Altify MCP Servers Release Notes

July 2026

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Release Overview

This release of the Altify MCP Servers, made available in **July 2026**, delivers new AI agent capabilities across Account Planning, Opportunity Manager, Insight Maps, Relationship Maps, and Sales Process Manager. MCP server updates are applied automatically — no action is required from administrators to receive this release.

The most substantial addition is a comprehensive **Account Planning toolset** delivered via the MCP servers. You can ask the agent for a **Contact Intelligence Briefing** on any account before a meeting, have it offer to add missing contacts to the relationship map when linking an insight, and receive solution recommendations that cite their supporting Insight Map cards for clearer, evidence-based suggestions.

In **Opportunity Manager**, agents can now write generated next best actions and insights directly back into core objects, so you no longer need to manually recreate work the agent has already done.

The agent also has full read and write access to **Insight Maps** and **Relationship Maps** at the account level.

With **Sales Process Manager (SPM)**, write capability is introduced. You can assign sales processes to opportunities and update qualifiers in natural language, all while the agent respects the org's configured SPM settings.

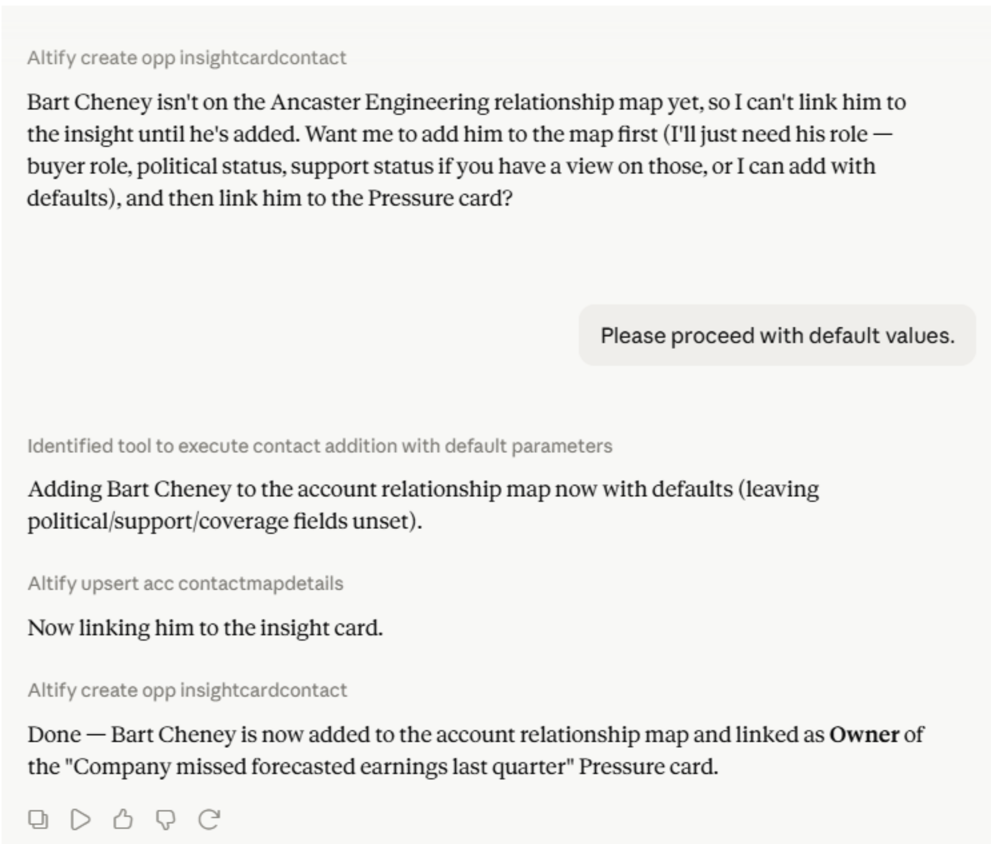
Across all areas, the agent has been made more accurate and configuration-aware: it no longer references insight fields or features that you've disabled, and no longer surfaces contacts who have left the company in its recommendations.

Account Planning

New user functionality

Add a Missing Contact to the Relationship Map

When a contact referenced on an insight card isn't yet on the relationship map, the agent now **offers to add them** — so you are no longer blocked from completing their insight map.



Richer Solution Recommendations

Account solution recommendations now **cite the supporting Insight Map cards** using their verbatim short descriptions, attributed by insight type, for clearer, evidence-based suggestions. You can see exactly which pressure, initiative, or obstacle each recommendation is responding to, rather than receiving a recommendation without supporting context.

What are your recommended solutions for the Ancaster Engineering account?

🏆 **Top Solution Recommendations**

1. Altify Accounts *(Strategic Account Planning)*
Addresses: Increase Rep Productivity, Customer Engagement. There's a proven track record here (Won £600K) alongside solid upside (Potential £250K). This is the highest-priority solution given the account's confirmed productivity and engagement goals.

2. Altify Opportunities *(Opportunity Management)*
Addresses: Maximize Revenue in Key Accounts, Poor Sales Enablement. Active pipeline (Qualified £20K + Potential £75K) reflects real urgency around revenue concentration in key accounts.

3. Altify Insights *(Strategic Account Planning)*
Addresses: Customer Satisfaction Not Improving, poor executive relationships. Meaningful whitespace here (Potential £200K), though it lacks a Won or Qualified deal to date.

Contact Intelligence Briefing

Before a customer meeting, you can ask the agent for a **Contact Intelligence Briefing** on any account via the MCP servers. The briefing surfaces the key contacts who matter most — including their role, support level, coverage, and links to relevant insight cards — alongside at least one specific recommended next step per contact.

Example prompt:

- *Create a contact intelligence summary for Acme. Show key people, who supports or blocks the deal, and what I should do next before my meeting.*

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Here's your pre-meeting brief for **Ancaster Engineering**:

👥 Key People

Mitch Brown *(Director Global Sales Operations)* — 🟢 Mentor · Multiple contacts
Focused on rep productivity and aware of the high-cost-of-sales problem — but flagged with multiple blocking insights. **Next step:** run a value matrix session with him before the meeting.

Ahmad Rishad *(SVP Product Development)* — 🟢 Supporter · Multiple contacts
Positioned to influence product decisions; limited insight coverage so far. **Next step:** open a conversation on his product vision and customer alignment.

Patti Miller *(SVP Operations)* — 🟢 Supporter · In-depth
Focused on the 15% churn problem — but carries a blocking insight tied to that same issue. **Next step:** dedicated churn-reduction discussion.

Deb Harson *(VP, Automotive Sales)* — 🔴 Non-Supporter · Brief contact
Wants harder proof — flagged that customer examples lack quantifiable results. **Next step:** bring detailed case studies with real numbers.

Mark Garcia *(SVP Marketing)* — 🔴 Enemy · No Contact
Not yet engaged at all. **Next step:** build a deliberate outreach plan before assuming his opposition is fixed.

⚠️ Support ≠ Safe: Conflict Flags

Several "supporters" are quietly sitting on blocking insights — worth resolving before you lean on them as champions:

- **Patti Miller** — supporter, but owns the churn blocker
- **Mitch Brown** — mentor, but owns multiple sales-enablement/productivity blockers
- **Beth Angel** — supporter, but owns the "lacking proof points" blocker
- **Tim Naans** — supporter, but owns several blockers

🎯 Before Your Meeting

1. Prep churn-reduction talking points for Patti Miller
2. Bring quantified case studies for Deb Harson
3. Line up value-matrix questions for Mitch Brown
4. Draft a first-touch engagement angle for Mark Garcia
5. Have a product-alignment conversation ready for Ahmad Rishad

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Opportunity Manager

New user functionality

Enable Agent Write-Back for Next Best Actions & Core Objects

Agents can now write generated **next best actions and insights** directly back into core Opportunity Manager objects via the MCP servers, so you no longer need to manually recreate actions, insights, or questions the agent has already generated.

Example prompt:

- *Add my next best actions to my actions in OM*

Add my next best actions to my actions in OM

Crafting task previews before executing action items

Adding these as PRIME actions on the opportunity. Let me pull the contact IDs first for Mitch Brown, Clara Wilson, and Charles Underwood.

Architected four tasks with strategic action types for preview

Here's the preview of 4 tasks I'll create on the opportunity **Ancaster Engineering - 200 Enterprise Licenses**:

#	Subject	Contact	Due	PRIME Type
1	Brief Clara Wilson on ROI (via Mitch Brown)	Clara Wilson	2026-07-09	PROVE
2	Schedule demo for Clara Wilson & Charles Underwood	Clara Wilson	2026-07-12	RETRIEVE
3	Follow-up 1:1 with Clara Wilson re: Garcia influence	Clara Wilson	2026-07-15	INSULATE
4	Share deployment success metrics with Clara's team	Clara Wilson	2026-08-01	EMPHASIZE

Insight Maps

New user functionality

Agent Respects Disabled Insight Fields and Features

The AI agent now reads your Insight Map configuration before generating responses. If you've disabled specific insight fields or insight types in your Altify configuration — including account insight map settings — the agent will no longer reference those fields or suggest those types of insight cards. Agent responses are always consistent with what is actually available and enabled in your org.

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Relationship Maps

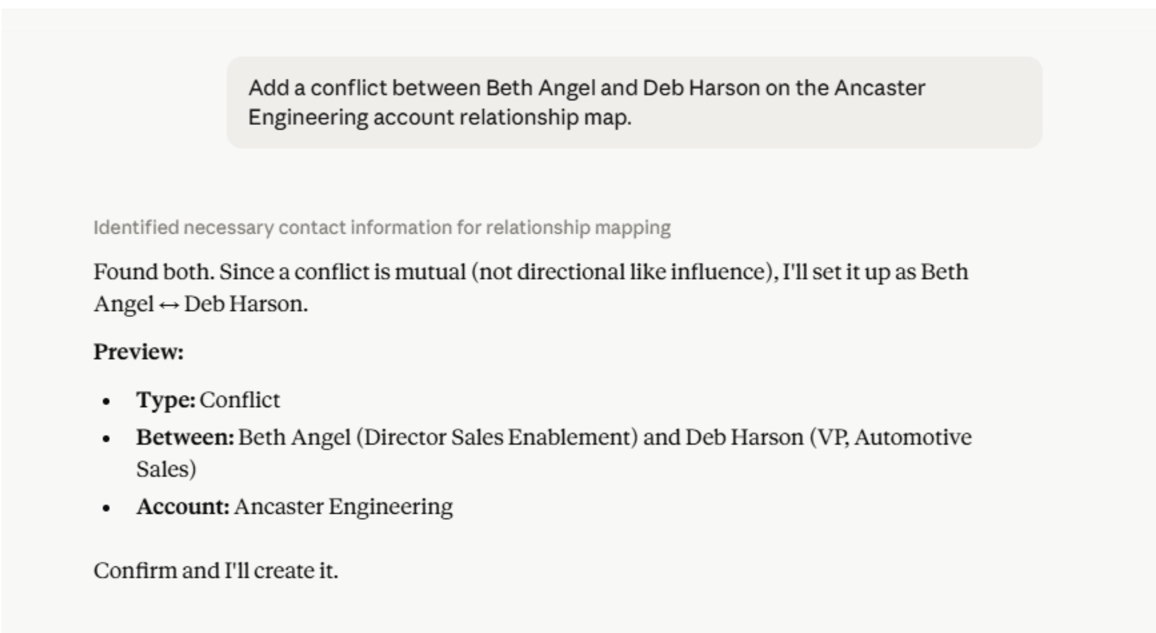
New user functionality

Relationship Map Read and Update

The MCP servers now support reading and updating account **Relationship Maps**. Agents can query who is on the relationship map, add contacts, and update stakeholder details including buyer role, political status, coverage, and decision orientation. Agents can also record **contact influence relationships**, capturing who influences whom across the stakeholder network.

Example prompts:

- *What are the contacts on my relationship map for Acme?*
- *Add [Contact Name] to the relationship map for Acme*
- *Who are the key players on the Acme account?*
- *Add a conflict between [X] and [Y] on my [Account Name] relationship map* (as shown in the example below)



Exclude Contacts Who Have Left the Company

The agent no longer recommends follow-up or engagement with contacts who are marked as having left the company in the Relationship Map. This configuration is read from your Altify settings and the exclusion is applied consistently across all agent tools that surface or recommend contacts.

Sales Process Manager

New user functionality

Assign or Change the Sales Process

You can now assign a sales process to an opportunity for the first time, or replace an existing one, through the agent. A confirmation step appears before any change is written, so nothing is assigned without your explicit go-ahead.

- *Change the sales process for [Opportunity Name] from 'Enterprise' to 'Mid Market'.*

Update Qualifier State

Agents can now set a qualifier to No, In Progress, or Yes from natural phrasing — such as "yeah, confirmed" — normalised against the org's live picklist, so you don't need to remember exact qualifier wording.

Example prompt:

- *Mark the 'Executive sponsor identified' qualifier as yes for this opportunity*

Configuration-Aware Opportunity Core Fields

When reading or updating opportunity **core fields** — amount, stage, close date, name, and probability — the agent now resolves the org's configured **Sales Process Settings** first, so it correctly uses a custom amount field where one has been configured, instead of assuming default field names.

Sales Process Configuration Awareness

Before writing any Sales Process data, the agent now checks the org's **Sales Process Settings** configuration for user-initiated change permissions. If an admin has disabled user-initiated sales process changes, the agent explains why no change was made rather than failing silently.

The example below shows what happens a sales process change is applied to an opportunity but Altify configuration prevents the change.

> Altify upsert opp salesprocess
>
> That change was blocked — your org has **"Allow Sales Process Popup"** disabled, so sales process changes on opportunities can't be made this way (via MCP or presumably the standard UI popup either). No change was made to the opportunity.
>
> You'd need a Salesforce admin to enable that setting first if you want this kind of change to go through going forward.