



# **Altify Summer '25 Release Notes (v9.15)**

**July 2025**



# Table of Contents

- Relationship Maps ..... 2**
  - New user functionality ..... 2**
    - Assigning functional roles by account type..... 2
    - Grouping of contact search results (internal and external)..... 4
  - New functionality to be administered..... 4**
    - Setting up functional roles..... 4
- Account Manager ..... 6**
  - New user functionality ..... 6**
    - Hidden division details..... 6
  - New functionality to be administered..... 6**
    - Hiding division details..... 6

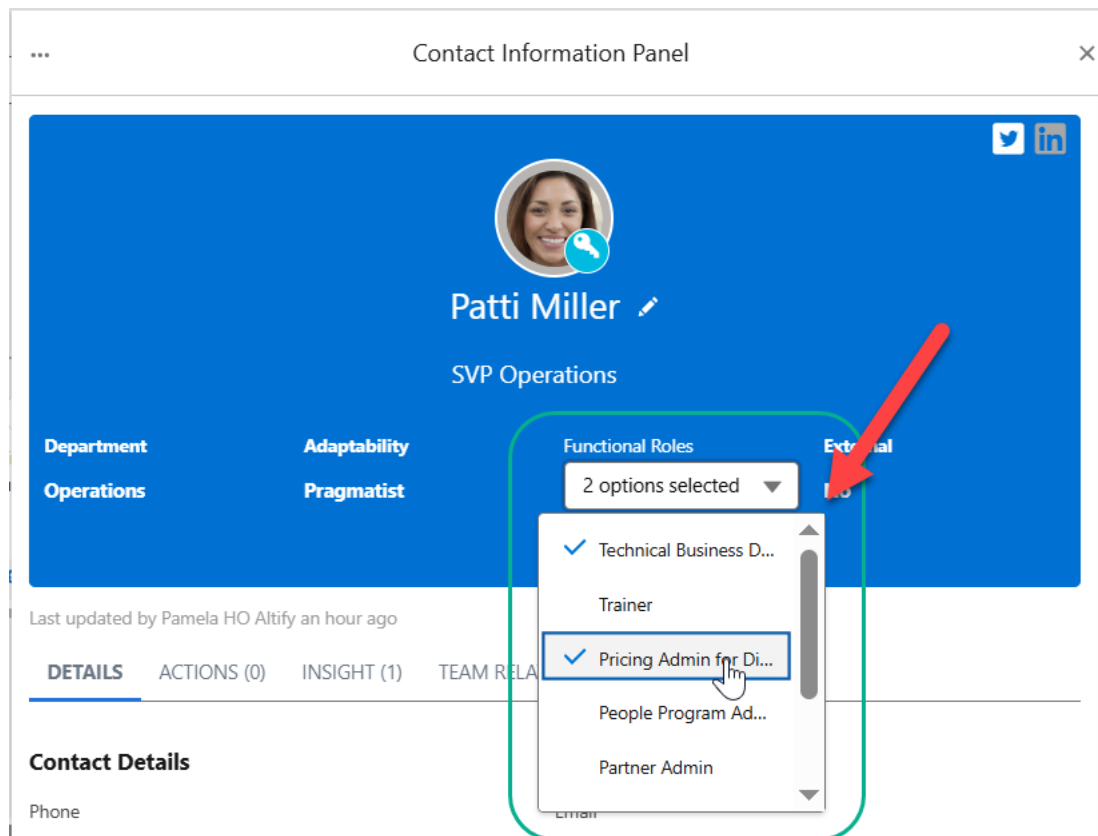
# Relationship Maps

## New user functionality

### Assigning functional roles by account type

Assign functional roles to relationship map contacts according to their associated account type. For example, contacts in a partner account can be assigned one set of roles, and contacts in a customer account can be assigned another.

More than one functional role can be assigned – as shown in the example below.



If a contact for a functional role is not currently identified in the account, a placeholder for that role can be added to your map – as shown in the example below:

Manage Contacts

Add

Functional Roles


Import Maps

Remove

Merchandising Manager

☐

**Add Placeholder functional role**  
Don't see any contacts you wish to add to your map? Add a placeholder functional role to attach/create a new contact later.



### No contacts with this functional role

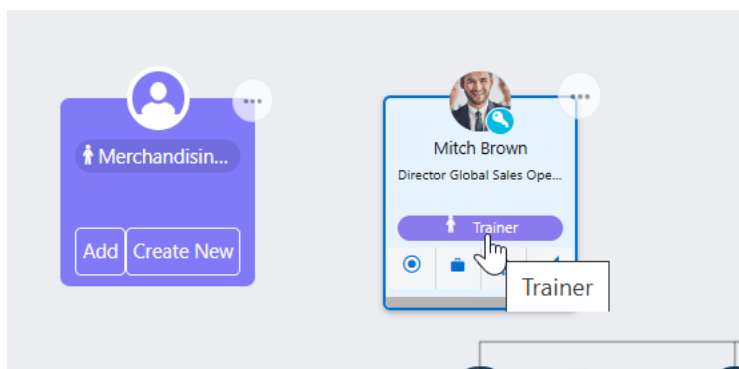
Check "add a placeholder" to add a placeholder functional role to the map.

Clear Selection

Add (0)

For more information, see [Adding Functional Role Contacts or Placeholders](#) in the Altify online help.

On the relationship map, a contact's functional role(s) can be identified by hovering over the purple icon on their contact card. Also shown in the example below is a functional role placeholder.



For more information, see [Identifying and Assigning Functional Roles](#) in the Altify online help.

## Grouping of contact search results (internal and external)

When performing a search on the *Manage Contacts* panel, search results are now automatically grouped into contacts who belong to the relevant account, and contacts who belong to other accounts – as shown in the example below:

The screenshot shows the 'Manage Contacts' interface. At the top, there are tabs: 'Add' (selected), 'Functional Roles', 'Import Maps', and 'Remove'. Below the tabs is a blue button labeled 'Create New Contact'. A search bar contains the text 'Adam' with a magnifying glass icon. Below the search bar is a link for 'Advanced Search'. Under 'Suggestions:', there are three buttons: 'Key Players', 'Mentors and Supporters' (highlighted with a dashed orange arrow), and 'High Coverage'. Below these is a button 'On Maps of Selected Account'. A toggle switch for 'Hide contacts already added:' is turned on. Below this is a checkbox 'Select All'. The search results are grouped into two sections: 'Contacts in this account (2)' and 'Contacts in other accounts (5)'. The first section contains two entries: 'Adam Gerald - Sales Manager - Energy' (with a profile picture and a checkbox) and 'Adam Crenshaw' (with a generic profile picture and a checkbox). A dashed orange arrow points from the 'Mentors and Supporters' suggestion to the 'Contacts in other accounts (5)' section. At the bottom, there are two toggle switches: 'Add who your selected contacts report to:' (turned off) and 'Import most recently updated attributes:' (turned on). There is also a 'Clear Selection' link and an 'Add (0)' button.

## New functionality to be administered

### Setting up functional roles

Functional roles are captured on the Account Contact Relationship standard object. As part of this configuration, Altify needs to be granted access to this object and custom fields need to be added to it.

For more information, see [Setting Up Functional Roles for Account Types](#) in the Altify online help.

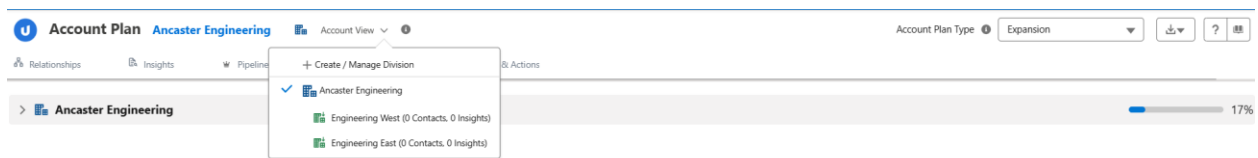
# Account Manager

## New user functionality

### Hidden division details

An administrator can now reduce the amount of work required by end users by hiding the following:

- Row Details for divisions in Account Manager plans
- Account Details for divisions in account plans (as shown in the example below where details for the account, and not its two divisions, are displayed).



In this way, details only need to be completed for an account and not its divisions.

## New functionality to be administered

### Hiding division details

A new Altify Account Manager Setting, *Hide Account/Row Details for Divisions*, enables the functionality described above.