



Fall '24 Altify Insights Release Notes (v9.13)

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Release Overview

Get ready to turbocharge your productivity with our latest 'data automation' enhancements, designed to make your sellers' lives as easier and more efficient than ever before! Imagine slashing the time you spend on administrative tasks and freeing up more moments to focus on what truly matters—building relationships and closing deals.

With these powerful updates to the relationship map, you'll find that everything you need is right at your fingertips. No more endless clicking to search for or add contacts—these crucial features, along with Altify's smart contact suggestions, are now front and center, saving you precious time and effort.

But that's not all—assembling your relationship map has never been quicker. Now, when you import contacts, a single additional click brings in all their vital attributes, such as Political Status or Support for your solutions, as well as their managers. It's like having a turbo boost for your contact management! The ability to import an entire map from an account to an opportunity or in the other direction will also reduce time on task for sellers.

With these enhancements, your selling teams will spend less time on admin and more time driving success. Let's get to work!

Summary of Changes

The following lists all enhancements introduced with Altify 9.13:

Relationship Map

- [Manage Contacts - side panel replaces dialogs](#) – new sliding panel provides easier access to adding/removing contact functionality.
- [Importing contacts from a specific map](#) – find and add contacts from a specific account or opportunity relationship map.
- [Importing contact attributes from a specific map](#) – option to include contact attributes from the map that contacts are imported from.
- [Drag and drop contacts into relationship map](#) – drag and drop one or multiple contacts into a relationship map.
- [Automatically importing the managers of added contacts](#) – option to automatically import the contacts that your selected contacts report to.
- [Importing the latest attributes of added contacts](#) – option to include mostly recently assigned attributes when adding contacts to a map.
- [Advanced searching of contacts to add to map](#) – advanced search available for adding contacts to map, including customizable search criteria and result columns.
- [Persona – number of suggested contacts indicated](#) – number of contacts suggested by Altify for each persona is now displayed in the persona menu.
- [New flow for assigning a placeholder persona to a new contact](#) – placeholder is automatically removed when replacing with a new contact.
- [Viewing recently added contacts](#) – new toggle to highlight contacts who are recently added to the relationship map.
- [Reordered contact information panel](#) – sections of *Details* tab reordered

Relationship Map

New user functionality

Manage Contacts – side panel replaces dialogs

A new side panel (shown below) provides access to functionality around adding and removing contacts in the relationship map.

Manage Contacts

Add Personas Import Maps Remove

Create New Contact

Search by name, title, email address...

Advanced Search

Suggestions:

Key Players Mentors and Supporters High Coverage

On Maps of Selected Account

Hide contacts already added: ☒

☐ Select All

☒ Vernon Gathy - Lead Engineer
Engineering | Ancaster EMEA | Reports To: Susan Peters |

☐ John Jones - Purchasing Officer
Ancaster EMEA | Reports To: Ben Schmee |

Add who your selected contacts report to: ☒

Import most recently updated attributes: ☒

Clear Selection

Add (1)

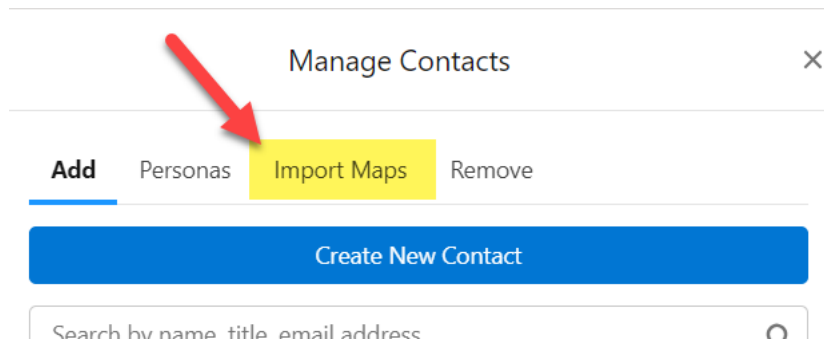
Two significant benefits of this design (in comparison with pre v9.13, when this functionality was accessed via dialogs) are as follows:

- Visibility of and access to the relationship map while adding and removing contacts.
- Access to adding and removing contacts with fewer clicks.

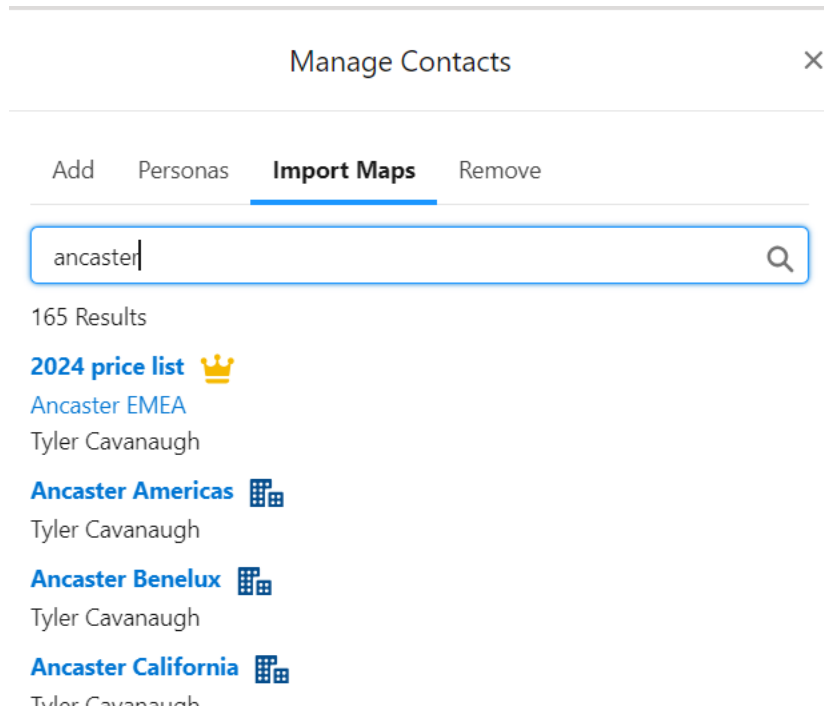
Other improvements delivered as part of this new panel are outlined in the following sections.

Importing contacts from a specific map

An *Import Maps* tab (shown below) on the new *Manage Contacts* panel enables searching for and importing the contacts of a specific account or opportunity relationship map.



Searching for relationship maps (as shown below), results are marked with the relevant Salesforce icon (👑 for opportunities and 🏢 for accounts).



When a relationship map in the search results is selected, all contacts on that map are listed and available for selection.

Contacts are added by [drag and drop](#) (which is new in v9.13) or by selecting them and clicking **Add**.

Also new in v9.13, the following data automation toggles that save considerable time are also available when adding contacts from a specific map:

- Include the [managers](#) of added contacts
- Include the [attributes](#) of added contacts

Importing contact attributes from a specific map

When [adding contacts from a specific relationship map](#), the toggle *Import contact attributes from the map* (if enabled, as shown in the example shown below) pulls in each added contact's attribute values from the source map.

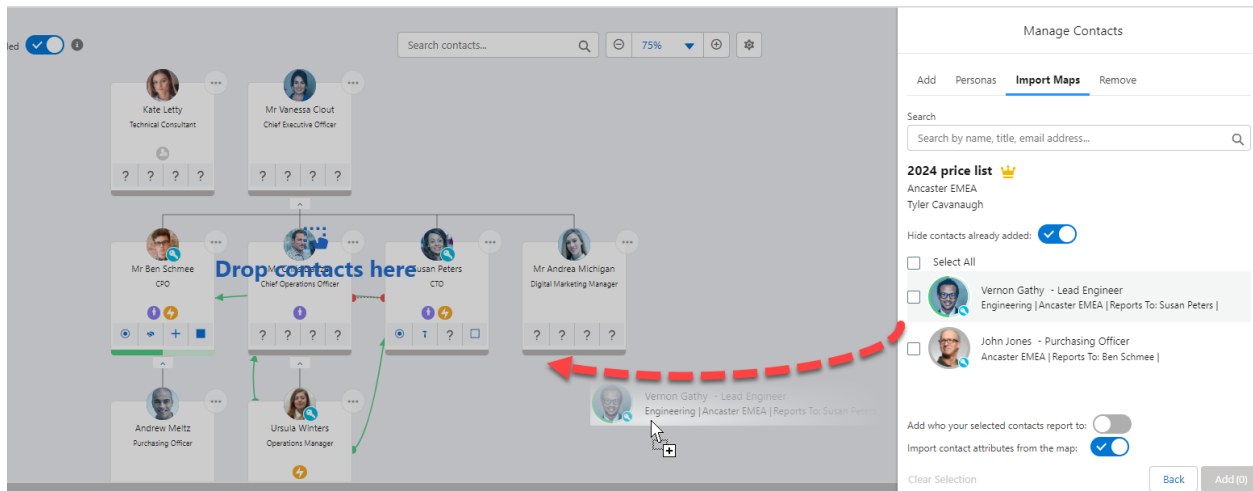
The screenshot shows the 'Manage Contacts' dialog box with the 'Import Maps' tab selected. At the top, there are tabs for 'Add', 'Personas', 'Import Maps', and 'Remove'. Below these is a search bar with the placeholder text 'Search by name, title, email address...'. A section titled '2024 price list' with a crown icon lists 'Ancaster EMEA' and 'Tyler Cavanaugh'. Below this is a toggle for 'Hide contacts already added:' which is turned on. There are three checkboxes: 'Select All' (checked), a contact card for 'Vernon Gathy - Lead Engineer' (checked), and a contact card for 'John Jones - Purchasing Officer' (checked). At the bottom, there are two toggles: 'Add who your selected contacts report to:' (turned off) and 'Import contact attributes from the map:' (checked). The 'Import contact attributes from the map:' toggle is highlighted with a red box and a red arrow points to it. At the very bottom are buttons for 'Clear Selection', 'Back', and 'Add (2)'.

If this toggle is not enabled, the attributes of all added contacts automatically default to 'Unknown'.

Note: the attribute *Decision Orientation* (on account relationship maps only) is not included in this functionality and is always set to 'Unknown' when a contact is added to an account relationship map.

Drag and drop contacts into relationship map

Listed on the *Add*, *Personas* or *Import Maps* tab can be dragged and dropped into the relationship map – as shown in the example below:

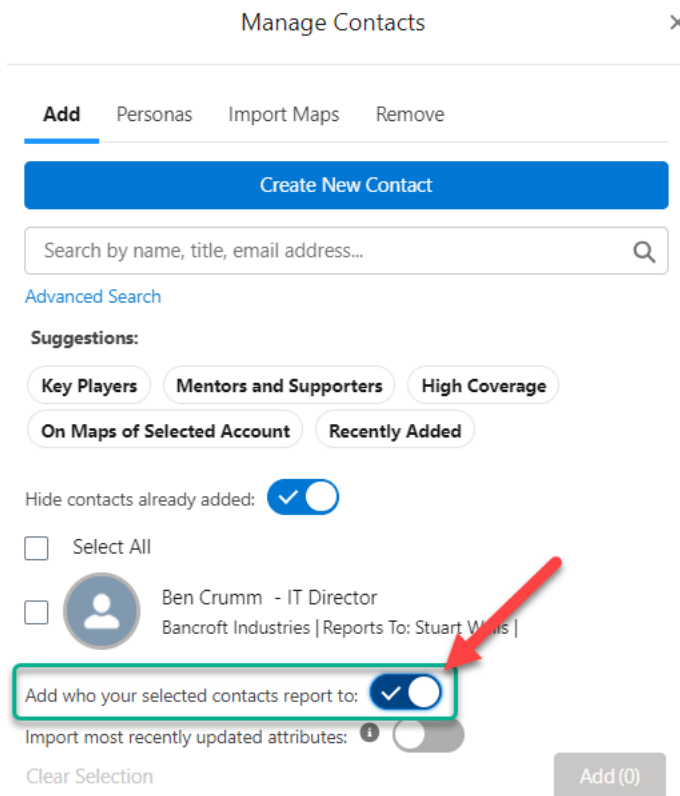


Select the relevant contacts in advance to drag and drop multiple contacts.

The toggles to automatically include each added contact's [manager](#), [latest attributes](#) or [attributes from a specific map](#) also apply when adding contacts via drag and drop.

Automatically importing the managers of added contacts

A new toggle option (*Add who your selected contacts report to* – enabled in the example shown below) is displayed on the *Add*, *Personas* or *Import Maps* tabs.




Manage Contacts ×

Add Personas **Import Maps** Remove

Search


Search by name, title, email address... Q


2024 price list 

Ancaster EMEA
Tyler Cavanaugh

Hide contacts already added: ☒

☐ Select All

☐  Vernon Gathy - Lead Engineer
Engineering | Ancaster EMEA | Reports To: Susan Peters |

☒  John Jones - Purchasing Officer
Ancaster EMEA | Reports To: Ben Schmee |

Add who your selected contacts report to: ☒

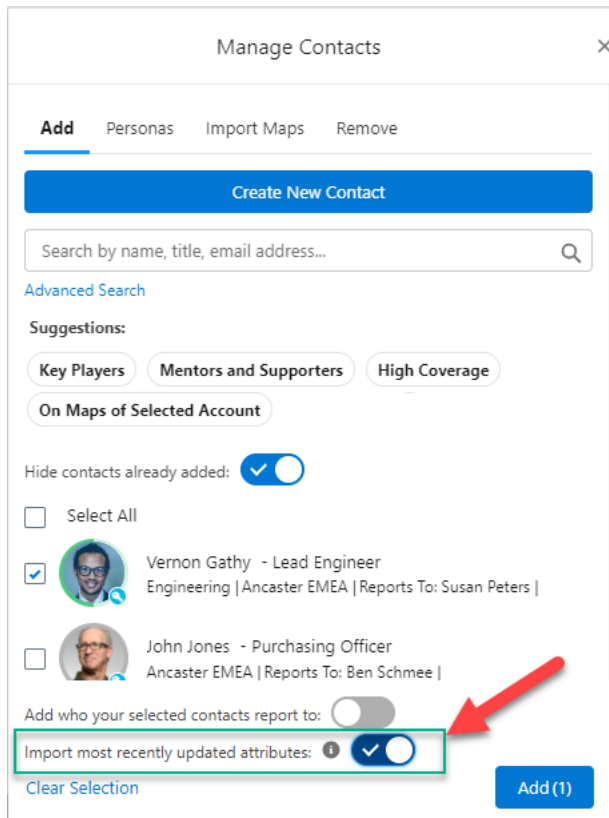
Import contact attributes from the map: ☐

[Clear Selection](#) [Back](#) [Add \(1\)](#)

If this toggle is enabled, the contacts who your added contacts report to are automatically added to the map also.

Importing the latest attributes of added contacts

When adding contacts via the *Add* or *Personas* tabs, their latest attributes (Political Status, Support, etc.) can also be pulled into the relationship map. To do this, the toggle *Import most recently updated attributes* needs to be enabled (as indicated in the example below) prior to adding the contacts.



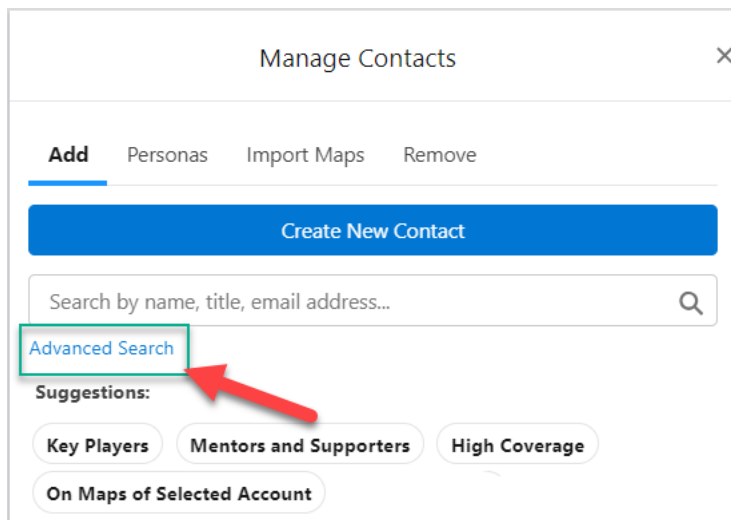
If this toggle is not enabled, the attributes of all added contacts automatically default to 'Unknown'.

Note: the attribute *Decision Attribute* (on account relationship maps only) is not included in this functionality and is always set to 'Unknown' when a contact is added to an account relationship map.

For a breakdown of how Altify identifies a contact's latest attributes – see [How are most recently updated attributes identified?](#) in the Altify online help.

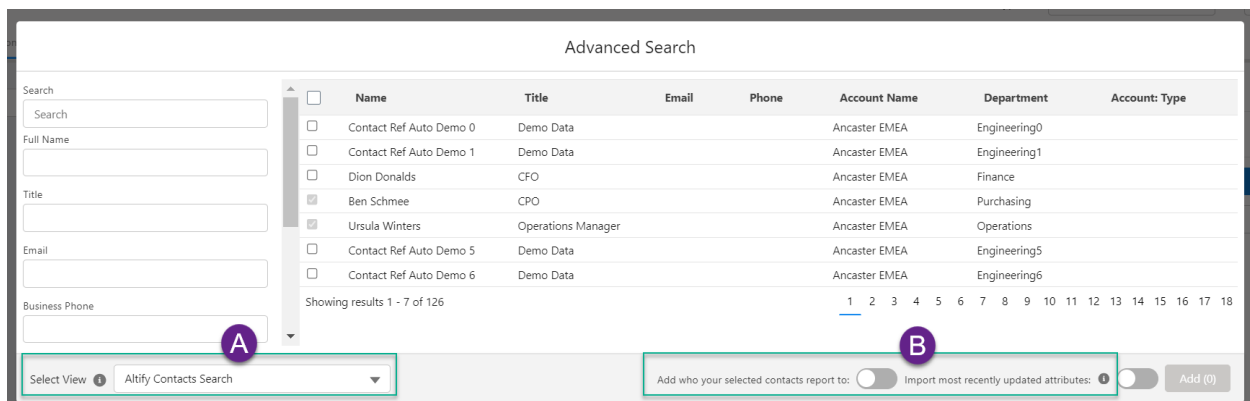
Advanced searching of contacts to add to map

When searching for contacts on the *Add* tab of the *Manage Contacts* panel, an **Advanced Search** option is now available – as indicated in the example below:



This increases the ease with which the appropriate contacts can be identified and added to a relationship map.

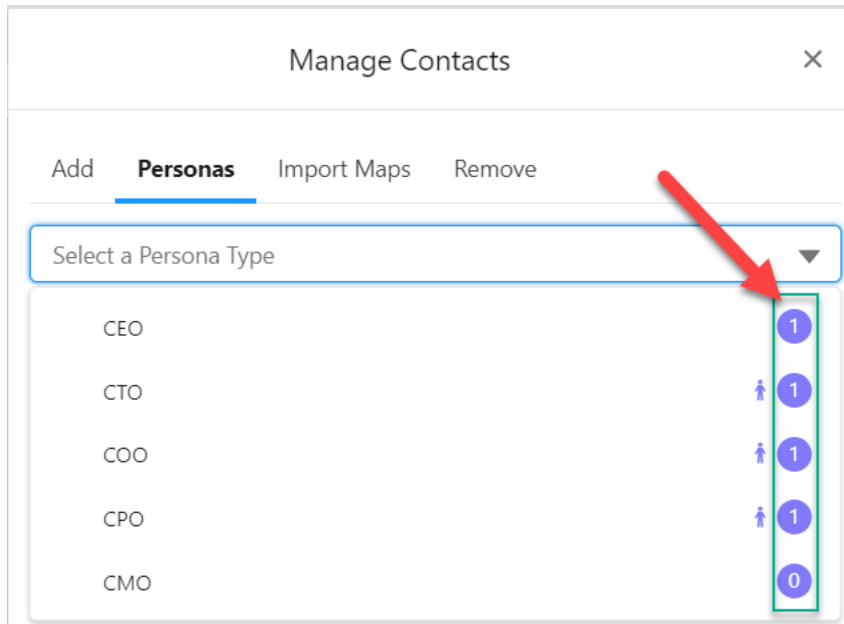
In the *Advanced Search* dialog, a Salesforce Contact List View can be selected (see **A** below). Each view determines the search criteria available and the columns displayed for the search results. An administrator can [specify a list view that is displayed by default](#) when searching for contacts to add to a relationship map




In addition, the toggles [Add who your selected contacts report to](#) and [Import most recently updated attributes](#) are applicable when adding contacts via the *Advanced Search* dialog selected (see **B** above).

Persona – number of suggested contacts indicated

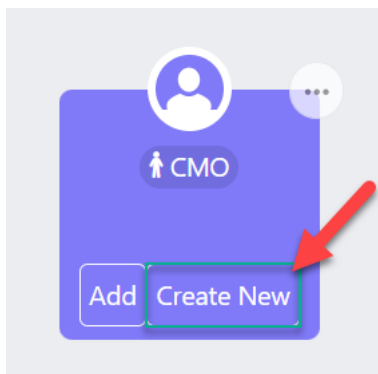
When adding personas to a relationship map, it's no longer necessary to click a persona to see the number of suggested contacts available. The number of suggested contacts for each persona is indicated as shown in the example below.



(This icon  replaces the green tick as an indication that a contact with the persona has been added to the map).

New flow for assigning a placeholder persona to a new contact

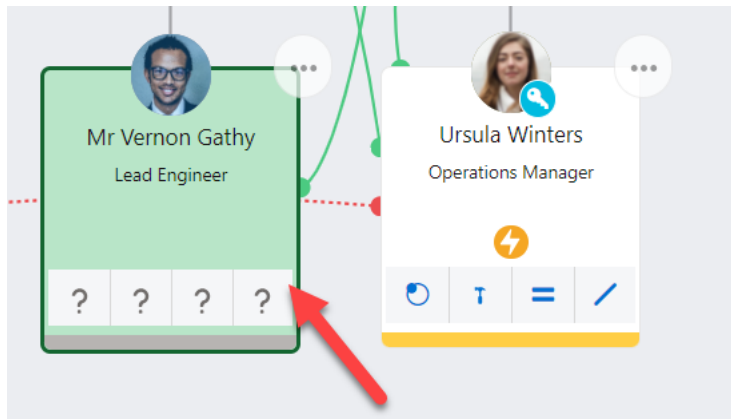
A new time-saving flow is applied when creating a new contact who will be assigned a persona that is currently added as a placeholder (as indicated in the example below).



On clicking Create New and creating the new contact, they are automatically assigned the persona ('CMO' in the above example) and the placeholder card disappears from the relationship map.

Viewing recently added contacts

When enabled, a new toggle (*Recently Added*) on the relationship map (including the List View) highlights in green the contacts who have been added to the map in the last 24 hours.



The time frame can be updated by your administrator – so that new contacts remain highlighted for a period specified by your organization.

Reordered contact information panel

The default order of sections on the Details tab of the contact information panel are rearranged to give greater prominence to contact attributes.

Before v9.12, the sections were ordered as follows:

Contact Details, Notes, Quicklinks, Division, Attributes, Suggested Target content, Relationships, Owner, Other

With v9.13, the sections are ordered as follows:

Contact Details, Attributes, Suggested Target content, Relationships, Division, Notes, Quicklinks, Owner, Other

The new order of sections is shown below from a v9.13 account relationship map.

Note: The hyperlink *View Contact History* is relabeled to the more accurate *Attributes from associated maps* and moved to just below the Attributes tiles from v9.13.

Viewing contact custom data (v9.13.7)

Administrators can add a *Custom* section to the *Details* tab on the Contact Information Panel. It can accommodate up to five Visualforce pages or external websites (these are also configured by an administrator).

In the example shown below, two panels are added to the Custom section: a Visualforce page that displays opportunities associated with the contact (see A indicated below) and a link to an external site (see B).

Custom


[View More](#)

Opportunities for Charles Underwood

Opportunity List		
Name	Stage	Amount
Fitzpatrick Cellular - 100 Licenses	Acquisition	36125.00
Kinney LLC - 350 Users, Support and Maintenance Contract	Acquisition	56400.00
Mcneil Services - 100 Renewals - 12 months	Acquisition	21958.17
Citicorp - Server Upgrade	Acquisition	1700000.00

A

[View More](#)



B

Improved handling of duplicate contacts (v9.13.11)

Altify relationship maps now handle duplicate contacts in the same way as in the Salesforce org.

View a list of duplicate contacts (if any are flagged by the org's matching and duplicate rules) when creating a new contact on a relationship map – as indicated in the example below.

Select the duplicate contact to add to the map instead of the new contact (as indicated below), or close the list and proceed with saving and adding the new contact (if the duplicate rule allows users to save a duplicate record).

Name	Account Name	Title	Phone	Email	Contact Owner Alias
Charles Underwood	Ancaster Engineering	President & CEO	001456711089	cunderwood@ancasterengineering.com	brice

Altify also respects matching and duplicate rules in the same way when editing a contact.

Clearer display of division data in exported account relationship maps (v9.13.11)

A new table is included in the PowerPoint exports of account relationship map data. It list the contacts who are assigned to each account division (for each account in the Account Manager plan) – as shown in the example below:

Relationships Detail - Division



Ancaster Engineering

Name	Division
Terri McHale	Engineering West
Deb Harson	Engineering East
Toni Wise	Engineering West
Mitch Brown	Engineering East
Tim Naans	Engineering East
Paul Chang	Engineering West
Adam Gerald	Engineering East
Lisa Leung	Engineering West

Ancaster Services

Name	Division
Robert Hopewell	Services East
Josh Taylor	Services East
Barry Peterson	Services West
Ramon Defilla	Services West

New functionality to be administered

Specifying a default list view for advanced search

The following *Altify Core Setting* determines the Salesforce Contact List View that is displayed by default in the relationship map [advanced search feature](#): *Contact Search View*.

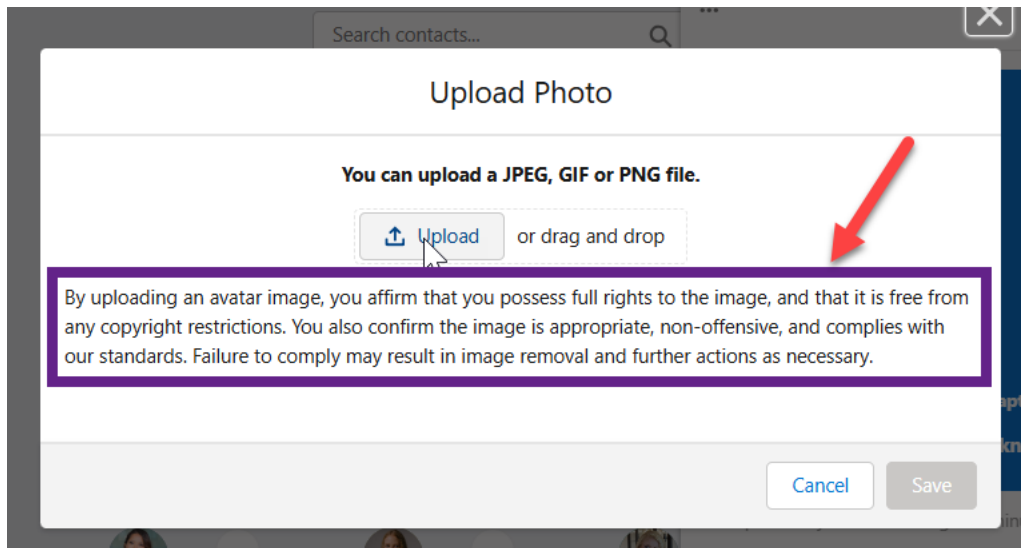
Updating the time frame for recently added contacts

The following *Altify Relationship Setting* determines the length of time that a new contact remains highlighted in your org's relationship maps: *Recently Added Timeframe*.

This setting accommodates decimalization, e.g. '2.5' for two and a half days (60 hours).

Adding a contact photo disclaimer (v9.13.5)

A new *Altify Relationship Setting*, 'Enable Photo Upload Disclaimer', displays a disclaimer regarding image copyright and standards to users who are uploading a contact's photo – as indicated in the example below. The disclaimer can be edited as required.



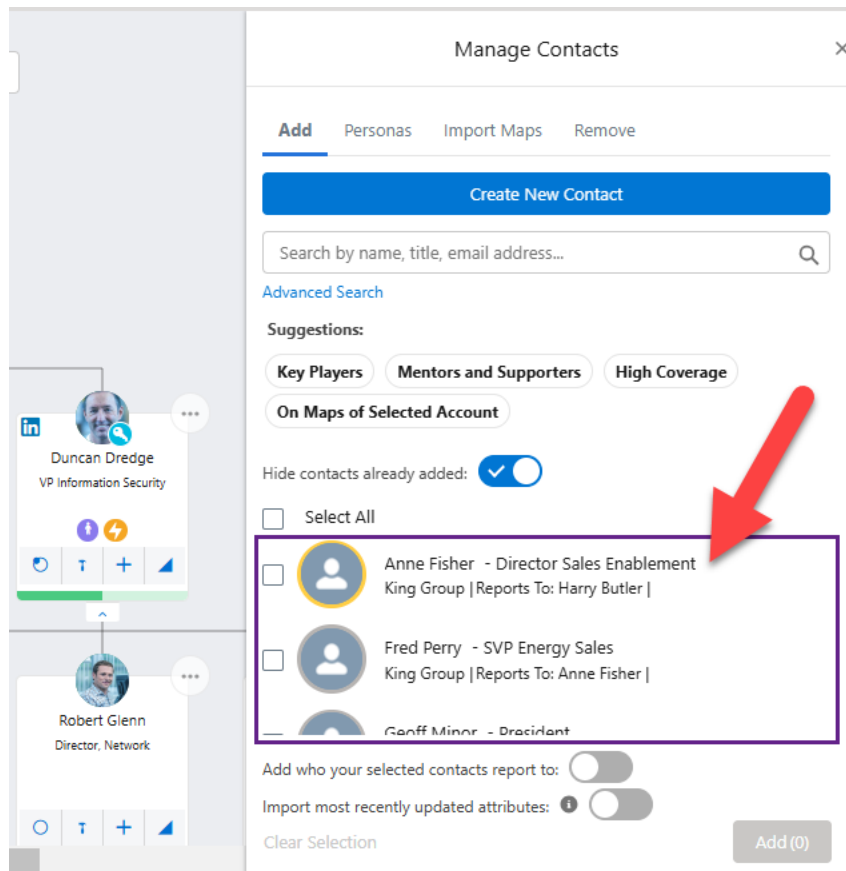
For more information, see [Adding a Photo Disclaimer](#) in the online help.

Adding custom panels to Contact Information Panel (v9.13.7)

Add up to five custom panels to the *Details* tab of the Contact Information Panel. For guidance on configuration, see [Adding Custom Panels to the Contact Information Panel](#) in the online help.

Hiding inactive contacts (v9.13.7)

If an organization uses a check box custom field on the standard Contact object to identify 'inactive' contacts, these contacts can be hidden from end users when they are adding contacts to their relationship maps. For example, hidden contacts will not appear in the list of suggested contacts indicated below.



For guidance on configuration, see [Hiding Inactive Contacts on Relationship Maps](#) in the online help.

Deprecated functionality

Onboarding videos

With the introduction of the new Manage Contact functionality – including intuitive new designs and easier access to add contact options – there is no longer a requirement for onboarding video. This video was shown when a relationship map was accessed for the first time.

For that reason the following *Altify Relationship Settings*, which supported the provision of alternative onboarding videos, are now deprecated:

- Onboarding URL 1
- Onboarding URL 2
- Onboarding URL 3

Hiding opportunity filter for contact import

Prior to v9.13, administrators could hide the opportunity filter (highlighted below in v9.12) on the *Import Contacts* dialog for account relationship maps.

Import Contacts
Select the contacts you want to import to your map

SEARCH PERSONAS

Search
Search by name, title, email add Q

Account
Ancaster Engineering X

Division
None Q

Opportunity
None Q

Altify suggestions: **Key Players** Mentors and Supporters High Coverage On Map

Hide contacts already added ☐

<input type="checkbox"/> CONTACT	EMAIL	REPORTS TO	DEPARTMENT	ACCOUNT
<input checked="" type="checkbox"/> Adam Gerald Sales Manager - Energy		Paul Shawshank	Sales	Ancaster Engineering
<input checked="" type="checkbox"/> Ahmad Rishad SVP Product Development	arishad@ancasterengineering.com	Charles Underwood	Engineering	Ancaster Engineering

Cancel

Import (0)

The *Import Contacts* dialog is no longer displayed in Altify v9.13 and an opportunity filter is not applied in the new *Manage Contacts* panel. The following *Altify Relationship Setting* is therefore deprecated: *Disable Import Contact Opp Search*.

