



Spring '25 Release Notes (v9.14)

April 2025



Table of Contents

Release Overview.....	3
MaxAI	4
New user functionality	4
Populating Altify with Agentforce	4
New functionality to be administered.....	4
Installing and customizing MaxAI.....	4
Relationship Map	5
New user functionality	5
Harnessing ZoomInfo data on the relationship map.....	5
New functionality to be administered.....	6
Integrating with ZoomInfo.....	6
Insight Map.....	8
New user functionality	8
Enhanced insight validation.....	8
New functionality to be administered.....	9
Enabling enhanced insight validation.....	9
Objectives & Actions [Account Manager]	10
New user functionality	10
Objective-Insight linking.....	10
New functionality to be administered.....	10
Enable objective-insight linking.....	10
Test & Improve.....	11
New user functionality	11
Test & Improves for account plans [Account Manager customers only].....	11
New functionality to be administered.....	11
Enabling test & improve access for account plans	11
Deprecated functionality [Account Manager and Opportunity Manager]	11
Account Planning	13
Access for Partner Users	13

Toggle for importing won opportunities (9.14.5).....14

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, understanding customer challenges and goals, and planning for revenue growth. 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.

Sales leaders can now validate their account objectives by directly [connecting them to specific insights from the account insight map](#). You can connect the dots for your customers by linking your opportunity solution with the goals they will help achieve, the initiatives they align with and the business pressures they will relieve.

Previously restricted to larger Account Manager plans, [Test & Improve events can now be scheduled for account plans](#). Now, sellers, sales leadership, and other members of the revenue team can benefit from a regular cadence of asking questions, identifying weaknesses, and proposing recommendations: strengthening and honing account plans through consistent best practice.

Your single account plans can also now be [integrated into existing partner portals](#) with Salesforce's Partner Community Login licenses, providing a powerful solution that enables joint account planning, collaboration, and effective execution in the context of partner ecosystems. Partner sellers can access important Altify account plan data like buyer insights, relationship maps, and more. 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, relationship maps or account details.

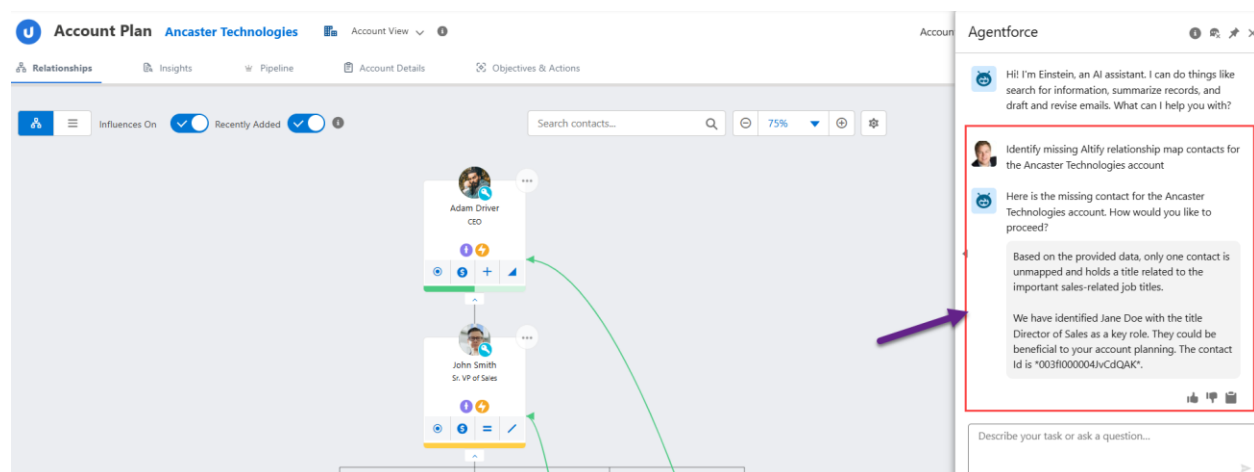
New user functionality

Populating Altify with Agentforce

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

- [Populating account details in an account plan](#) (or row details in an Account Manager)
- [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](#).

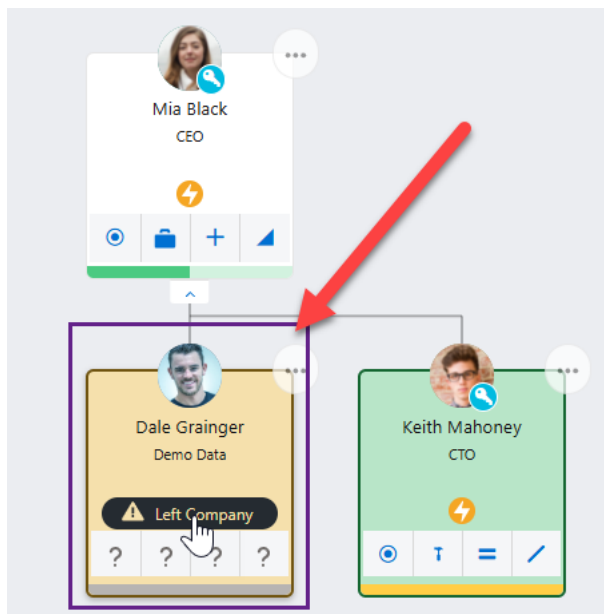
Relationship Map

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	Adaptability	Persona	External
Project Management	Visionary		No

Last updated by Stephen Jones on 11/1/2024

DETAILS ACTIONS (1) INSIGHT (5) TEAM RELATIONSHIPS

Contact Details

Phone	Email
(910) 896-9866	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

New functionality to be administered

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 online help. (This process will involve requesting the relevant code from Altify Support).

Insight Map

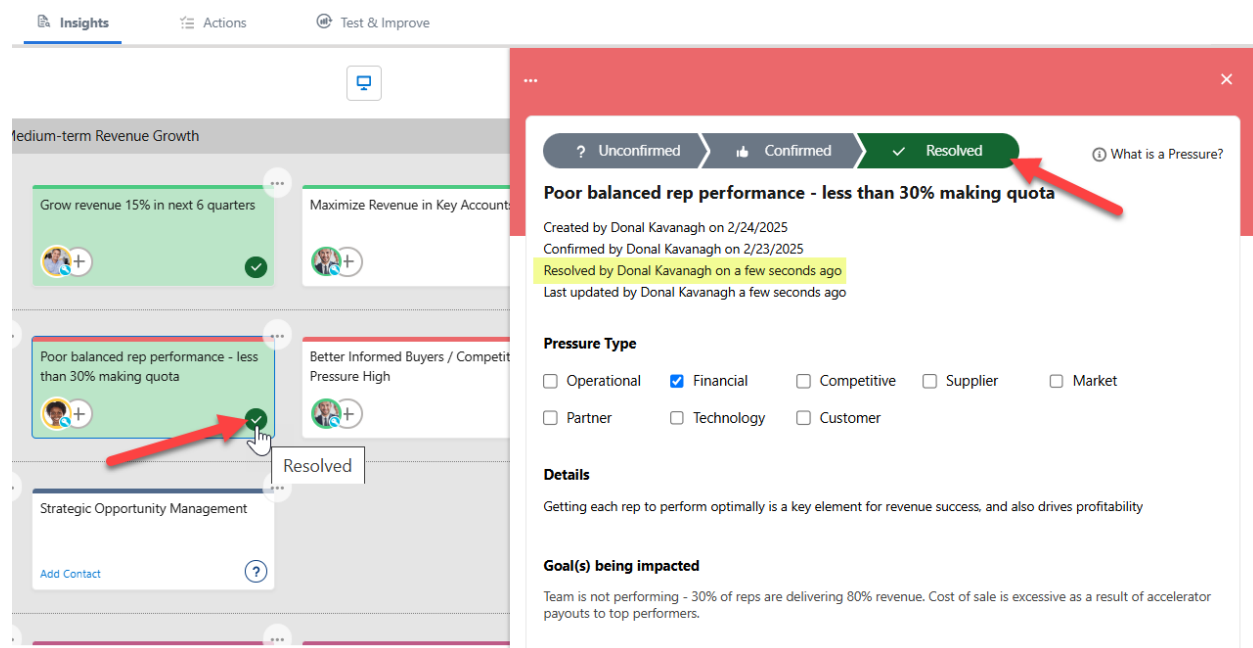
New user functionality

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 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](#).

Objectives & Actions [Account Manager]

New user functionality

Objective-Insight linking

Link objectives to insights belonging to the same account. This can be performed in account plans (as shown in the example below) or Account Manager plans, via the icon indicated below.

The screenshot shows the 'Account Plan' for 'Ancaster Engineering' with the 'Objectives & Actions' tab selected. On the left, a donut chart shows '3 All'. The main panel displays details for an objective: 'Change perception that we have limited implementation and support capabilities'. The details include: Due date (2/27/2025 with a warning icon), Status (Not Started), Objective type (Remove Barrier), Owner (Donal Kavanagh), and Account Name (Ancaster Engineering). There is an 'Upload' button and a note 'or drag and drop'. A purple arrow points to a link icon in the top right corner of the objective details panel.

The resulting dialog (shown in the example below) includes a search function and a toggle to only display the insights that are already linked with the objective.

The 'Insight Linking' dialog box is shown for the objective 'Change perception that we have limited implementation and support capabilities'. It includes a search bar with 'customer' entered, a 'Clear' button, and a 'Search' button. Below the search bar is a 'Show linked only' toggle. A table lists insights with columns for 'Section Name', 'Insight Name', 'Type', and 'Account Name'. The table contains four rows, all with 'Customer Retention' as the section name and 'Ancaster Engineering' as the account name. The first two rows are checked, and the last two are not. A green banner at the top of the table area says 'Please click the "save" button to ensure your changes are saved.' At the bottom right are 'Cancel' and 'Save' buttons.

Section Name	Insight Name	Type	Account Name	
<input checked="" type="checkbox"/>	Customer Retention	Customer Engagement	Goal	Ancaster Engineering
<input checked="" type="checkbox"/>	Customer Retention	Customer Satisfaction not improving	Pressure	Ancaster Engineering
<input type="checkbox"/>	Customer Retention	Launch Tier Customer Support Program	Initiative	Ancaster Engineering
<input type="checkbox"/>	Customer Retention	Customer Churn at 15%	Pressure	Ancaster Engineering

For more information, see [Linking Objectives and Insights](#) in the Altify online help.

New functionality to be administered

Enable objective-insight linking

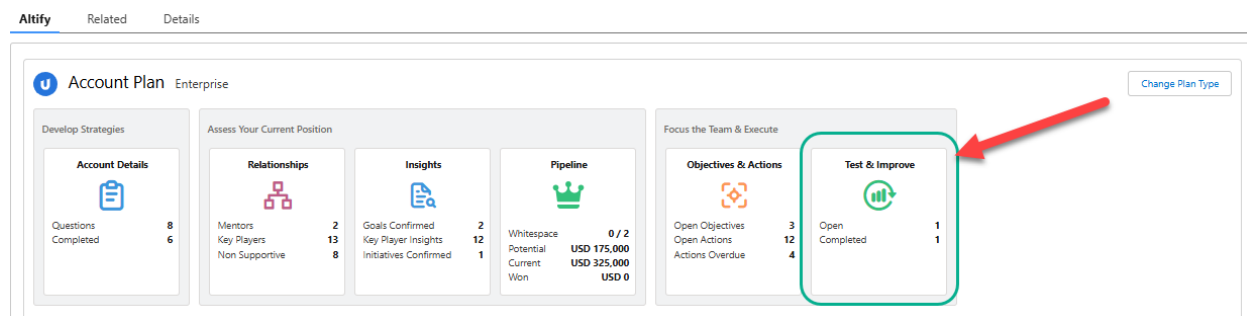
Objective-insight linking is not available by default. It can be activated by the following Altify Account Manager Setting: *Enable Objective-Insight Linking*.

Test & Improve

New user functionality

Test & Improves for account plans [Account Manager customers only]

Establish a best-practice meeting cadence for your Altify account plans with regular test & improve events. Test & improves for account plans are accessed via the Account Plan launchpad as indicated below.



These events allows the account owner to visually present the current state of play across all aspects of the account (Account Details, Relationships, Insights, Pipeline and Objectives & Actions) and for stakeholders to submit questions, gaps and recommendations which are subsequently summarized and reviewed for actionable outcomes.

Test & improve for Account Manager plans remain available for a higher level meeting cadence.

For more information, see [Test & Improve](#) in the Altify online help.

New functionality to be administered

Enabling test & improve access for account plans

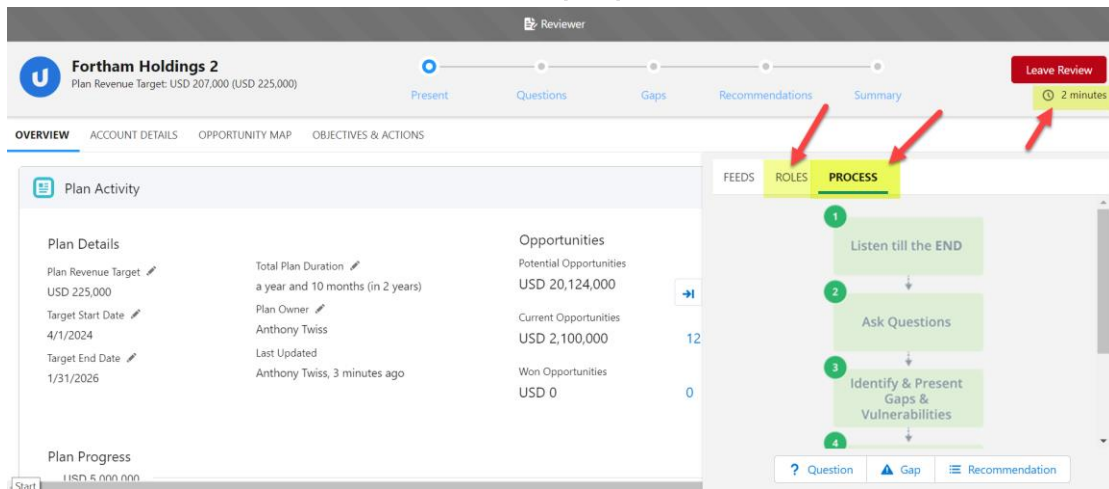
Test & Improve needs to be added to the tab list of relevant plan types for this feature to be made available on the Account Plan launchpad.

For more information, see [Updating or Creating a Plan Type](#) in the Altify online help.

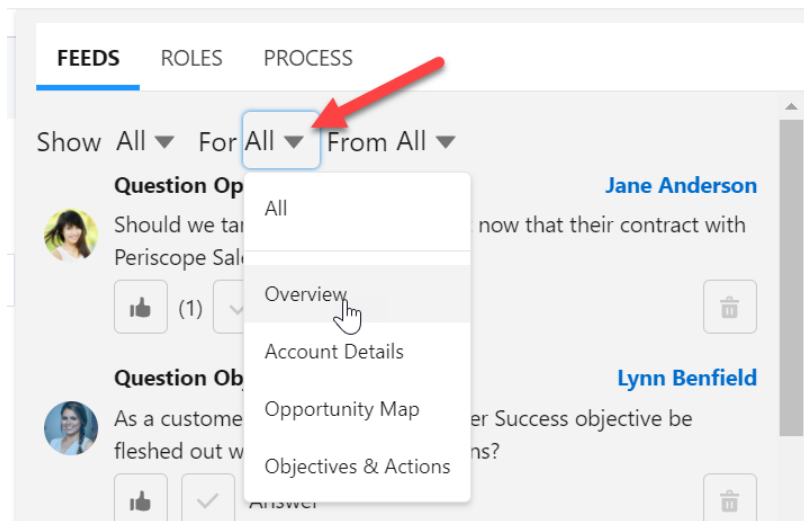
Deprecated functionality [Account Manager and Opportunity Manager]

The test & improve user interface is cleaner and easier to navigate with the removal of the following elements (following discussion with customers):

- Roles tab, Process tab and timer (all highlighted below in v9.13)



- The For filter when viewing reviewer comments (as highlighted below in v9.13).



Account Planning

Access for Partner Users

Partner users such as third party consultants or salespeople can now easily access account plans via the Account Plan launchpad on a partner portal (as shown in the example below).

The screenshot displays a partner portal interface. At the top, a navigation bar includes links for Home, Sales, Marketing, Resources, and Account. A red callout box points to this navigation bar with the text "Partner portal with customized navigation". Below the navigation bar, there is a form for account details with fields for SLA Expiration Date, SLA Serial Number, Number of Locations, Upsell Opportunity, Active status, Created By, Last Modified By, and Description. Below this form is a section titled "ALTIFY" with a "New Account Manager Plan" button and a table with columns: PLAN NAME, PLAN TYPE, STATUS, OWNER, ACCOUNT LIST, REVENUE TARGET, FROM, and TO. A red callout box points to this section with the text "Account Plan launchpad accessible via the partner portal". Below the ALTIFY section is a "Billing" link. At the bottom, there is a detailed "Account Plan Enterprise" dashboard. This dashboard is divided into several sections: "Develop Strategies" (Account Details), "Assess Your Current Position" (Relationships, Insights, Pipeline), and "Focus the Team & Execute" (Objectives & Actions, Test & Improve). Each section contains various metrics and counts.

PLAN NAME	PLAN TYPE	STATUS	OWNER	ACCOUNT LIST	REVENUE TARGET	FROM	TO
-----------	-----------	--------	-------	--------------	----------------	------	----

Account Details	
Questions	6
Completed	2

Relationships	
Mentors	1
Key Players	2
Non Supportive	1

Insights	
Goals Confirmed	0
Key Player Insights	4
Initiatives Confirmed	1

Pipeline	
Whitespace	0 / 1
Potential	\$90,000
Current	\$110,000

Objectives & Actions	
Open Objectives	2
Open Actions	4
Actions Overdue	3

Test & Improve	
Open	1
Completed	0

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]
- [Account Plan Access for Partner Users](#) [Altify online help]

Toggle for importing won opportunities (9.14.5)

In v9.13, the date range for the importing of won opportunities into an account plan was updated from 'current and previous quarter' to 'current financial year'. In support of this a toggle is now displayed (*Show opportunities won outside current fiscal year*) when performing an advanced search of won opportunities to import.

Advanced Search

Account Name

Amount From To

Stage --NONE--

Owner Full Name

Clear Search

Show opportunities won outside current fiscal year ☒

Select View Altify Opportunities CRUD Search

Opportunity Name	Account Name	Amount	Close Date	Stage	Owner Full Name
<input type="checkbox"/> BDGW Inc. Enterprise Licenses	BDGW Inc.	USD 23,126.50	3/20/2025	Closed Won	Jane Anderson
<input type="checkbox"/> BDGW Inc. Enterprise Licenses	BDGW Inc.	USD 76,626.50	12/24/2024	Closed Won	Kevin Bradley
<input type="checkbox"/> BDGW Inc. Enterprise Licenses	BDGW Inc.	USD 23,000.00	3/20/2025	Closed Won	Kevin Bradley
<input type="checkbox"/> BDGW Inc. Enterprise Licenses	BDGW Inc.	USD 23,000.00	3/20/2025	Closed Won	Kevin Bradley
<input type="checkbox"/> BDGW Inc. Enterprise Licenses	BDGW Inc.	USD 45,000.00	3/20/2025	Closed Won	Kevin Bradley

Showing results 1 - 5 of 105

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21

Close OK

Opportunities won outside the current fiscal year are displayed for information purposes only and cannot be selected for import.