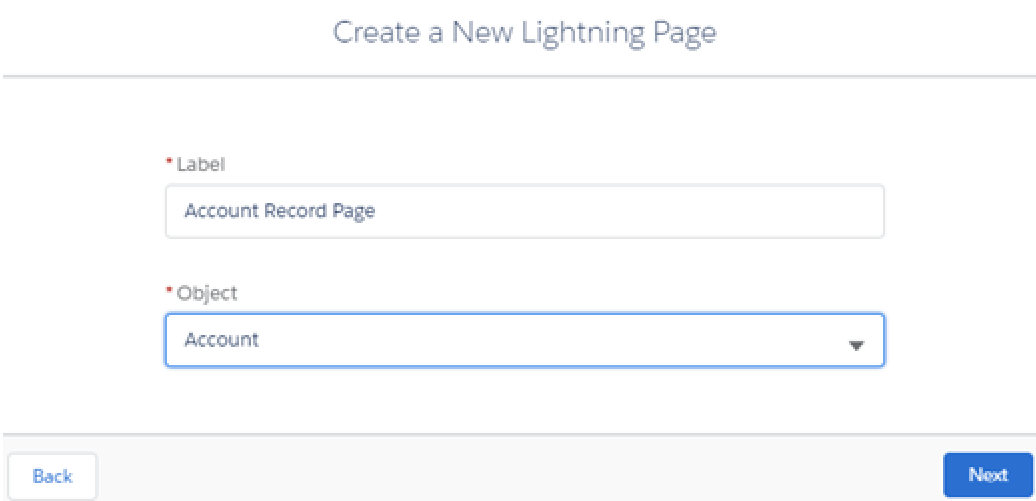
Setting up the record page has three stages.

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**.

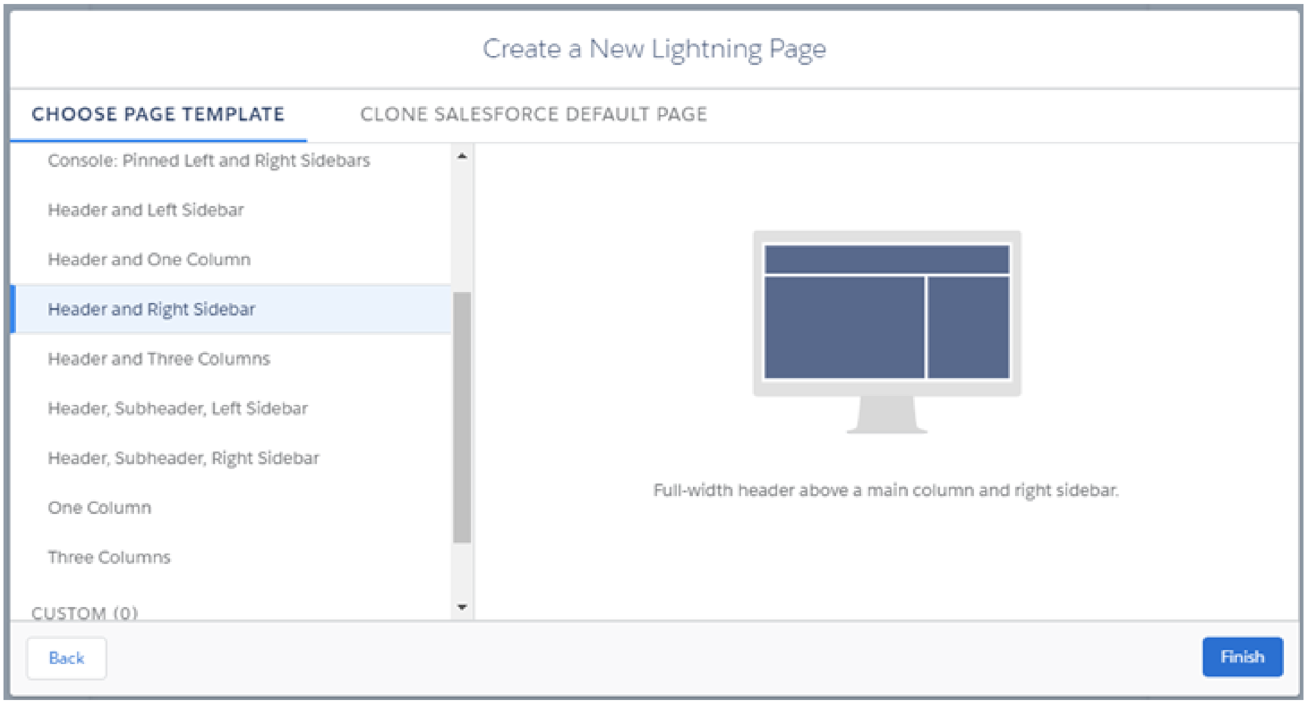


6. Give the new record page a suitable name, and associate it with the **Account** object.



7. Click **Next**.

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



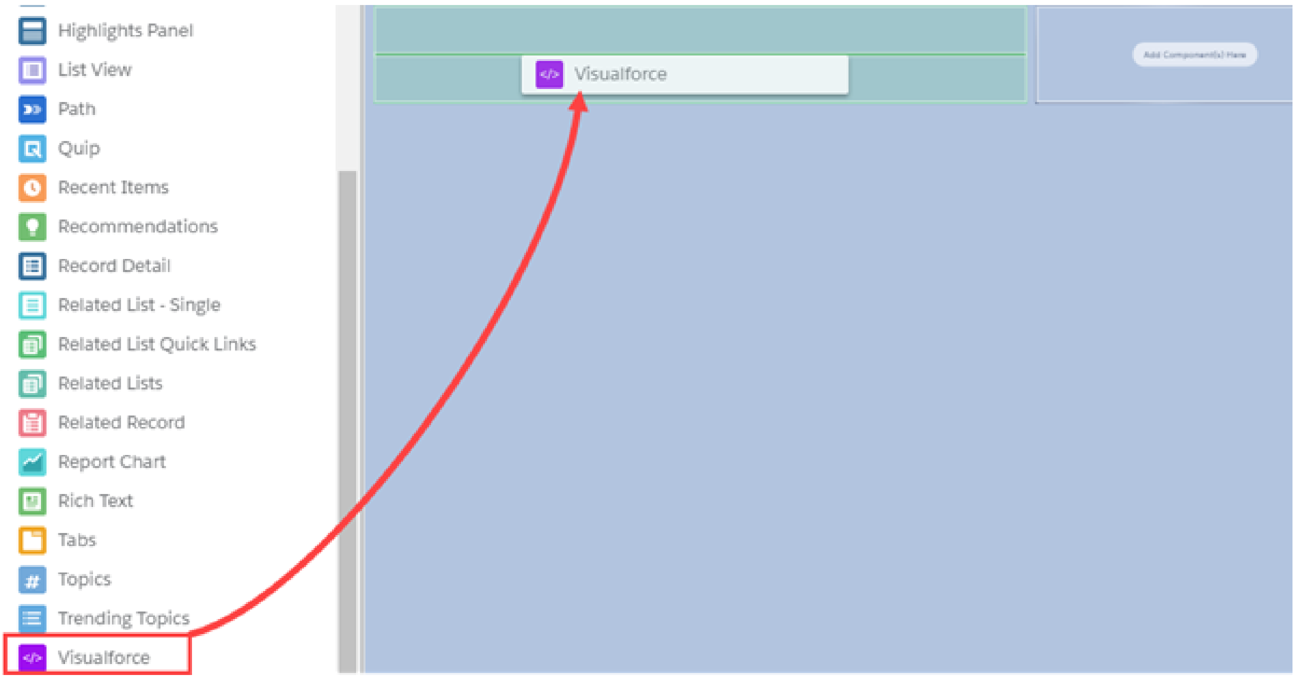
9. Click **Finish**.

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

3.2.2 Add Altify Launchpads to the Record Page

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

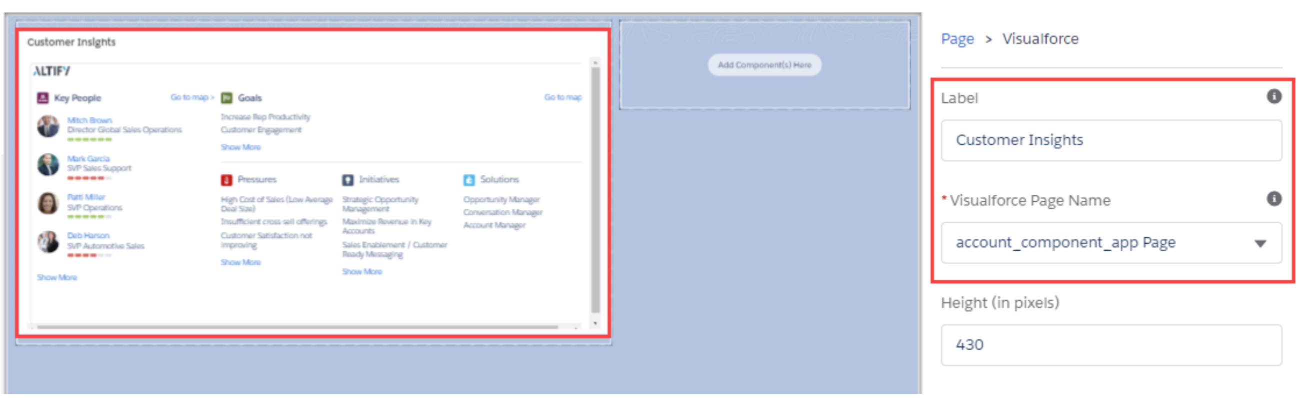
1. From the left-hand panel, drag **Visualforce** into the main body area.



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*.

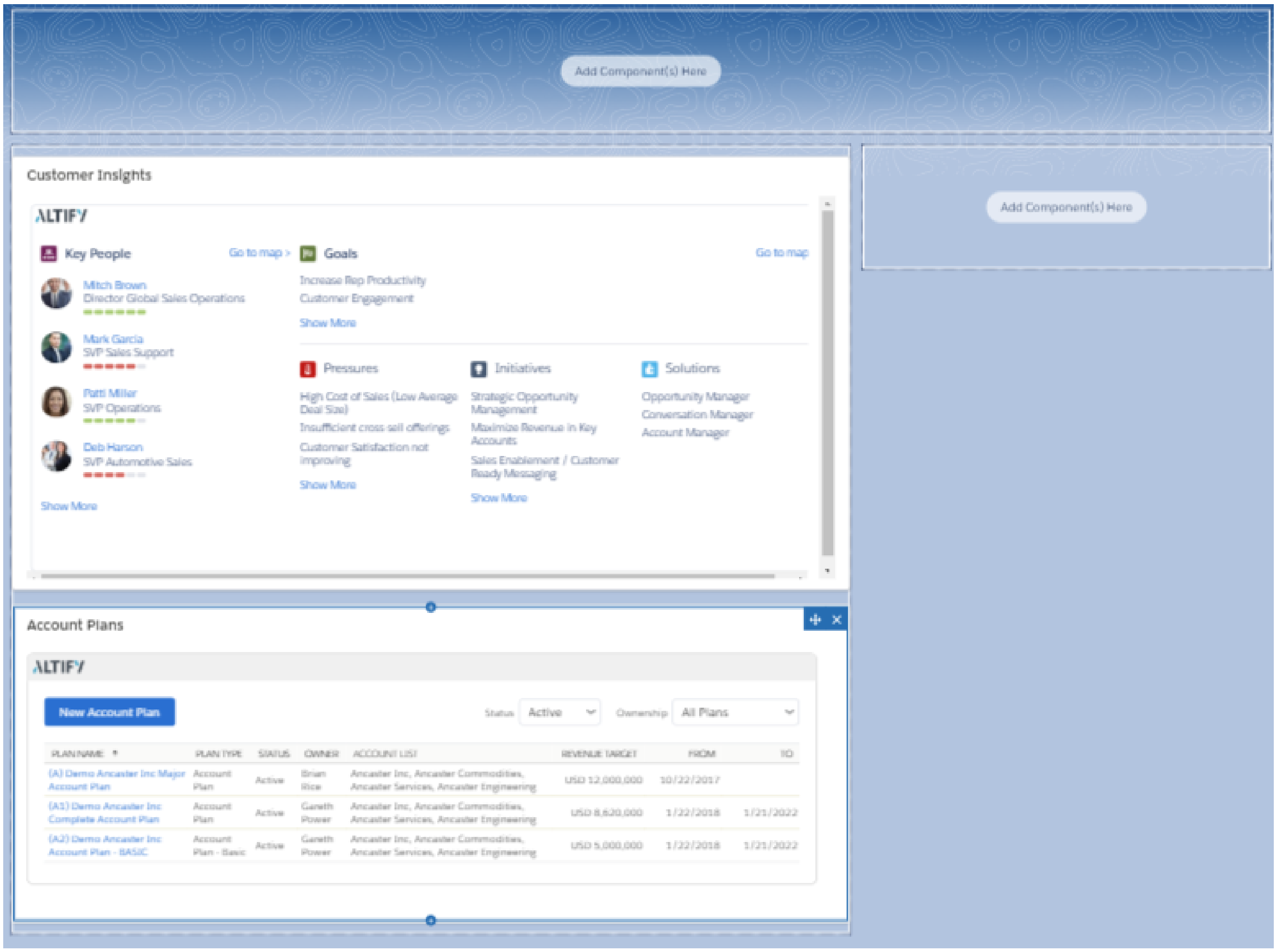


5. From the left-hand panel, drag **Visualforce** into the main body area, and position it below the Customer Insights item (if you added this item).

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:



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**

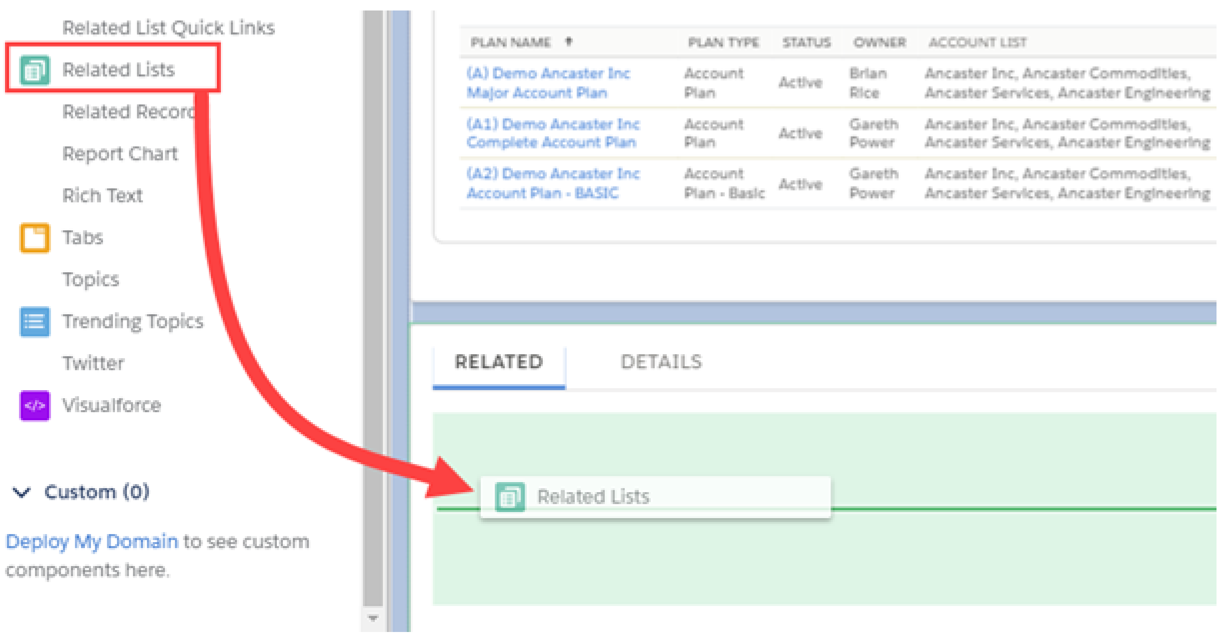
3.2.3 Add Other Components

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.

1. From the left-hand panel, drag **Highlights Panel** into the Header area.
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.)



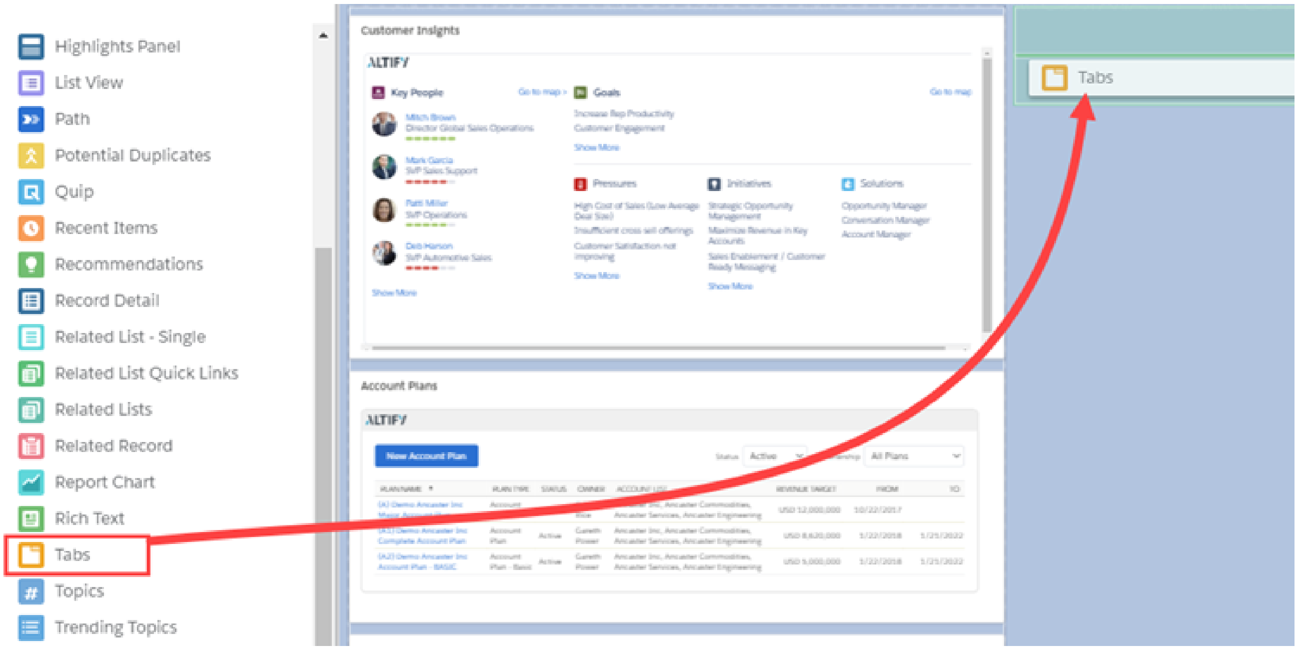
4. With **Details** selected, drag in **Record Detail.**

   (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:

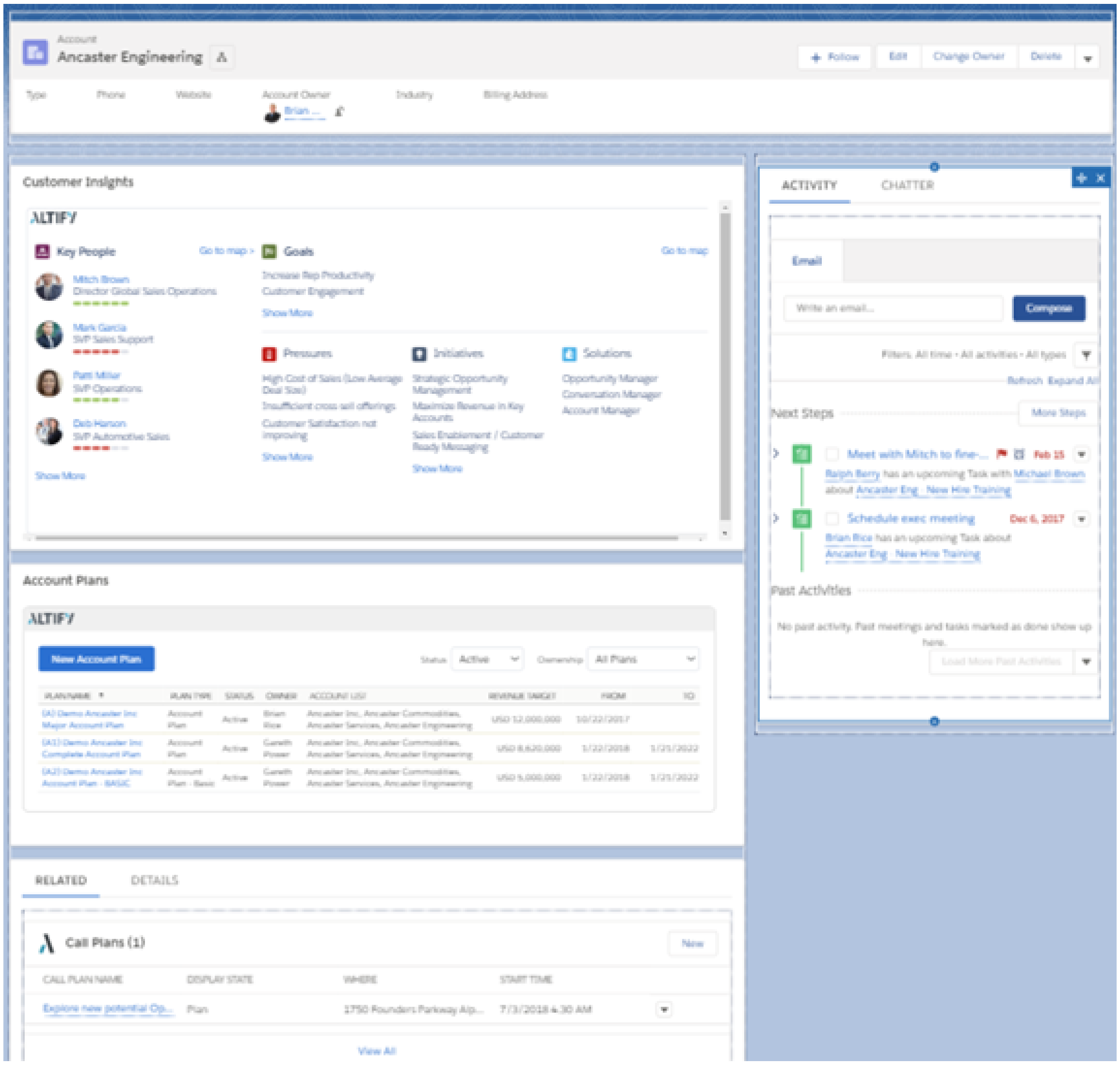
1. Drag another **Tabs** item into the side-panel.



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:



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

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