ALTIFY

Altify Nov'26 Release Notes (Core & MaxAI)

November 2026

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Release Overview

Selected **MaxAI MCP tools** can now display their results as **visualizations**: branded visual cards, shown in the AI app alongside the text response, for relationship maps, insight maps, assessments, actions and sales process status. Visualizations are off by default and are enabled by an administrator. In addition, Account Details answers and insights that an AI app creates through MaxAI's MCP Servers now show an AI badge, so that users can see where they came from.

AI usage reporting comes to MaxAI's MCP Servers. Administrators get three ready-made Salesforce reports that show who uses MaxAI MCP tools, which tools they use most, and where LLM tokens are spent. A new MCP tool lets users ask about AI usage in plain English from their AI client.

Getting started with an empty account plan is now much faster with MaxAI for Agentforce. With one click, **MaxAI** can complete every Account Details question that your admin has set up for AI guidance. Generating an insight map already takes a single click, and **review and acceptance** now applies to both. Everything MaxAI generates is clearly marked until a user accepts it, so teams can move quickly while keeping control of their plan data. Content created by the MaxAI Revenue Execution agent in chat is also marked, so that users can see at a glance where it came from.

The new **AI Agnostic Connector** lets organizations send Generate with MaxAI requests to the large language model (LLM) provider of their choice instead of the Altify-managed endpoint. The provider can be OpenAI, Anthropic, Perplexity, or the organization's own endpoint. The connector is part of the core Altify package, so the MaxAI package is not required.

The MaxAI Revenue Execution agent and MaxAI's MCP Servers can do more with **account plans**: they can add and qualify opportunities on the Pipeline page, link objectives to insights and opportunities, and file new insights into a section that the user chooses.

Relationship maps have been refreshed for all users, with a clearer way of showing contacts who have left their company and an updated contact card design.

MaxAI MCP Servers

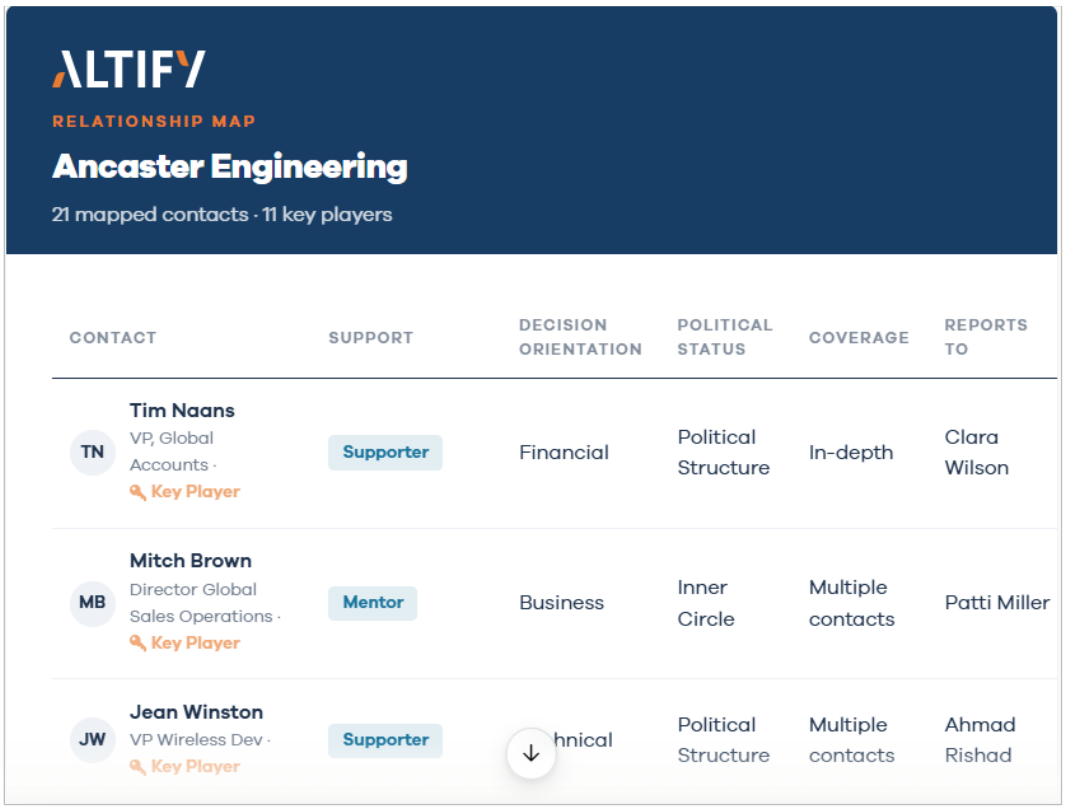
New user functionality

Visualizations in AI apps

Selected Altify MCP tools can now display their results as a visualization: a branded visual card shown in the AI app conversation alongside the text response. Because the data is retrieved from Salesforce when the question is asked, users can view current relationship maps, insight maps, assessments, actions and sales process status in a familiar Altify format, without leaving the AI app.

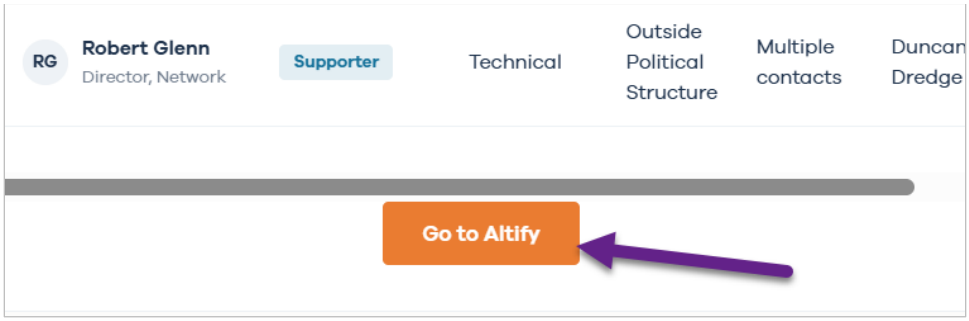
Visualizations are off by default and are enabled by an administrator. They are displayed in AI apps that support the MCP Apps standard. In other AI apps, the tools return the same information as text only.

Pictured below is an example of a visualization.



Each visualization includes a **Go to Altify** button that opens the corresponding page in Altify (for example, the relationship map or the account plan's Actions tab). This lets users move from a summary in the AI app to the full view in Altify. The AI app may ask the user to confirm before opening the link. Users who are not logged in to Salesforce are taken to the page after logging in.

Pictured below is the **Go to Altify** button at the bottom of a visualization.



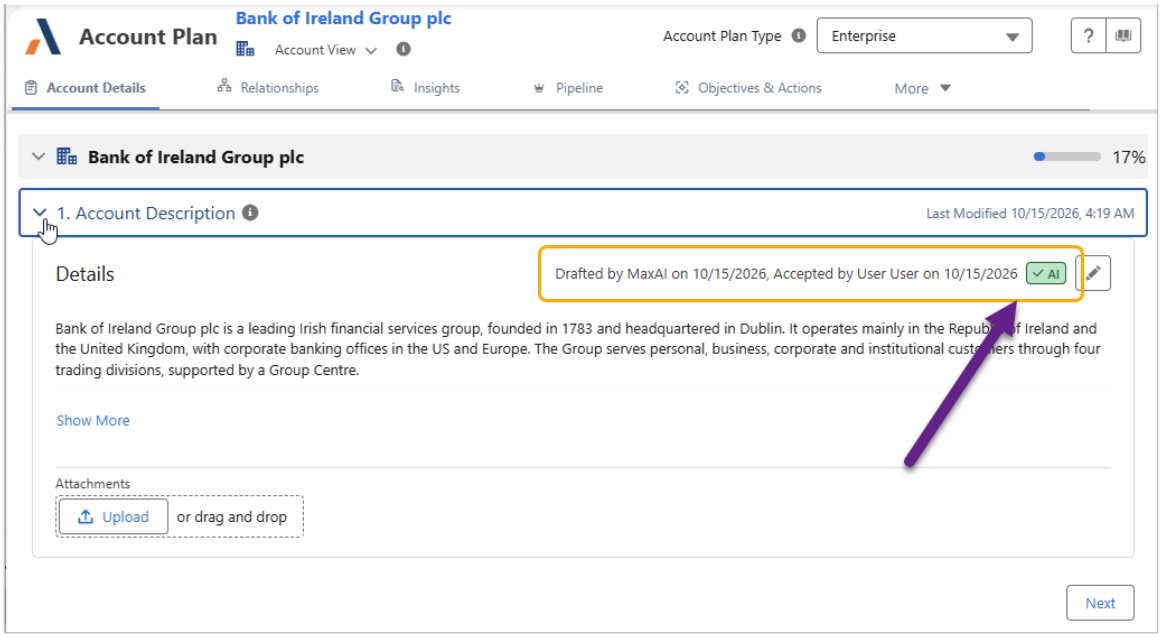
The following tools can display a visualization:

Tool name	Visualization	Sample prompt
`altify_read_acc_actions`	Account Actions	Show me the open actions in the account plan for [Account Name].
`altify_read_acc_objectives`	Objectives & Actions	What are the objectives and actions in the account plan for [Account Name]?
`altify_read_acc_insightmap`	Insight Map (account)	Show me the insight map for [Account Name].
`altify_read_opp_insightmap`	Insight Map (opportunity)	Show me the insight map for the [Opportunity Name] opportunity.
`altify_read_acc_relationshipnetwork`	Relationship Map (account)	Show me the relationship map for [Account Name].
`altify_read_opp_relationshipnetwork`	Relationship Map (opportunity)	Who is on the relationship map for the [Opportunity Name] opportunity?
`altify_read_acc_testimprove`	Test & Improve (account)	Show me the Test & Improve sessions for [Account Name].
`altify_read_opp_testimprove`	Test & Improve (opportunity)	Show me the Test & Improve sessions for the [Opportunity Name] opportunity.
`altify_read_opp_assessment`	Opportunity Assessment	Show me the opportunity assessment for [Opportunity Name].
`altify_read_opp_primeactions`	PRIME Actions	What are the PRIME actions on the [Opportunity Name] opportunity?
`altify_read_opp_salesprocess`	Sales Process	Where is the [Opportunity Name] opportunity in the sales process?

AI badges for content created through MCP

When your AI assistant adds an answer to an empty Account Details or Row Details question, or creates a new insight on an account or opportunity insight map, the item shows a green AI badge straight away. This shows that the content comes from an AI source. Because you confirm the content in the chat before it's saved, no further acceptance is needed. Updates to existing answers and insights aren't marked.

Pictured below is an Account Details answer with an AI badge.



For example prompts, see MaxAI Prompt Library for Account Planning and MaxAI Prompt Library for Opportunity Manager.

Ask about AI usage in plain English

A new read-only tool, `altify_read_ai_usage`, on the Retrieve MCP server lets users ask their AI client how MaxAI's MCP Servers are being used. For example, a user might ask "What has Kevin been doing this week?" or "Which AI features are most popular?" The answer summarizes call counts grouped by person, feature, MCP server, day, or hour. Where tools use an LLM, it also includes token figures. The tool reads the same usage data as the new AI usage reports for administrators.

Any user with access to MaxAI's MCP Servers can use the tool, and it reports usage for everyone in the org, not only the user asking. Each question can cover up to 180 days. Token figures are totals; for a breakdown of input and output tokens, use the AI usage reports. Features that don't call an LLM are reported as having no LLM spend rather than zero tokens. The tool shows that a feature was used, but never the content of what was asked.

New functionality to be administered

Configuring visualizations

Administrators configure visualizations for their org:

- **Enabling**: visualizations are off by default. Switch them on for all tools or for specific tools using an Altify Customization record named `enabled_visualisations`.

- **Logo**: replace the Altify logo with your company logo by uploading a Salesforce Document named `Altify_Widget_Logo`. If you have already set the `Our Logo` Document used in the Altify app header, visualizations display it automatically.
- **Brand colors**: set the primary and secondary colors using an Altify Customization record named `widget_brand`.

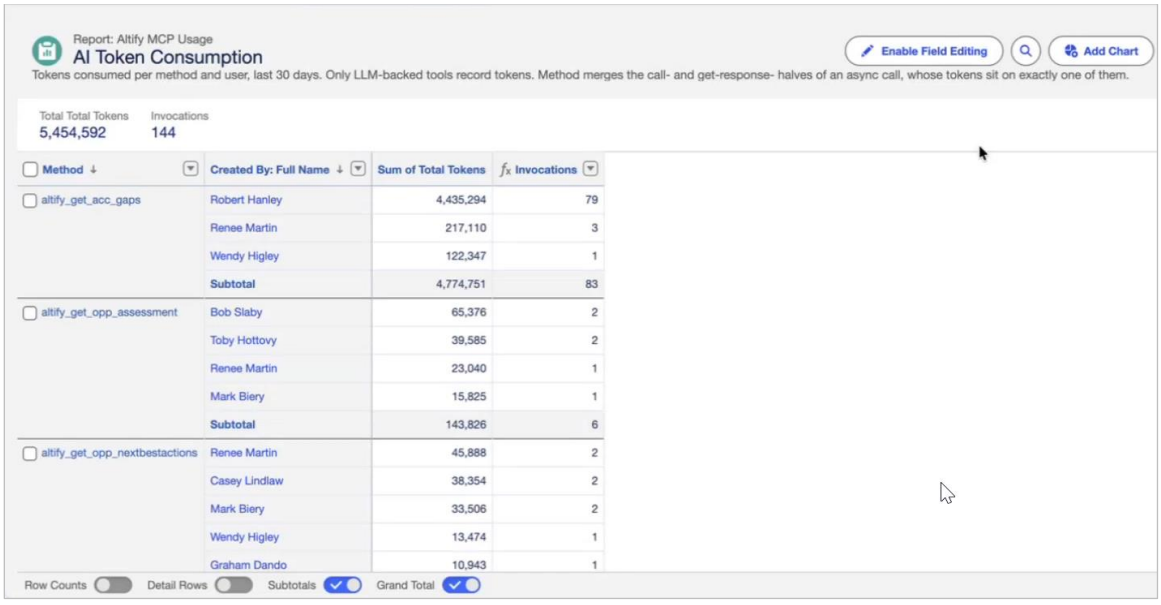
For more information, see Configuring Visualizations for Altify MCP Tools in the Altify online help.

AI usage reports

Upgrading to Altify MCP Connector package 1.3 installs three reports in a new **Altify MCP Usage** report folder:

- **AI Feature Usage by User** shows how often each user invoked each MaxAI MCP tool.
- **AI Feature Usage by Feature** shows how often each tool was invoked across all users.
- **AI Token Consumption** shows LLM tokens consumed per tool and per user.

Each report covers the last 30 days and includes all users. The folder installs unshared, so administrators decide who can view it. The reports show the same usage data that users can query from their AI client with the `altify_read_ai_usage` tool.



You can edit the reports directly, and package upgrades won't overwrite your changes. To change the time range or grouping, edit a report, save a copy, or build a new one using the **Altify MCP Usage** report type. The report type also includes the **Method** and **Server** fields for grouping and filtering, and separate **Input Tokens** and **Output Tokens** fields for analyzing token costs, which typically differ between input and output.

Usage data has been collected since the Altify MCP Connector package was first installed in your org. After you upgrade, you can see that history by changing a report's date filter, unless the log purge job has deleted older records.

Token figures are recorded only for MaxAI tools that call an LLM, which are served by the Analysis MCP server. If your org doesn't connect the Analysis server, the token report has no data. Tokens consumed by the AI client itself, such as Claude, aren't captured.

For more information, see Monitoring MaxAI MCP Usage.

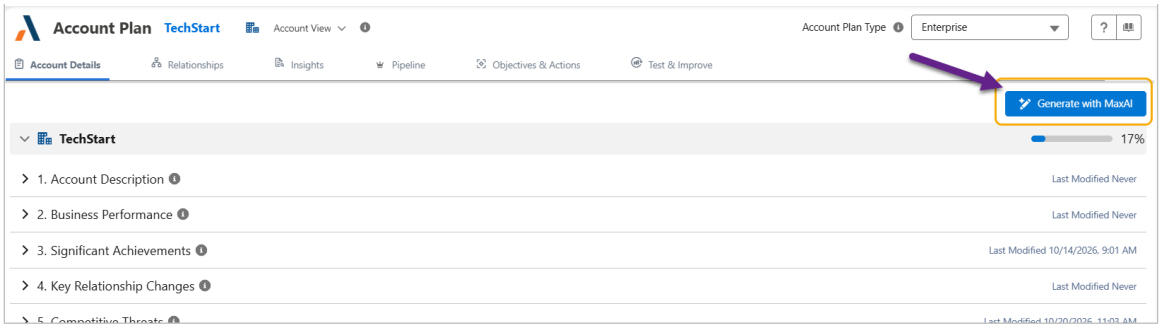
MaxAI Agentforce

New user functionality

Generate all Account Details answers in one click

A new **Generate with MaxAI** button at the top of the Account Details page generates answers for every question that your admin has set up for MaxAI guidance. The answers are saved straight away, ready for review. If a question already has an answer, MaxAI replaces it, and you can restore the previous answer by rejecting MaxAI's.

The existing Generate with MaxAI button for individual questions remains available.



For more information, see 'One Click' Account Detail Completion with MaxAI.

Review and accept MaxAI-generated content

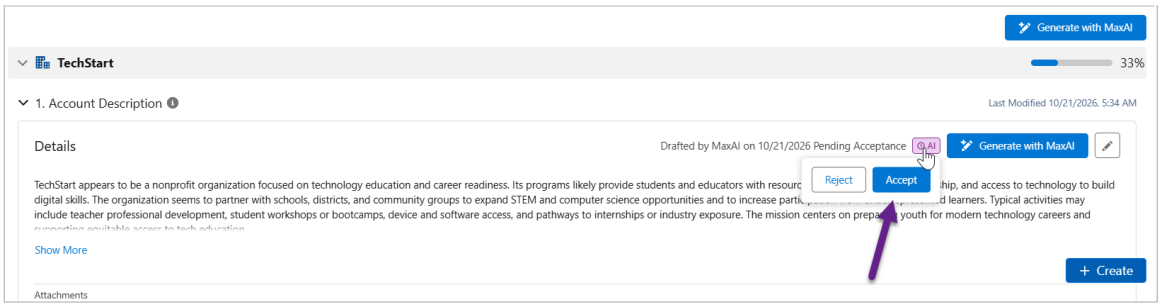
Account Details answers, Account Manager row details, and account and opportunity insights generated with the Generate with MaxAI button now show an AI badge:

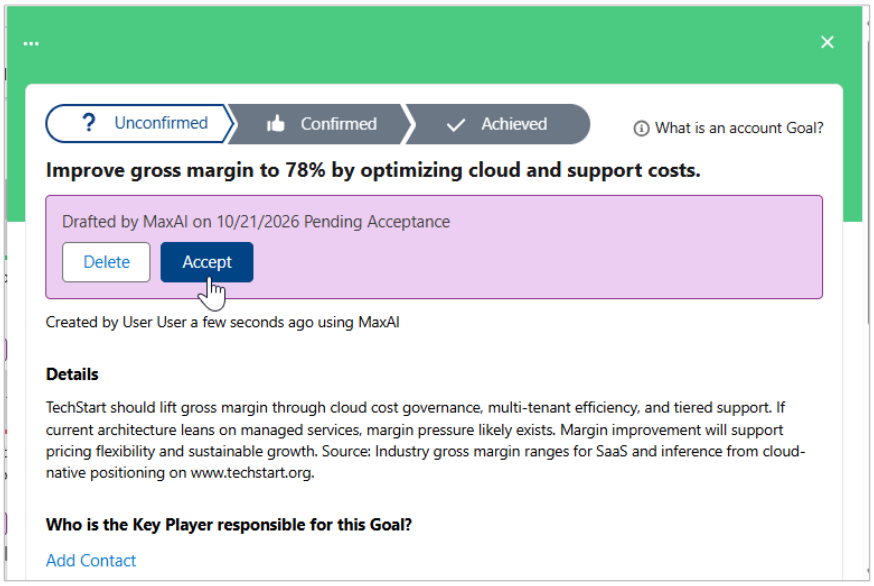
- A **purple** badge shows that the content is pending acceptance.
- A **green** badge shows that it has been accepted.

To review an item, click its purple badge:

- For Account Details and row details answers, choose **Accept** or **Reject**.
- For insights, choose **Accept** or **Delete**. You can also open the insight's information panel to do this.

Editing an item also accepts it.





For more information, see 'One Click' Account Detail Completion with MaxAI, 'One Click' Row Detail Completion with MaxAI and 'One Click' Insight Generation with MaxAI.

AI badges for content created by the MaxAI Revenue Execution agent

When the agent adds an answer to an empty Account Details or Row Details question, or creates a new insight, the item shows a green AI badge straight away. Because you confirm the content in the chat before it's saved, no further acceptance is needed. Updates to existing answers and insights aren't marked.

New functionality to be administered

MaxAI package requirement

The new Account Details button and the review and acceptance of MaxAI-generated content require MaxAI package version 2.5 or later. No new configuration is needed. The button at the top of the Account Details page covers every question that has a prompt in the Question_Prompt field.

For more information, see Enabling the 'Generate with MaxAI' Button.

AI Agnostic Connector

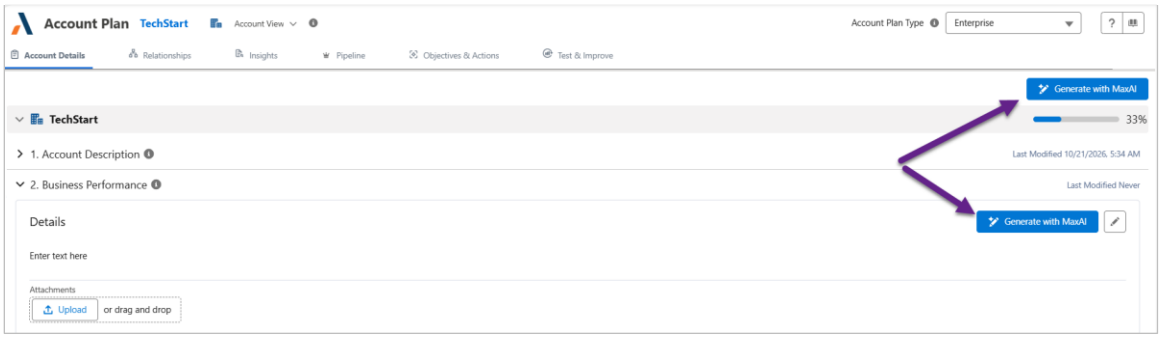
New user functionality

Generate AI sourced content with the click of a button

If your organization has set up the AI Agnostic Connector, users can now generate content in Altify with a single click. A **Generate with MaxAI** button is available in Account Details, Row Details, and on account and opportunity insight maps.

When a user clicks the button, Altify sends a prompt set up by your administrator to the AI provider your organization has chosen, and uses the response to populate the relevant field.

Pictured below are the **Generate with MaxAI** buttons in Account Details.



New functionality to be administered

Setting up the AI Agnostic Connector

The AI Agnostic Connector lets the Generate with MaxAI buttons in Altify send their stored prompts to an LLM provider that your organization chooses and pays for, rather than to the Altify-managed endpoint. Altify supports OpenAI, Anthropic, and Perplexity out of the box. You can also connect to your own internally hosted model or AI gateway, although depending on that endpoint's API, this may require additional development by Altify.

When a user clicks **Generate with MaxAI** in Account Details, Row Details, or an account or opportunity insight map, Altify passes the request to your configured provider through a Salesforce named credential. The provider's response is then returned to Altify to populate the relevant field. The connector applies to the Generate with MaxAI buttons only and does not apply to MaxAI chat.

Altify builds each request from one of three prompt templates included in the core package: **Account Answer**, **Account Insights**, and **Opportunity Insights**. The templates add context such as the account name, website, and industry and, for account and row

details, the question and its prompt. They work as delivered; if you want to customize a template, contact Altify first.

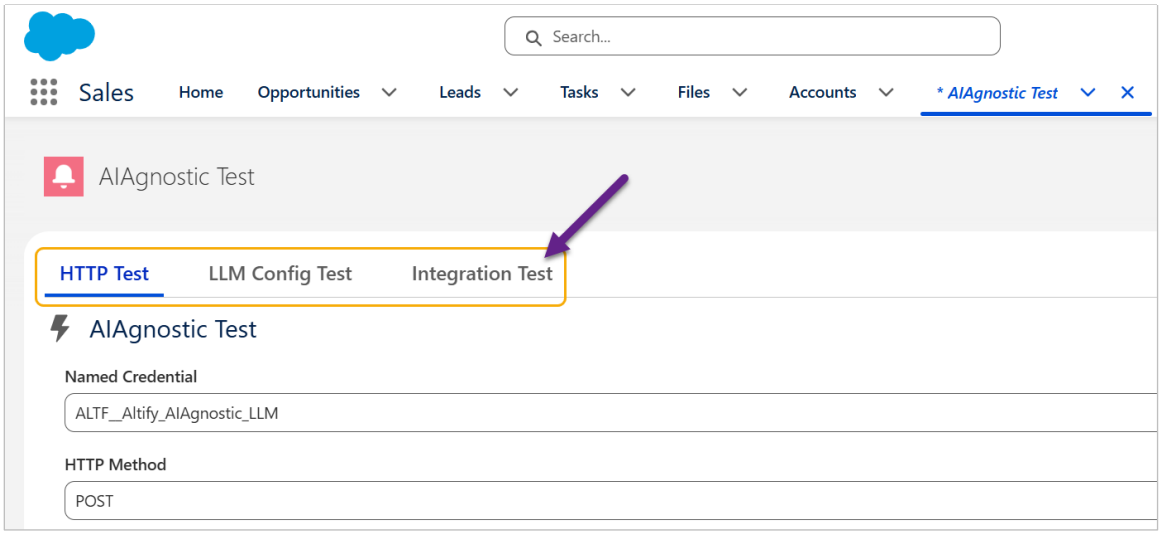
The connector is part of the core Altify package, so the MaxAI package is not required. To configure it, you need the Altify Administrator permission set and an API key from your chosen provider. Setup involves:

- Creating an External Credential that holds your provider's API key, and a Named Credential that holds the provider's API URL.
- Granting External Credential Principal Access in one of your own permission sets (not the Altify permission set) and assigning that permission set to the users of the feature.
- Completing the **Altify LLM Config** custom setting with your provider type, model, endpoint path, and related parameters.
- Completing the **Altify In-App MaxAI Settings** custom setting by setting **AI Endpoint** to the AI Agnostic path and **Account Details MaxAI Prompt Field** to `ALTF__Question_Prompt__c`.
- Adding prompts to your account questions in the core **Question Prompt** field. The Generate with MaxAI button is only displayed for questions that have a prompt.

A new **AIAgnostic Test** page lets you verify the connection in three stages before you roll it out to users. It is available to Altify administrators only.

- The HTTP test confirms that Salesforce can reach the endpoint with the configured credentials.
- The LLM Config test confirms that your provider and model settings return a response.
- The Integration test runs the same request as a Generate with MaxAI button for a specific account and question.

Each test adds one layer to the one before, so the first test that fails shows where the problem lies. When all three tests succeed, you make the buttons available to users by setting **Enable Generate MaxAI Button** to `All`.



Because the button label refers to MaxAI, you may want to change it. You can do so by translating the custom label `CustomLabel.ALTF__GENERATE_USING_MAXAI`.

For full setup instructions, see Configuring the AI Agnostic Connector.

Account Plan AI Updates

New user functionality

Add and qualify opportunities on the Pipeline page

The MaxAI Revenue Execution agent and MaxAI's MCP Servers can now add opportunities to an account plan's **Pipeline** page. Users can add:

- **A potential opportunity**: an opportunity that isn't yet in Salesforce, with a name, amount and description, and optionally a solution and division.
- **An existing Salesforce opportunity**: mapped against a solution, either at account level or against one of the account's divisions. The AI won't add a Salesforce opportunity that is already on the account's Pipeline page.

Users can also qualify a potential opportunity by linking it to an existing Salesforce opportunity.

Before making a change, the AI shows what it will do, including any fields the user doesn't have permission to edit, and saves the change only after the user confirms.

Example prompts:

- *Add a potential opportunity for [Solution Name] to the [Account Name] account plan.*
- *Add the [Opportunity Name] opportunity to the [Account Name] pipeline against [Solution Name].*
- *Qualify the [Potential Opportunity Name] potential opportunity on [Account Name] to the [Opportunity Name] opportunity.*

For more information, see Add, Edit, or Delete a Potential Opportunity, Qualifying a Potential Opportunity and Add Current or Won Opportunities.

Link objectives to insights and opportunities

Users can now ask the AI to link an account objective to an insight on the account insight map, or to an opportunity. Each link connects the objective to one insight or one opportunity.

Example prompts:

- *Link the [Objective Name] objective on [Account Name] to the [Insight] insight.*
- *Link the [Objective Name] objective on [Account Name] to the [Opportunity Name] opportunity.*

For more information, see Linking Objectives and Insights.

Choose the section for a new insight

Until now, every insight that the AI created on an account or opportunity insight map went into the same AI section. Users can now name the section that a new insight goes into, and the AI shows which section it will use before saving the insight. If no section is named, the insight goes into the AI section as before. The card's position on the map is still set automatically.

Example prompt:

- *Add an insight to the [Section Name] section of the [Account Name] insight map: [insight].*

New functionality to be administered

MaxAI package requirement

To use these capabilities with the MaxAI Revenue Execution agent, your org needs MaxAI package version 2.5 or later.

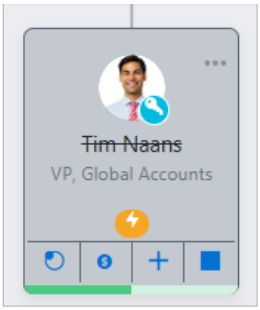
MaxAI's MCP Servers are updated automatically, so no action is needed to use these capabilities through MCP.

Relationship Maps

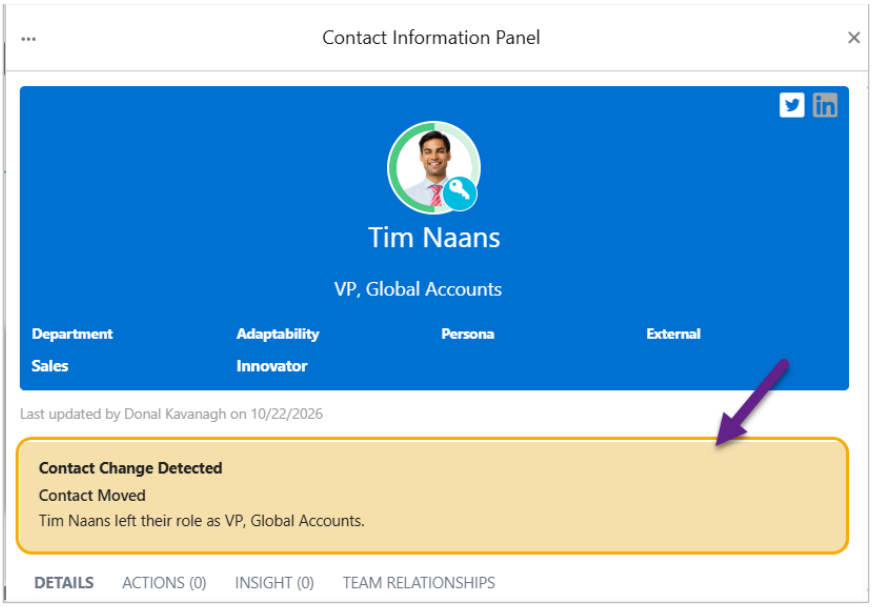
New user functionality

Updated display of contacts who have left the company

Contacts who are recorded as having left their company are now shown on the relationship map with a grey card and their name struck through, replacing the previous yellow highlighting – as shown in the example below.



The contact's information panel shows that the contact has left and is read-only: users can view the contact's details but can't edit them. Users can still mark the contact's actions as complete and remove the contact from the map. The relationship map list view is unchanged.



A contact is recorded as having left using a field on the Salesforce Contact record specified by your admin. The field can be set automatically by an integration such as ZoomInfo, or manually by users.

For more information, see Highlighting of Contacts Who Have Left the Company.

Usability improvements

Refreshed contact cards

Contact cards on the relationship map have an updated design – as shown in the example below. Changes include:

- A contact's persona is shown as an icon.
- The row below the contact's title shows the relationship owner or department, as selected in your Display Settings.
- The LinkedIn icon is shown at the top left of the card.

