



Altify Insights Spring '25 Release Notes (v9.14)

April 2025



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Release Overview

This release is a significant step toward our goal of empowering sales teams with AI. A [MaxAI extension package](#) allows you to plug Agentforce (Salesforce's AI application) into Altify, unearthing important customer data in the drive toward building executive relationships and understanding customer challenges and goals. Future releases will maximize the applicability of Agentforce across Altify's products.

Integrations that maximize a sales team's potential is another key area of development for Altify. This release sees Altify harnessing [ZoomInfo data in relationship maps](#), highlighting contacts who have left their companies and surfacing ZoomInfo data in relationship map custom panels. Similar integration and interoperability with other popular data applications are planned.

Customer feedback influenced our decision to deliver [enhanced validation of insights](#) with this release. The addition of a completion status for insight cards instantly allows you and your customer to see where value is realized and where further validation is required.

Altify Insights can now be [integrated into existing partner portals](#) with Salesforce's Partner Community Login licenses. Partner sellers can now access buyer insights and relationship maps. This enables greater collaboration between Altify enterprise customers and their channel partners.

MaxAI

A new extension package, MaxAI enables users to harness Salesforce's powerful AI tool Agentforce when they are working with insight maps and relationship maps.

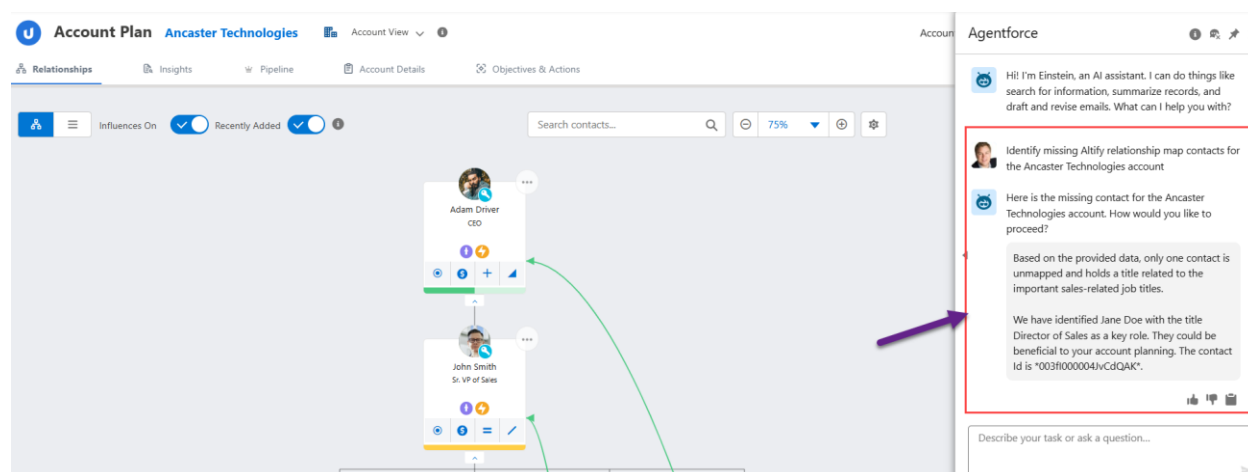
New user functionality

Populating Altify with Agentforce

With MaxAI installed, end users can seek assistance from Agentforce in two scenarios (click a link to view the relevant article in Altify online help):

- [Populating an account insight map with goals, pressures and so on](#) (for an account or opportunity insight map).
- [Identifying relevant contacts and adding them to a relationship map](#) (for an account or opportunity relationship map).

In the example shown below, Agentforce is assisting finding relevant contacts who are missing from an account relationship map.



New functionality to be administered

Installing and customizing MaxAI

MaxAI is an extension package that can be installed and enabled in minutes. For detailed guidance on each step, see [Installing MaxAI](#) in the Altify online help.

MaxAI can also be customized so that Agentforce's responses are more aligned with a customer's business processes. For more information, see [Customizing MaxAI](#).

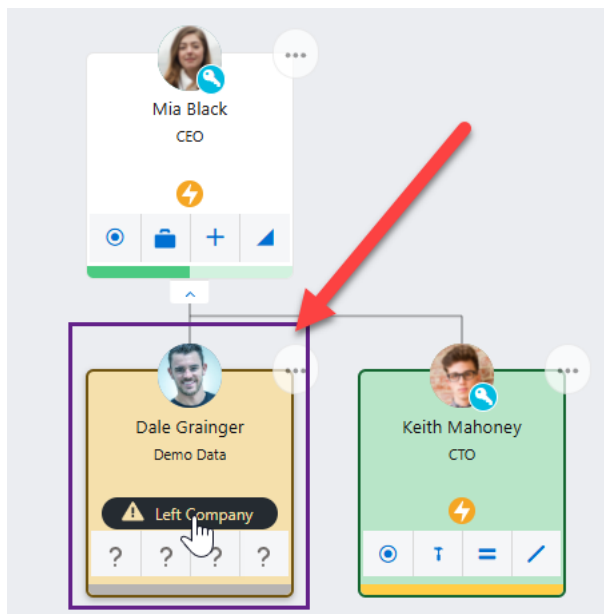
Relationship Map

New user functionality


Harnessing ZoomInfo data on the relationship map

Additional data can now be accessed on the relationship map if ZoomInfo is integrated with the Salesforce org.

- If a contact has left their company, their contact card is flagged and highlighted in yellow on the map – as indicated in the example below.



- In 9.13, Altify introduced custom panels for relationship maps. In the use case shown below, where a contact's activity history is shown in the custom panel, activity data captured by ZoomInfo will also be included.



Clara Wilson

EVP Project Management

Department

Project Management

Adaptability

Visionary

Persona

External

No

Last updated by Stephen Jones on 11/1/2024

DETAILS ACTIONS (1) INSIGHT (5) TEAM RELATIONSHIPS

Contact Details

Phone

(910) 896-9866

Email

cwilson@starbucks.com





Starbucks USA

Neutral

Custom

[View More](#)

Activity History

- >  **Develop inner circle strategy and build consensus plan with key playe** Nov 19, 2023
Ralph Berry created a task for Starbucks USA - DataMesh Oppty 2025
 - >  **Schedule progress meeting with Stephen** Nov 28, 2023
Ralph Berry created a task for Starbucks USA - DataMesh Oppty 2025
 - >  **Solution demo to Mitch / Patti / Tim / Clara** Jul 12, 2024
Stephen Jones created a task for Starbucks USA - DataMesh Oppty 2025
 - >  **Solution demo to Mitch / Patti / Tim / Clara** Aug 13, 2024
Stephen Jones created a task for Starbucks USA - DataMesh Oppty 2025

Integrating with ZoomInfo

- To enable the flagging of contacts who have left the company, the Altify Relationships Setting *Contact has left Company Field* needs to be populated with a string field on the Contact record that indicates the contact has left the company (in ZoomInfo's case, this field is 'ZI Person Has Moved').

- To build a custom panel that displays the contact's activity history, see [Adding Custom Panels to the Contact Information Panel](#) in the Altify Insights online help. (This process will involve requesting the relevant code from Altify Support).

Insight Map

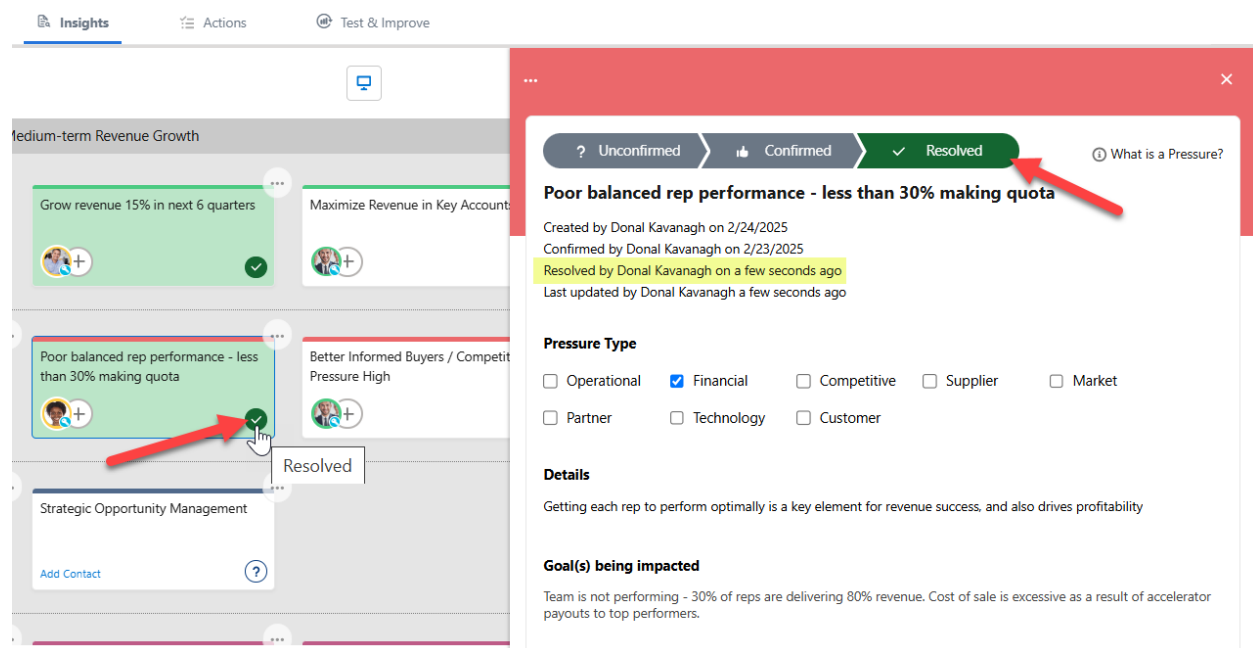
New user functionality

Enhanced insight validation

By default, an insight can be moved from 'Unconfirmed' to 'Confirmed' status. A third level of validation is now available as follows:

- Goal: 'Unconfirmed' → 'Confirmed' → 'Achieved'
- Pressure: 'Unconfirmed' → 'Confirmed' → 'Resolved'
- Initiative: 'Unconfirmed' → 'Confirmed' → 'Completed'
- Obstacle: 'Unconfirmed' → 'Confirmed' → 'Overcome'
- Solution: 'Unconfirmed' → 'Confirmed' → 'Implemented'

New status can be selected on the insight card or details panel (as indicated in the example below) and a validation message indicates when the status was assigned.



The new validation labels ('Achieved', 'Resolved', etc.) can be updated to better suit an organization's processes.

For further information, see [Marking Insights as Completed](#) in the Altify Insights online help.

This functionality needs to be enabled by an administrator. For more information, see [Enabling enhanced insight validation](#) below.

New functionality to be administered

Enabling enhanced insight validation

A new custom setting enables users to validate insights beyond the 'Confirmed' status (goal 'Achieved', pressure 'Resolved', etc.)

The custom setting is *Enable Insight Map Validation* in Altify Insights Settings.

For more information on enabling and customizing insight validation, see the [Altify online help for administrators](#).

Altify Insights Access for Partner Users

Partner users such as third party consultants or salespeople can now easily access Altify Insights via the Altify Insights launchpad on a partner portal.

Access can be configured to assign read-only or read/write permission per partner user.

For more information see the following:

- [Create a Partner Portal, Enable Partner Account and Users, and Add Members](#) [Salesforce Trailhead]
- [Create and Manage Partner Portals](#) [Salesforce publication]
- [Altify Insights Access for Partner Users](#) [Altify online help]