



Altify Insights v9.17 Release Notes

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Release Overview

In **MaxAI**, users can now generate **opportunity-centric insights** directly within the workflow. You can query the MaxAI chat for deal-specific information—such as customer goals, obstacles, and other relevant factors—or generate a full set of opportunity insights with a single click using the **Generate MaxAI** button. Response readability has also been improved through clearer citation formatting, giving users better context and straightforward next steps when more information is needed. Additionally, MaxAI now successfully interprets a wider range of non-Altify terminology and query styles, resulting in more robust and complete responses.

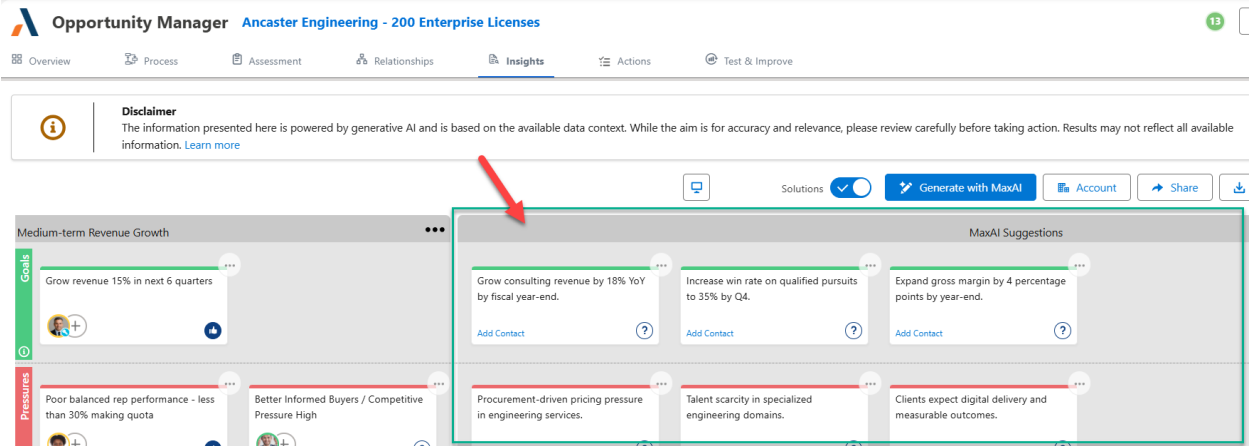
This release also includes **relationship map usability improvements** informed by customer feedback and internal design reviews. These updates deliver a more consistent and intuitive user experience.

MaxAI

New user functionality

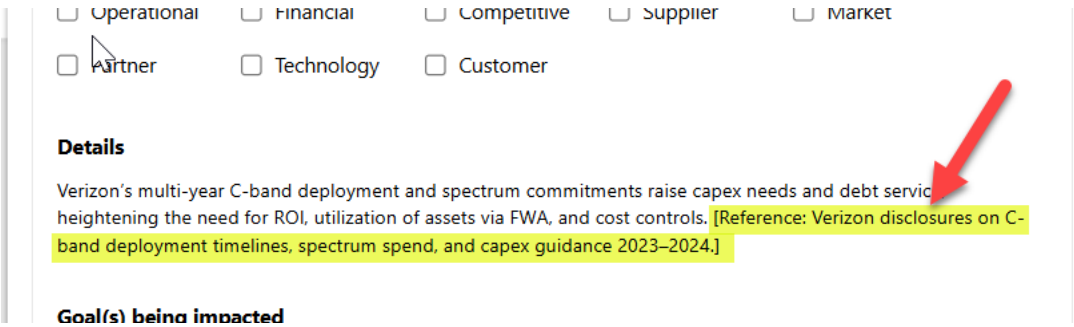
Opportunity-centric insight generation

MaxAI will now generate insights specific to the opportunity with the click of a button. (Previously, the insights that were uncovered all derived from account data).



Clearly formatted citations

Citations provided in MaxAI insight map suggestions are now clearly formatted for improved readability – as shown in the example below:



Increased scope of tested utterances

MaxAI successfully responds to a wide array of newly tested user queries, accommodating non-Altify terminology and phrasing. For example:

Relationships

- Who is not mapped to the account?
- Show me who is missing from the org chart
- Who is not on the political map?

Insights

- Generate strategic insights for [Company Name]
- Create a strategy map for [Company Name]
- Generate a strategy map with insights for [Company Name]

New functionality to be administered

New prompt template for generating Opportunity insights

A new prompt template supports the generation of insights for opportunities. As with the pre-existing templates (for relationship contacts, account details and account insights), an Altify MaxAI Setting is available where the default prompt template can be replaced with a customized template if required.

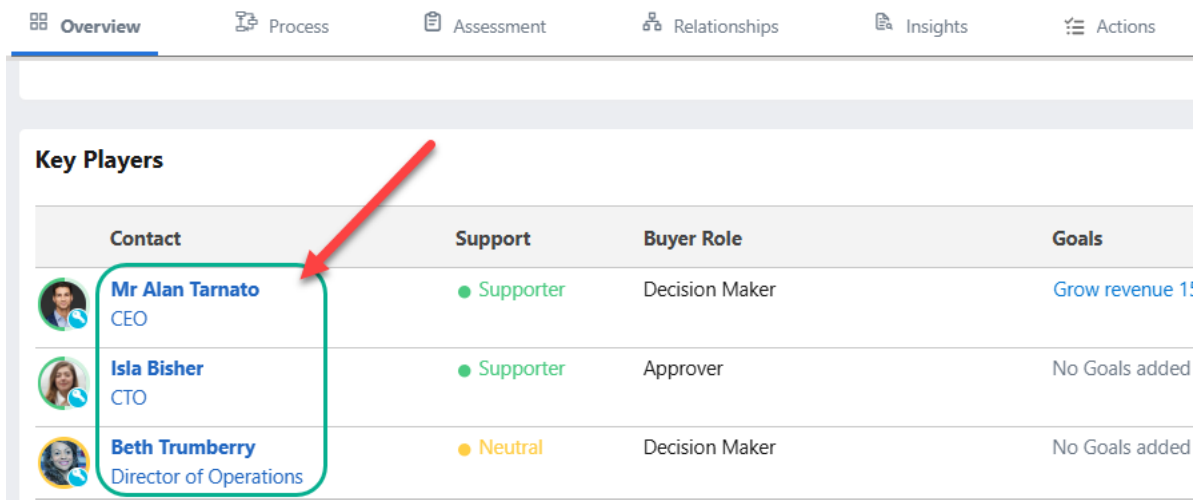
For more information, see [Customizing MaxAI](#) in the Altify online help.

Relationship Maps

Usability improvements

Visual indication of key player links to relationship map

Key players are clickable in Altify, opening the relevant relationship map with the contact's information panel on display. This linking is now clearly indicated to users with hyperlink-style formatting – as shown in the example below. This enhancement improves the accessibility of Altify relationship maps.



Contact	Support	Buyer Role	Goals
Mr Alan Tarnato CEO	● Supporter	Decision Maker	Grow revenue 1!
Isla Bisher CTO	● Supporter	Approver	No Goals added
Beth Trumberry Director of Operations	● Neutral	Decision Maker	No Goals added

This change is implemented wherever key players are listed in Altify.

- For account relationship maps: on the Altify Insights launchpad
- For account and opportunity relationship maps: on the list view of a relationship map

Reordering of list view attributes

On the list view of a relationship map (for an account or opportunity), contact attributes are now listed in the order in which they are displayed on the contact information panel – as shown in the example below from an opportunity relationship map. This provides a continuous user experience across the relationship map list and map views.

Recently Added [Filter] [Info] [Search contacts...] [Manage Contacts] [Group by: --NONE--]

CONTACT	POLITICAL STATUS	BUYER ROLE	SUPPORT	COVERAGE	ADAPTABILITY	REPORTS TO
Mr Alan Tarnato CEO	Inner Circle	Decision Maker	Supporter	Multiple contacts	Unknown	-
Alma Delgado Marketing Director	Inner Circle	Approver	Neutral	Multiple contacts	Unknown	Alan Tarnato
Beth Trumberry	Inner Circle	Decision Maker	Neutral	Brief contact	Unknown	Alan Tarnato

Contact Information Panel

Attributes

Political Status	Buyer Role	Support	Coverage
Inner Circle	Approver	Neutral	Multiple Conta...

Attributes from associated maps

Alma Delgado is a Suggested Target

Heads Up: "This decision maker or approver does not support you, and you have not identified anyone who influences them." Action: "You need to find out who influences this person and ensure you are proving the value of your solution to all involved in this buying decision."

Relationships