Altify Summer '25 Release Notes (v9.16)

October 2025

Table of Contents

Release Overview

First introduced in v9.14, Altify's AI-powered solution MaxAI takes a significant step forward with one-click data generation. In account planning and insight mapping, users can click a button to automatically generate account details and account/opportunity insights suggested by AI – bypassing the need to interact with the Agentforce chat facility. The data is clearly indicated as generated by MaxAI and your users can accept/reject and edit the data as they see fit.

In Account Manager, PowerPoint export functionality is extended to include your account plans. Users click a button to generate a smartly designed PPT that clearly presents account plan data featuring, for the first time, a visual representation of the account relationship map as it is displayed in Altify.

When capturing account/row details (in Account Manager plans/account plans), enhanced design gives a clearer indication of when details are unsaved. In addition, your organization can now choose to hide such details for account divisions, removing the potential for duplication of work (if your experience is that the same details regularly apply to accounts and their divisions).

A whole new suite of reports are available for installation in Altify 9.16. Built for C-suite and sales leaders, these reports provide a comprehensive overview of the value your organization gets from using Altify to manager opportunities and plan accounts. Available in two unmanaged package (for opportunity management and account planning), these reports are entirely customizable and highlight the impact of Altify by comparing the size, pipeline, win rate and velocity of Altify managed accounts and opportunities with those not managed within Altify.

In relationship maps, Altify now supports the Account Contact Relationship object to a limited extent. If your organization applies this junction object (which allows a contact to be associated with multiple accounts), Altify will generate these records when contacts are added to relationship maps and track indirect relationships when suggesting contacts to be added to maps. With additional support from Altify, account contact relationships can be harnessed to capture account-specific roles on relationship maps.

Note: Enhancements initially delivered with Altify 9.15 are included (and marked as such) in these release notes.

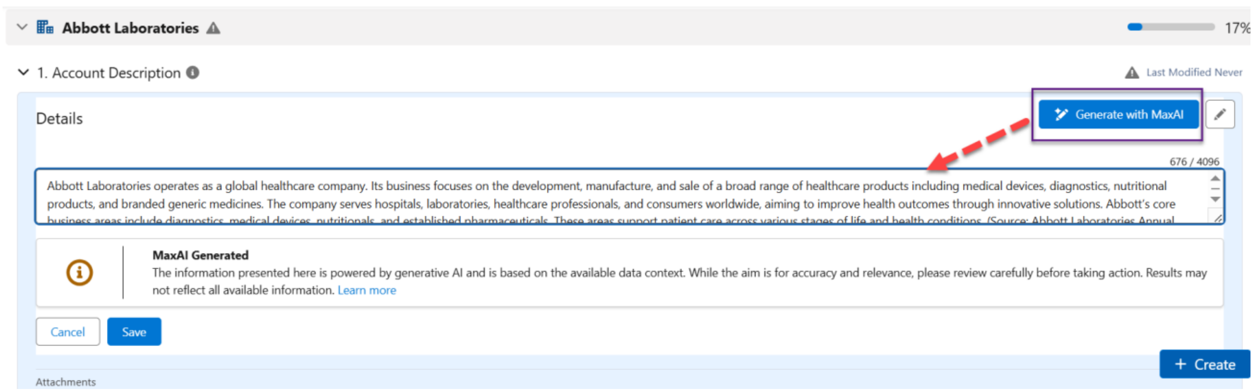
MaxAI

New user functionality

Accessing AI guidance in the Altify interface

Access Agentforce guidance with the click of a button at the following locations:

- Account details of an account plan (or row details of an Account Manager plan): click the **Generate with MaxAI** button to generate a suggested answer for the accompanying question - as shown in the example below.

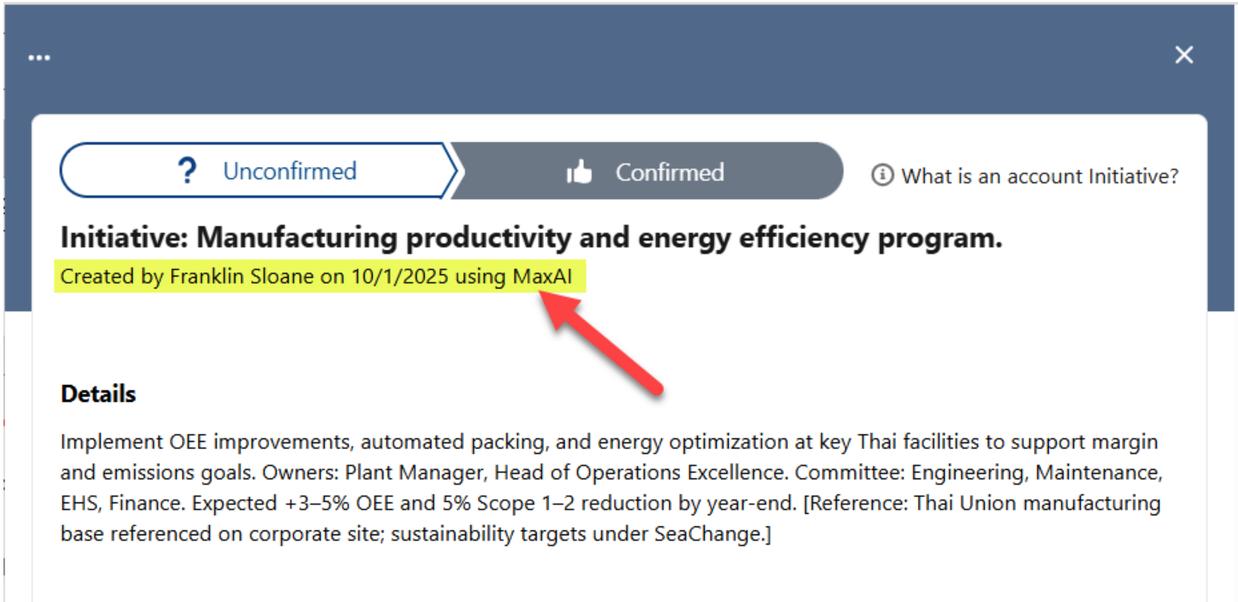
  

  For more information, see [Using Agentforce to Complete Account Details]() in the Altfiy online help.

- Account or opportunity insight map: click the **Generate with MaxAI** button to generate a section of suggested insights - as shown in the example below.

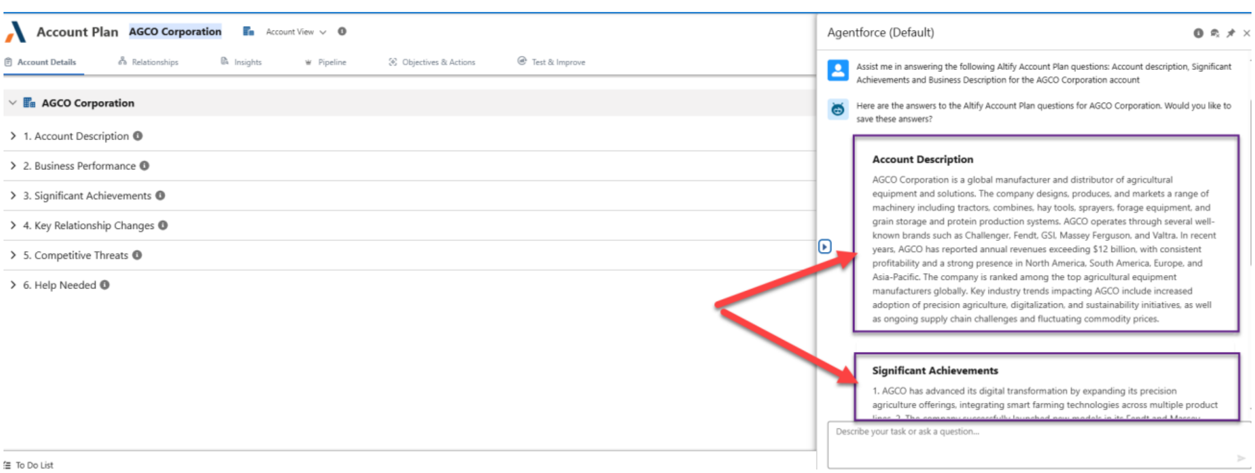
In both of the above use cases, the data generated by MaxAI can be edited or removed as required. Insights generated by MaxAI are recorded as such – as shown in the example below.



For more information, see Using Agentforce to Populate an Insight Map in the Altify online help.

Improved formatting of Agentforce account/row detail responses

When AI guidance is accessed via the Agentforce chat, its account/row details suggestions are now presented as distinct cards that are easier to discern - as shown in the example below.



New functionality to be administered

Setting up AI access in the Altify interface

Displaying the *Generate with MaxAI button* requires additional configuration – it is not displayed by default. In the case of account/row details responses, a unique prompt can be created to guide Agentforce's responses to specific account questions.

For more information, see Enabling MaxAI in Altify in the administration section of the Altify online help.

Account Manager

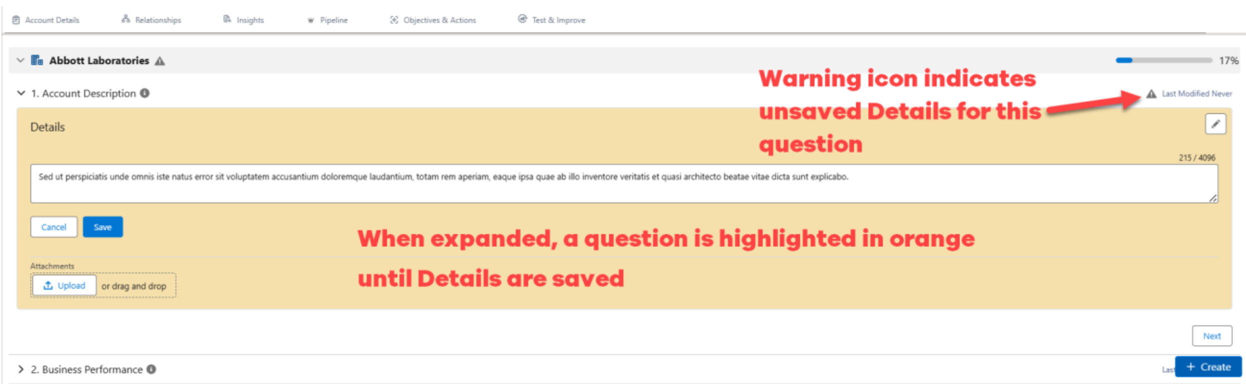
New user functionality

Flagging of unsaved account/row details

To avoid the accidental loss of data, unsaved account details in an account plan (or row details in an Account Manager plan) are now flagged as follows:

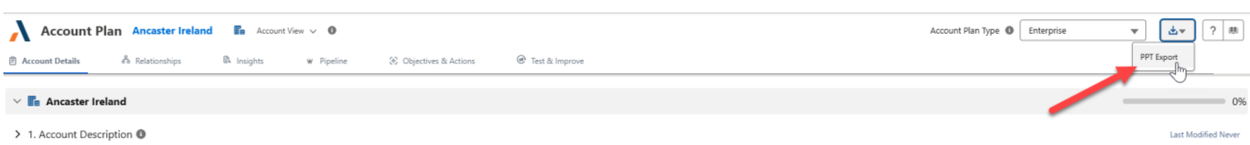
- A warning symbol is displayed
- Question is highlighted in orange while in expanded state

These indications of unsaved Details are shown in the example below.

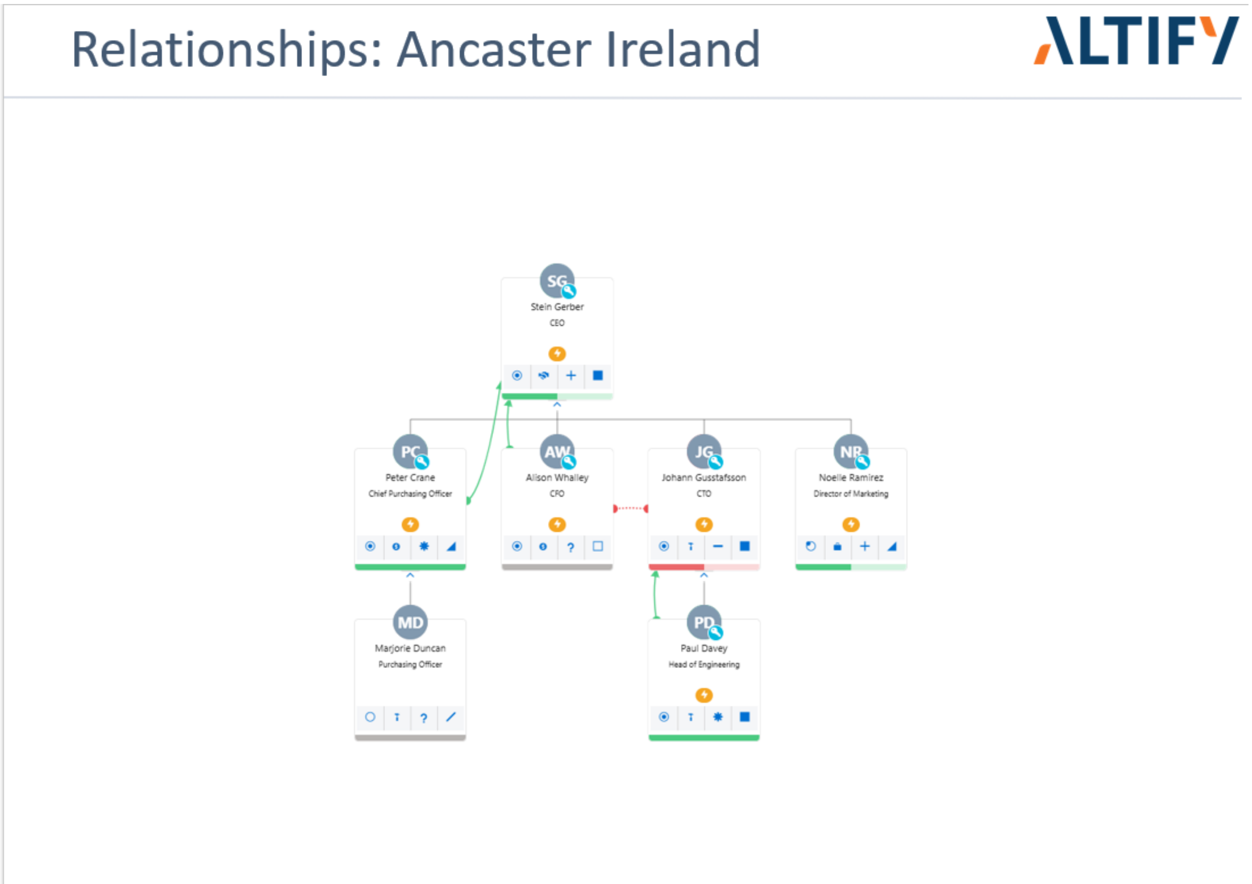


Exporting account plans

The exporting of account plans to a PowerPoint file is now possible. As with Account Manager plans, the export function is accessed via the Export drop-down in the upper right-hand corner - as indicated in the example below.



Account plan PowerPoint exports include a new relationship map output whereby an image of the map is included in the PPT file. An example is shown below:

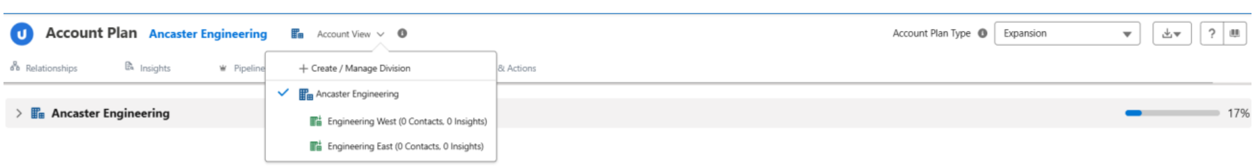


For more information, see [Exporting to PowerPoint]() in the Altify online help.

Hidden account/row division details (v9.15)

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

Configuring the relationship map image in the account plan export

The inclusion of a relationship map image in an account plan PowerPoint export (as described above) can only work if the number of contacts displayed falls within specified limits.

By default, these limits are set to values recommended by Altify: a maximum of 35 contacts in total, with a maximum width of 15 contacts and a maximum height of 7 contacts. In this default scenario, an image is not included in the PPT export if there are, for example, 36 contacts in the relationship map.

These limits can be adusted if required. For more information see Setting Contact Limits for Account Plan Export in the administrator section of the Altify online help.

Hiding account/row division details

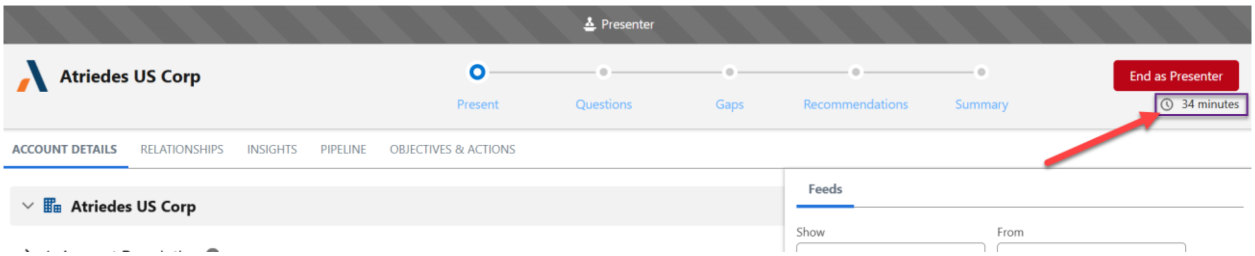
A new Altify Account Manager Setting, *Hide Account/Row Details for Divisions*, enables the functionality described above whereby account details in account plans, and row details in Account Manager plans, are hidden for account divisions.

Test & Improve

New user functionality

Timer displayed in T&Is

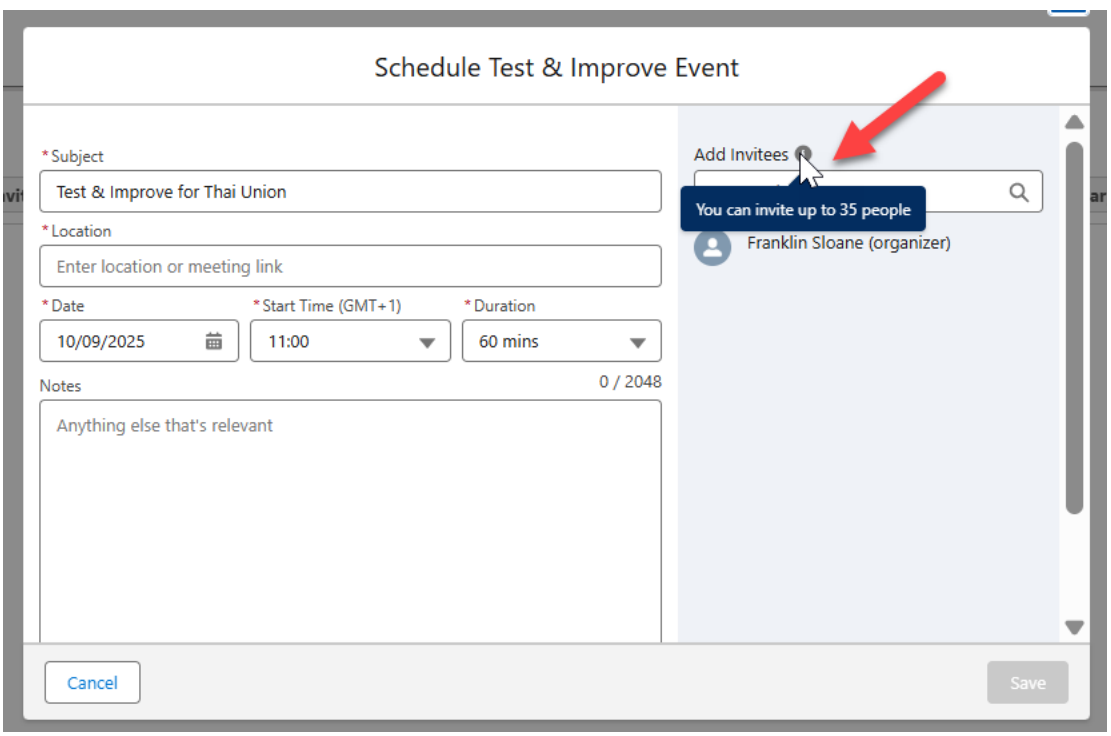
A timer in the upper right corner of the screen informs T&I attendees of how much time has elapsed – as indicated in the example below.



This timer is not displayed by default and needs to enabled by an administrator.

Maximum number of T&I attendees increased

The maximum number of people who can attend a T&I is increased from 15 to 35 – as indicated below:



New functionality to be administered

Enabling a test & improve timer

The Altify Core Custom Setting *Enable Test & Improve timer* controls the display of the T&I timer in Account Manager and Opportunity Manager.

Reporting

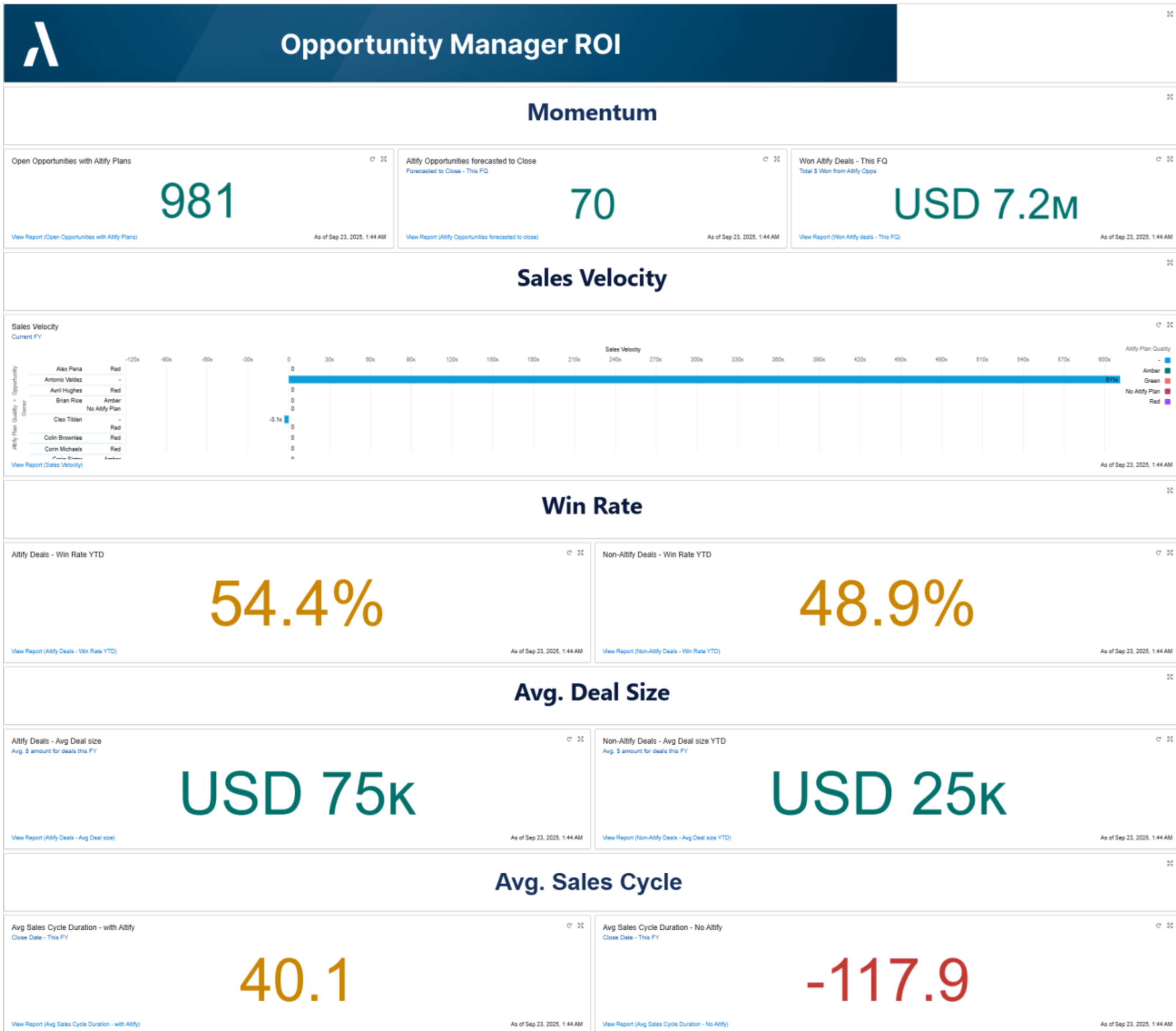
New user functionality

New Opportunity Manager and Account Planning ROI dashboards

New dashboard options are available via an unmanaged package:

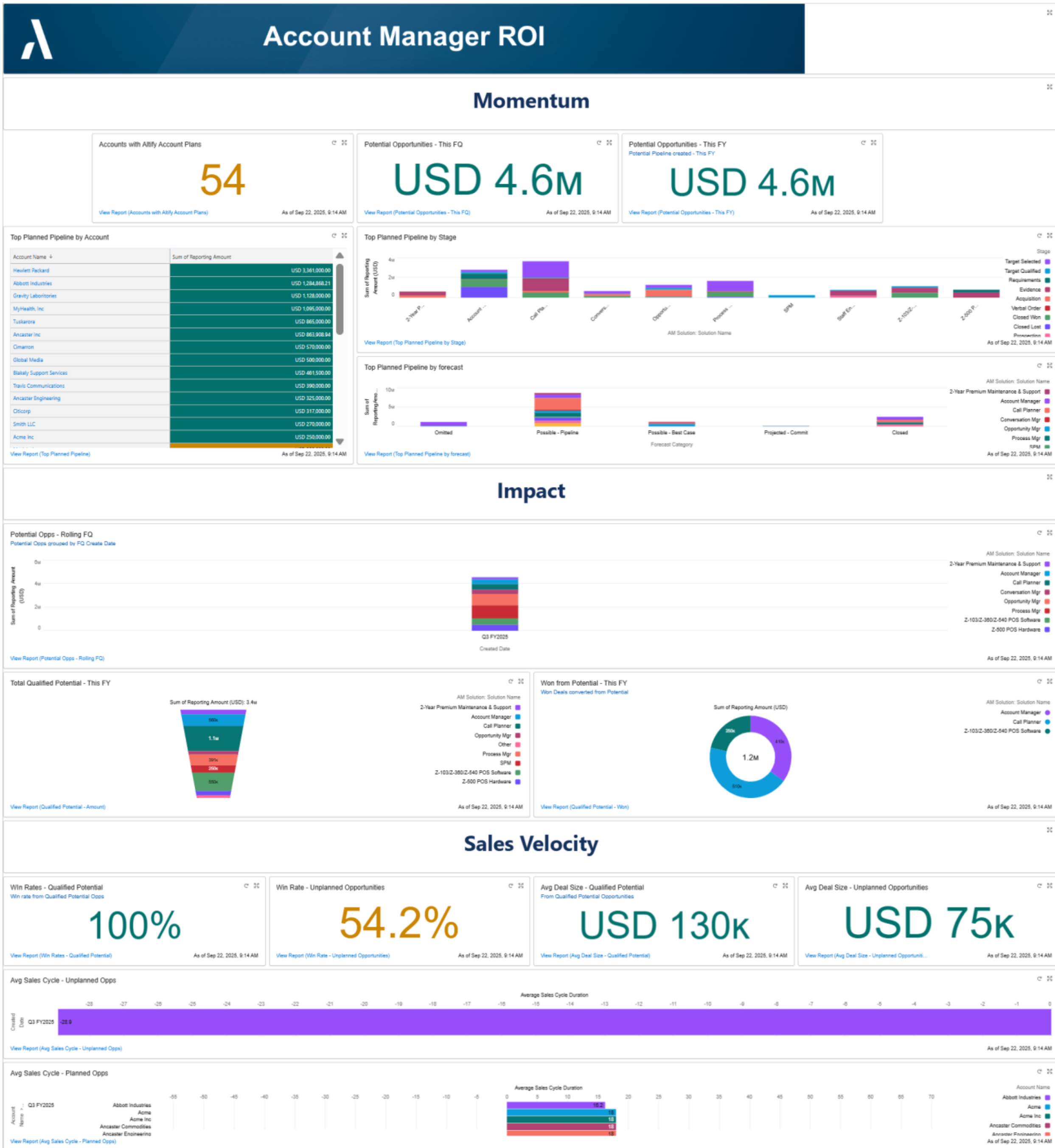
- The *Opportunity Manager ROI* dashboard gives a comprehensive view into the momentum, velocity, and performance of opportunity-based selling activities. It is designed to help sales and operations teams assess return on investment (ROI) from structured opportunity management using the Altify platform. It helps track both leading indicators (such as open opportunities with Altify plans and forecasted pipeline) and lagging indicators (such as win rate, deal size, and sales cycle time) by leveraging Altify data.

Pictured below is an example of an Opportunity Manager ROI dashboard:



- The *Account Planning ROI* dashboard gives a comprehensive view into the momentum, impact, and velocity of account-based selling activities. It is designed to help sales and operations teams assess return on investment (ROI) from strategic account planning using the Altify platform. It helps track both leading indicators (such as pipeline growth and plan activity) and lagging indicators (such as closed/won revenue) by leveraging Altify data.

Pictured below is an example of an account planning dashboard:



New functionality to be administered

Installing the Opportunity Manager and Account Planning dashboards

The dashboards are installed as unmanaged packages into a Salesforce org.

The Opportunity Manager package contains one custom report type, ten reports, one dashboard and two custom fields on the standard Opportunity object.

The Account planning package contains one custom report type, fifteen reports and a single dashboard.

Once installed, both dashboards can be customized by applying standard Salesforce reporting functionality.

For further information on the reporting packages such as the widgets that they display, and the value that they bring to opportunity management/account planning, see Opportunity Manager ROI Dashboard and Account Planning ROI Dashboard in the in the administrator section of the Altify online help.

For installation guidance, see Installing the Opportunity Manager ROI Dashboard and Installing the Account Planning ROI Dashboard in the administrator section of the Altify online help.

Relationship Maps

New user functionality

Supporting the Account Contact Relationship object [v9.15]

Altify offers limited support if your organization uses the standard Account Contact Relationship object.

The account contact relationship object is a junction object that allows you to associate a single contact with multiple accounts (a direct relationship with their primary account and an indirect relationship with other accounts). For more information, see Contacts to Multiple Accounts in the Salesforce Help.

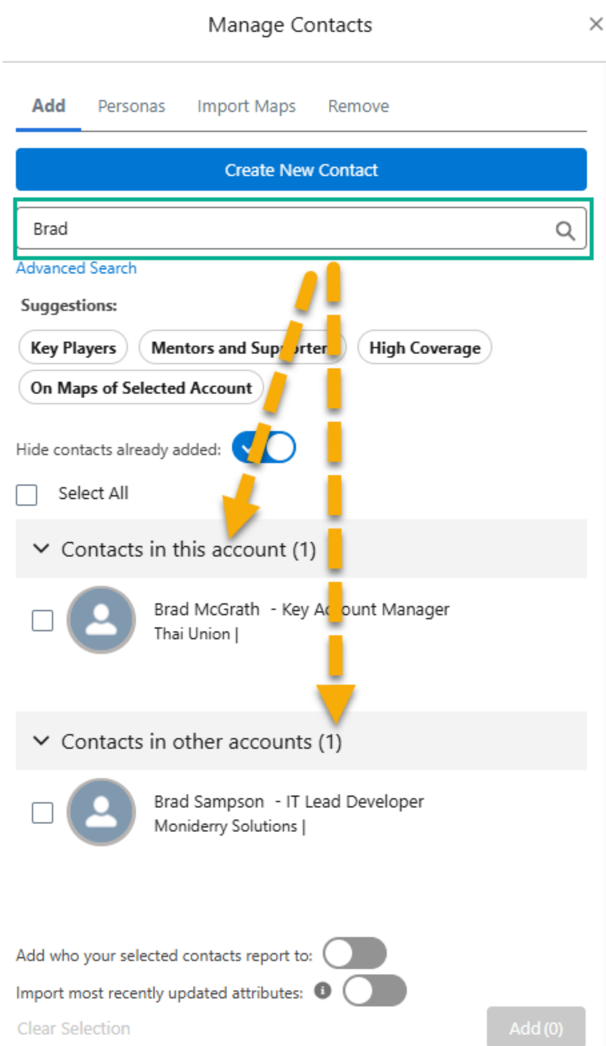
Altify relationship maps supports these relationships as follows:

- When adding contacts to a map, contacts indirectly associated with the account are available for selection in the list of contacts suggested by Altify.
- Adding or creating a contact on a relationship map will create an Account Contact Relationship record connecting the contact with the relevant account.
- The Account Contact Relationship record will capture whether this is a direct or indirect relationship (indirect if the contact belongs to a different account than the one associated with the relationship map).

Note: Altify does not currently support additional fields such as *Roles*, *Start Date* or *End Date*.

Grouping of contact search results (internal and external) [v9.15]

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

Enabling support for the Account Contact Relationship object

Support for the account contact relationships is enabled with the help of a custom setting. For more information, see the Administrator section of the Altify online help.

With additional support from Altify in terms of set up, your users can do the following:

- Capture the specific roles that a contact has across different accounts - they might be assigned the role of 'CTO' on one relationship map, and 'Technical Consultant' on a map associated with a different account.
- Filter relationship maps by these account-specific roles.

- Add placeholders for roles on relationship maps (in cases where the contact with the role has not been identified yet).
- Configure roles so that a different picklist of roles is available for each account type.

To enable support for roles using the Account Contact Relationship object, please contact your Altify CSM or Altify Support.