Altify MaxAI 2.3.0 Release Notes

July 2026

ALTIFY

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Release Overview

This release of **Altify MaxAI 2.3.0**, made available in **July 2026**, marks a significant shift in where the MaxAI agent operates. Until now, MaxAI's capabilities have lived almost entirely inside **Opportunity Manager**. This release introduces the agent's first large-scale extension into **Account Manager**, bringing a substantial set of Account Planning capabilities directly into Salesforce for the first time.

The agent can now perform a structured, deep assessment of a single account plan, evaluate the health of your entire account portfolio, and analyse opportunity risk across all deals on an account. It can also surface **solution recommendations** mapped to an account's Insight Map, and generate a concise **pre-meeting contact briefing** on the key stakeholders for an account.

You can now interact with every key area of an account plan directly through the agent. The **Insight Map** can be read, populated, and managed without leaving the account record. The **Relationship Map** can be queried and updated, with stakeholder details, coverage, and contact influence all accessible through simple prompts. **Actions and Objectives** can be created and tracked against account plans, and **Test & Improve** session data is now available to the agent for coaching context.

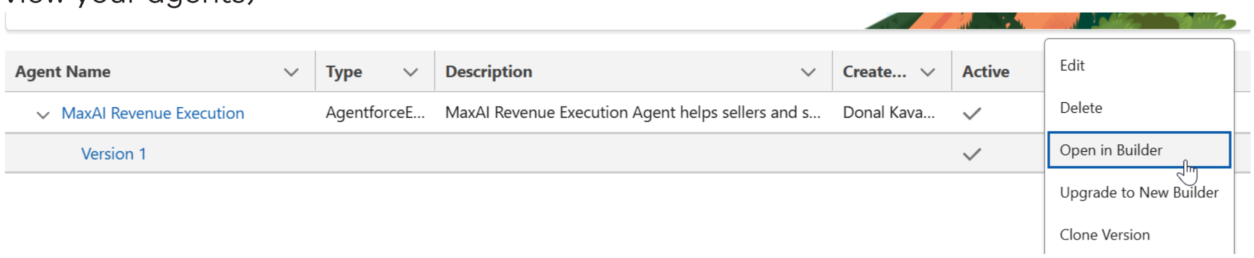
This release also takes a first step for **Sales Process Manager (SPM)** within MaxAI, bringing initial read and write capability for the agent. You can ask the agent to inspect qualification state and closure probability, list and assign sales processes, and update qualifiers in natural language, all while the agent respects the org's configured SPM settings.

Across all areas, the agent uses Account Manager terminology consistently on the Relationship Map, creates and updates decision criteria through a single unified action, and offers to add a missing contact to the relationship map rather than failing with a raw error.

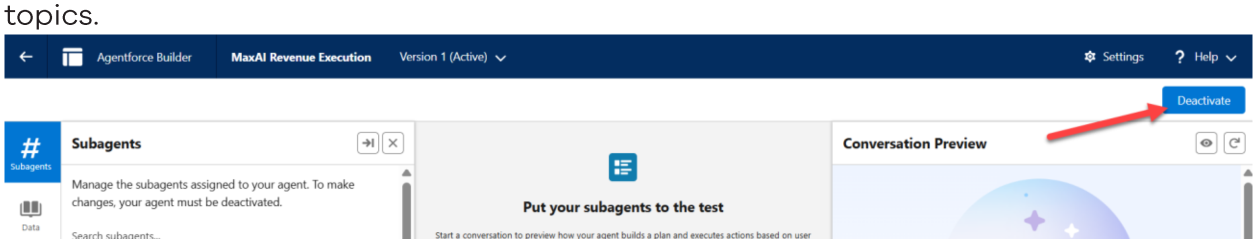
Note on installing/upgrading MaxAI

The MaxAI 2.3.0 package includes three new subagents that support the functionality describe in this document.
If you are installing MaxAI for the first time, please refer to [Installing MaxAI and Creating the Agent] in the Altify online help.
If you are upgrading, these topics need to be added to your existing agent following installation of the MaxAI 2.3.0 package.

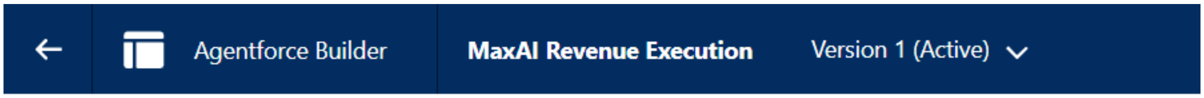
1. In **Setup**, go to **Agentforce Agents**.
2. Open your agent in builder ('MaxAI Revenue Execution' in the example shown below). (Note you may need to enable the **Agentforce** toggle on this page to view your agents)

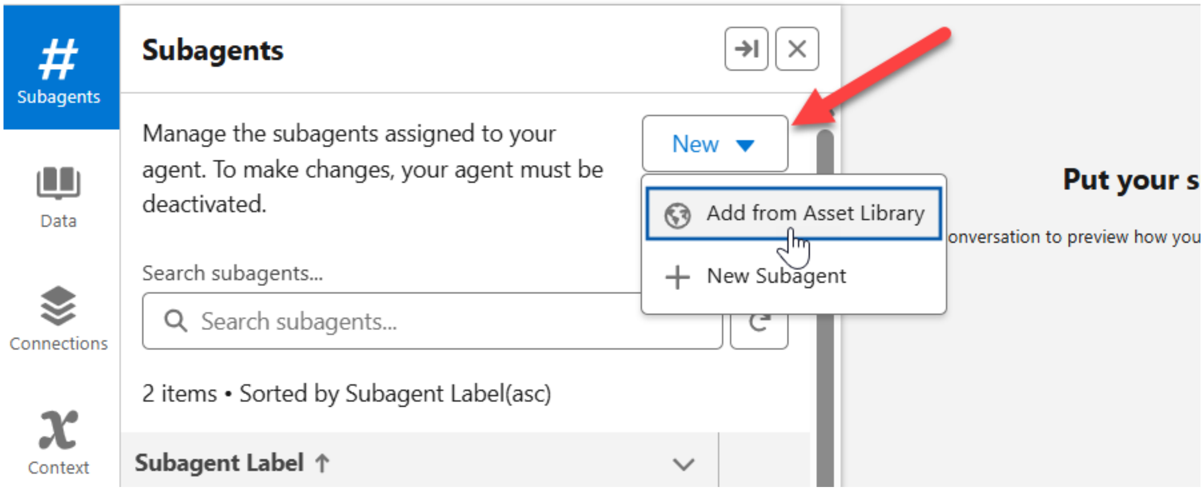


3. In Agentforce Builder, you need to **Deactivate** your agent before adding the new topics.



4. Click **New** and select **Add from Asset Library**.





5. Select the following subagents and click **Finish**:
   - Altify MaxAI Account Coaching and Pre-Meeting Intelligence
   - Altify MaxAI Account Portfolio Health
   - Altify MaxAI Account Read and Write Data
6. **Activate** your agent.

For more information, see [Add a Subagent to Your Agent from the Asset Library]
In the Salesforce Help.

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Account Planning

New user functionality

Single Account Plan Deep Assessment

The agent can now perform a structured **four-part diagnostic** of a single account plan, examining the relationship map, insight map, account-detail completeness, and objective linkage. The assessment highlights gaps, weak stakeholder coverage, and unlinked objectives so you know exactly where the plan needs work before a high-stakes meeting.

Example prompt:

- *Assess this account plan*

Portfolio Account Health

You can now evaluate up to **100 accounts at once**, with Red / Amber / Green status, completeness scoring, and prioritised next actions for each. The agent auto-discovers your owned accounts, so no manual list-building is required.

Example prompt:

- *Which of my accounts need attention?*

Opportunity Risk Across a Plan

The agent can now analyse every open opportunity on an account plan in a single pass, classifying each deal Red, Amber, or Green with recommended actions. You and sales managers get a prioritised view of risk across the full pipeline on an account without reviewing each opportunity individually.

Example prompt:

- *Analyse the opportunities on this account plan and tell me where I should focus*

Solution Recommendations

The agent now returns **ranked solution recommendations** that map an account's Insight Map pressures and initiatives to the Altify Solution Pipeline, and to opportunity products where enabled. Each recommendation comes with a coverage gap analysis, so you can see exactly which pressures and initiatives remain unaddressed.

Example prompt:

- *What solution recommendations do you have based on this account's insight map?*

Pre-Meeting Contact Briefing

Before a customer meeting, you can ask the agent for a contact briefing on any account. The agent returns up to **five prioritised stakeholders** with role, sentiment, engagement, and a specific next step for each, alongside top objectives and any conflicting signals on the account.

Example prompt:

- *Brief me on the key contacts at Acme*

Insight Map Read and Write

The agent can now read, create, and manage account **Insight Map** cards across all five insight types — Goals, Pressures, Initiatives, Obstacles, and Solutions — and link contacts to them, all without leaving the account record.

Example prompts:

- *Show me the insight map for Acme*
- *Add a pressure for Acme: increasing competition from local suppliers*

Relationship Map Read and Update

The agent can now read and update account stakeholders, including buyer role, political status, coverage, and decision orientation. It can also record **contact influence and conflict relationships** between contacts on an account, capturing who influences whom across the stakeholder network.

Example prompt:

- *Who are the key players on this account?*

Actions and Objectives

You can now read account plan actions and objectives, and create or update actions tied to objectives, directly from the Account record without leaving the page.

Example prompts:

- *What actions are overdue for Acme?*
- *Create an action for Acme to schedule a product roadmap presentation for the 'Expand Platform Adoption' objective*

Test & Improve Sessions

Sellers and sales managers can now ask the agent about **Test & Improve** session data directly from the Account context — including review details, vulnerabilities, questions raised, and recommendations from past coaching sessions.

Example prompt:

- *What did we discuss in the Acme coaching sessions?*

Graceful “Add Missing Contact” Flow

When linking a contact to an insight card who isn’t yet on the relationship map, the agent now offers to add them first instead of showing a raw error. Batch operations attribute the offer per contact, so you see exactly which contacts need adding.

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Sales Process Manager

New user functionality

Read Sales Process State, Qualifiers, and Closure Probability

You can now ask the agent which qualifiers are complete, what is blocking stage progression, and the deal's **closure probability** — all in a single request, with the score calculated to match exactly what is displayed on the Altify SPM page.

Example prompt:

- *What's blocking this deal?*

List Configured Sales Processes

The agent can now catalogue all active sales processes configured in the org, giving you the context they need to choose the right process for an opportunity.

Example prompt:

- *What sales processes are available?*

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.

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.

Respect Sales-Process Configuration Before Writing

If an admin has disabled user-initiated sales-process changes, or the org auto-assigns the sales process via mapping, the agent now explains why no change was made instead of failing silently.