Altify MCP Servers Release Notes

August 2026

ALTIFY

Table of Contents

ALTIFY

Release Overview

This release of the Altify MCP Servers, made available in **August 2026**, brings new capabilities across Account Manager, Opportunity Manager, and Insight Maps. This release is applied automatically to all MCP servers; administrators should be aware of an important change to MCP server topology, described below.

In **Account Manager**, sellers can now ask the agent for an **Account Portfolio Health** view across multiple accounts at once, surfacing a red/amber/green status alongside completeness scores so reps and managers can quickly see which accounts need attention. Organizations that use their own terminology for Altify concepts can now have the agent recognize and respond using those preferences, thanks to new **Customer Terminology Support** — removing the friction of translating between an organization's own language and Altify's canonical terms. Pipeline and financial tools across the MCP servers also now correctly reflect a **Custom Opportunity Amount Field** where one has been configured, rather than always defaulting to the standard Salesforce Amount field.

In **Opportunity Manager**, the agent can now generate **Opportunity Insight Suggestions** for a deal, identifying gaps across the five Insight Map types — Goal, Pressure, Initiative, Obstacle, and Solution — and proposing new insight cards with supporting rationale.

For account and opportunity **Insight Maps**, MCP tools now correctly respect the **Enable Enhanced Validation** setting when interpreting insight completion status, ensuring insight status is represented accurately for organizations using this validation workflow.

Administrators should also note that the number of MCP servers Altify customers connect to has changed from **five to four** in this release. The Account MCP server has been deprecated and its tools redistributed to the Analysis and Retrieve servers. See **MCP Server Configuration** below for details on the connector changes required.

Account Manager

New user functionality

Account Portfolio Health

Sellers and sales managers can now ask the agent for a portfolio-level health check across multiple accounts at once. The agent returns a red/amber/green status per account, completeness scores across six dimensions — answers, relationships, insights, objectives, whitespace, and plan answers — along with missing-data flags and a narrative summary of which accounts most need attention and why.

If no accounts are specified, the agent automatically discovers the accounts you own, and results can optionally be filtered by plan type.

Example prompt:

- *How healthy are my accounts?*
- *Which accounts need attention this week?*
- *Give me a portfolio health check across my top accounts.*

Customer Terminology Support

Many organizations use their own naming conventions for Altify concepts — for example, calling the Relationship Map a "Stakeholder Map," or referring to Key Players as "Champions." Once your Altify administrator configures a terminology glossary, the agent's responses will consistently use your organization's preferred terms instead of Altify's own labels.

To also have the agent correctly understand requests phrased in your organization's terms — for example, so "Show me the Stakeholder Map for Acme Corp" is understood as a request for the Relationship Map — the same terminology glossary needs to be added to your AI client's own custom instructions. This is a separate, manual step configured directly in your AI client, outside of Salesforce, and may need to be repeated per user depending on your client.

Example: if your organization refers to the Relationship Map as the "Stakeholder Map" and has completed both configuration steps above, you can ask the agent to "show me the Stakeholder Map for Acme Corp," and its response will also use "Stakeholder Map" rather than the Altify default term.

See Terminology Customization for Altify MCP in the Altify online help for full setup instructions.

Custom Opportunity Amount Field Respected

Pipeline and financial tools now correctly reflect a custom opportunity amount field when one has been configured in your Account Manager settings, rather than always defaulting to the standard Salesforce Amount field. This ensures pipeline figures, deal values, and other financial data the agent surfaces are accurate for organizations that track opportunity value using a custom field. Behavior is unchanged for organizations that have not configured a custom amount field.

Opportunity Manager

New user functionality

Opportunity Insight Suggestions

The agent can now suggest new Insight Map cards for an opportunity, mirroring the account-level insight suggestion capability already available. Given an opportunity, the agent reviews its existing Insight Map alongside core opportunity fields, assessment answers, and the relationship map, identifies which of the five insight types — Goal, Pressure, Initiative, Obstacle, and Solution — are missing or underdeveloped, and returns suggested insight cards with supporting rationale and recommended contacts to link.

Example prompt:

- *What insights are we missing for this opportunity?*
- *Suggest insight cards for this deal based on what's already captured.*
- *Help me complete the Insight Map for this opportunity.*
- *Where are the gaps in this deal's Insight Map across the five insight types?*

Insight Maps

New user functionality

Enable Enhanced Validation Setting Respected

By default, an insight's lifecycle ends at 'Confirmed.' For organizations using the Enable Enhanced Validation setting, insights can be validated a step further into a type-specific terminal state — for example, an Obstacle can be marked 'Overcome' or an Initiative 'Completed' — so 'Confirmed' is no longer necessarily the final state. MCP tools now correctly recognize this further validation stage when interpreting insight completion status, rather than treating 'Confirmed' as complete. Behavior is unchanged for organizations that do not have this setting enabled.

ALTIFY

MCP Server Configuration

New functionality to be administered

Account Server Deprecation

The number of MCP servers Altify customers connect to has changed from **five to four** in this release. The Account MCP server has been deprecated and is no longer part of the Altify MCP Server topology.

What changed:

- *Tools previously hosted on the Account MCP server have been redistributed to the Analysis and Retrieve servers.*
- *The Account MCP server is now deprecated and should no longer be used.*

This is a pure relocation: tool names, parameters, and behavior are unchanged from your point of view — only the server that hosts each tool has moved.

What administrators need to do:

- *Remove any existing connector or client configuration pointing at the Account MCP server.*
- *Confirm your MCP client (or AI agent connector) is configured against the remaining four servers only.*
- *Tools previously accessed via the Account connector will now surface under the Analysis or Retrieve connectors instead.*

See [Altify MCP Server and Tool Descriptions] in the Altify online help for the new allocation of tools to servers.