Max on Salesforce Spring 2020

Administrator Guide

Table of Contents

About This Guide

Max Administrator Guide is designed to provide Max Administrators with information on configuring Max. The guide covers the setup and installation procedure for using Max.

Topic	Description
What's Covered	This guide walks the administrator through the complete set-up of Max using Max Admin Console. It also describes steps on installing and configuring Max on Salesforce.
Primary Audience	Max Administrator
IT Environment	Refer to the latest Max on Apttus Omni Release Notes for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this guide for each release, refer to What's New topic.
Other Resources	• CPQ User Guide: Refer to this guide for detailed information on CPQ use cases that you can achieve using conversational flow. • Contract Management User Guide: Refer to this guide for detailed information on Contract Management use cases that you can achieve using conversational flow. • Intelligent Workflow Approvals Administrator Guide: Refer to this guide for detailed information on Approval use cases that you can achieve using conversational flow.

This guide describes the following tasks:

- Installing and configuring Max on Salesforce
- Using Max Admin Console

Before using Max, you must be familiar with the following:

- Basic Salesforce administration
- Apttus CPQ and Apttus CLM administration
- Salesforce and Apttus terms and definitions
- Basic Apttus Omni administration
- Azure Platform and Apttus terms and definitions

If you are new to Max, begin here: About Max and Getting Started

What's New

The following table lists changes in the documentation to support each release.

Document	Topic	Description
Spring 2020	Setting up Basic Configurations	Modified topic. Updated the topic to include the Edit Tenant feature.
	Defining Synonyms	New topic, New feature for this release.
	Configuring Proactive Notifications	New topic, New feature for this release.
Winter 2019	About Max	New topic to conform with Apttus Documentation standards.
	Max Setup on Salesforce	New topic. New feature for this release.
	Max Admin Console	New topic, New feature for this release.
Summer 2019	N/A	No new features were added for this release. The guide was updated to reflect product name changes.
Spring 2019	N/A	No new features were added for this release. The guide was updated to reflect product name changes.

About Max

Max is a conversational, intelligent virtual assistant for the Middle Office. It is available embedded within the Salesforce web, Salesforce1 mobile app as well as on mobile devices through other communication channels such as Microsoft Team.

Max on Apttus Omni allows an administrator to Launch Max chatbot in their salesforce org in the embedded form. Administrators can enable conversational workflows for Max. They can also configure the display cards for the respective conversational workflow.

Key Terminology

It is important to understand how terms are used when working with Apttus Max on Salesforce.

Term	Definition
Lookup Query	Using lookup queries, you can ask max to search for any entity in your Salesforce Org. Like, a record or an object or field associated with that record. When you ask Max to lookup an object, Max shows display cards that match with your query. For example, if you ask Max to lookup an agreement, Max displays the 20 most recently modified agreements.
Primary Cards	Primary cards are adaptive cards that Max shows as the initial response of the lookup query.

Getting Started

Max is a conversational, intelligent virtual assistant for the Middle Office. It is available embedded within Salesforce and Aptttus Omni web applications, as a standalone chat window in supported browsers, as well as on mobile devices through channels Slack, Microsoft Teams and Skype for Business.

Max Admin Console

Max Admin Console is an interface for Max administrator to launch the Max chatbot. With Max Admin Console, you can customize Max's responses according to your business needs.

Max Connected App

A connected app is required to access Max outside the Salesforce platform. You do not need to create a connected app for accessing Max in an embedded form in your salesforce org.

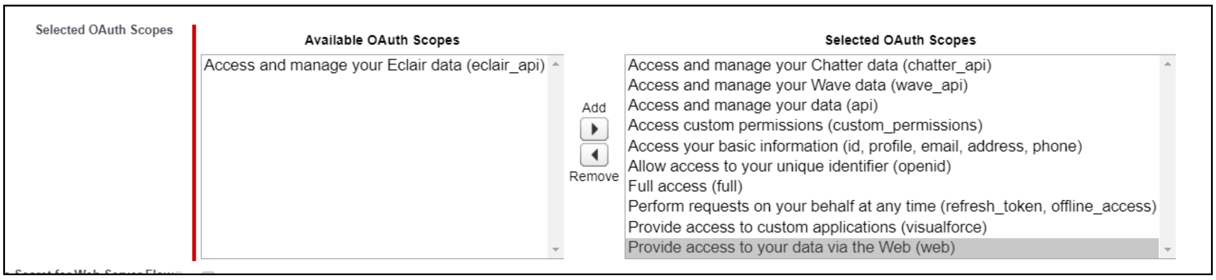
Creating a connected app is a prerequisite to launching Max using the Admin Console. To launch Max using the Admin Console, you need to enter the Consumer Key and Consumer Secret of your connected app.

To create a connected App, refer the Salesforce Documentation on creating a connect app.

> Apttus recommends that you name the connected app as **Max.**

When you create a connected app, ensure:

- **Enable OAuth Settings** is set as true.
- **Selected OAuth Scopes** is set as:



To access Max outside Salesforce, enter the OAuth Callback URL displayed by Max Admin Console in the **Callback URL** field under API section.

Launching Max

Launching a chatbot is a one-time activity.

To access Max Admin Console, click **More Menu → Max Admin Console** in your Salesforce Org.

⚠ If **Max Admin Console** tab is not available in your Salesforce org, get in touch with your Apttus Contact.

Configuring Max chatbot is a three-step process as follows:

1. Setting up basic configurations
2. Enabling Conversations
3. Configuring Display Cards

Setting up Basic Configurations

To onboard Max, perform the following steps:

1. Enter the following company details:

Field	Description
Company Name	Enter the name of your organization. If the company name already exists, Max auto-populates the rest of the configurations done for that company.
Domain URL	Enter your Salesforce Instance URL. You can retrieve your instance URL from Setup → Company Settings → My Domain.

2. Enter the following Connection Details for Max:

Field	Description
Consumer Key	Enter your consumer key. To retrieve your consumer key, go to Setup → App Manager. Under the *Connected Apps* section, click Max. Get the ConnectedApp Id from the **Consumer Key** field under the API section.
Consumer Secret	Enter your consumer secret key. To retrieve your consumer key, go to Setup → App Manager. Under the *Connected Apps* section, click Max. Get the ConnectedApp Secret from the **Consumer Secret** field under the API section.

3. Click **Save and Next.**

After saving the basic configurations, you must enable conversational flows for Max chatbot.

Editing Configurations of an Existing Chatbot

Using Max Admin Console, you can edit the configurations of an existing Max chatbot. You can also edit the configuration of draft tenants. Draft tenants are tenants that are partially configured and not submitted.

You can edit the basic configurations, enabled conversations, and settings for card display fields.

> ⓘ You can only edit tenants that were configured using Max Admin Console.

To edit an existing chatbot

1. Select your tenant from the Tenant dropdown menu. Max auto-populates the configuration details of the tenant.
2. Make your required changes.
3. Click **Save and Next.**

> ⓘ Ensure that you submit your changes by clicking **Submit** after the preview screen.

Enabling Conversations

To enable conversational workflows for Max chatbot, enter the related conversation codes.

The following CRM conversations are enabled by default:

- Lookup Account
- Lookup Contact
- Lookup Opportunity

To enable conversations apart from the default conversations, refer to the conversational codes provided in your Max Statement Of Work(SOW) contract.

To enable a conversational workflow,

1. Enter the conversation code and press Enter. Your conversational workflow is added to the list of available conversations.
2. Click **Save and Next.**

After enabling the conversational flow, you must Configure the Display Fields for each conversational workflow.

Configuring Display Cards

For each conversation that you enable, you can configure how the relevant fields are presented on the cards displayed by Max as part of query response. For each field, you can:

- Change the Display Label
- Set the Lookup Field
- Select the Display Card

Max displays the available fields that you can add to Max display cards. Available fields are standard Salesforce fields that are available for the related conversation.

To configure display fields

1. Select your conversation from the conversation dropdown menu.
2. From the Available Fields, select a field to configure it. You can,
   - Change the Display Label
   - Select the Lookup Field

     > ⓘ For custom fields, the lookup field can only be the ID of the parent object.

   - Select the display card. You can set it as:
     - **Yes, Primary**: If you select this option, the field is available in the primary card displayed by Max as a response to the lookup query.

       > ⓘ You can only display 10 primary fields at a time.

     - **Yes, View more details:** If you select this option, the field is visible when the user clicks the **View More Details** action button.
     - **No:** Select this option to remove the field from the display.

       > ⓘ For header fields, you can only change the display labels. You cannot edit the lookup field or change the display card settings.

3. To add additional fields, select the Field API Name from the dropdown menu, set the Display Label, set the Lookup Field, select the Display Card and click ⊕.
4. **Select another conversational flow from the conversation dropdown menu. Click Save.**

5. Repeat this procedure for all the conversations.
6. Click **Save and Next.**

You can now define synonyms to customize your conversations with Max. For more information, refer to Defining Synonyms.

Defining Synonyms

You can personalize the conversational workflows in Max by defining synonyms for Salesforce fields. This feature helps you in personalizing your Max experience according to your organizational needs. You can define multiple synonyms for a single field. After you have configured the synonyms, you can address the field using your defined synonym and Max understands the fields you are referring to.

To Define a Synonym

1. Select a conversational flow from the *conversation* dropdown menu. Max displays the standard fields of the selected conversational flow.
2. Enter the synonym next to your field and press **Enter.**

   > For fields with data type as picklist, you can also provide synonyms for the picklist values.
   >
   > To define synonym for the picklist values, click next to your field.

3. Click **Save and Next.**

Max displays a summarized view of all the configured data. The preview screen displays the basic configurations and the configuration of conversational flow.

Click **Submit.** Your Max bot is now created.

Embedded Max Configurations

After the successful creation of Max chatbot, the Admin Console displays the data required to embed Max in your Salesforce Instance.

Copy and save the value of the **Custom Label**, **Named Credentials** and **OAuth Callback URL**. You will need these values while embedding Max in Salesforce UI.

Download the Tenant Config file.

Max Setup on Salesforce

You can setup and embed Max in Salesforce Classic, Lightning and the Salesforce Mobile app.

Installing Max in Salesforce

1. Download the zip file named “Max Implementation Package.zip” from the link you received from your Apttus Contact and save it to your local machine.
2. Login to your Salesforce Org. Go to Setup → Custom Labels.
3. Click the **New Custom Label** button. Create the following custom labels:

Short Description	Value	Name
Store platform name	SFDC	APTS_Domain
Header key to be send in HTTP request	Content-Type	APTS_HTTP_Header_Key
Header value to be send in HTTP request	application/json	APTS_HTTP_Header_Value
Method which is used to send HTTP request	POST	APTS_HTTP_Method
Named Credentials details	callout:APTS_MAX_Connection	APTS_MAX_End_Point
Maximum time limit for HTTP request	120000	APTS_Max_Time
Quantity discount based Rule type	Quantity Discount Based	APTS_QuantityDiscountBased
Supported Currencies	Supported Currencies	APTS_Supported_Currencies

4. Create one more custom label as follows using the value provided by the Max Admin Console:

Short Description	Value	Name
MAX Bot chat URL	<Value displayed by Max Admin Console>	APTS_Max

5. Navigate to Setup → Named Credentials.

6. Click **New Named Credential** button to create a name named credentials as follows:

Label	Name	URL
APTS_MAX_Connection	APTS_MAX_Connection	<Value provided by Max Admin Console>

7. Open your Salesforce Developer Console. Perform the following steps to create the apex classes, visualforce pages, and components required for Max.
    a. Go to File → New → **Apex Class** and name it as '**APTS_UserDetails'.**
    b. From your downloaded files, open the '**APTS_UserDetails.cls**' class file in notepad. Copy and paste the class file content in the New Apxcex Class window and click **Save.**
    c. Go to File → New → **Apex Class** and name it as **'APTS_getUserDetails'.**
    d. From your downloaded files, open the **'APTS_getUserDetails.cls'** class file in notepad. Copy and paste the class file content in the New Apex Class window and click **Save.**
    e. Go to File → New → **Visualforce Page** and name it as **'APTS_Max_LT'.**
    f. From your downloaded files, open the **'APTS_Max_LT.page'** file in notepad. Copy and paste the file content in the New Visualforce page window and click **Save.**
    g. Go to File → New → **Visualforce Page** and name it as **'APTS_Max'.**
    h. From your downloaded files, open the **'APTS_Max.page'** file in notepad. Copy and paste the file content in the New Visualforce page window and click **Save.**
    i. Click File → New → **Lightning Component** and name it as **'APTS_Max'.**
    j. Click the **Component** button available on the right-hand side.
    k. From your downloaded files, open the **'APTS_Max.cmp** file in notepad. Copy and paste the file content in the New Component window and click **Save.**
8. Switch to Salesforce Lightning.
9. Go to Setup → App Manager.
10. Click **Edit** next to **Sales** app.
11. Go to Utility Items, click **Add Utility Item** and *Select APTS_Max* from custom tab.
12. Select an Icon and enter Name, Height, and Width. Click **Save.**
13. Go to Home page and open Sales app.

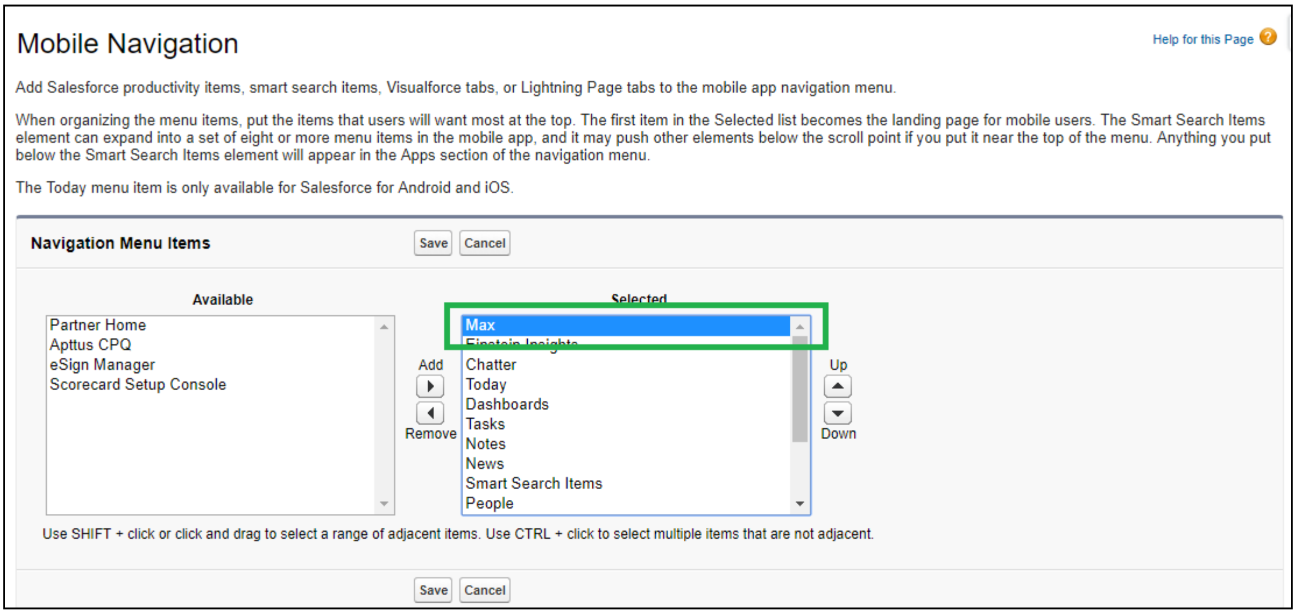
Max is deployed in Salesforce Classic. It is now available as a utility bar at the bottom of the screen in your Salesforce UI.

Salesforce Mobile App Setup

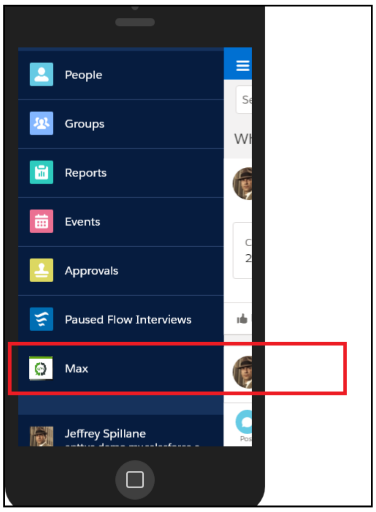
To display the Max Application in the Salesforce Mobile app, the prior steps for installing Max on Salesforce need to be completed. Here are the additional steps to be followed for mobile:

Setup>Administer>Mobile Administration>Salesforce Navigation

> ⚠ The position of the Max among the other apps can be adjusted, so Max is 2nd on the list for example, with the up/down buttons.

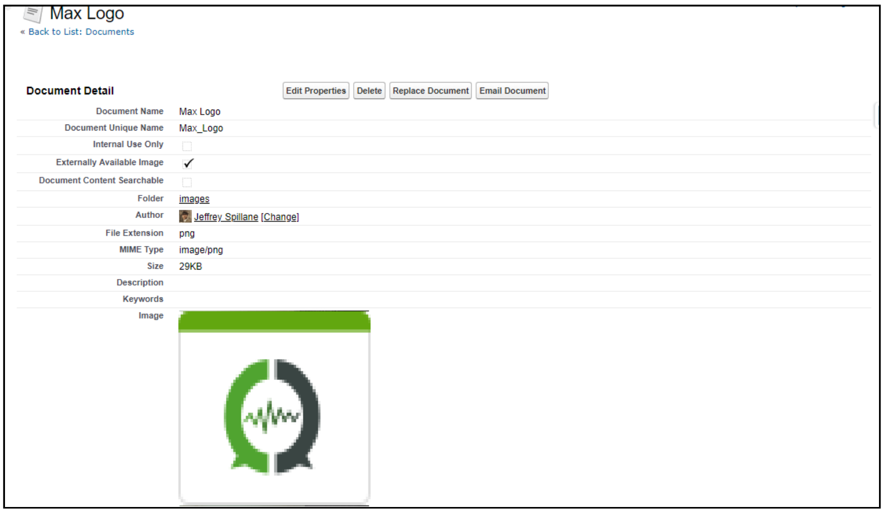


Max in Mobile app:



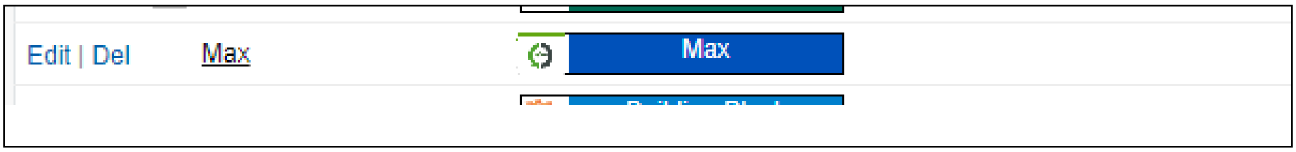
To display Max Logo under Mobile App:

Navigate to All Tabs -> Documents -> Upload the below image:



Navigate to Setup>Build>Create>Tabs>Visualforce Tab

Click on Edit Max Tab and select the Tab Style>Create your own Style>Select the above image.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Configuring Proactive Notifications

With Max, you can create flows in Salesforce to provide chatter notifications. You can create flows to remind you of quotes that are near expiry or agreements that are waiting for your approval. Max assists you in creating a flow by asking a series of questions.

Creating Flows

To create a flow, initiate the conversation with **#installflow#** followed by your query. You can specify the frequency of the notifications, the date and time for the notification to start and the user profiles to send these notifications.

Use Case: Creating a flow for Quotes that are expiring in the next 10 days

The following is a conversational flow with Max to create proactive notification flows:

You: #installflow# show me all quotes expiring in 10 days

Max: How often would you like this notification to be sent to users?

- Once
- Daily
- Weekly

You: Daily

Max: On what date would you like this to start recurring as a scheduled notification?

You: March 15

Max: Please enter the time of day that you would like to have this notification run (HH:MM format, using the 24-hour scale, in the time zone of your Salesforce instance):

You: 13:30

Max: What is the API Field Name that we will use to identify which user will receive the notification? (Note: this must be a User ID reference field on the object we are querying)

You: OwnerId

Max: Please give me a name, with no spaces, for the Salesforce Flow we are creating

You: quotesExpiringin10Days

Max: We will make a post to Chatter to notify users, which will include a direct link to the Max page. What would you like the Chatter post to say for this notification?

You: You have notifications that require your attention.

Max: When users click the link referenced above, Max will send users the first message for their notification. What would you like this message to say? (E.g. "Hi {UserName}
, it looks like you have records that are due soon. Let me pull those up for you.")

You: You have quotes expiring in 10 days. Let's check them out.

Max: What is the name of that Visualforce page where Max is located in your Salesforce org?

You: APTSMD_Max

> To find the Visualforce page,
> 1. Navigate to Setup → Tabs.
> 2. Under Visualforce Tabs, click **Max.**
> 3. Copy the Tab Name entry.
>
> This is the name of the Visualforce page of Max.

Max: A flow named quotesExpiringin10Days is created.

Max displays the summary flow and provides you instructions on activating the flow.

> While creating flows, ensure that you:
> - Do not include 'my' in your query.
> - Include 'all' in your query
> - Do not include a limit on the numbers of records to retrieve
> - Insert a space after the last #

Activating a Flow

After Max creates a flow, you need to activate it.

To activate a flow

1. Navigate to Setup → Flows.
2. Select your flow and click **Activate.**

Once you activate the flow, users will get chatter notifications when they log-in to Salesforce.

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