Max on Salesforce Summer 2020

Administrator Guide

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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 Salesforce 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
Summer 2020	Notification Control Center	New topic. New feature for this release.
	Setting up Notifications	New topic. New feature for this release.
	Configuring Proactive Notifications	Deleted topic. Refer to Notification Control Center to setup notifications.
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.

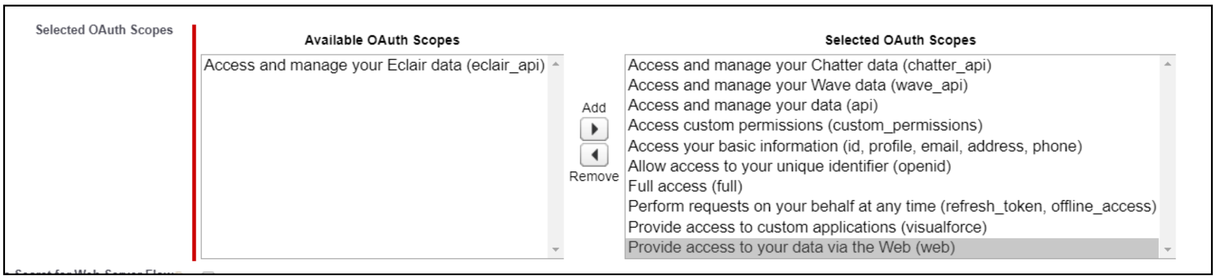
Creating a connected app is a prerequisite to launching Max using the Admin Console. To launch Max using the Admin Console, you need to enter the Consumer Key and Consumer Secret of your connected app.

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. Max also displays the out of the box provided synonyms.
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.

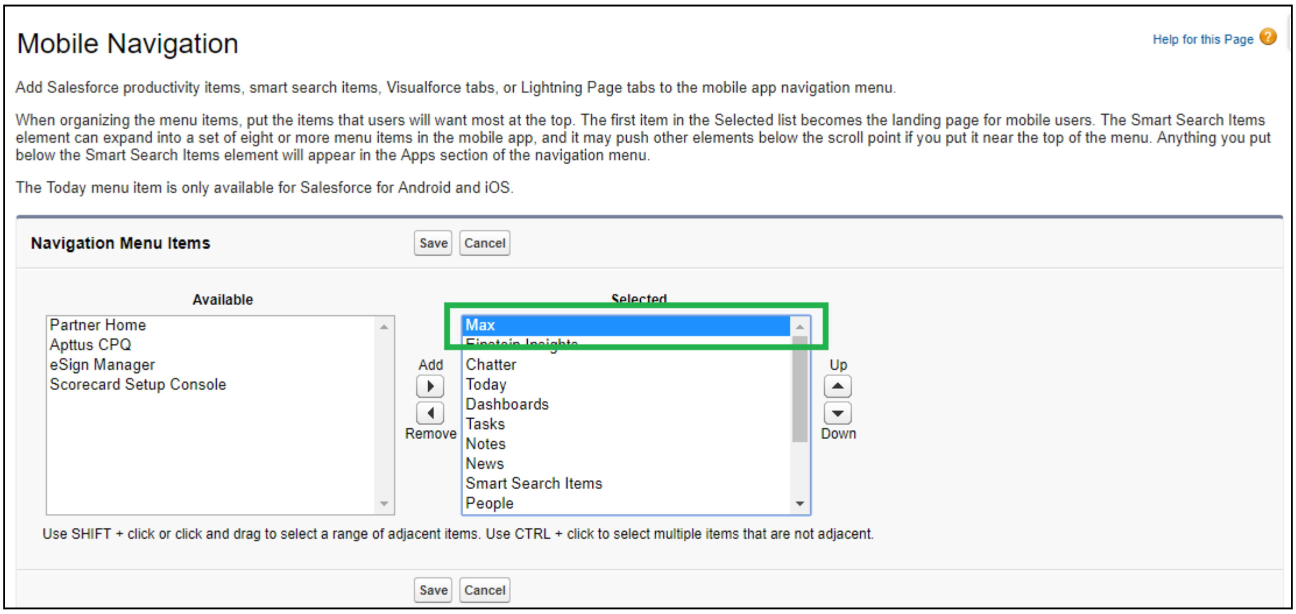
Max is deployed in Salesforce Classic. It is now available as a utility bar at the bottom of the screen in your Salesforce UI.

Salesforce Mobile App Setup

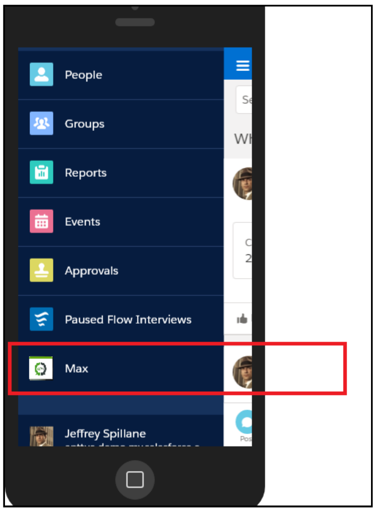
To display the Max Application in the Salesforce Mobile app, the prior steps for installing Max on Salesforce need to be completed. Here are the additional steps to be followed for mobile:

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.

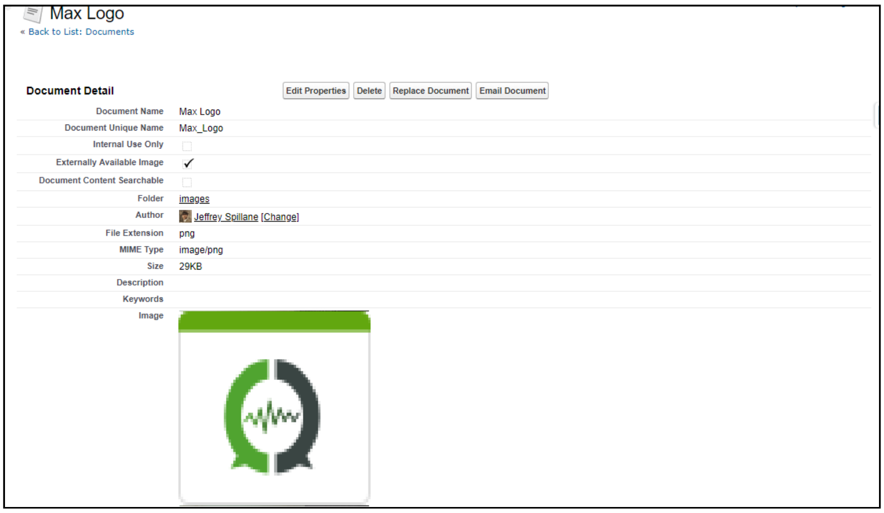


Max in Mobile app:



To display Max Logo under Mobile App:

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



Max Logo

« Back to List: Documents

Document Detail

Edit Properties | Delete | Replace Document | Email Document

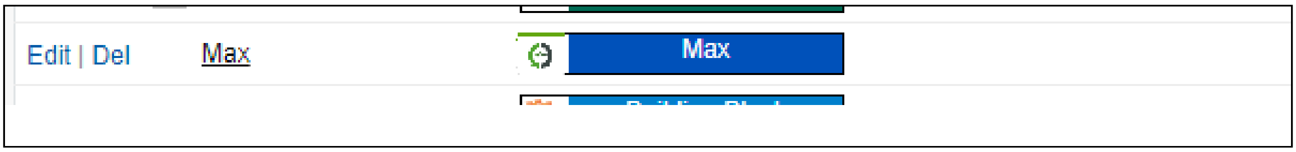
Document Name	Max Logo
Document Unique Name	Max_Logo
Internal Use Only	
Externally Available Image	✓
Document Content Searchable	
Folder	images
Author	Jeffrey Spillane [Change]
File Extension	png
MIME Type	image/png
Size	29KB
Description	
Keywords	
Image	

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.

Visualforce Tabs New What Is This?

Action	Label	Tab Style	Description


Edit | Del
Max
Max

Notification Control Center

With Notification Control Center, you can configure and manage all your notifications. You can create notification flows to remind you of upcoming events or to notify you of status change in a particular record.

Notifications are available across the following communication channels:

- Slack
- Microsoft Teams
- Salesforce1 Mobile App
- Salesforce

Max supports the following types of notifications:

- Reminders
  Reminder notifications are triggered on a scheduled basis and apply to actions that are pending, where you made to remind the relevant stakeholder to take the next action. For example, reaching out to an assigned approver or a contract reviewer about pending items that you have submitted to them.
- Upcoming Events
  Upcoming event notifications are triggered on a scheduled basis and suggest actions that the relevant stakeholder can take preemptively to stay on top of their customer interactions. For example, create a new agreement when the existing agreement is terminating soon, or cloning a quote which is set to expire in the upcoming days.

To access the Notification Control Center, Click **More Menu → Max Notification Control Center** in your Salesforce Org.

Creating and Activating a Notification Flow

To trigger a notification on a Salesforce object, Max admins need to create a notification flow and activate it.

To Create Notification Flow

Navigate to Max Notification Control Center:

1. Enter your tenant name. You can create notification triggers for existing tenants only.
2. Select the object name to create a notification trigger.

> ⓘ Currently, Quotes and Agreements are the only objects supported for notifications.

3. Click **New.**
4. Enter values for the following fields:

Field	Description
Name	Enter the name of the notification trigger.
Field Name	Select the API name of the field to create the notification trigger.
Notification Type	Select one of the following: • Reminder • Upcoming Event If you set Notification Types as an Upcoming Event, you need to select the follow-up action to perform after the notification triggers. Follow-up actions can be *create NDA, create Quote, or send for eSignature.*
Query	Enter the query for the notification trigger in natural language. For example: • Show me all quotes expiring in next 15 days • Remind to send my agreements for signature
Recurrence	Select the frequency of the notification flow. You can set it as Once, Daily, or Weekly.
Date	Select the date from which you want to start the notification flow.
Time	Select the time on which you want to receive the notification.

5. Click **Save.**

Your notification flow is created and it is now available on the Notification Control Center.

To Activate the Notification Flow

1. Click Activate to enable the notification flow.

2. Enable the notification flow for your desired communication channels.

The notification flow is now activated and users will receive the notification when they login to Max.

Setting up Notifications

For Max users to receive notifications using the Salesforce functionality, you need to set-up notifications. Setting-up notifications is an eight-step process as follows:

- Updating Named Credential
- Adding Max Token Label
- Enabling Notifications
- Adding Custom Notification Flow
- Creating Apex Classes
- Creating Apex Triggers
- Scheduling Flows
- Creating Custom Object: CongaEvent

Pre-requisites:

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.

> ⓘ Ensure that embedded Max is setup in your Salesforce Org. For information on setting up embedded Max, refer to Max Setup on Salesforce.

Updating Named Credential

1. Go to **Setup → Named Credential.**
2. Search for **APTSMD_MAX_Connection** credential.
3. Go to Apex Classes → APTS_getUserDetails class.
4. Update it with the latest version of APTSMD-getUserDetails.cls from the downloaded zip files.

   > ⓘ Updating named credentials step is required only if the credential includes, sendSfdcData in the named credential.

Adding Max Token Label

1. Go to **Setup → Custom Label.**
2. Click User Interface → **Custom Labels.**
3. Click New. Enter the following values:

Short Description	Name	Value
APTSMD_MAX_Token	APTSMD_MAX_Token	Enter the connected app ID concatenated with the connected app secret. For information on getting connected app Id, refer to Salesforce Documentation on creating a connect app.

4. Click **Save.**

Enabling Notifications

1. Go to **Setup → Custom Notifications.**
2. Click **New.** Enter the following values:

Field	Values
Custom Notification Name	MaxNotification
API Name	MaxNotification

3. Select Desktop and Mobile as supported channels. Click **Save.**
4. Under setup column, click **Notification Delivery Settings.**
5. Under *Custom Notification Types*, find *MaxNotification* and click **Edit** from the drop-down menu.
6. Ensure that all boxes are selected and click **Save.**

Adding Custom Notification Flow

1. Go to **Setup → Flows.**
2. Click **New Flow.**
3. Select *Autolaunched* Flow and click **Create.**
4. Click and drag Action in the main window.
5. Select *Notifications.*

6. Click on the search bar and Click **Send Custom Notification**. Edit SendCustom Notification screen appears.
7. Click edit next to *Custom Notification Type ID.*
8. Click **New Resource** and create a new resource as follows:
    a. Select **Variable** as Resource Type.
    b. Set API name as ***NotifTypeId.***
    c. Select **Text** as Data Type.
    d. Select Availble for Input.
    e. Click **Done.**
9. Repeat step 8 for the following:
    a. Notification Body. Set API name as **NotifBody**
    b. Notification Title. Set API name as **NotifTitle**
    c. Recipient IDs. Set API name as **NotifRecipients.** Note that this variable needs to be a collection, so ensure to check the *Allow mutliple values* checkbox.
    d. Target ID. Set API name as **NotifTarget**
10. Connect the Start node to the Action node
11. Click **Save** and provide a name for the flow.
12. After saving, click the **Activate** button

Creating Apex Classes

Create the following Apex classes using your downloaded zip files. Ensure that you create the Apex classes in the order mentioned below:

1. APTSMD_JITNotificationMaxResponse
2. APTSMD_NotificationMaxInput
3. APTSMD_NotificationObject
4. APTSMD_MaxQueryResponse
5. APTSMD_JITNotificationInput
6. APTSMD_SendMaxNotification
7. APTSMD_ProcessMaxTimedNotification
8. APTSMD_MaxResolveQuery

Creating Apex Triggers

You need to create two Apex triggers as follows:

Agreement (Apttus__APTS_Agreement__c)

1. Go to **Setup → Object Manager.**
2. Go to the Agreement object.
3. Select Triggers. Click **New.**
4. Copy TestAgreementInSignature.tgr from Apex/Notifications from your zip file and paste it.
5. Click **Save**.

Review Cycle (Apttus__ReviewCycle_c)

1. Go to **Setup → Object Manager.**
2. Go to the Review Cycle object.
3. Select Triggers. Click **New.**
4. Copy ReviewCycleJITTrigger.tgr from Apex/Notifications from your zip file and paste it.
5. Click **Save.**

Scheduling Flows

1. Go to **Setup → Flows.**
2. Click **New Flows.**
3. Select Schedule-Triggered Flow. Click **Create.**
4. Click and drag *Action* onto the main window.
5. Set **Filter By** as *Type. C*lick **Apex Action.**
6. Click the search bar. Select **APTSMD_MaxResolveQuery.**
7. Enter the following values for each flow:

Notification Flow	fieldToSave	notificationType	query
PendingApprovals	Apttus_Approval__Initial_Submitter__c	pendingApprovals	show all the agreement approval requests that were created before yesterday and are assigned

Notification Flow	fieldToSave	notificationType	query
ReviewCycleInProgress	CreatedById	reviewCycleStatus	pull up review cycles in the last 30 days that are in progress

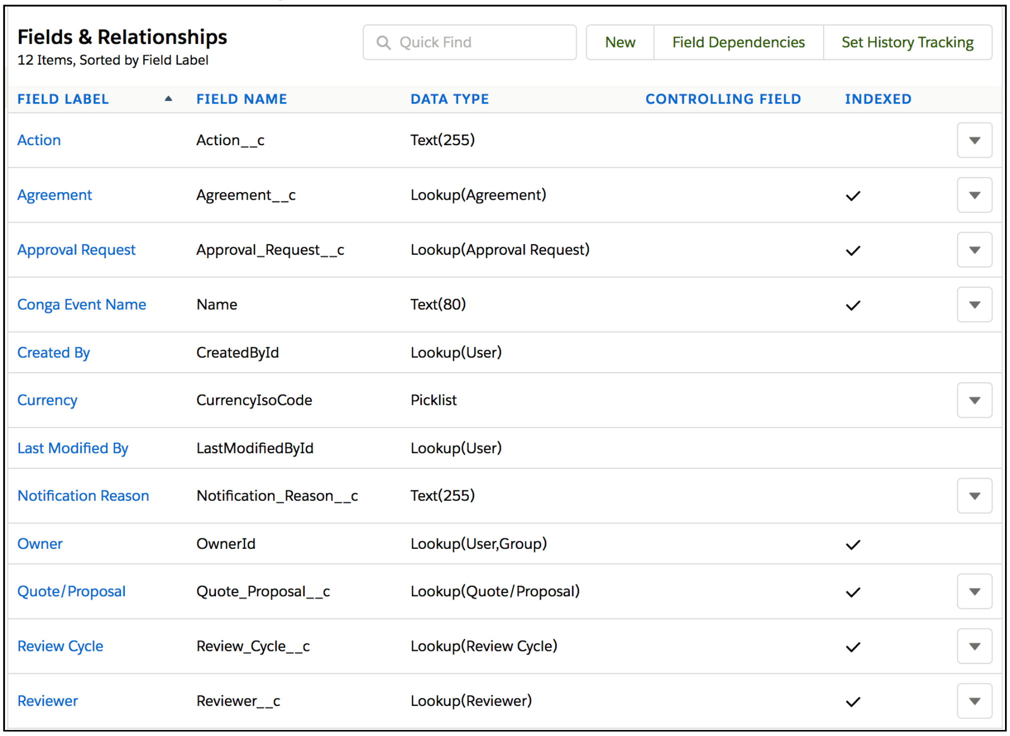
8. Connect the Start Node to Action Node. Set the schedule and activate it.

Creating Custom Object: CongaEvent

1. Go to **Setup → Object Manager → Create.**
2. Enter the following details:

Field	Description
API Name	Conga_Event_c
Singular Label	Conga Event
Deployement Status	Deployed

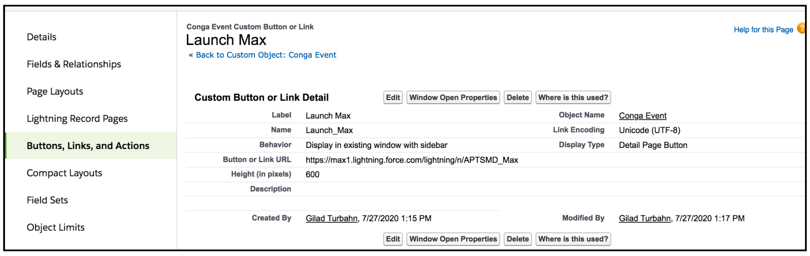
3. Create the following fields:


Fields & Relationships
12 Items, Sorted by Field Label

Quick Find | New | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Action	Action__c	Text(255)		
Agreement	Agreement__c	Lookup(Agreement)		✓
Approval Request	Approval_Request__c	Lookup(Approval Request)		✓
Conga Event Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Notification Reason	Notification_Reason__c	Text(255)		
Owner	OwnerId	Lookup(User,Group)		✓
Quote/Proposal	Quote_Proposal__c	Lookup(Quote/Proposal)		✓
Review Cycle	Review_Cycle__c	Lookup(Review Cycle)		✓
Reviewer	Reviewer__c	Lookup(Reviewer)		✓

4. Create a button as follows:



5. Under Conga Event Layout, add the created fields and buttons.

Notifications setup is complete. To enable notifications, refer to Notification Control Center.

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For additional resources and support, please visit https://community.conga.com.

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