



# Max on Salesforce Spring 2020 Release

## Notes



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# About Release Notes

Apttus Release Notes contain the following information about Max Spring 2020 Release on Salesforce

For more information on new features, enhancements, and document improvements refer to

- [What's New](#) in *Max on Salesforce Spring 2020 User Guide* or
  - [What's New](#) in *Max on Salesforce Spring 2020 Administrator Guide*
- [Packages](#): Lists packages that are required to upgrade to this release of the product
  - [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
  - [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
  - [Enhancements](#): Provides high-level descriptions of enhancements to existing features
  - [Resolved Issues](#): Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
  - [Known Issues](#): Lists known issues that are applicable in this release

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## Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Package	Latest Certified Version
Apttus Max <b>(New)</b>	Microsoft Azure: 2.0.0173 IBM Cloud: 2.0.0.132

# System Requirements and Supported Platforms

The following table lists the communication channels and supported platforms required for communicating with Max.

Item	Requirement
Browsers	Apttus Max supports the following browsers: <ul style="list-style-type: none"><li>• Google Chrome</li><li>• Safari</li></ul> Note: Internet Explorer is no longer supported on the Apttus Platform.
Communication Channels	<ul style="list-style-type: none"><li>• Slack</li><li>• Embedded in Salesforce</li><li>• Microsoft Teams</li></ul>
Connectivity	Salesforce

## New Features

The following features are new to Max on Apttus Omni:

- [Lookup Approvals](#)
- [Edit Tenants using Admin Console](#)
- [Ability to define Synonyms using Admin Console](#)
- [Generate Quote](#)
- [Clone Quote](#)
- [Slack Connectivity](#)
- [Proactive Notifications](#)

### Lookup Approvals

Apttus Max introduces the Lookup Approvals conversational flow, using which you can look up for approval and approval fields. You can perform follow-up actions on approvals such as view more details, add comments, and email approval details to yourself. You can also approve or reject an approval request.

#### Get Started

For more information, refer to [Lookup Approvals](#) in *Max on Salesforce User Guide*.

### Edit Tenants using Admin Console

You can now edit the tenant configuration details of an existing Max chatbot using the Admin Console.

#### Get Started

For more information, refer to [Setting up Basic Configurations](#) in *Max on Salesforce Administrator Guide*.

## Ability to define Synonyms using Admin Console

With Max Admin Console, you can now define synonyms for Salesforce standard as well as custom fields. Using this feature, you can customize your conversations with Max according to the verbiage used in your organization.

### Get Started

For more information, refer to [Defining Synonyms](#) in *Max on Salesforce Administrator Guide*.

## Generate Quote

With Max, you can now generate quote documents using conversational workflows. While generating the quote, you can also specify the document template, document format and add watermark to your quote document.

### Get Started

For more information, refer to [Generating Quotes](#) in *Max on Salesforce User Guide*.

## Clone Quote

With Max, you can now clone an existing Quote/Proposal. Cloning a quote copies all the information from the existing quote, including field data, line items, and proposal header information.

### Get Started

For more information, refer to [Cloning existing Quotes](#) in *Max on Salesforce User Guide*.

## Slack Connectivity

You can now converse with Max using Slack as a communication channel. Max is a communication channel within Slack.

### Get Started

For more information, refer to [Slack Connectivity](#) in *Max on Salesforce User Guide*.

## Proactive Notifications

With Max, you can create flows in Salesforce to provide Chatter notifications. Max assists you in creating a flow by asking a series of questions.

### Get Started

For more information, refer to [Configuring Proactive Notifications](#) in *Max on Salesforce Administrator Guide*.



# Enhancements

There are no enhancements in this release.

## Resolved Issues

The following table lists the known issues resolved from the previous release.

Apttus Internal ID	Description
N/A	Max gave an error if you used an apostrophe (') in a conversational input.
MAX-3095	If you expressed date range in the format, <date> to <date>, Max understood the end date incorrectly.
MAX-3555	Although Max supported the conversation for updating the Price Book ID of a quote, you could not update the Price Book ID field of the quote using Max.
MAX-3885	You could not access Max via <b>Microsoft Edge</b> browser.
MAX-3894	If you referenced a date in a query, as "show me<object> for <date>", Max incorrectly tagged the date as a name and returned incorrect results.
MAX-4041/MAX-4241	If you gave a combined input to update the line item owner, Max ignored the name of the owner that you provided in the input and asked you for the new owner value. In the confirmation step, Max displayed the owner ID instead of the owner name.
MAX-4393	The hyperlinks for <b>Proposal ID</b> and <b>Created By</b> fields in quote cards were incorrect.
MAX-4465	Max provided incorrect answers to yes-no questions pertaining to the existence of an object.
MAX-4493	If you asked Max to create an NDA and there were no accounts missing an NDA, Max did not display the account options for you to select a parent account.
MAX-4503	You could not remove opportunity team members using combined instructions.
MAX-4509	If you asked Max to create an NDA in a conversation that caused Max to ask you a follow-up topic switch question, Max did not retain the name mentioned in the initial command if you clicked Yes.

Apttus Internal ID	Description
MAX-4518	If you clicked Submit after entering text using Keyboard Dictation, the text was not cleared right away and remained in the dictation window. This issue was observed in phones using version 13.2.3 of iOS 13.
MAX-4538	When you asked Max to update a specific product in the update quote conversation, it replied saying the specific line item cannot be found. Although, Max displayed the existing line items matching your query.
MAX-4549	If you updated a quote and submitted it for approval, you could not search for your most recent quote. Max replied saying it cannot understand your input.
MAX-4551	Max did not include the quantity of the products in the line item display cards in the update quote workflow. This issue was observed when you gave Max combined instructions.
MAX-4553	Max provided incorrect answers to yes-no questions if the question contained 'any' keyword.
MAX-4568	If you searched for opportunity line items by their associated product names, Max provided incorrect results. This issue was observed with long product names.
MAX-4585	Explain Yourself functionality was not available for chatbots launched using the Admin Console.

## Known Issues

The following are the known issues for this release.

Apttus Internal ID	Description
N/A	Max shows up the typing indicator even though it is not processing anything. To continue, type your next command in the chat window.
N/A	While processing a complex query, Max ignores the query part which it can not process.
N/A	Max has a limited ability to recognize record names (for example: Quotes, Opportunities, Accounts), if there are more than 2 words. <b>Workaround:</b> To increase the accuracy of Max's understanding, use quotation marks(""). For example: Show me all quotes for "ABC Corp Distribution".
N/A	When working with Quote, Max interprets <b>Close date</b> as the <b>Expected End Date</b> of the quote.
N/A	You cannot update fields with Long Text (for example: description, next step) through combined instructions.
MAX-2771	Max sometimes returns error while completing the send for proposal workflow. Max also incorrectly updates the proposal templates and changes the recipients.
MAX-3540	Max does not support the X.X date format.
MAX-3635	Max does not display the latest values of the sales discount for a quote line item. This happens because the latest configuration details for the active proposal cart are not reflected on the Proposal Line Item object but on the Configuration Line Item object.
MAX-4495	When you create a quote header through Max, Max does not populate the price list.  Workaround: Set the price list manually.
MAX-4536	After you update the quantity or discount of a quote and select a line item, you cannot update the value of another field. Max ignores your input and asks you for the new value of quantity or discount of the quote.

Apttus Internal ID	Description
MAX-4582	<p>While configuring card display fields using Max Admin Console, the <b>Field(API) Name</b> is not populated sometimes.</p> <p><b>Workaround:</b> Administrators can enter the Field(API) Name manually.</p>
MAX-5074	<p>Max does not give a yes/no answer to the following kind of queries:</p> <p>Are there any ABC account quotes that are approved?</p>
MAX-5405	<p>You cannot ask Max to change the email recipient by using conversational input.</p> <p><b>Workaround:</b> Click <b>Change Recipient</b> action button.</p>
MAX-5417	<p>Max conversation disappears after you click a link in the Salesforce mobile app.</p> <p><b>Workaround:</b> To redisplay your conversation, ask Max to <b>Go back</b> or <b>Help</b>.</p>
MAX-5426	<p>When you ask to lookup the approval status on your last approval, Max does not highlight the Approval Status field in the response card.</p>
MAX-5428	<p>Max does not understand the following query:</p> <p><code>show me approval request I submitted on 01/01</code></p> <p><b>Workaround:</b> Rephrase your query to <i>show me approvals I submitted on 01/01</i></p>
MAX-5434	<p>When you ask to lookup multiple records on Teams, Max returns out of order results.</p>
MAX-5438	<p>Max returns incorrect results for the following query:</p> <p><code>clone a quote where grand total is greater than 5k</code></p> <p><b>Workaround:</b> Ask Max to Lookup quotes greater than 5K and then use the clone quote workflow.</p>
MAX-5444	<p>Max does not consider the document format mentioned in the Create NDA query.</p>
MAX-5446	<p>If you define a synonym for an existing field, Max does not respond to it if you address the field implicitly.</p> <p><b>Workaround:</b> Call out the field name explicitly in your query.</p>

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