



Altify v9.17 Release Notes

February 2026



Table of Contents

- Release Overview..... 2**
- MaxAI 3**
 - New user functionality3**
 - Opportunity-centric insight generation..... 3
 - Clearly formatted citations..... 3
 - Increased scope of tested utterances 3
 - New functionality to be administered..... 4**
 - New prompt template for generating Opportunity insights 4
- Account Manager 5**
 - New user functionality5**
 - Partner user access to Account Manager plans 5
 - New functionality to be administered.....5**
 - Configuring partner user access to Account Manager plans..... 5
- Opportunity Manager..... 7**
 - Usability improvements.....7**
 - Actions – visual indicator of mapped contacts.....7
 - Intuitive editing of assessment notes.....7
- Relationship Maps 9**
 - Usability improvements..... 9**
 - Visual indication of key player links to relationship map..... 9
 - Reordering of list view attributes..... 9
- Sales Process Manager 11**
 - Usability improvements.....11**
 - Alignment of qualifying question attachments..... 11
 - Relabelling of ‘Sales Cycle’ to ‘Deal Velocity’ 11
 - Cancel option for sales process selection..... 12
 - Intuitive editing of qualifying question notes..... 12

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.

In **Account Manager**, partner portal users can now access Account Manager plans. This enhancement strengthens planning, collaboration, and execution across partner ecosystems. Sellers with **Partner Community Login** licenses can view higher-level Altify account data—including plan details, opportunity maps, competitive landscapes, and more—enabling deeper collaboration between Altify enterprise customers and their channel partners.

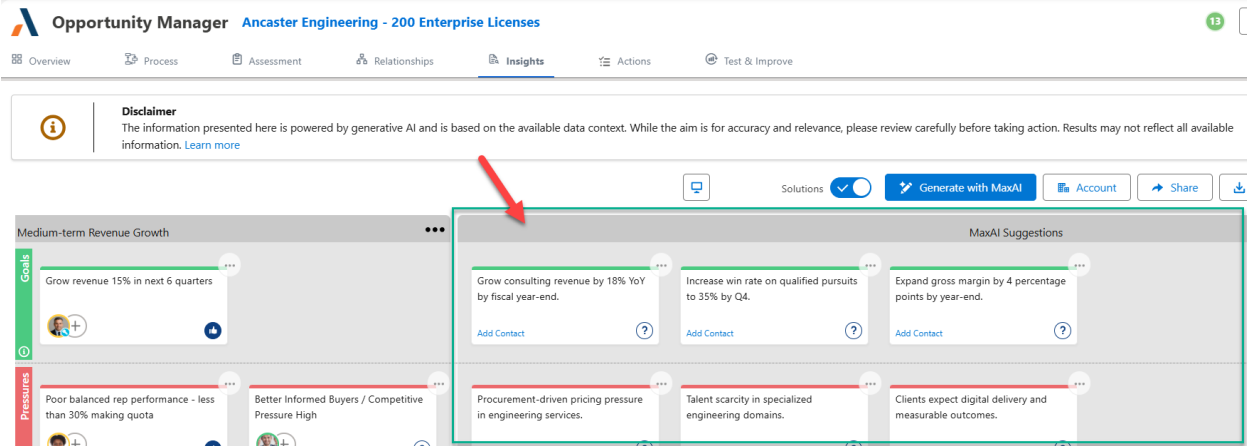
This release also includes a variety of **usability improvements** informed by customer feedback and internal design reviews. These updates deliver a more consistent and intuitive user experience across **Relationship Maps, Opportunity Manager, and Sales Process Manager**.

MaxAI

New user functionality

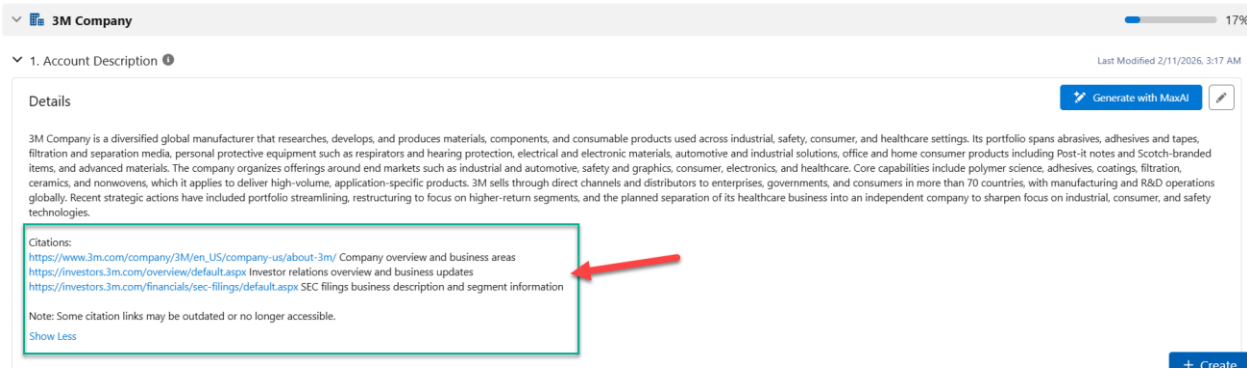
Opportunity-centric insight generation

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

Links provided in MaxAI responses 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.

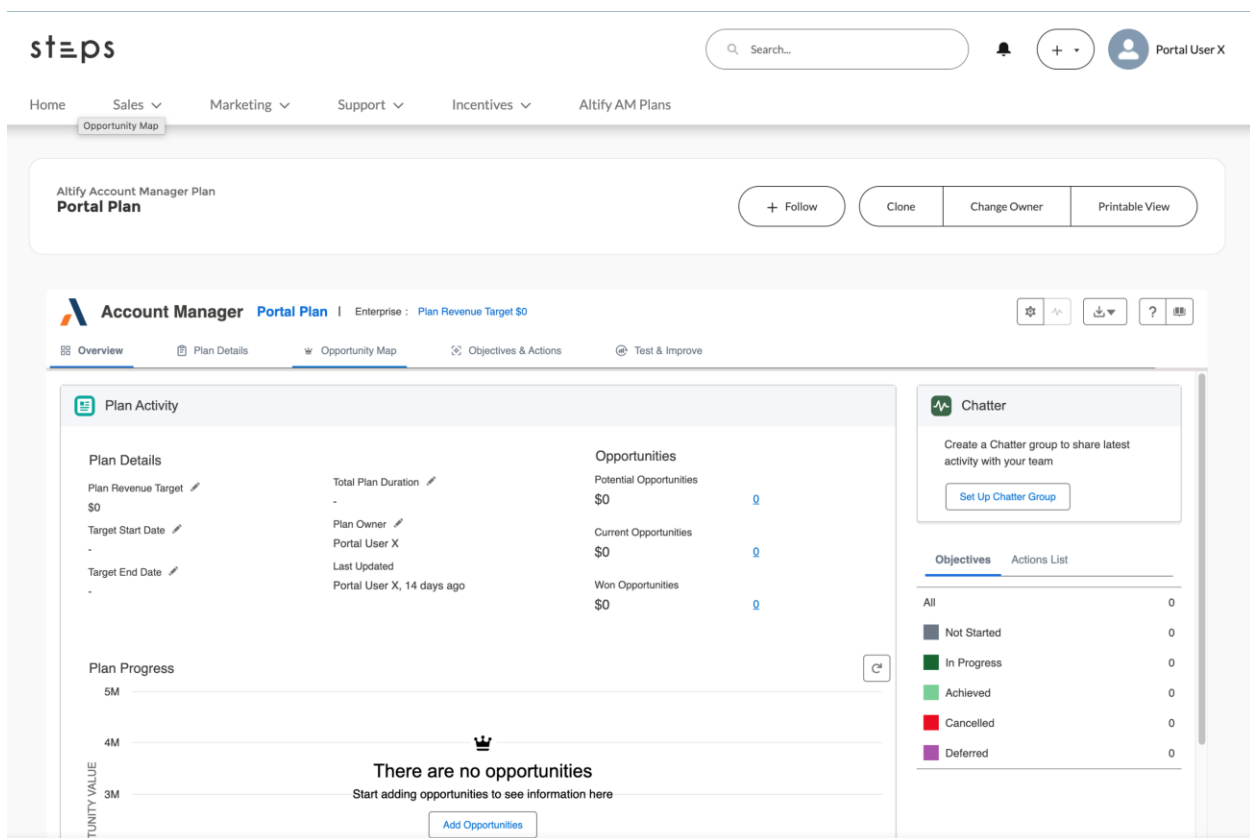
Account Manager

New user functionality

Partner user access to Account Manager plans

Partner users can be granted access to specific Account Manager plans via a Salesforce portal site. Add them as plan team members, enable read or write permissions, and restrict their access to specific accounts in the plan if required.

Pictured below is an example of how an Account Manager plan can be accessed via a partner portal site.



New functionality to be administered

Configuring partner user access to Account Manager plans

This enhancement is a progression of partner user access to Altify Account Plans, which was introduced in Altify v9.14.

If account plan access is already configured, [additional steps](#) are required to configure partner user access to AM plans.

If account plan access is not yet configured, [these steps](#) need to be taken before proceeding to enable access to AM plans.

Opportunity Manager

Usability improvements

Actions – visual indicator of mapped contacts



A new icon indicates when a contact associated with an action is on the opportunity relationship map. If the icon is not displayed, the contact is yet to be added to the relationship map. With this enhancement users are made more aware of potential gaps in their opportunity relationship maps.

The icon is visible in the *Open Actions* pane on the *Overview* tab:

Opportunity Manager 2yr Support Renewal

Overview Process Assessment Relationships Insights Actions Test & Improve

Open Actions
Click the relevant check box to mark an action as completed. Completed actions can still be accessed on the Actions page.



Subject	Contact	Due date ↑	Own
<input checked="" type="checkbox"/> Send over quote documentation	 Beth Trumberry	1/27/2026	Sop
<input checked="" type="checkbox"/> Get Peter's input on insight map	Peter Tensmith	1/30/2026	Gra
<input checked="" type="checkbox"/> Hold a demo for Chris and Lisa	 Chris Best	1/31/2026	Gra
<input checked="" type="checkbox"/> Invite a delegation to our conference	Ian Bishop	3/19/2026	Sop

It is also displayed for relevant contacts on the *Actions* tab – as shown in the examples below:


Opportunity Manager 2yr Support Renewal

Overview Process Assessment Relationships Insights **Actions** Test & Improve

Open Actions

Subject	Comments	Action Type	Contact	Due date ↑	Owner	Priority
<input checked="" type="checkbox"/> Send over quote documentation		Insulate against competition	 Beth Trumberry	1/27/2026	Sophie Vender	Normal
<input checked="" type="checkbox"/> Get Peter's input on insight map	Looks like Pete is missing from the ...	Retrieve missing information	Peter Tensmith	1/30/2026	Graham Feldman	Normal
<input checked="" type="checkbox"/> Hold a demo for Chris and Lisa		Insulate against competition	 Chris Best	1/31/2026	Graham Feldman	Normal
<input checked="" type="checkbox"/> Invite a delegation to our conference		Minimize your weaknesses	Ian Bishop	3/19/2026	Sophie Vender	Normal

Completed Actions

Subject	Comments	Action Type	Contact	Due date ↑	Owner	Priority
<input checked="" type="checkbox"/> Schedule a T&I/Plan Review	Make sure we invited key stakehold...	Prove your value	 Alan Tarnato	2/1/2026	Graham Feldman	Normal

Intuitive editing of assessment notes

For assessment questions, the following improve the editing and reading experience:

- The pencil icon is now adjacent to the *Notes* heading to clearly indicate that they are editable (see **1** below).
- Where previously just one line of notes was displayed, it is now two (**2**).
- Clicking anywhere in the *Notes* pane now opens the edit dialog, where previously a user needed to click on the pencil icon (**3**).

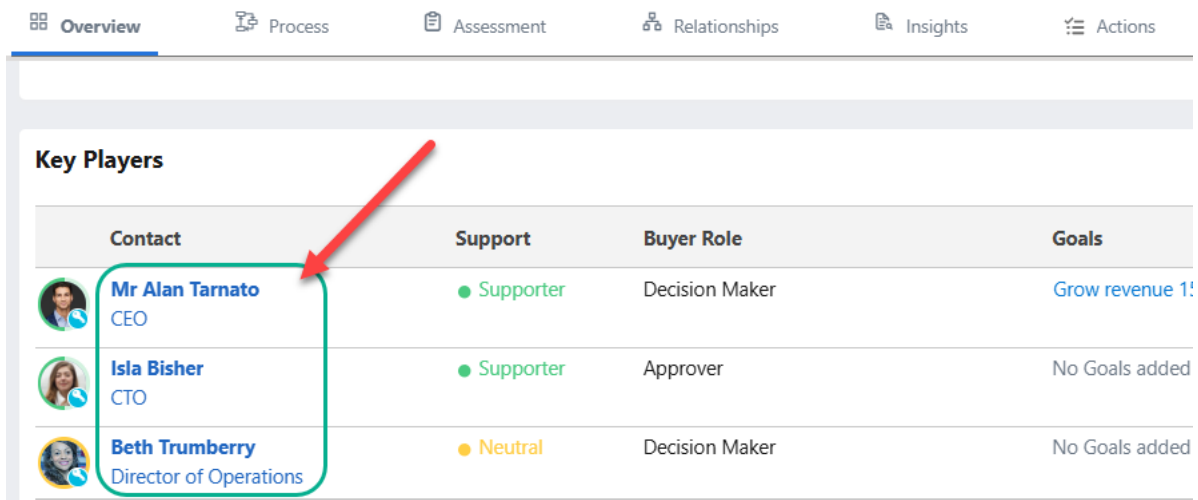
The screenshot displays a software interface with a navigation bar at the top containing 'Overview', 'Process', 'Assessment', 'Relationships', 'Insights', and 'Actions'. Below the navigation bar is a header area with a blue '+ Add Competitor' button on the left and the text 'altify9.17' on the right. A grey bar below the header contains a dropdown arrow and the text 'Is there an opportunity?' followed by four empty square boxes. The main content area features a section titled '1. Customer Initiative' with a question 'Is this initiative currently a priority for the customer?' and a 'Select an Option' dropdown menu. Below this is a 'Notes' section with a pencil icon and a red circle containing the number '1'. The notes text is 'Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco' with a red circle containing the number '2' over the second line. A 'Show More' link is at the bottom left of the notes box. A red circle containing the number '3' is positioned at the bottom center of the notes box.

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 *Account Plan* launchpad
 - On the *Account Summary* pane of the *Overview* page in an Account Manager plan.
- For opportunity relationship maps:
 - On the *Overview* page.
- For all 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.

Opportunity Manager 2yr Support Renewal

Overview Process Assessment Relationships Insights Actions Test & Improve

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

75%

Mobile

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."

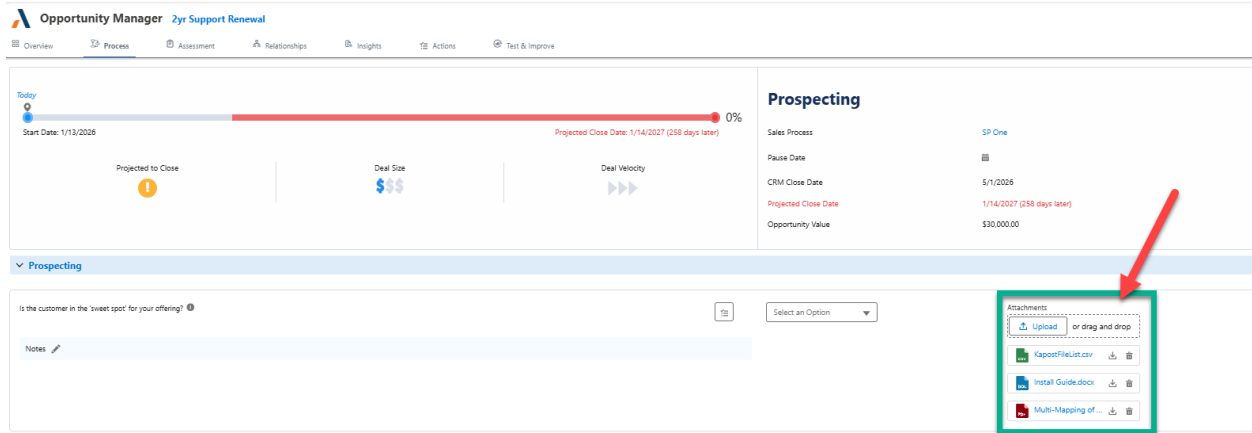
Relationships

Sales Process Manager

Usability improvements

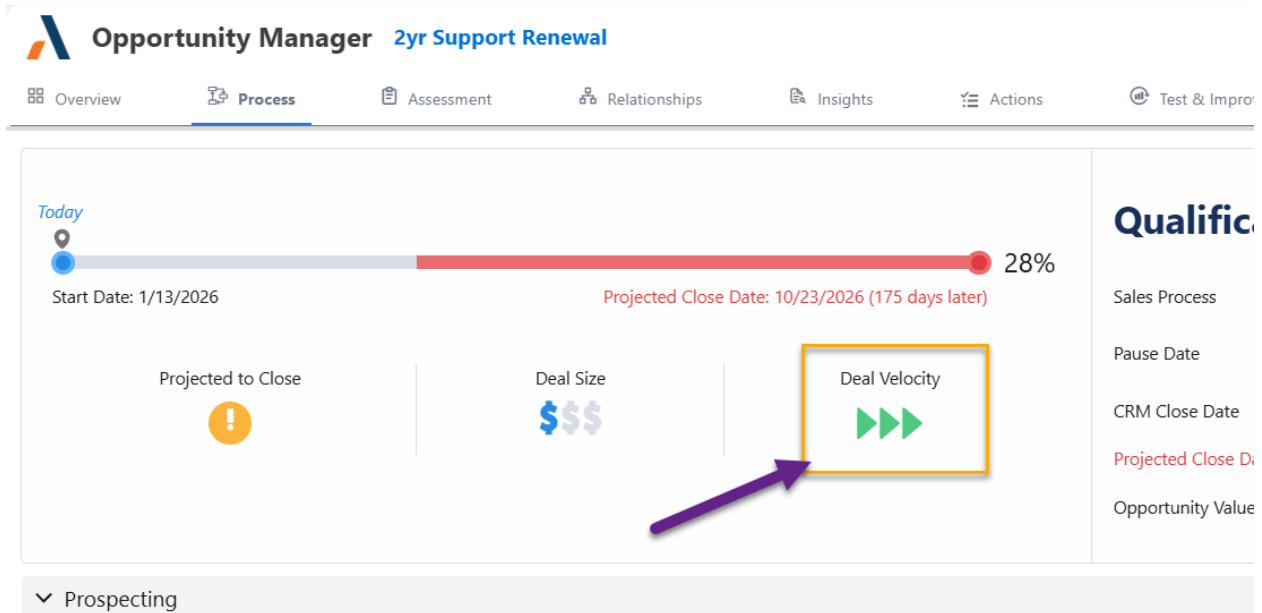
Alignment of qualifying question attachments

Attachments uploaded to provide supporting information are now uniformly aligned to improve user experience – as shown in the example below.



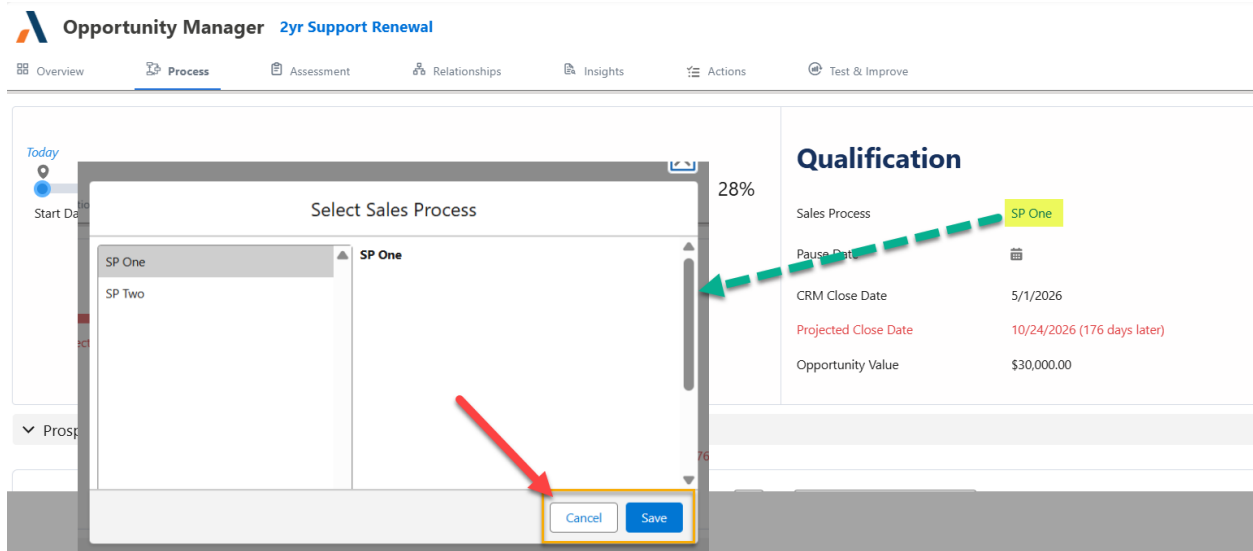
Relabelling of 'Sales Cycle' to 'Deal Velocity'

A more accurate label is applied to the graphic that measures the opportunity's velocity: 'Deal Velocity' as indicated in the example below.



Cancel option for sales process selection

Save and **Cancel** buttons added to the *Select Sales Process* dialog (as shown below) allow the user to cancel their selection and retain their currently selected process.



Intuitive editing of qualifying question notes

For sales process qualifying questions, the following improve the editing and reading experience:

- The pencil icon is now adjacent to the *Notes* heading to clearly indicate that they are editable (see **1** below).
- Where previously just one line of notes was displayed, it is now two (**2**).
- Clicking anywhere in the *Notes* pane now opens the edit dialog, where previously a user needed to click on the pencil icon (**3**).

