



Altify v9.19 Release Notes

August 2026



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Release Overview

This release of Altify, made available in **August 2026**, focuses on administrative enhancements that cater to our growing set of AI capabilities.

Administrators managing Opportunity Manager gain a new **large deal size threshold** custom setting, providing a fallback for the large deal AI signal when Sales Process Manager is not installed. Administrators can also now access and manage Altify methodology customizations directly from a new **Customisations tab** added to the Sales Process Manager, Account Manager, Insights, and Opportunity Manager admin apps in Salesforce Setup. Customization enables Altify's AI features to respect the methodology and terminology of each individual customer.

Behind the scenes, this release also makes a broad set of Altify's tools and actions available for use outside of Agentforce, including by a customer-built **Salesforce-hosted MCP server**, achieves **feature parity between MaxAI Agentforce and Altify MCP Servers**, and refines licensing controls for how MaxAI functionality is rendered in Altify.

Opportunity Manager

New functionality to be administered

Configurable large deal size threshold

Administrators can now configure a large deal size threshold directly in Opportunity Manager settings. Previously, the large deal AI signal relied exclusively on Sales Process Manager's rock/stone/pebble classification to identify high-value opportunities, meaning organizations without Sales Process Manager installed could not use this signal. With this release, if no sales process is assigned to an opportunity, the signal now falls back to the org-level threshold you define here.

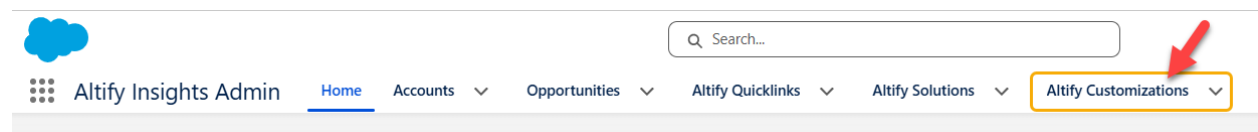
For configuration steps, see [Setting Small and Large Deal Sizes](#) in the Altify online help.

Customizing Altify Methodology for AI

New functionality to be administered

Customizations tab added to admin apps

You can now access and manage your organization's Altify methodology customizations directly from the Sales Process Manager, Account Manager, Insights, and Opportunity Manager admin apps in Salesforce Setup – as shown in the example below.



This makes it easier to find, review, and update the customization records that tailor Altify's AI-generated coaching, assessments, and recommendations to your organization's sales methodology, without needing to navigate to the underlying object separately.

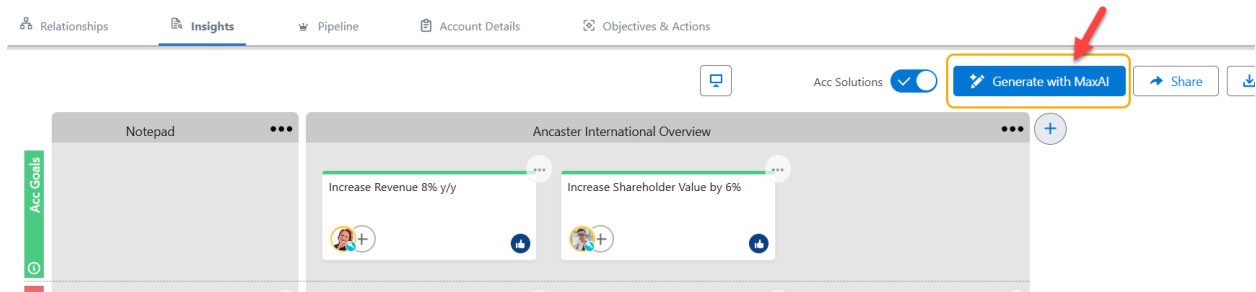
For full details on how methodology customization works, see [Methodology Customization for Altify MCP](#) in the Altify online help.

MaxAI Agent Tooling

New functionality to be administered

MaxAI license-based control of button rendering (9.18.4)

Previously, the 'Generate with MaxAI' button (shown below on an account insight map) was controlled by a single org-wide setting: once switched on, it displayed to every user, and clicking it without the required MaxAI permissions produced an error.



MaxAI package license checks now control the rendering of these buttons directly, so organizations with mixed MaxAI and non-MaxAI user populations only see MaxAI functionality where it is actually licensed.

Note: this change was initially released in the Altify v9.18.4 patch release.

Enabling Salesforce-hosted MCP servers to access MaxAI guidance

A broad set of Altify's underlying AI tools and actions — spanning Account Planning, Relationship Maps, Insight Maps, and Sales Process Manager, among others — have been made available for use outside of Agentforce, including by Salesforce-hosted MCP servers created by customers. This includes generating Account Plan improvement questions, which previously required Agentforce.

Feature parity between MaxAI Agentforce and Altify MCP Servers

The tools and actions available through MaxAI Agentforce and Altify MCP Servers are now aligned, so equivalent AI-assisted actions are available to customers regardless of your org's method of invoking AI assistance.