



# Max on Salesforce Summer 2020 Release

## Notes



# Table of Contents


- About Release Notes ..... 3
- Packages..... 4
- System Requirements and Supported Platforms ..... 5
- New Features..... 6
  - Notification Control Center .....6
  - Mobile Notifications for Contract Management .....6
  - Create Agreements Workflow .....6
  - View Approval Chain..... 7
  - Reassign Approval Records ..... 7
  - Max App within Slack Directory..... 7
  - Create NDA Shortcut in Slack ..... 7
- Enhancements..... 8
  - Out-of-the-Box Synonyms in Admin Console .....8
  - Action Buttons along with Greeting Message .....8
  - Enhanced UI Labels and Help Text on Admin Console.....8
  - This One Action Button Replaced with Select Action Button .....9
- Resolved Issues .....10
- Known Issues .....11
- Apttus Copyright Disclaimer .....12

# About Release Notes

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

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

- [What's New](#) in *Max on Salesforce Summer 2020 User Guide* or
  - [What's New](#) in *Max on Salesforce Summer 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>	4.0.0.350   4.350

# 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:

- [Notification Control Center](#)
- [Mobile Notifications for Contract Management](#)
- [Create Agreements Workflow](#)
- [View Approval Chain](#)
- [Reassign Approval Records](#)
- [Max App within Slack Directory](#)
- [Create NDA Shortcut in Slack](#)

### Notification Control Center

With this release, Apttus Max introduces Notification Control Center. With the Notification Control Center, you can configure and manage all your notifications. Notifications are available across Salesforce and Slack communication channels. You can setup Upcoming Events Notifications and Reminder Notifications utilizing the Notification Control Center.

#### Get Started

For more information, refer to [Notification Control Center](#).

### Mobile Notifications for Contract Management

Max now supports Out-of-the-box Contract Management notifications, deliverable via **Slack, Teams, or SF1**. The notifications alert you about stages in contract negotiation, important milestones, and offer you context-specific quick action buttons to act on them.

#### Get Started

For more information, refer to [Mobile Notifications](#).

### Create Agreements Workflow

With Max, you can now create all types of agreements using conversational workflows.

### Get Started

For more information, refer to [Creating Agreements](#).

## View Approval Chain

For an approval record, you can now view the entire approval chain along with all the approval process details.

### Get Started

For more information, refer to [Follow Up Actions for an Approval](#).

## Reassign Approval Records

For an approval record, you can now reassign the approval request to another user using action buttons displayed by Max.

### Get Started

For more information, refer to [Follow Up Actions for an Approval](#).

## Max App within Slack Directory

Max is now available as an App with Slack. You can directly connect to Max using Slack by opening Max app and typing Hi into the conversation window.

### Get Started

For more information, refer to [Slack Connectivity](#).

## Create NDA Shortcut in Slack

**Create NDA** conversation is also available as a shortcut action in Slack. To create an NDA, click **Create NDA** from the message input field and click **Create NDA**. You can also invoke the create NDA shortcut outside of Max chat. If you click **Create NDA** from outside of the Max chat window, Max will create an NDA and provide you with a link to navigate the chat window.

### Get Started

For more information, refer to [Creating Non-Disclaimer Agreements \(NDA\)](#).

## Enhancements

- - Out-of-the-Box Synonyms in Admin Console
  - Action Buttons along with Greeting Message
  - Enhanced UI Labels and Help Text on Admin Console
  - This One Action Button Replaced with Select Action Button

### Out-of-the-Box Synonyms in Admin Console

Max now displays all the available out-of-the-box synonyms in the **Defining Synonym** UI.

#### Get Started

For more information, refer to [Defining Synonyms](#)

### Action Buttons along with Greeting Message

When you log into Max, Max greets you and provides you with action buttons to initiate your conversation.

#### Get Started

For more information, refer to [Getting Started](#).

### Enhanced UI Labels and Help Text on Admin Console

Admin Console Synonym UI is now enhanced with descriptive labels and informative help text.



## This One Action Button Replaced with Select Action Button

When Max displays multiple results promoting you to make a selection, the action button **This One** is now replaced with **Select**. Click Select to make your selection out of Max's multiple responses.

## Resolved Issues

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

Apttus Internal ID	Description
MAX-3540	Max did not support the X.X date format.
MAX-4495	When you created a quote header through Max, Max did not populate the price list.
MAX-5074	Max did not give a yes/no answer to the following kind of queries: Are there any ABC account quotes that are approved?
MAX-5405	You could not ask Max to change the email recipient by using conversational input.
MAX-5426	When you asked Max to lookup the approval status on your last approval, Max did not highlight the Approval Status field in the response card.
MAX-5428	Max did not understand the following query: <code>show me approval request I submitted on 01/01</code>
MAX-5438	Max returned incorrect results for the following query: <code>clone a quote where grand total is greater than 5k</code>
MAX-5444	Max did not consider the document format mentioned in the Create NDA query.
MAX-5446	If you defined a synonym for an existing field, Max did not respond to it if you address the field implicitly.

## 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-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.
MAX-4582	While configuring card display fields using Max Admin Console, the <b>Field(API) Name</b> is not populated sometimes. <b>Workaround:</b> Administrators can enter the Field(API) Name manually.
MAX-5417	Max conversation disappears after you click a link in the Salesforce1 mobile app. <b>Workaround:</b> To redisplay your conversation, ask Max to <b>Go back</b> or <b>Help</b> .
MAX-5434	When you ask to lookup multiple records on Teams, Max returns out of order results.

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DOC ID: MAXSFSUM20RN20200804