Altify Summer '25 Release Notes (v9.15)

July 2025

Table of Contents

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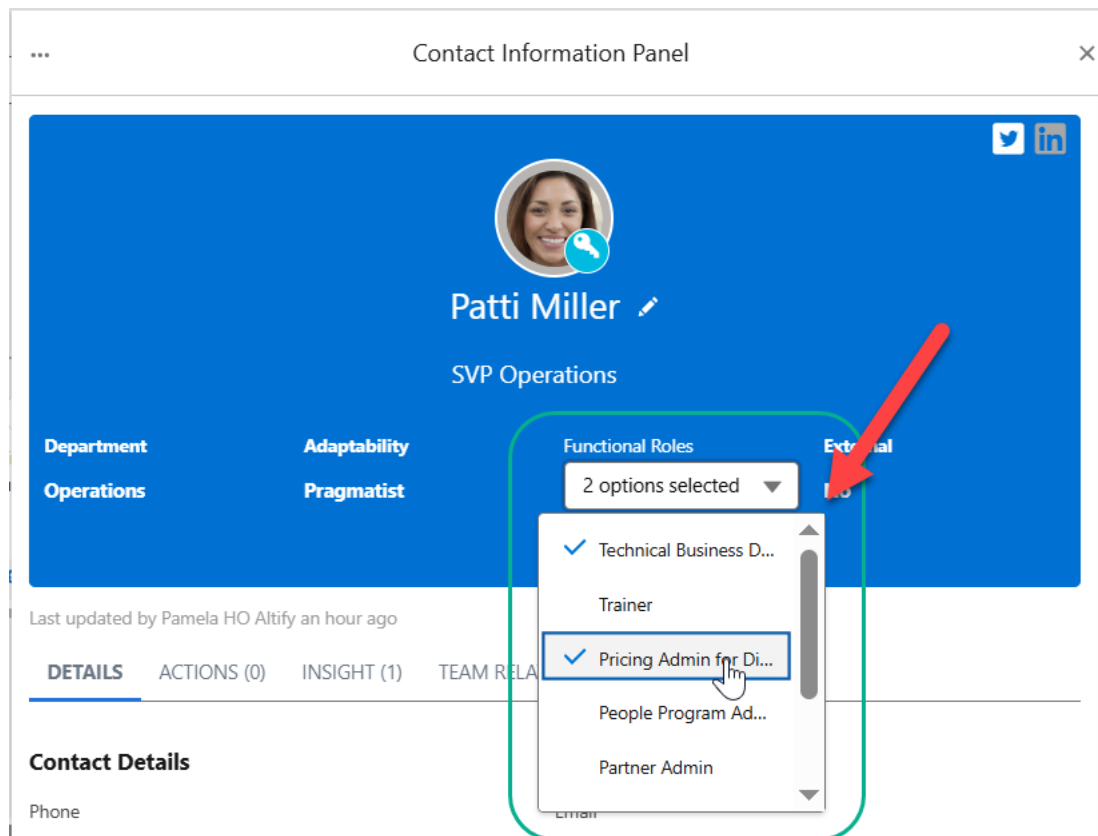
If a contact for a functional role is not currently identified in the account, a placeholder for that role can be added to your map – as shown in the example below:

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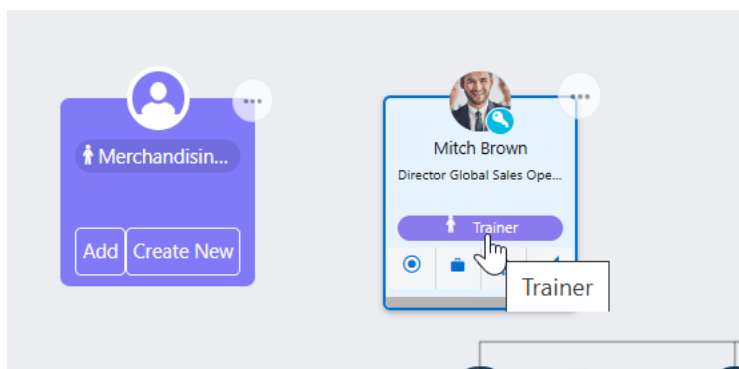
For more information, see [Identifying and Assigning Functional Roles](#) in the Altify online help.

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:

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.
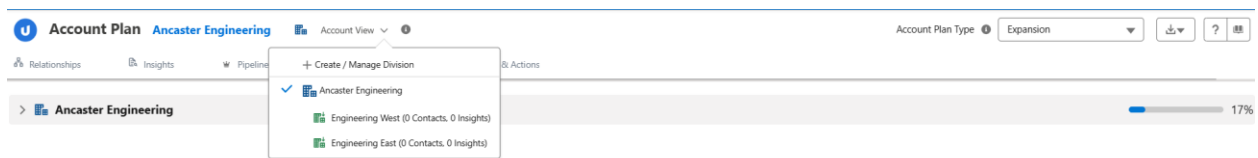
Account Manager

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.