Max on Salesforce Summer 2020 User Guide

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About This Guide

Max User Guide is designed to provide Max users with information on using Max. The guide covers the conversational flows that Max supports out-of-the-box.

Topic	Description
What's Covered	This guide walks the user through a set-up of the entire conversion process with Max. It covers information, step-by-step instructions, and use cases for the features provided by Max on Apttus Omni.
Primary Audience	Sales representatives, Collaborator
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 • Contract Management User Guide: Refer to this guide for information on Contract Management use cases

This guide describes the following tasks:

- CPQ conversational flow
- Contract Management conversational flow
- Lookup Approvals
- Approve or reject an approval
- Standard Salesforce Objects conversational flow:
    - Accounts
    - Opportunities
    - Contacts
- Enabling Explain Yourself feature
- Advanced Features of Max
- Providing feedback to Max

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

- Salesforce
- Apttus terms and definitions

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

What's New

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

Document	Topic	Description
Summer 2020	Creating Agreements	New topic. New feature for this release.
	Getting Started	Modified topic. Added information about quick actio
	Follow Up Actions for an Approval	Modified topic. Added information about the followi • Reassign • View Approval Chain
	Slack Connectivity	Modified topic. Added information about installing N
	Mobile Notifications	New topic. New feature for this release.
Spring 2020	Generating Quotes	New topic. New feature for this release.
	Cloning existing Quotes	New topic. New feature for this release.
	Lookup Approvals	New topic. New feature for this release.
	Follow Up Actions for an Approval	New topic. New feature for this release.
	Slack Connectivity	New topic. New feature for this release.
Winter 2019	Submitting a Quote for Approval	New topic. New feature for this release.
	Lookup Contacts	New topic. New feature for this release.
	Lookup Accounts	New topic. New feature for this release.
	Follow Up Actions for an Opportunity	Modified topic. Updated the topic to add Opportunit
	Submitting an Agreement for Approval	New topic. New feature for this release.
	Max Advanced Features	Modified topic. Updated the topic to add Yes/No Qu
Summer 2019	Opportunity Max Flow	New topic. New feature for this release.
	Updating Quotes	New topic. New feature for this release.
	Getting Started	Modified topic. Updated the topic to include the Gett feature.

Document	Topic	Description
	Explain Yourself	New topic. New feature for this release.
	Verbose Mode	Removed Topic. See Explain Yourself.
Spring 2019	CPQ Max Flow	New topic. New feature for this release.
	Verbose Mode	New topic. New feature for this release.
	Max Advanced Features	Modified topic. Updated the topic to include the Proc
	Contract Management Max Flow	Modified topic. Updated the screenshots to reflect th

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 a user to perform the following tasks:

- Lookup Quotes and Fields
- Perform follow-up actions on quotes:
    - View more details
    - Search for particular fields
    - Email your quote
- Email Proposal Reports
- Update Quotes
    - Quote Header Fields
    - Quantity
    - Discount Percentage
- Submit a Quote for Approval
- Create an agreement - NDA
- Change NDA Parameters
    - Name
    - Format
    - Template
- Send Agreement for eSignature
- Send Agreement for review
- Lookup Agreements and Fields
- Email Agreements
- Submit an agreement for Approval
- Lookup Opportunity and Fields
- Perform Follow-up actions on opportunities
    - Sort
    - View more details
    - Show related quotes
    - Show opportunity products
    - Search for fields
    - Email an opportunity
- Update Opportunity
- Lookup Accounts
- Perform follow-up actions on accounts:

    - View more details
    - show related quotes
    - show related opportunities
    - Search for particular fields
    - Email it to you
- Lookup Contacts
- Perform follow-up actions on contacts:
    - View more details
    - show related quotes
    - show related accounts
    - show related opportunities
    - Search for particular fields
    - Email it to you
- Ask Max for help
- Give Feedback to Max

Getting Started

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.

You can get started with Max by greeting Max with a Hello. If you are using Max in the embedded format, Max proactively greets you without needing a prompt.

The following table describes the Greeting and Login procedure in Max:

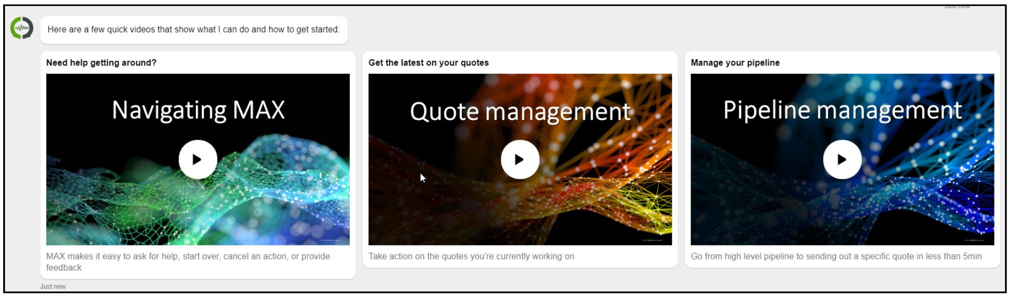
Workflow Step	Description	Conversational Input	Response from Max
Greet	You greet Max	Hey Max Hi	If Max is not directly embedded in Salesforce, Max asks you to login. *Hi! I'm happy to help you!* *Please log on to Salesforce.*
Login	You click the link and sign in		Your login to Salesforce was successful. Should I save this information for future auto-login?
	You choose the auto-login preference		Max asks if you want to save your credentials for auto-login.
Getting Started Video Cards	Max provides a rotating set of short instructional videos.	Help Show me the videos Home	Max plays a video card.

Getting Started Video Cards

For providing a seamless experience for first-time users, Max displays enhanced tip cards with short tutorial videos. The tutorial videos display how Max performs the requested tasks. The instructional videos are played inside the card itself enabling you to watch them

without having to leave Max. The video cards are played for the first few times whenever a new user logs in Max.
Video Cards are currently available for the following tasks:

- Navigational - This includes instructions for getting around Max and includes the following tasks: go back, home, bye, cancel, explain yourself, help.
- Finding a quote and working on it
- Editing a quote
- Working with complex queries and follow-ups.
- Jumpstarting a new quote creation



You can also play the video cards by saying, **Help or What can you do?** after the initial greetings.

Quick Action Buttons

For experienced users, Max provides quick action buttons to initiate the conversation flow. Action buttons are displayed when you greet Max after you log into your account. Max provides the following action buttons:

- Create NDA
- Create MSA
- Clone Quote
- Create Quote
- Update Opportunity

Lookup Accounts

You can lookup an account or account fields using conversational flows in Max.

The Lookup workflow is triggered by typing in lookup queries for accounts or fields.

Looking up Accounts with Max

When you ask Max to lookup an account, Max performs the following steps:

1. Selects the candidate accounts. If there are no candidate accounts or the lookup query that is too generic, Max returns the top 20 accounts, sorted by the *Last Modified Date*.
2. Once Max selects the candidate account, it fetches the below details for each account:
    - Account Name
    - Type
    - Account Owner
    - Industry
    - Billing Address
    - Created By
    - Last Modified On
3. After Max obtains all the information, it displays a summary of the retrieved accounts.

Conversational Flow: Lookup Accounts

The following table describes the possible conversational flow between the user and Max for looking up accounts.

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Single Account	• show me the last account	Shows the last modified account	You can also use the following terms for, **'Last'**: • latest • most recent • past • recent

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
	• show me the Portal account • show me the first account with the name Portal	Shows the oldest (modified) account with the name matching the substring Portal	You can also use the following replacements for, **'First'**: • top • oldest • earliest
Multiple Accounts	• show me the last 3 Accounts • show me the 3 most recent accounts	Shows the 3 most recently modified accounts.	
Accounts created by you	show me the last 3 accounts that I created	Shows the 3 accounts most recently created by the user logged into the Apttus system.	You can also use the term 'Authored' in replacement of the term 'Updated'
	• show me the last 3 accounts that I updated • show me the last 3 accounts that I worked on • show me the last 3 accounts that I modified	Shows 3 accounts most recently updated by the user logged into the Apttus system.	You can also use the following replacements for, **'Updated'**: • modified • changed • worked on

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup account within a specific time duration	• show me the last 3 accounts that John Snow created in the past 2 months • show me the last 3 accounts that John Snow created last Monday • show me the last 3 accounts that John Snow created on 08/01/2018	Shows 3 recent accounts created by **John Snow** in the past 2 months.	You can also use the following phrases for looking up accounts within a specific time duration: • last Monday (specific day relative to current time) • On 08/01/2018 (specific date) • Feb 2020 (date range) • In the last week (date range relative to current time) • since yesterday (past time duration)
	• show me the last 3 accounts that I worked on in the last week • show me the last 3 accounts that I worked on since yesterday	Shows 3 recent accounts updated by the user logged into the Apttus system in the past week.	
Lookup account based on account data	show me my last 3 accounts in the healthcare industry	Shows 3 recent accounts updated by the user logged into Apttus system that has Industry as Healthcare.	

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup account sorted by specific criteria	show me my last 3 accounts in the healthcare industry sorted by created date in descending order	Shows at the most 3 recent accounts updated by the user logged into Apttus system that has Industry as Healthcare. The resultant accounts are sorted in descending order. Max displays the most recent accounts first.	
	show me my last 3 accounts in the healthcare industry sorted by created date in ascending order	Shows at the most 3 recent accounts updated by the user logged into the Apttus system that has Industry as Healthcare. The resultant accounts are sorted in ascending order. Max displays the accounts with the oldest start date first.	
Lookup accounts with no specific criteria	lookup accounts	Max returns the 20 most recently modified accounts.	

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup an invalid account	show me Jamba account	Max returns an error as, "I'm sorry, I couldn't find any accounts that match that description. Try rewording your search, or giving me more information about the account you're looking for. You can ask for 'help' at any time, or say 'explain' to see how I interpreted your request.".	

Looking up Account Fields with Max

When you ask Max to lookup an account field, Max performs the following steps:

1. Selects the candidate accounts. If there are no candidate accounts or the lookup query that is too generic, Max returns the 20 most recently modified accounts.
2. Once Max selects the candidate accounts, it fetches the below details for each account:
   - Account Name
   - Type
   - Account Owner
   - Industry
   - Billing Address
   - Created By
   - Last Modified On
3. Max also fetches the specific user-requested fields.
4. After Max obtains all the information, it displays a summary of the retrieved accounts and fields.

Conversational Flow: Lookup Account Fields

The following table describes a possible conversational flow between the user and Max for looking up account fields.

Type of Lookup	Conversational Input from User	Response from Max | Result
Look up account fields	show me type and industry of my accounts	Shows the requested fields and other fields that partially match the search criteria for the account created by the user logged into Apttus system.

Follow Up Actions for an Account

After Max displays the search results of your account query, you can invoke workflows to perform the following actions:

Workflow Type	Description	Conversational Input	Max Response
View more details	Drill down into a specific account	• Show me more details • Click **View more details** action button.	Max displays additional fields for all accounts.

Show related quotes	You want to view the quotes related to your accounts	• Click **Show related Quotes** action button.
		• Type one of the following:
		    • show me the quotes for this account
		    • show me the quotes on the third account
		    • show me the quotes for the second one
			Max displays the related quotes for your accounts.

Workflow Type	Description	Conversational Input	Max Response

Show related opportunities	You want to view the opportunities related to your accounts	• Click **Show related opportunities** action button.
		• Type one of the following:
		    • show me the opps for this account
		    • pull up proposals related to the third one
		    • show quotes for #2
			Max displays the related opportunities for your accounts.

Send it to me	You want to send the account report to your email address	• send it to John Snow <john@snow.com> • send it to me • send to me • send to john@snow.com • send it	Max emails the account report to your email address.
Search for fields	You want to search for a specific field	• what is the billing address and shipping address? • show me billing address and shipping address • You click **Search for fields** action button. **MAX:** Which field(s) would you like to see? **You:** Billing Address, Annual Revenue	Max displays specific field details.

You can also ask Max to create an NDA as a followup action on an account. To create an NDA, enter **Create NDA** as a conversational input after Max displays the account cards. For details on NDA generation, refer to Creating Non-Disclosure Agreements.

Lookup Contacts

You can lookup a contact or contact fields using conversational flows in Max.

The Lookup workflow is triggered by typing in lookup queries for contacts.

Looking up Contacts with Max

When you ask Max to lookup contact, Max performs the following steps:

1. Selects the candidate contacts, If there are no candidate contacts or the lookup query that is too generic, Max returns the top 20 contacts, sorted by the *Last Modified Date*.
2. Once Max selects the candidate contact, it fetches the below details for each contact:
    - Contact Name
    - Account Name
    - Title
    - Contact Owner
    - Phone Number
    - Email
    - Mailing Address
    - Created By
    - Last Modified On
3. After Max obtains all the information, it displays a summary of the retrieved contacts.

Conversational Flow: Lookup Contacts

The following table describes the possible conversational flow between the user and Max for looking up contacts.

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Single contact	• show me the last contact	Shows the last modified contact	You can also use the following replacements for, **'Last'**: • latest • most recent • past • recent
	• show me Joe's Contact Info	Shows the oldest (modified) contact with the name matching the substring Joe	
	• show me the last 3 contacts • show me the 3 most recent contacts	Shows at the most 3 most recently modified contacts.	
contacts created by you	show me the last 3 contacts that I created	Shows at the most 3 contacts most recently created by the user logged into the Apttus system.	You can also use the term 'Authored' in replacement of the term 'Updated'
	• show me the last 3 contacts that I updated • show me the last 3 contacts that I worked on • show me the last 3 contacts that I modified	Shows at the most 3 contacts most recently updated by the user logged into the Apttus system.	You can also use the following replacements for, **'Updated'**: • modified • changed • worked on

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup contact within a specific time duration	• show me the last 3 contacts that John Snow created in the past 2 months • show me the last 3 contacts that John Snow created last Monday • show me the last 3 contacts that John Snow created on 08/01/2018	Shows at the most 3 recent contacts created by **John Snow** in the past 2 months.	You can also use the following phrases for looking up contacts within a specific time duration: • last Monday (specific day relative to current time) • On 08/01/2018 (specific date) • Feb 2020 (date range) • In the last week (date range relative to current time) • since yesterday (past time duration)
	• show me the last 3 contacts that I worked on in the last week • show me the last 3 contacts that I worked on since yesterday	Shows at the most 3 recent contacts updated by the user logged into the Apttus system in the past week.	
Lookup contact based on contact data	show me the contacts of Acme Account	Shows at the most 3 recent contacts updated by the user logged into Apttus system that has Account as Acme.	

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup contact sorted by specific criteria	show me my last 3 contacts of Acme Account sorted by created date in descending order	Shows at the most 3 recent contacts updated by the user logged into Apttus system that has Account as Acme. The resultant contacts are sorted in descending order. Max displays the most recent contacts first.	
	show me my last 3 contacts of Acme Account sorted by created date in ascending order	Shows at the most 3 recent contacts updated by the user logged into the Apttus system that has Account as Acme. The resultant contacts are sorted in ascending order. Max displays the contacts with the oldest start date first.	
Lookup contacts with no specific criteria	lookup contacts	Max returns the 20 most recently modified contacts.	

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup an invalid contact	show me Jamba contact	Max returns an error as, "I'm sorry, I couldn't find any contacts that match that description. Try rewording your search, or giving me more information about the contact you're looking for. You can ask for 'help' at any time, or say 'explain' to see how I interpreted your request.".	

Looking up contact Fields with Max

When you ask Max to lookup a contact field, Max follows the following steps:

1. Selects the candidate contacts. If there are no candidate contacts or the lookup query that is too generic, Max returns the 20 most recently modified contacts.
2. Once Max selects the candidate contacts, it fetches the below details for each contact:
    - Contact Name
    - Account Name
    - Title
    - Contact Owner
    - Phone Number
    - Email
    - Mailing Address
    - Created By
    - Last Modified On
3. Max also fetches the specific user-requested fields.
4. After Max obtains all the information, it displays a summary of the retrieved contacts and fields.

Conversational Flow: Lookup contact Fields

The following table describes the possible conversational flow between the user and Max for looking up contact fields.

Type of Lookup	Conversational Input from User	Response from Max | Result
Look up contact fields	show me account and email of my contacts	Shows the requested fields and other fields that partially match the search criteria for the contacts created by the user logged into Apttus system.

Follow Up Actions for a Contact

After Max displays your contact query search results, you can invoke workflows to perform the following actions:

Workflow Type	Description of the Workflow	Conversational Input	Max Response
View more details	Drill down into a specific contact	• Show me more details • Click **View more details** action button.	Max displays additional fields for all contacts.

Show related quotes	You want to view the quotes related to your contacts	• Click **Show related Quotes** action button.
		• Type one of the following:
		    • show me the quotes for this contact
		    • show me the quotes on the third contact
		    • show me the quotes for the second one
			Max displays the related quotes for your contacts.

Workflow Type	Description of the Workflow	Conversational Input	Max Response

Show related opportunities	You want to view the opportunities related to your contacts	• Click **Show related opportunities** action button.
		• Type one of the following:
		    • show me the quotes for this contact
		    • show me the quotes on the third contact
		    • show me the quotes for the second one
			Max displays the related opportunities for your contacts.

Show related accounts	You want to view the accounts related to your contacts	• Click **Show related Accounts** action button.
		• Type one of the following:
		    • show me the accounts for this contact
		    • show me the accounts on the third contact
			Max displays the related accounts for your contacts.

Send it to me	You want to send the contact report to your email address	• send it to John Snow <john@snow.com> • send it to me • send to me • send to john@snow.com • send it	Max emails the contact report to your email address.

Workflow Type	Description of the Workflow	Conversational Input	Max Response
Search for fields	You want to search for a specific field	• what is the email and phone number? • show me billing address and shipping address • You click **Search for fields** action button. **MAX:** Which field(s) would you like to see? **You:** Phone Number	Max displays specific field details.

Lookup Approvals

You can ask Max to lookup approval records using conversational flows. Max supports approvals for Quotes and Agreements. For information on submitting an approval, refer to Submitting a Quote for Approval and Submitting an Agreement for Approval.

When you ask Max to look for your approvals, Max displays action buttons based on your profile. If you placed the approval request, Max displays approvals where you have initially submitted the quote or agreement for approval. If you are the approver, Max displays quote and agreement approvals that are assigned to you.

Based on your profile and the approvals related to you, Max displays the following action buttons:

- Quote Approvals Submitted
- Quote Approvals Pending Action
- Agreement Approvals Submitted
- Agreement Approvals Pending Action

Click the relevant action buttons to view the most recent approval records.

Conversational Flow: Lookup Approvals

The following table describes the possible conversational flow between you and Max for looking up quote approvals or agreement approvals.

Type of Lookup	Conversational Input from User	Response from Max | Result
Single Approval	show me my last agreement approval	Shows the last modified agreement approval submitted by you
Multiple Approvals	• show me the last 3 Approvals • show me the 3 most recent quote approvals	Shows the 3 most recently modified approvals
Approvals submitted by you	show me approvals I submitted	Shows the approvals recently submitted by the user logged into the Apttus system.

Type of Lookup	Conversational Input from User	Response from Max | Result
Lookup approvals based on approval data	show me the approvals I created that are on hold	Shows the approvals submitted by the user logged into the Apttus system which has the status, On Hold
	show approvals where the approver is John Smith	Shows approvals assigned to John Smith
Lookup approval status	what is the status on the last approval I submitted	Shows the value of the field, *Approval Request Status*
	show me my **open** approvals	Max displays approvals with **Approval Status** as *Notified, Submitted, Assigned, Reassigned, Approval Required, or Pending Approval.*
	show me my **closed** approvals	Max displays approvals with **Approval Status** as *Cancelled, Approved, or Rejected.*
Lookup approvals with no specific criteria	lookup approvals	Max returns the 20 most recently modified approvals related to you.
Complex queries	show me approvals that I submitted recently for ABC that are on hold	Max display approvals where you are either the **Initial Submitter** or the **Assigned To and** the related Account or Quote matches the substring ABC and the Created Date is within the last 30 days and the Approval Status is On Hold

If you do not specify whether the approval is for a quote or an agreement in your lookup query, Max first asks if you want to see Quote Approvals or Agreement Approvals. Max displays the relevant approvals based on your selection.

For approvals that are submitted to you, you can also approve or reject them as a follow-up action on lookup approvals. For more information, refer to Follow Up Actions for an Approval.

Follow Up Actions for an Approval

After Max displays the search results of your approval, you can invoke workflows to perform the following actions:

Workflow Type	Description of the Workflow	Conversational Input	Max Response
View more details	Drill down into a specific approval	• Show me more details • Click **View more details** action button.	Max displays additional fields for all approvals.
Add Comments	Add comment to a specific approval	• Add comments	After you select an approval, Max asks you for your comment. **Max:** What would you like the comment to say? **You:** Need approval in 5 days **Max:** Comment saved successfully.
Send it to me	You want to send the approval details to your email address	• send it to John Snow <john@snow.com> • send it to me • send to me • send to john@snow.com • send it • Click **Send it to Me** action button	Max emails the approval details to your email address after confirming your email address.

Workflow Type	Description of the Workflow	Conversational Input	Max Response
Approve	This action button is only visible if there are approvals assigned to you.	• Click **Approve**	Max updates the **Approval Required Status** to *Approved*. You can also add comments to your approval: **You:** Click **Update Comments.** **Max:** What would you like the comment to say? **You:** Approved **Max:** Comment saved successfully. Max saves the approval with your comments and changes the Approval Required Status to **Approved.**

Workflow Type	Description of the Workflow	Conversational Input	Max Response
Reject	This action button is only visible if there are approvals assigned to you.	• Click **Reject**	Max updates the **Approval Required Status** to *Rejected.* You can also add comments to your approval: **You:** Click **Update Commen ts.** **Max:** What would you like the comment to say? **You:** Rejected due to inconsistent data. **Max:** Comment saved successfully. Max saves the approval with your comments and changes the Approval Required Status to *Rejected.*
Reassign		• Click **Reassign**	Max displays the childline items that you can reassign to another user. Select the child line item and the user to reassign the request. You can only reassign approval records to existing users.

Workflow Type	Description of the Workflow	Conversational Input	Max Response
View Approval Chain		• Click **View Approval Chain**	Max displays the full approval workflow for a given quote or agreement. In addition, you can start from a given approval request, and see where it stands in the context of the complete approval chain. The display card is color-coded as follows: • Red: Rejected Approval • Green: Approved Approval • White: On-hold Approval • Blue: Assigned Approval

Opportunity Max Flow

Max supports the following conversational flows for an Opportunity:

- Lookup Opportunity and Fields
- Follow Up Actions for an Opportunity
- Updating Opportunities

Lookup Opportunity and Fields

You can lookup Opportunity or Opportunity fields using conversational flows in Max.

The Lookup workflow is triggered when you type in lookup queries for opportunities or fields.

Looking up an Opportunity with Max

When you ask Max to lookup an opportunity, Max performs the following steps:

1. Identifies the candidate Opportunity. If there are no candidate Opportunities or the lookup query is too generic, Max returns the 20 most recently modified opportunities.
2. After Max selects the candidate opportunities, it fetches the following fields:
    - Opportunity Name
    - Account Name
    - Owner
    - Stage Name
    - Amount
    - Close Date
    - Created By
    - Last Modified On
3. After Max obtains all the information, it displays the standard fields as summary of the retrieved opportunities.

Conversational Flow: Lookup Opportunities

The following table describes the possible conversational flow between the user and Max for looking up opportunities:

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Single Opportunity	• show me the last Acme opportunity • show me the most recent opportunity on account Acme	Shows the last modified opportunity where the name of either the parent account or the opportunity matches the substring **Acme.**	You can also use the following replacements for, **'Last':** • latest • most recent • past • recent
	• show me the first opportunity named testopportunity • show me the first opportunity with the name testopportunity	Shows the oldest modified opportunity with the name matching the substring **testopportunity.**	You can also use the following replacements for, **'First':** • top • oldest • earliest
	show me past due opportunities	Shows opportunities that have a close date in the past.	You can also use the following replacements for, **'Past Due':** • overdue • past close
	show me opportunities closing soon	Shows opportunities that have a close date falling within the next 30 days.	You can also use the following replacements for, **'Soon':** • about to • shortly

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
	show me untouched opportunities	Shows opportunities that have the last activity more than 30 days in the past.	You can also use the following replacements for, **'Untouched'**: • haven't worked • haven't been touched • neglected
Multiple opportunities	• show me the last 3 Acme opportunities • show me the 3 most recent opportunities on account Acme	Shows at most 3 of the most modified opportunity where the name of either the parent account or the opportunity matches the substring **Acme.**	
opportunities created by you	show me the last 3 opportunities that I created	Shows at the most 3 opportunities most recently created by the user logged into the Salesforce system.	You can also use the term **'Created'** in replacement of the term 'Authored'.
	show me the last 3 opportunities that I updated	Shows at the most 3 opportunities most recently updated by the user logged into the Salesforce system.	You can also use the following replacements for, **'Updated'**: • modified • changed • worked on
	• show me the last 3 Acme opportunities that I worked on • show me the last 3 opportunities on account Acme that were modified by me	Shows at the most 3 opportunities associated with the account **Acme** most recently updated by the user logged into the Salesforce system.	You can also use the following replacements for, **'Worked on'**: • engaged • touched

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup opportunity within a specific time duration	• show me the last 3 opportunities that John Snow created in the past 2 months • show me the last 3 opportunities that John Snow created last Monday • show me the last 3 opportunities that John Snow created on 08/01/2018 • show me the opportunity John Snow created recently	Shows a maximum of 3 opportunities most recently created by John Snow in the past 2 months.	You can also use the following phrases for looking up opportunities within a specific time duration: • last Monday (specific day relative to current time) • On 08/01/2018 (specific date) • Feb 2020 (date range) • In the last week (date range relative to current time) • in the next 12 months (future time relative to current time) • since yesterday (past time duration)
	show me the last 3 opportunities that I worked on in the last week	Shows at a maximum 3 opportunities most recently updated by the user logged into Salesforce, in the past week.	

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup opportunity based on opportunity data	show me the last 3 Acme Inc opportunities that I worked on in the last week having ACV between $200k to $300k and a term of at least 6 months ending in the next 12 months	Shows at the most 3 recent opportunities where the parent account or opportunity name matches the substring "Acme Inc", and were updated by the user logged into Salesforce, with an ACV $200k - $300k with a term >= 6 months and end date in the next 12 month.	
Lookup opportunity sorted by specific criteria	show me the last 3 Acme Inc opportunity that I created in the last month with ACV between $200k to $300k, a payment term of Net 30 and that expires in the next 12 months sorted by create date in descending order	Shows at the most 3 recent opportunities where the parent account or opportunity name matches the substring **"Acme Inc"**, and were updated by the user logged into Salesforce in the past week, that have ACV of $200k - $300k with a payment term set to Net 30 days and end date in the next 12 months. The resultant opportunities are sorted in descending order. Max displays the most recent opportunity first.	

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
	show me the last 3 Acme Inc opportunity that I created in the last month with ACV between $200k to $300k, a payment term of Net 30 and that expires in the next 12 months sorted by create date in ascending order	Shows at the most 3 recent opportunities where the parent account or opportunity name matches the substring **"Acme Inc"**, and which were updated by the user logged into Salesforce in the past week, that have ACV of $200k - $300k with a payment term set to Net 30 days and end date in the next 12 months. The resultant opportunities are sorted in ascending order. Max displays the opportunities with the oldest start date first.	
Lookup opportunities based on opportunity stage	show me my qualified opportunities	Shows the opportunities created by the current user logged into Salesforce, that are in the stage **Qualification.**	You can also use the following replacements for, **'Qualified'**: • qualification • qualifying
	show me my opportunities in the prospecting stage	Shows the opportunities created by the current user logged into Salesforce, that are in the stage **Prospecting.**	

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
	show me my opportunities that need analysis	Shows the opportunities created by the current user logged into Salesforce, that are in the stage **Needs Analysis.**	You can also use the following replacements for, **'Needs Analysis'**: • needing analysis • need further analysis
	show me my opportunities where we need to identify decision-makers	Shows the opportunities created by the current user logged into Salesforce, that are in the stage **ID Decision Makers.**	You can also use, identifying decision-makers as a replacement phrase for, **' ID Decision Makers'**.
	show me all the opportunities that I won in the last year	Shows the opportunities created by the current user logged into Salesforce, that are in the stage **Closed Won.**	You can also use the following replacements for, **'Closed Won'**: • won • closed and won
Lookup an opportunity with no specific criteria	• lookup opportunities • pull up deals	Max returns the 20 most recently modified opportunities.	You can also use the following replacements for, **'Opportunities'**: • opp • oppty • deal
Lookup latest opportunities	show me the latest opportunities	Max returns the 20 most recently modified opportunities.	

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup a given number of opportunities	show me the 4 Acme opportunities	Max returns up to 4 maximum records of the recent opportunities where the parent account or opportunity name matches the substring **"Acme Inc".**	
Lookup an opportunity for an invalid account	show me the last opportunities on Jamba account	Max returns an error as, "I am sorry, I couldn't find any opportunities that match that description. Try refining your search by giving me more information about the opportunity you're looking for".	

Looking up opportunity Fields with Max

When you ask Max to lookup an opportunity field, Max performs the following steps:

1. Selects the candidate opportunities. If there are no candidate opportunities or the lookup query is too generic, Max returns an error.
2. After Max selects the candidate opportunities, it fetches the following fields:
    - Opportunity Name
    - Account Name
    - Owner
    - Stage Name
    - Amount
    - Close Date
    - Created By
    - Last Modified On
3. After Max selects the candidate opportunity, it fetches your specific user-requested fields.

4. After Max obtains all the information, it displays a summary of the retrieved opportunities and fields.

> If you use Max to search for a single field on a single record, along with the summary result, Max also responds with a generated sentence answering your query.
> For example,
> You: Max, what is the close date on the last opportunity I created?
> Max: The value in the 'close date' field is '1/24/2019''.

Conversational Flow: Lookup opportunity Fields

The following table describes the possible conversational flow between the user and Max for looking up opportunity fields.

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup opportunity fields	• what is the close date, ACV, and description for the Acme Inc opportunity I created last week? • can you show me the amount, close date, and stage for all the opps I created for Acme?	Shows the requested fields and other fields that partially match the search criteria (eg: Renewal Term matches the phrase, "term") for the related opportunity with a name or parent account matching the substring **Acme Inc,** created in the past week by the user logged into Salesforce.	You can also ask Max to retrieve the following fields: • close date • name • type • stage • contact (primary contact) • ACV (annual value, contract value, total value, worth, net value) • attachments • created date • owner • author

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup for a specific field in a specific opportunity	what is the start date on the Google opportunity?	Provides a specific answer to the specific question. If there are multiple answers for your question, Max displays all the relevant opportunities and highlights your requested field in each opportunity.	
Lookup for specific fields on specific opportunities matching specific criteria,	show me the type, owner, and description of my last 4 opportunities with an amount over 50k.	Max automatically includes all relevant details in the information display. Max shows the most recent 4 opportunities with an amount of over $50k and displays the fields type, owner, and description along with the standard fields	

Follow Up Actions for an Opportunity

After Max displays your opportunity search results, you can invoke workflows to perform the following actions:

Workflow Type	Description of the Workflow	Conversational Input	Max Response
Sort	Sort the search results	• sort by ACV, account • reverse it • sort by account in desc order • sort by name in asc order	Max returns the sorted list of opportunities.

Workflow Type	Description of the Workflow	Conversational Input	Max Response
View more details	Drill down into a specific opportunity	• Show me more details • Click **View more details** action button.	Max displays the opportunity detail card for all the opportunities.
	Drill down using conversational input	• show me more on the second one • view more details on #3 • Show more details for the 3rd opportunity • show me more on the last one	Max returns the details of the requested opportunity.

Show related quotes	You want to view the quotes related to your opportunity	• Click **Show related Quotes** action button.
		• Type one of the following:
		    • show me the quotes for this opportunity
		    • show me the quotes on the third opportunity
		    • show me the quotes for the second one
			Max returns the related quotes sorted by Last Modified Date.

Workflow Type	Description of the Workflow	Conversational Input	Max Response

Show opportunity products	You want to view the products related to your opportunity.	• Click **Show Opportunity Products** action button.
		• Type one of the following:
		  • show me products
		  • show me the products for the second opp
		  • show me the products on the first one
			I can do that! Which opportunity would you like to view the products for?
			1. Venture CA Office Hardware and SoftwareOptty
			2. ABC Corporation
			3. ABC Corporation
			4. Venture - CRM 30k

Search for fields	You want to search for a specific field	• what is the ACV, account, start date and end date? • show me the ACV, account, start date	Max displays specific field details.
		You click **Search for fields** action button.	<u>**MAX**</u>: Which field(s) would you like to see? <u>**You**</u>: ACV, template, account, start date and end date Max displays specific field details.

Workflow Type	Description of the Workflow	Conversational Input	Max Response
Send it to me	You want to send the opportunity report to your email address	• send it to John Snow <john@snow.com> • send it to me • send to me • send to john@snow.com • send it	Max emails the opportunity report to your email address.

Updating Opportunities

Using conversational input, you can update an opportunity by making changes to the opportunity fields. With Max, you can also update multiple fields on multiple opportunities at a time.

<table>
<tr><th>Workflow Step</th><th>Possible Conversational Inputs</th><th>Response from Max</th></tr>
<tr><td>Identify the opportunity</td><td>update this opportunity
push out the close date on my opportunities
change the stage of my "ABC" opportunity to Validated</td><td>Max asks you for confirmation. Click This One button to confirm. After you confirm, Max lists down the fields that you can update as follows:
Close Date
Stage
Opportunity Name
Owner
Description
Amount
To update opportunity team members, you need to Setup Opportunity Teams and enable Team Selling in your Salesforce Org. For information on Opportunity Teams, refer to Opportunity Teams.
Using Max, you can add or remove a team member from Opportunity Teams.

Note: You can also update the fields that are not listed by Max.</td></tr>
<tr><td>Identify fields</td><td>2
Close Date
Owner</td><td>Max shows the current field value and asks for the new value. For example, if you ask Max to change the close date, Max will reply as:

The current value in the Close Date field is Sat Jun 01 2019.

What would you like the new Close Date to be?

If you ask Max to update multiple opportunities, Max only asks for the new field value.</td></tr>
</table>

Workflow Step	Possible Conversational Inputs	Response from Max
Identify field and get value	• Next friday • Jan 1 2020	Max displays the updated opportunity and asks for confirmation to save it. You can also change the field value again before saving it.
Change Details	Click **Change Details**	If Max has incorrectly captured the new value or you want to change your entered value, you can update it quantity before saving the opportunity. You can loop back to the first step and change your entered value.
Save	Click **Save**	Max displays the updated opportunity card with links for easy navigation.

You cannot update opportunity fields with data type as Multi-select Picklists and Dependent Picklists via Max.

CPQ Max Flow

Max supports the following CPQ out-of-the-box conversational flows:

- Lookup Quote and Fields
- Follow Up Actions
- Emailing Proposal Reports
- Sending Proposals
- Updating Quotes
- Submitting a Quote for Approval
- Generating Quotes
- Cloning existing Quotes

Lookup Quote and Fields

You can lookup Quotes or Quotes fields using conversational flows in Max.

The Lookup workflow is triggered by typing in lookup queries for Quotes or fields.

Lookup Quotes with Max

When you ask Max to lookup a Quote, Max performs the following steps:

1. Selects the candidate Quote. If there are no candidate quotes or the lookup query is too generic, Max displays the top 20 quotes sorted by the Last Modified Date.
2. Once Max selects the candidate quotes, it fetches the following details for each quote:
    - Quote Name
    - Account Name
    - Primary Contact
    - Proposal Id
    - Opportunity Name
    - Quote Status
    - Net Price
    - Payment Terms
    - Created By & Created Date
    - Owner
    - Last Modified Date
3. After Max obtains all the information, it displays a summary of the retrieved quotes.

Conversational Flow: Lookup Quotes

The following table describes the possible conversational flow between the user and Max for looking up Quotes:

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Single quote	• show me the last Acme quote • show me the most recent quote for the account Acme	Shows the last modified quote for the account named **Acme**	You can also use the following replacements for, **'Last':** • latest • most recent • past • recent
	• show me the first quote named testquote • show me the first quote with the name testquote	Shows the oldest (modified) NDA with the name matching the substring **testquote.**	You can also use the following replacements for, **'First':** • top • oldest • earliest
Multiple quotes	• show me the last 3 Acme quotes • show me the 3 most recent quotes on account Acme	Shows at the most 3 most recently modified quotes on the account **Acme.**	
quotes created by you	show me the last 3 quotes that I created	Shows at the most 3 quotes most recently created by the user logged into the Apttus CPQ system.	You can also use the term 'Authored' in replacement of the term 'Created'.

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
	• show me the last 3 quotes that I updated • pull up the last 3 proposals I worked on	Shows at the most 3 quotes most recently updated by the user logged into the Apttus CPQ system.	You can also use the following replacements for, **'Updated':** • modified • changed • worked on
	• show me the last 3 Acme quotes that I worked on • show me the last 3 quotes on account Acme that were modified by me	Shows at the most 3 quotes associated with the account **Acme** most recently updated by the user logged into the Apttus CPQ system.	You can also use the following replacements for, **'Worked on':** • engaged • touched Worked on can also refer to objects that the account team or opportunity team has worked on.

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup quote within a specific time duration	• show me the last 3 quotes that John Snow created in the past 2 months • show me the last 3 quotes that John Snow created last Monday • show me the last 3 quotes that John Snow created on 08/01/2018 • show me the quotes John Snow created recently • Pull up the quotes John Snow created between Jan 1st and the end of last quarter	Shows at the most 3 recent quotes created by **John Snow** in the past 2 months.	You can also use the following phrases for looking up quotes within a specific time duration: • last Monday (specific day relative to current time) • On 08/01/2018 (specific date) • Feb 2020 (date range) • In the last week (date range relative to current time) • in the next 12 months (future time relative to current time) • since yesterday (past time duration)
	• show me the last 3 quotes that I worked on in the last week • show me the last 3 contracts that I worked on since yesterday	Shows at the most 3 recent quotes updated by the user logged into Apttus CPQ in the past week.	

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup quote based on quote data	show me the last 3 Acme Inc Quotes that I worked on in the last week having a net price between $200k to $300k and a term of at least 6 months ending in the next 12 months	Shows at the most 3 recent quotes of the account **Acme Inc** updated by the user logged into Apttus CPQ in the past week with a net price of $200k - $300k with a term >= 6 months and end date in the next 12 month.	
Lookup quote sorted by specific criteria	show me the last 3 Acme Inc quote that I created in the last month with a net price between $200k to $300k, a payment term of Net 30 and that expires in the next 12 months sorted by create date in descending order	Shows at the most 3 recent quotes on account **Acme Inc** updated by the user logged into Apttus CPQ in the past week that have a net price of $200k - $300k with a payment term set to Net 30 days and end date in the next 12 months. The resultant quotes are sorted in descending order. Max displays the most recent quotes first.	
	show me the last 3 Acme Inc quote that I created in the last month with a net price between $200k to $300k, a payment term of Net 30 and that expires in the next 12 months sorted by create date in ascending order	Shows at the most 3 recent quotes on account **Acme Inc** updated by the user logged into Apttus CPQ in the past week that have a net price of $200k - $300k with a payment term set to Net 30 days and end date in the next 12 months.The resultant quotes are sorted in ascending order. Max displays the quotes with the oldest start date first.	

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup quotes based on quote status	show me the last 3 quotes that I created that are in draft stage	Shows the 3 most recently created quotes by the user logged into Apttus CPQ, that are in draft stage	You can also use the following replacements for, **'In Draft Stage':** • still being drafted • drafted right now • currently drafted
	show me the last 3 quotes that I created that are in accepted stage	Shows the 3 most recently created quotes by the user logged into Apttus CPQ, that are in accepted stage	You can also use the following replacements for, **'In Accepted Stage':** • **are/were accepted** • **approved by the customer** • **confirmed**
	show me the last 3 quotes that I created that are declined	Shows the 3 most recently created quotes by the user logged into Apttus CPQ, that are in declined stage	You can also use the following replacements for, **'In Declined Stage':** • have been declined • were not accepted • got rejected

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
	show me the last 3 quotes that I created that are not yet accepted	Shows the 3 most recently created quotes by the user logged into Apttus CPQ, that do not have status as accepted or declined	You can also use the following replacements for, **'Not Yet Accepted':** • prior to the acceptance stage • are in a presented or earlier stage
Lookup a quote with no specific criteria	• lookup quotes • lookup proposals	Max returns the 20 most recently modified quotes	
Lookup latest quotes	show me the latest quotes	Max returns the 20 most recently modified quotes	
Lookup a given number of quotes	show me the 4 Acme quotes	Max returns the 4 most recent quotes of the Acme account	
Lookup an quote for an invalid account	show me the last 3 quotes on Jamba account	Max returns an error as, "I am sorry, I couldn't find any quotes that match that description. Try refining your search by giving me more information about the quote you're looking for".	

Lookup Quote Fields with Max

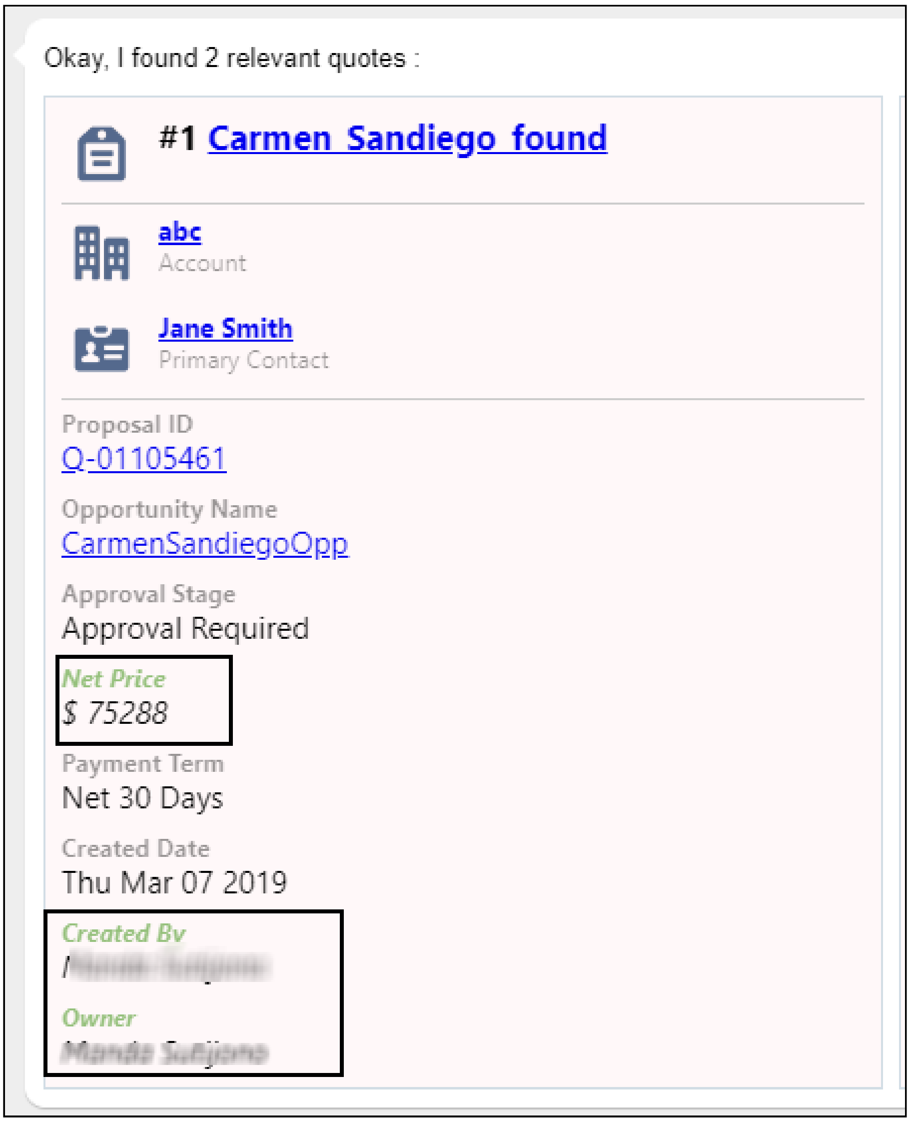
When you ask Max to lookup a quote field, Max follows the following steps:

1. Selects the candidate quotes. If there are no candidate quotes or the lookup query that is too generic, Max returns an error.
2. Once Max selects the candidate quote, it fetches the specific user-requested fields

3. After Max obtains all the information, it displays a summary of the retrieved quotes and fields.

When returning the quote results, Max highlights the quote fields that you specifically ask for.

For example, if you ask Max to look up quotes over $5000, Max will reply as:



Here, the fields Net Price, Created By, and Owner are highlighted.

Conversational Flow: Lookup Quote Fields

The following table describes the possible conversational flow between the user and Max for looking up Quote fields.

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Look up quote fields	• What is the create date, close date, term and net price for the Acme Inc quote I created last week? • Show me the net price, account, and payment terms for all quotes I created for the Acme account?	Shows the requested fields and other fields that partially match the search criteria (eg: Payment Terms matches the phrase "term") for the quote on account **Acme Inc** created in the past week by the user logged into Apttus CPQ	You can also ask Max to retrieve the following fields: • Quote Name • Account Name • Proposal ID • Opportunity Name • Quote Status • Net Price • Payment Term • Primary Contact • Created Date • Expected Start Date • Expected End Date • Price List • Last Modified By • Init Price Display • Effective Discount • Contract Term (Months)
Look up for a specific field in a specific quote	What is the start date on the Google quote?	Provides a specific answer to the specific question. If there are multiple answers for your question, Max displays all the relevant quotes and highlights your requested field in each quote.	

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Look up for specific fields on specific quotes matching specific criteria,	Show me the last 3 quotes that I created in the last 2 months that have a net price between $2000 and 150k ending in Q4 2020.	MAX automatically includes all relevant details in the information display. MAX shows the **3 most recently modified quotes** authored by the logged in user with the quote **creation date in the last 6 months** with a **Net price between $2000 to $150k** with a quote e**nd date in Q3 2020.**	

Looking up Quote Line Items with Max

After selecting your quote, you can also ask Max to look for Quote Line Items.

Conversational Flow: Lookup Quote Line Items

The following table describes the conversational flow between the user and Max for looking up quote line items.

Workflow Step	Conversational Input from User	Response from Max | Result
Quote selection	• show me line items over 50k • show me line item QL-000046597 • can i see the MaaS360 line items • pull up line items for the first one Looking up quote line items is a followup action for lookup quote.	Max displays the quote line item summary view.

Once Max has fetched the quote or quote line items, refer to Follow Up Actions to understand the set of actions that you can perform on a quote or quote line item.

Follow Up Actions

After Max displays your quote or quote line item search results, you can invoke workflows to perform the following actions:

Workflow Type	Description of the Workflow	Conversational Input	Max Response
View more details	Drill down into a specific quote or quote line item	• Show me more details • Click on '**Quick Action**'	Max asks you to select the quote.
	Drill down using conversational input	• show me more on the second one • view more details on #3 • Show more details for the 3rd quote • show me more on the last one	Max returns the details of the requested quote.

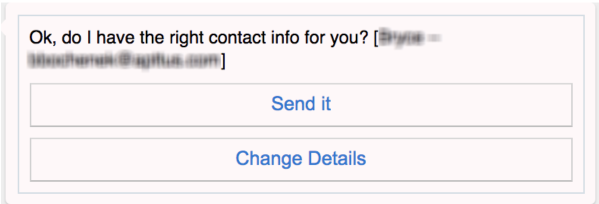
Show related accounts	You want to view the accounts related to your quote	• Click **Show related Accounts** action button.
		• Type one of the following:
		    • show me the accounts for this quote
		    • show me the accounts on the third quote
			Max returns the related accounts sorted by Last Modified Date.

Workflow Type	Description of the Workflow	Conversational Input	Max Response
Send proposal	You want to send a quote as an official proposal to a customer	• send it as a proposal to John Snow <john@snow.com> • send it to John Snow <john@snow.com> as a proposal • send proposal John Snow • send proposal	Max asks you to select the quote.
Search for fields	You want to search for a specific field	• what is the ACV, account, start date and end date? • show me the ACV, account, start date	Max displays specific field details.
		You click **'Search for fields'** quick action button.	<u>**MAX**</u>: Which field(s) would you like to see? <u>**You**</u>: ACV, template, account, start date and end date Max displays specific field details.
Send it to me	You want to send the quotes report to your email address	• send it to John Snow <john@snow.com> • send it to me • send to me • send to john@snow.com • send it	Max emails the quote report to your email address.

You can also update the quantity and discount of the cart line item for a quote. For more information, refer to Updating Quotes.

Emailing Proposal Reports

You can send a snapshot of a specific report view to your email. This feature allows you to save and forward query results in an email for later use. In Max, sending proposal reports is a follow-up action after a lookup. You can invoke it by clicking, **"Send it to me"** or via a conversational input, along with the recipient information. After you invoke the workflow, Max displays a confirmation as follows:



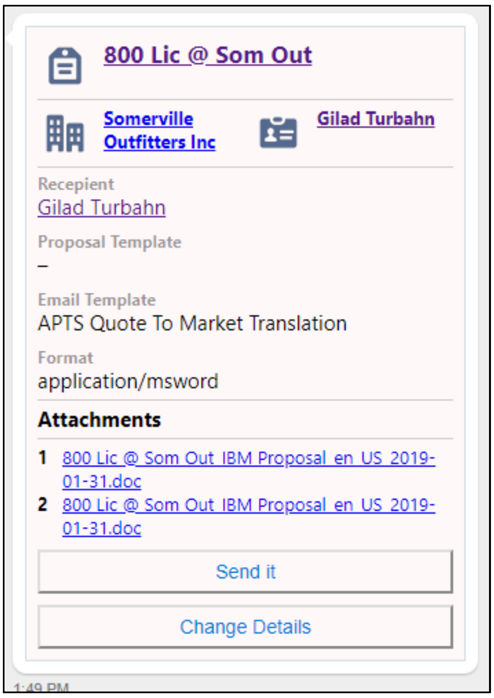
You can change the recipient details by clicking, **"Change Details".**

After you confirm, Max sends an email to the user with the proposal report and responds as:

Alright! I've sent the details to user@useremail.com

Sending Proposals

You can send quote proposal attachments to an external contact by using the following conversation flow:

<table>
<tr><th>Workflow Step</th><th>Possible Conversational Inputs</th><th>Max Reply</th></tr>
<tr><td rowspan="2">Send Confirmation</td><td rowspan="2">Send it!
Change details</td><td>Max takes the relevant information from the conversation in order to format it and send it as an email.

</td></tr>
<tr><td>If there is no attachment, Max replies:
Sorry! That quote does not have any attachments to send.</td></tr>
<tr><td>You confirm</td><td>MAX shows you the intended recipient and their email address. User clicks Send It, to proceed</td><td>All set! I've sent your proposal to Gilad Turbahn at Somerville Outfitters Inc, and I've cc'd you on the email.
Let me know if there is anything else I can help with.</td></tr>
</table>

Workflow Step	Possible Conversational Inputs	Max Reply
	You ask MAX to send it to a different recipient than the one suggested by MAX. • no change the recipient to abc@apttus.com • no send it to ABC <abc@apttus.com>	All set! I've sent your proposal to ABC at Apttus and I've cc'd you on the email. Let me know if there is anything else I can help with.
	You say "proceed" or "go ahead". You can use one of the following ways to ask Max to proceed: • yes • looks great • looks good • letsgo • lets do it • ok • sure • go for it • cool • proceed • go ahead	All set! I've sent your proposal to ABC at Apttus and I've cc'd you on the email. Let me know if there is anything else I can help with.
	You say "go back". This step applies only if there is a valid context to go back to. If you looked up quotes and invoked review and decided to go back, this option will take you to the last major step.	Max displays the Quote details.

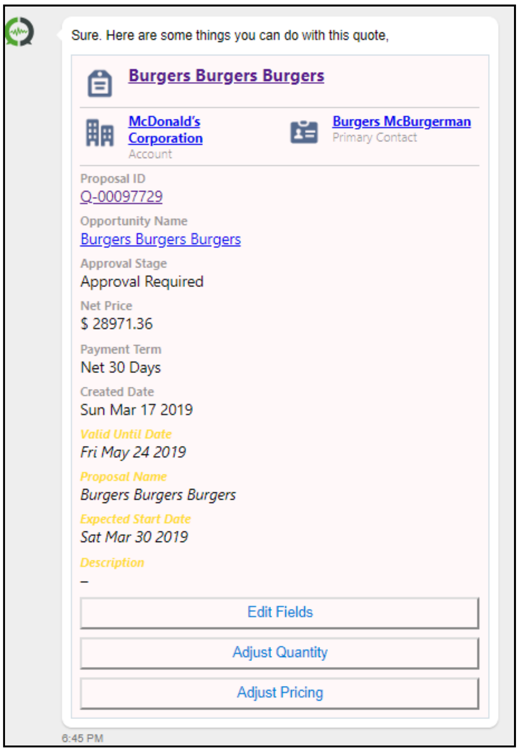
Workflow Step	Possible Conversational Inputs	Max Reply
You want to change details	You clicked **Change Details.**	What would you like to change? 1. Recipient 2. Email Template 3. Nothing, send it off!

Updating Quotes

After you have identified your quote, you can make changes to the following quote fields:

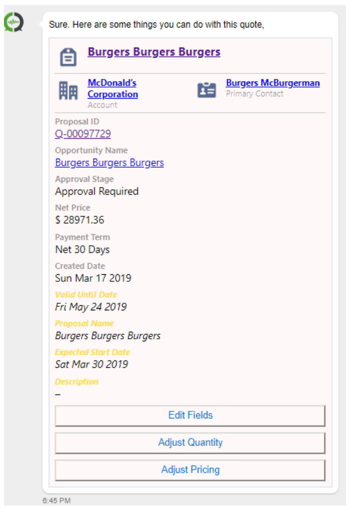
- Quote Header Fields
- Quantity
- Discount Percentage

Quote Header Fields

Workflow Step	Possible Conversational Inputs	Response from Max
Identify the quote	• update this quote • adjust pricing • edit the fields on this quote • i want to update the start date	
Editing the quote	Click **Edit Fields**	Ok, Which field would you like to update? 1. Start Date 2. Name 3. Valid Until Date 4. Description
Identify fields	• 2 • Start Date	Max shows the current field value and asks for the new value. For example, if you ask Max to change the start date, Max will reply as: ***The current value in the Start Date field is*** *Sat Jun 01 2019.* ***What would you like the new Start Date to be?***

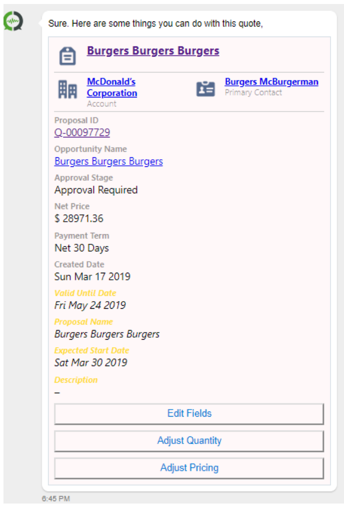
Workflow Step	Possible Conversational Inputs	Response from Max
Identify field and get value	• Next friday • Jan 1 2020	Max displays the updated quote or quote line item and asks for confirmation to save it. You can also change the field value again before saving it.
Save	• go ahead • change details or Click **Save.**	Max displays the updated quote in a card view with links for easy navigation.

Quantity

Workflow Step	Possible Conversational Inputs	Response from Max
Identify the quote	• add 15 MaaS360 licenses to the ABC quote • adjust quantity • update this quote	
Adjusting Quantity	Click **Adjust Quantity**	Select your quote line item. Max displays the selected quote line item
Identify field and set value	• increase the quantity of the Watson line item • update the quantity of the Watson line item on my ABC quote	

Workflow Step	Possible Conversational Inputs	Response from Max
Confirmation Card		Max displays the updated quote or quote line item and asks for confirmation to save it. In the confirmation car, the updated field is displayed in Red font. You can also change the field value again before saving it.
Change Quantity	Click **Change Quantity**	If Max has incorrectly captured the new quantity value or you want to change the entered quantity, you can update the quantity before saving the quote. Before saving. you can go back to the first step and change your entered quantity.
Save and Finalize	Click **Save**	Max displays the updated quote in a card view with links for easy navigation.

Discount Percentage

Workflow Step	Possible Conversational Inputs	Response from Max
Identify the quote	• increase discount by 15% for the MaaS360 licenses on this quote • update this quote	

Workflow Step	Possible Conversational Inputs	Response from Max
Adjusting Quantity	Click **Adjust Pricing**	Select your quote line item. Max displays the selected quote line item
Identify field and set value	• increase the discount of the Watson line item • decrease the discount of the MaaS360 licenses • update the pricing of the Watson line item on my ABC quote	
Confirmation Card		Max displays the updated quote or quote line item and asks for confirmation to save it. In the confirmation car, the updated field is displayed in Red font. You can also change the field value again before saving it.
Change Discount	Click **Change Discount**	If Max has incorrectly captured the discount value or you want to change the entered quantity, you can update the discount before saving the quote. before saving. you can loop back to the first step and change your entered discount.
Save and Finalize	Click **Save**	Max displays the updated quote in a card view with links for easy navigation.

ⓘ You can only update one quote at a time.

Submitting a Quote for Approval

You can submit a quote for approval using the follow-up action from the lookup quotes workflow. Max uses *Apttus Intelligent Workflow Approvals* application to manage approval flows. For information on configuring an approval process for quotes, refer to Intelligent Workflow and Approvals Administrator Guide.

Max displays a **Submit for Approval** button as a follow-up action on quotes. You can also submit a quote for approval while updating a quote. You can add comments to your approval request. Max submits the approval request along with your comments to the assignee defined in the approval process.

Sending a Quote for Approval

The following table represents the conversational flow for sending a quote for approval. You can submit a quote for approval using the follow-up action from the lookup quotes workflow.

User	Max	Description
After Max displays the quote, click **Submit for Approval.**	Max displays a preview of your approval request and asks if you are ready to submit the approval request. If multiple approvals are required, Max displays all required approvals.	For a lookup query that displays multiple quotes, Max first asks you to select a quote to submit for approval.
Click **Add Comments.**	**Max:** What would you like the comment to be? **User**: Need approval by Monday. **Max:** Comment saved successfully!	Max displays a preview of your approval request along with your comment. For agreements with multiple approval steps, Max asks you to select an approval step to add comments. You can also add additional comments by clicking **Add Comments** again.
Click **Go Ahead.**	**Max:** All set! I have submitted your Quote for approval. Here is the link(s): *001001* Max also displays a preview of the submitted approval request.	Max submits the approval request.

After Max displays a preview of the submitted approval request, you can perform additional follow-up actions on the quote.

Generating Quotes

You can generate quote documents and download them by using conversational workflow in Max. You can initiate the workflow by asking Max to Generate a Quote, during Lookup Quote conversations.

> ⓘ You can generate a quote document only for quotes with finalized carts.

The following table describes the possible conversational flow between you and Max for generating a quote.

Workflow Step	Possible Conversational Inputs	Max Reply
Quote Generation	• Generate quote • generate the quote for the first one • generate #2 ⓘ You can only generate one quote at a time.	Sure I can do that. Which one do you want me to use? Max also displays the latest quotes in card view asking you to select the quote for generating the quote document. ⚠ If you select a quote that does not have a finalized cart, Max displays a message saying that the selected quote is not ready to be generated. Max also returns you to the lookup step of the conversation.
You confirm	• generate a quote for the first one • generate #1 • the first one • #2	Max displays the preview card containing the following action buttons: • Generate it • Change Details

<table>
<tr><th>Workflow Step</th><th>Possible Conversational Inputs</th><th>Max Reply</th></tr>
<tr><td>You want to change details</td><td>You clicked Change Details.</td><td>Which detail would you like to change?
Document format
Proposal template
Watermark</td></tr>
<tr><td></td><td>Document Format</td><td>Which document format should I use to generate this proposal?
DOC
DOCX
PDF
RTF
After you select the document format, Max redisplays the preview card.</td></tr>
<tr><td></td><td>Proposal Template</td><td>Which proposal template should I use?
Template A
Template B
Template C
Template D
After you select the proposal template, Max redisplays the preview card.</td></tr>
<tr><td></td><td>Watermark</td><td>Would you like to include a draft watermark on the proposal document?
Yes
No
After you provide your selection, Max redisplays the preview card.</td></tr>
</table>

Workflow Step	Possible Conversational Inputs	Max Reply
Quote Generation	• You clicked **Generate it** • Go ahead	Alright, I have successfully generated your proposal! Here is the link to the new proposal document. Max provides a download link for your generated quote.

Cloning existing Quotes

You can clone an existing Quote/Proposal using conversational workflows with Max. Cloning a quote copies all the information from the existing quote, including field data, line items, and proposal header information. If an approval trigger is set on the existing quote, the approval status and trigger are not copied to the cloned quote. You must re-trigger approval on the cloned quote.

The new cloned quote will retain all the information of the parent quote, including:

- Proposal header details
- Configuration line items (if parent quote is not finalized)
- Proposal line items (if parent quote is finalized)

The following information is not retained from the parent quote:

- Activity history
- Notes and Attachments

You can initiate the clone quote workflow as part of the lookup quote workflow You can clone a quote using the following conversational workflow:

Workflow Step	Possible Conversational Inputs	Max Reply
Clone Quotes	• Clone quote	Sure I can do that. Which one do you want me to use? Max also displays the latest quotes in card view asking you to select the quote to clone

Workflow Step	Possible Conversational Inputs	Max Reply
	• Clone the first one • the first one	Max displays the preview quote card and asks you to provide confirmation.
Change Details	Click **Change Details**	Max displays the list of quote header fields that you can edit. Max: Okay, Which field would you like to edit? • Expected End Date • Valid Until Date • Proposal Date • Expected Start Date • Presented Date You: Expected End Date Max: What date you You: March 31 Max: Great, Here are the details I going to use to create your new quote. Max displays the preview quote card.
You Confirm	• Click **Go Ahead** • Looks Good	After the successful creation of the new quote, Max displays the quote card and provides a link for you to navigate to it.

A new quote is generated with a unique quote number with **Status** as *Draft* and **Configurations Status** as *Saved.* The following values are set as default on the cloned quote:

- Start Date - Today's Date is set as the Start Date of Quote
- End Date - End Date is calculated as a year from yesterday
- Presented Date - Today's Date is set as the Presented Date of the Quote
- Valid Until Date - Last Date of the current quarter is set as the Valid Until Date

> ⓘ You can only clone one quote at a time.

Contract Management Max Flow

Contract Management is the process of systematically and efficiently managing contract creation, execution, and analysis for the purpose of maximizing financial and operational performance and minimizing revenue leakage, legal risks, and operating costs.

Apttus Contract Management helps companies manage the entire contract lifecycle inside Microsoft Word, including standard templates, clause libraries, and terms. It can manage any type of contract, process or function.

Max supports the following Out-of-the-Box conversational flows for Apttus Contract Management:

- Creating Non-Disclosure Agreements
- Lookup Agreements and Fields
- Sending an Agreement for e-Signatures
- Sending an Agreement for Review
- Emailing Agreements
- Submitting an Agreement for Approval
- Creating Agreements
- Mobile Notifications

Creating Non-Disclosure Agreements

Using this feature, you can create Non-Disclosure Agreements (NDA) for a given account. Initially, Max greets the user and asks the user to log on to their Salesforce account.

Creating an NDA with Max involves:

- Choosing an **account** associated with the NDA
- Confirming the **document format** and **template** for the NDA documents
- Having Max generate the NDA and the associated documents

When you ask Max to create an NDA, Max follows the following steps.

1. **Agreement Type**: Max shows the agreement types to you and asks you to pick the type of agreement to be created. If you have specified the agreement type already, this step is skipped.
2. **Account:** Max shows the accounts that have recent activity and are missing NDAs. If the user has specified an account, Max checks if the specified account has an NDA.
    a. If the account specified by the user is missing an NDA, the account selection is skipped.

   b. If the account specified by the user already has NDAs, Max will provide links to existing NDAs and ask you to confirm whether you want to use the existing agreement or create a new NDA.
3. **Document Format:** After you select an account, Max will pick the document format that was most recently used by you.
4. **Default Fields**; Max will also set all NDA parameters to appropriate defaults as:
   a. Start date = The day NDA is created
   b. End date = None
   c. Perpetual = Yes
   d. Term = None
   e. Annual Contract Value = None
5. **Template:** Max selects the template for Agreement as:
   a. Max first filter outs all the available NDA templates sorted by frequent of most recent updates
   b. Max applies user or agreement or account level query filters and qualifiers to further filter the templates.
6. **Confirmation:** Max asks the user to confirm that the choices made for creating an NDA are good. The user can confirm and proceed or change parameters.
7. **NDA Generation:** Once the user confirms, Max generates the NDA and the documents and provides a link to the NDA.
8. **Followup:** Max asks the user to confirm if the NDA should be forwarded for a signature.

Conversational Flow for creating an NDA

The following table represents the conversational flow for creating an NDA.

User	Max	Description
Create Agreement	Which type of agreement do you want to create? 1. NDA 2. MSA 3. ASC606 4. RevRec 5. SLA 6. SOW 7. Admin MSA	You ask Max to create an agreement and Max asks you to choose the type of agreement.

User	Max	Description
Create NDA	Here are the X recent accounts you have worked with that are missing NDAs. Please select one or enter another account name:	Max asks you to choose the account.
You reply, “Alpha”	Which of the following accounts would you like to create NDA for? 1. Alpha Communications 2. Alpha Gas & Electric 3. Alpha Industries 4. Alpha Publishing 5. None of the above	You try to create an NDA using combined instructions and Max asks you to clarify which account it applies to.
Create NDA for Alpha Gas	"Great! Here are the details I am going to use to create your new agreement:" Go Ahead Change Details	When you instruct Max to create an NDA for a specific account, Max proceeds straight to the confirmation step. To change the NDA parameters, refer to Changing NDA Parameters
Click **Go Ahead**	All set! Your NDA was successfully generated. Give me a second, while I pull up the agreement we just created. Okay, here is the agreement we just created. What would you like to do with it?	Max generates an agreement for you and provides you with a link for easy access. Max also proactively asks if you would like to send it to the account contacts for signatures.

The conversational flow for an account already having an NDA is as follows:

User	Max	Description
Create NDA for Apttus	Max first checks if an NDA exits for the account mentioned. The account Apttus already has 1 NDA(s) in place. Link(s): [Apttus NDA] Let me know if I can help with anything else.: 1. Continue with creating an agreement 2. Cancel	NDA already exists for Apttus
Continue	Click **Go Ahead** to generate the NDA document.	NDA is created for Apttus
Cancel	Alright, I've canceled your request. Let me know if i can help with anything else.	

Changing NDA Parameters

You can change the NDA parameters through quick actions or by providing explicit input parameters.

Changing NDA Parameters using Quick Actions

User	Max	Description
Click **Change Details** to change the NDA parameters.	Okay, which field would you like to edit? 1. Name 2. Document Format 3. Start Date 4. End Date 5. Template	Select the appropriate response.
Change Agreement Name	**Max:** OK, what do you want to call this NDA? **User:**testnda	Click **Go Ahead** to generate the NDA document.

User	Max	Description
Change Format	**Max:** Okay, which document format should I use? 1. DOCX 2. PDF **You:** PDF	Click **Go Ahead** to generate the NDA document.
Change Template	**Max:** Okay, which template should we use? 1. Self Service NDA - Workday 2. NDA 3. NDA 4. Amended MSA Agreementforgenerixscript 5. Max NDA 6. Barclays Loan 7. Executive Summary **You:** 1	Click **Go Ahead** to generate the NDA document.
To **proceed** with the NDA request, reply with any of one of the following: • yes • go ahead • proceed • cool • go for it • sure • ok • letsdo it • letsgo • looks good • looks great	Got it! Here are the new details of your NDA.	click **Go Ahead** to generate the NDA document.

User	Max	Description
To **cancel** the NDA request, reply with any one of the following: • no • hold on • cancel • stop • abort • not quite • nah • nope	Alright, thanks! I'll stop here. Let me know if I can help you with anything else. You can ask for help at any time by typing 'help'.	

Changing NDA parameters using Combined Instructions

User	Max	Description
Change Agreement Name • name it testnda • let's call it testnda • have it named testnda • change the name to testnda	Max changes the NDA name to testnda.	Click **Go Ahead** to generate the NDA document.
Change Format • make it a PDF • change it to PDF • change the format to PDF	Max changes the NDA format to PDF.	Click **Go Ahead** to generate the NDA document.
Change Template • change the template to Barclays • lets use the Barclays template • use the Barclays template	Max sets the NDA template as Barclays.	Click **Go Ahead** to generate the NDA document.

User	Max	Description
Set Start Date, End Date, and Term • set the start date to 01/01/2020, the end date to 12/21/2022, and make the term to 36 months • push the start date to EOM and the end date to the last workday of 2022	Max changes the values of Start Date, End Date and Term.	Click **Go Ahead** to generate the NDA document.
Set Month or Year as Start Date and End Date set start date to Feb 2019 and end date to March 2020	Max picks the beginning of a start date range as start date and end of the end date range as end date.	Click **Go Ahead** to generate the NDA document.
Change Annual Contract Value set ACV = $200k	Max sets the ACV as $20,000.	Click **Go Ahead** to generate the NDA document.
Change Perpetual Settings of Agreement • make it perpetual • set it as perpetual • make it non-perpetual • set to non-perpetual	If you set perpetual as true, Term and End date are reset.	click **Go Ahead** to generate the NDA document.

Lookup Agreements and Fields

You can look-up an agreement or agreement field using conversational flows in Max.

The Lookup workflow is triggered by typing in lookup queries for agreements or fields.

Looking up Agreements with Max

When you ask Max to lookup an agreement, Max performs the following steps:

1. Selects the candidate agreements. If there are no candidate agreements or the lookup query that is too generic, Max displays the top 20 agreements, sorted by the Last Modified Date.
2. Once Max selects the candidate agreements, it fetches the below details for each agreement:
    - Agreement Name
    - Account Name
    - Primary Contact
    - Agreement Type
    - Value
    - Agreement Status
    - Created By
    - Created Date
    - Last Modified By
    - Last Modified Date
3. After Max obtains all the information, it displays a summary of the retrieved agreements.

Conversational Flow: Lookup Agreements

The following table describes the possible conversational flow between the user and Max for looking up agreements.

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Single Agreement	• show me the last Acme NDA • show me the most recent NDA on account Acme	Shows the last modified **NDA** on account **Acme**	You can also use the following replacements for, **'Last':** • latest • most recent • past • recent
	• show me the first NDA named testnda • show me the first NDA with the name testnda	Shows the oldest (modified) NDA with the name matching the substring **testnda.**	You can also use the following replacements for, **'First':** • top • oldest • earliest

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Multiple Agreements	• show me the last 3 Acme agreements • show me the 3 most recent agreements on account Acme	Shows at the most 3 most recently modified agreements on the account **Acme.**	
Agreements created by you	show me the last 3 agreements that I created	Shows at the most 3 agreements most recently created by the user logged into the Apttus CLM system.	You can also use the term 'Authored' in replacement of the term 'Updated'
	• show me the last 3 agreements that I updated • show me the last 3 contracts that I worked on • show me the last 3 NDAs that I modified	Shows at the most 3 agreements most recently updated by the user logged into the Apttus CLM system.	You can also use the following replacements for, **'Updated':** • modified • changed • worked on
	• show me the last 3 Acme agreements that I worked on • show me the last 3 agreements on account Acme that were modified by me	Shows at the most 3 agreements associated with the account **Acme** most recently updated by the user logged into the Apttus CLM system.	

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup agreement within a specific time duration	• show me the last 3 agreements that John Snow created in the past 2 months • show me the last 3 agreements that John Snow created last Monday • show me the last 3 agreements that John Snow created on 08/01/2018	Shows at the most 3 recent agreements created by **John Snow** in the past 2 months.	You can also use the following phrases for looking up agreements within a specific time duration: • last Monday (specific day relative to current time) • On 08/01/2018 (specific date) • Feb 2020 (date range) • In the last week (date range relative to current time) • in the next 12 months (future time relative to current time) • since yesterday (past time duration)
	• show me the last 3 agreements that I worked on in the last week • show me the last 3 contracts that I worked on since yesterday	Shows at the most 3 recent agreements updated by the user logged into Apttus CLM in the past week.	

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Lookup Agreement based on agreement data	show me the last 3 Acme Inc MSAs that I worked on in the last week having an ACV between $200k to $300k and a term of at least 6 months ending in the next 12 months	Shows at the most 3 recent MSA agreements of the account **Acme Inc** updated by the user logged into Apttus CLM in the past week that have an annual contract value of $200k - $300k with a term >= 6 months and end date in the next 12 month.	
Lookup Agreement sorted by specific criteria	show me the last 3 Acme Inc MSAs that I created in the last month that have ACV between $200k to $300k and a term of at least 6 months ending in the next 12 months sorted by start date in descending order	Shows at the most 3 recent MSA agreements on account **Acme Inc** updated by the user logged into Apttus CLM in the past week that have an annual contract value of $200k - $300k with a term >= 6 months and end date in the next 12 months. The resultant agreements are sorted in descending order. Max displays the most recent agreements first.	

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
	show me the last 3 IBM MSAs that I worked on in the last month that have an ACV between $200k to $300k and a term of at least 6 months ending in the next 12 months sorted by end date in ascending order	Shows at the most 3 recent MSA agreements on account **Acme Inc** updated by the user logged into Apttus CLM in the past week that have an annual contract value of $200k - $300k with a term >= 6 months and end date in the next 12 months. The resultant agreements are sorted in ascending order. Max displays the agreements with the oldest start date first.	
Lookup Agreements based on agreement status	show me the last 3 NDAs that I created that are pending signatures	Shows the 3 most recently modified NDAs that were created by the user logged into Apttus CLM, that are awaiting signatures.	You can also use the following replacements for, **'Pending Signatures':** • in signature • unsigned • awaiting signature
	show me the last 3 NDAs that I created that are pending signature with John Snow	Shows the 3 most recently modified NDAs created by the user logged into Apttus CLM, that awaiting signature by John Snow.	
	show me the last 3 signed NDAs that I created	Shows the 3 most recently modified signed NDAs that were created by the user logged into Apttus CLM.	You can also use the following replacements for, **'Signed':** • esigned • completed • accepted

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
	show me the last 3 NDAs that I created that are declined	Shows the 3 most recently modified NDAs created by the user logged into Apttus CLM, that were in the signature process.	You can also use the following replacements for, **'Rejected'**: • rejected • not accepted • failed signature
	show me the last 3 NDAs that I created that are no longer valid	Shows the 3 most recently modified NDAs created by the user logged into Apttus CLM, that are no longer valid.	You can also use the following replacements for, **'No longer valid'**: • recalled • voided • canceled • invalidated
Lookup an agreement with no specific criteria	• lookup agreements • lookup contracts	Max returns the 20 most recently modified agreements.	
Lookup an agreement for an invalid account	show me the last 3 agreements on Jamba account	Max returns an error as, "I am sorry, I couldn't find any agreements that match that description. Try refining your search by giving me more information about the agreement you're looking for".	

Looking up Agreement Fields with Max

When you ask Max to lookup an agreement field, Max follows the following steps:

1. Selects the candidate agreements. If there are no candidate agreements or the lookup query that is too generic, Max returns the 20 most recently modified agreements.
2. Once Max selects the candidate agreements, it fetches the below details for each agreement:
   - Agreement Name
   - Account Name
   - Primary Contact
   - Agreement Type
   - Value
   - Agreement Status
   - Created By
   - Created Date
   - Last Modified By
   - Last Modified Date
3. Max also fetches the specific user-requested fields
4. After Max obtains all the information, it displays a summary of the retrieved agreements and fields.

Conversational Flow: Lookup Agreement Fields

The following table describes the possible conversational flow between the user and Max for looking up agreement fields.

Type of Lookup	Conversational Input from User	Response from Max | Result	Useful Tips
Look up agreement fields	• What is the start date, end date, term and ACV for the Acme Inc agreement I created last week? • Show me the ACV, account, payment terms for all agreements I created on Acme account?	Shows the requested fields and other fields that partially match the search criteria for the agreement on account Acme Inc created in the past week by the user logged into Apttus CLM	You can also ask Max to retrieve the following fields: • start date • end date • name • type • format or doc format • contact or primary contact • perpetual • ACV (You can also the following terms for ACV: annual value, contract value, total value, worth, net value) • template • attachments • eSign status • create date • owner • status • agreement number • term • author

Sending an Agreement for e-Signatures

You can send an agreement for signatures using the follow-up action from lookup agreements or create NDA workflow.

To send an agreement for e-Signature, you need to install DocuSign or AdobeSign in your Salesforce Org. Max discovers the signature provider and forwards the agreement for signature.

Max follows the following steps:

1. Determines the e-signature provider.
2. Selects the email template based on tenant level configuration.
3. Sets the email subject based on tenant level configuration.
4. Predicts the e-signature recipient as below:
   a. First preference is given to user-specified contact.
   b. If you do not specify any e-signature contact, Max selects the most recent recipient.
   c. If the most recent recipient of the Agreement is unavailable, Max prefers the agreement level primary contact.
   d. If the agreement level primary contact is unavailable, Max prefers the account level primary contact.
5. Sets the CC user to the user logged in the Apttus system.
6. Asks the user to confirm the e-signature settings.
7. Asks the user to change or confirm the recipient.
8. Once the user confirms, the agreement is sent via email to the recipient for signature.

Sending an Agreement for e-Signatures

The following table represents the conversational flow for sending an agreement for e-Signature.

User	Max	Description
After Max displays the eSingature information, Click **Send it.** or Say Proceed. You can use one of the following commands: • yes • go ahead • proceed • cool • go for it • sure • ok • lets do it • lets go • looks good • looks great	Alright! I've sent your agreement to usermail@user.com for signature. Let me know if I can help with anything else.	
Click **Change Details** to change the details of the recipient.	**Max:** What is the name of the signing party? **User**: TestUser **Max:** And what is their email address? **User**: usermail@user.com **Max:** Alright! I've sent your agreement to usermail@user.com for signature.	

User	Max	Description
Say **Cancel or Stop** to abort the workflow. You can use one of the following commands: • no • hold on • cancel • stop • abort • not quite • nah • nope	Alright, I am canceling the request for signature. Let me know if you need help with anything else.	
Say **Go back** to revert to the last major step.		This option is applicable only if there is a valid context to go back to. If you looked up an agreement and invoked signature, and changed your mind and decided to go back, this option works as a "Back" button on the browser. It takes you back to the last major step

Sending an Agreement for Review

You can send an agreement for review using the follow-up action from lookup agreements or create NDA workflow.

Max follows the following steps while sending an agreement for review:

1. Asks you to select the agreement attachment.
2. Selects the email template based on tenant level configuration.
3. Sets the email subject based on tenant level configuration.
4. Predicts the e-signature recipient as below:
    a. First preference is given to your specified contact.
    b. If you do not specify any e-signature contact, Max selects the most recent recipient.

   c. If the most recent recipient of the Agreement is unavailable, Max selects the agreement level primary contact.
   d. If the agreement level primary contact is unavailable, Max selects the account level primary contact.
5. Sets the CC recipient as the logged-in user.
6. Asks you to confirm the e-review settings
7. Asks you to change or confirm the recipient
8. Once you confirm, the agreement is sent via email to the recipient for signature.

Sending an Agreement for Review

The following table represents the conversational flow for sending an agreement for e-Signature.

User	Max	Description
After Max displays the agreement details, Click **Send it.** or Say Proceed. You can use one of the following commands: • yes • go ahead • proceed • cool • go for it • sure • ok • lets do it • lets go • looks good • looks great	Alright! I've successfully sent the attachments of your NDA to John Snow for review.	

User	Max	Description
Click **Change Recipient** to change the details of the recipient.	**Max:** What is the name of the reviewer? **User**: TestUser **Max:** And what is their email address? **User**: usermail@user.com **Max:** Alright! I've successfully sent the attachments of your NDA to John Snow for review.	
Say **Cancel or Stop** to abort the workflow. You can use one of the following commands: • no • hold on • cancel • stop • abort • not quite • nah • nope	Alright, I am canceling the request for review. Let me know if you need help with anything else.	
Say **Go back** to revert to the last major step.		This option is applicable only if there is a valid context to go back to. If you looked up an agreement and invoked review, and changed your mind and decided to go back, this option works as a "Back" button on the browser. It takes you back to the last major step

Emailing Agreements

You can ask Max to email you a snapshot of an agreement. Emailing agreements feature to allow you to save and forward query results in an email for later use. Emailing an Agreement workflow is triggered as a follow-up action on a lookup workflow. For details on looking-up an agreement, refer to Lookup Agreements and Fields.

After Max fetches you your requested agreement, click **Send it to me.** You can also invoke the workflow through conversational inputs.

Submitting an Agreement for Approval

You can submit an agreement for approval using the follow-up action from the lookup agreements workflow. Max uses *Apttus Intelligent Workflow Approvals* application to manage approval flows. For information on configuring an approval process for Agreements, refer to Intelligent Workflow and Approvals Administrator Guide.

Max displays a **Submit for Approval** button as a follow-up action on agreements. You can also add comments to your approval request. Max submits the approval request along with your comments to the approved defined in the approval process.

Sending an Agreement for Approval

The following table represents the conversational flow for sending an agreement for Approval.

User	Max	Description
After Max displays the agreement, click **Submit for Approval.**	Max displays a preview of your approval request and asks if you are ready to submit the approval request. If multiple approvals are required, Max displays all required approvals.	For a lookup query with multiple agreements, Max first asks you to select an agreement to submit for approval.

User	Max	Description
Click **Add Comments.**	**Max:** What would you like the comment to be? **User**: Need approval by Monday. **Max:** Comment saved successfully!	Max displays a preview of your approval request along with your comment. For agreements with multiple approval steps, Max asks you to select an approval step to add comments. You can also add additional comments by clicking **Add Comments** again.
Click **Go Ahead.**	**Max:** All set! I have submitted your agreement for approval. Here is the link(s): *00100* Max displays a preview of the approval request.	Max submits the approval request to the approver defined in the approval process.

Creating Agreements

With Max, you can create agreements using conversational workflows. Max greets the user and asks the user to log on to their Salesforce account.

Creating an agreement with Max involves:

- Selecting the type of agreement to create
- Choosing an **account** to associate with the agreement
- Confirming the **document format** and **template** for the agreement documents
- Having Max generate the agreement documents

When you ask Max to create an agreement, Max executes the following steps.

1. **Agreement Type**: Max shows the agreement types to you and asks you to pick the type of agreement to be created. If you have specified the agreement type already, this step is skipped.
2. **Account:** Max shows the accounts that have recent activity and are missing agreements. If the user has specified an account, Max checks if the specified account has an agreement.

   a. If the account specified by the user is missing an agreement, the account selection is skipped.
   b. If the account specified by the user already has agreements, Max will provide links to existing agreements and ask you to confirm whether you want to use the existing agreement or create a new agreement.
3. **Document Format:** After you select an account, Max will pick the document format that was most recently used by you.
4. **Default Fields**; Max will also set all agreement parameters to appropriate defaults as:
   a. Start date = The day agreement is created
   b. End date = None for NDA and 1 year from today for SOW and MSA type of agreements
   c. Perpetual = Yes for NDAs and False for SOW or MSA type of agreements
   d. Term = None
   e. Annual Contract Value = None
5. **Template:** Max selects the template for Agreement as:
   a. Max first filter outs all the available templates sorted by frequent of most recent updates
   b. Max applies user or agreement or account level query filters and qualifiers to further filter the templates.
6. **Confirmation:** Max asks the user to confirm that the choices made for creating an agreement are good. The user can confirm and proceed or change parameters.
7. **Agreement Generation:** Once the user confirms, Max submits the agreement request. The configured agreement rules in the Contract Management application are triggered and depending on the agreement details, Max performs one of the following:
   a. Automatically approve and generate the document, and return that to the user.
   b. Submit the agreement request to the appropriate queue, and inform the user that the agreement request is submitted for review.
8. **Followup:** Max provides follow-up actions that you can perform on the agreement.

For a detailed example of a conversational workflow of creating agreements, refer to Creating Non-Disclosure Agreements.

Mobile Notifications

Max also provides default mobile notifications for Contract Management flow to alert you of important milestones, stages in contract negotiations and offers context-specific quick action links to act on them. Notifications are stored in a custom object, **Conga Event.**

Notifications are delivered to you using Conga Events and contain more information about the event, link to navigate to the contextual object, and a quick action button to launch Max.

Notification Types

The following table describes the types of notifications supported by Max and the quick action links provided for each of them.

<table>
<tr><th>Type of Notification</th><th>Triggering Event</th><th>Quick Actions</th></tr>
<tr><td rowspan="4">Event Notifications
Event Notifications are triggered immediately. They alert you about the change in the status of your contract and provide quick action links to take immediate actions to advance the deal.</td><td>Agreement stage changes to Ready for Signatures</td><td>Send for Signature</td></tr>
<tr><td>Agreement state moves to Approved Request</td><td>Send for Review</td></tr>
<tr><td>Agreement state changes to Approval Required</td><td>Submit for Approval</td></tr>
<tr><td>Review Cycle is Cancelled / Completed</td><td>Send for Review
Send for Signature
Sumit for Approval</td></tr>
</table>

Type of Notification	Triggering Event	Quick Actions
Reminder Notifications Reminder Notifications alert you about inactivity in the contract and provide the contact information of the current owner to get in touch about advancing the deal.	• Approval requests were not replied for two days • Review cycle still in progress after one week	Get in touch with the current owner • Phone number linked for a quick call • Email link with pre-filled subject & body
Upcoming Event Notifications Upcoming Event Notification alert you about upcoming contract milestones and suggest proactive actions to get you in front of customer interactions.	NDAs expiring in the next month. MSAs expiring in the next 3 months.	Create NDA Create MSA

Follow-up Actions

With each notification, the user will be provided with contextually relevant follow-up actions, that they can immediately use to take the next step and advance the negotiation or deal in progress. Follow-up actions are categorized as follows:

- **Quick Actions:** Actions such as send for review, send for signature, submit for approval are examples of quick actions.
- **Get-in-Touch Actions:** Actions such as calling the customer or sending emails to customers are examples of Get in Touch Actions. Get in touch actions are related to Reminder Notifications only. They involve quick links for you to call your customer or send a pre-composed email to relevant stakeholders. These actions are useful in scenarios where you are waiting for inputs from someone else. For example, pending review cycles or pending approvals.
- **Notification Quick Actions:** These actions are provided by default with every notification. They involve handling the notification, especially when you cannot

interact with the notification immediately. Notification quick actions are of two types:

- **Snooze -** You can snooze the notification by clicking the Snooze button or by asking Max to snooze the notification using natural language commands. The notification is snoozed for 15 minutes.
- **Dismiss** - You can dismiss the notification clicking the Dismiss button or by asking Max to dismiss the notification using natural language commands. When you dismiss a notification, the notification is removed from the notification queue.

Available Channels

Mobile notifications are available for you on multiple channels enabled by Max administrator using the Notification Control Center. Currently, Notifications are supported on **Slack, Teams, and Salesforce1 Mobile App.**

Triggered notifications are delivered when you sign-in, end a conversation, or you have been inactive for longer than two minutes. For Salesforce1 mobile app, you will receive the notification using your Salesforce's native notification mechanism and the follow-up actions are performed using the conversational interface of Max.

Slack Connectivity

Max is also available as an App within Slack.

Installing Max from Slack Directory

To install Max,

1. Go to https://slack.com/apps/A011B8KMBPC-apttus-max. Alternatively, you can also search for Apttus Max in the Slack App Directory.
2. Click **Add to Slack** and follow the installation instructions.
3. Enter the tenant name and click **Next.**

> Installation of Apttus Max must be performed by Slack and Apttus administrators. Use of Apttus Max requires a commercial license and a valid tenant name to proceed with installation.

Max is now added to your available list of apps within Slack.

Enabling Max Interactions with Slack

After you log-in to Slack, you can find **Max** channel from the left-hand list of workspaces. If Max channel is not available for you, get in touch with your Apttus point of contact.

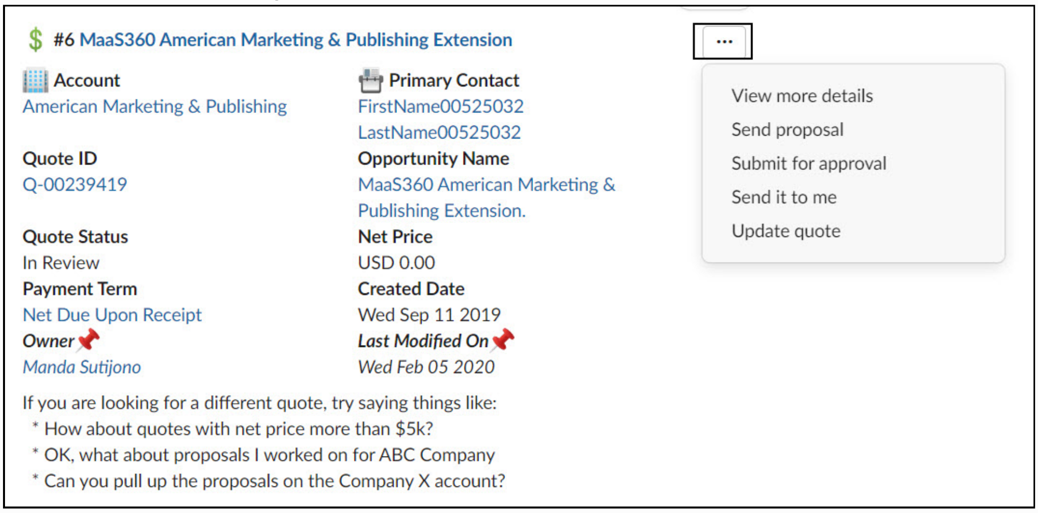
Using Apttus Max with Slack

You can get started with Max by greeting Max with a Hello. Max will ask you to log in to Salesforce. Once you are logged in, you can trigger all the workflows.

Max on Slack supports the following conversations:

- Lookup Accounts
- Lookup Contacts
- Lookup Approvals
- Opportunity Max Flow
- CPQ Max Flow
- Contract Management Max Flow

ⓘ Action buttons in Slack are available by clicking the more menu(...) icon, available next to each display card.



Creating Non-Disclaimer Agreements (NDA)

You can create NDAs in Max using conversational commands. For information on the conversational flow of creating NDAs, refer to Creating Non-Disclosure Agreements.

Create NDA Shortcut in Slack

Create NDA conversation is also available as a shortcut action in Slack. For information on create NDA conversational workflow, refer to Creating Non-Disclosure Agreements.

Creating an NDA

1. Click the lightning bolt icon available to the left of the message input field.
2. Click **Create NDA.** Slacks opens the modal window.
3. Select an account, provide NDA details and click **Save.**

You can also invoke the Create NDA shortcut outside of the direct message interaction with Max. If you are in another channel or chatting with another user, follow the above-mentioned steps to create an NDA agreement. Max will create an NDA and provide you with a link to the created agreement record in Salesforce. You will also receive a notification from Max.

Max Advanced Features

Apart from supporting the Out-Of-The-Box conversations, Max supports the following functionalities:

- **Processing Indicators:** Max provides numerous processing indications to manage user expectations while it is working on user inputs.
    - Max displays a thinking indication icon in the user interface while it's working on the user request.
    - Max displays courtesy messages such as "Just a moment", "Give me a sec", "Hang on for a second" .
    - Max displays empathetic messages such as "Apologies, this is taken longer than expected, appreciate your patience" for requests that take longer than the usual amount of the time for processing.
- **Multi-intent workflows**
    - Max allows the user to specify multiple intents in a single command. For example: ***create nda for Alpha Gas and send it to Bob Schank <bschank@acme.com> for signature***
- **Zero input workflows**
  Max makes smart on-the-spot-decisions on your behalf. For example:
    - Max picks the most frequently updated template and further filters it by user's existing template filter choices by incorporating the settings of the account, agreement or other objects.
    - Max picks the most frequently used document format for agreement documents in the last 30 days.
- **Ease of use**: Max provides easy to click quick action buttons, while also allowing the user to provide verbal inputs.
- **Mobile support:** Max allows users to invoke the conversation via a mobile browser or the embedded Max plugin from the native SFDC app on both iPhone and Android devices.
- **Voice dictation**: Max allows users to provide input using the inbuilt keyboard dictation on iPhone and Android devices.
- **Handling unsupported intents:** Max understands the popular workflows that it cannot handle. For such workflows, it displays the appropriate help to guide you accordingly. Example: You ask Max to "create an account", Max responds with the below message:

    I'm sorry! I'm not able to create accounts for you at this point. You can find instructions on how to create an account here: Managing Accounts in

SalesForce. *If you'd like me to be able to do this for you, you can reach out to your Max Admin and the Apttus team by clicking* here.

- **Contextual help:** Max understands the context of the user conversation and responds with the correct help text. For examples of Contextual Help, refer to Contextual Help.
- **Provide Feedback:** You can provide feedback to Max at any stage in your conversation. To provide feedback, type Feeback or Provide Feedback in Max chat window. Max asks you whether your feedback is positive or negative. Based on your feedback, Max asks you to provide details about what you liked and what you disliked. After providing your feedback, Max navigates you back to your conversation.
- **Navigation:** All major conversation steps provide you with the following options:
    - *Proceed*: User can respond affirmatively and proceed with the action
    - *Change Details*: User can opt to change details first and then proceed
    - *Abort*: User can abort the operation by canceling the request
    - *Go back*: User can go back to the previous major workflow step when applicable.
    - *End*: Ends the conversation by typing "Bye"
- **Quick Answers:** If you ask a specific question such as "what is the expiration date of the Google quote?", Max provides a quick answer with a generated sentence answering your query as below:
  The *Valid Until Date* for ***Google Dec-2018*** is **Fri Dec 14 2018**. Here are the details of the quote: .....
- **Yes/No Questions:** If you ask Max a specific yes/no question such as "Is the Google quote accepted?", Max provides a quick yes/no answer with a generated sentence answering your query as follows:
  Yes, The Google quote is Accepted.
- **Response Relevance**: When a user asks for specific fields from quotes that satisfy a certain search criterion, Max includes both the fields that are selected and the fields used for filtering the results, in addition to the default fields that are normally displayed.
- **Conversational Analytics**: All workflow steps, parameter selections, user utterances, workflow anomalies are logged as part of conversational analytics. This data is used as the raw material to study usage trends, usability and other issues that help improve Max.
- **Proactive Greeting:** In the embedded mode, Max proactively greets you when you click the Max pop-up window.
- **Proactive tips:** Max offers proactive tips to the user based on the conversation context.
  For example:
  Let's get started! What can I do for you?

** You can create an agreement by saying: 'create an nda and send it to John Snow for signature'*

** You can search for agreement(s) by saying: 'help me find the last NDAs I created on 08/01/2018'*

** You can search for fields within agreements by saying: 'show me the ACV of the last MSA I created, and also list the start date and duration'*

** You can search for quote(s) by saying: 'help me find the last quote I created in 2018'*

** You can search for fields within quotes by saying: 'show me the amount of the last quote I created, and also show me the expiration date'*

Contextual Help

Max offers contextual help based on the step the user is performing. You have to type "help" or "list options" to avail help from Max.

Contextual Help for CLM Flow:

Context of the Conversation	Help Text from Max
At the very beginning	Here are a few example queries I can handle: • You can create an agreement by saying: 'create an nda' • You can search for agreement(s) by saying: 'help me find the last 3 agreements I created for IBM with terms of at least 6 months, which have an ACV of more than $20,000' • You can search for fields within agreements by saying: 'show me the ACV of the last MSA I created, and also list the start date and duration'
Create NDA – account selection step	You can do things like: • Search for accounts by either full or partial match. (e.g. 'IBM' will return 'IBM', 'IBM_Test', etc...)

Context of the Conversation	Help Text from Max
Create NDA – confirmation step	You can say things like: • make it a PDF • call it testABCNDA and change it to a DOCX • set start date to next Monday and end date to March 2020
E-Signature – confirmation step	You can do things like: • Click the attachment links to download from the Apttus Intelligent Cloud • Type 'cancel' to cancel the request • Click 'Send It' to proceed or 'Change Details' to change the recipient
Agreement Review – confirmation step	You can do things like: • Click the contact to view the email address • Click the agreement link to view in the Apttus Intelligent Cloud • Type 'go back' to go back to the last step if this was a follow up to agreement search
Lookup Agreement	You can do things like: • Ask me to show fields: (e.g. 'show me the ACV, term, and template') • Say 'Bye' to end the conversation • View more details for this agreement

Contextual Help for CPQ Flow

Context of the Conversation	Help Text from Max
At the very beginning	Here are a few example queries I can handle: • You can search for quote(s) by saying: 'help me find the last quote I created in 2018' • You can search for fields within quotes by saying: 'show me the amount of the last quote I created, and also show me the expiration date'

Context of the Conversation	Help Text from Max
Lookup Quotes	You can do things like: • Ask me to show fields: (e.g. ‘show me the amount, payment terms, and owner’) • Say 'go back' to go to the previous step, or say 'bye’ to end the conversation • View more details for this quote • View the related line items: "show me the line items for this quote" • Send it to yourself: "send this to me"
View More Details	You can do things like: • View the related line items: "show me the line items for this quote" • Say 'go back' to go to the previous step, or say 'bye’ to end the conversation • Send it to yourself: "send this to me"
Send proposal	You can do things like: • Say 'go back' to go to the previous step, or say 'bye’ to end the conversation • Change the default recipient: "no, send it to John Smith" • Change the send details: "change the email template to XYZ template"
Show Line Items	You can do things like: • Say 'go back' to go to the previous step, or say 'bye’ to end the conversation • Send it to yourself: "send this to me"
Send it to me	You can do things like: • Say 'go back' to go to the previous step, or say 'bye’ to end the conversation • Change the default recipient: "no, send it to alt_email@email.com.

Explain Yourself

Explain yourself feature helps you understand how Max is processing your conversational input. Max displays a card showing your query input, hat it understood from the query and how it processed the different search parameters in your query.

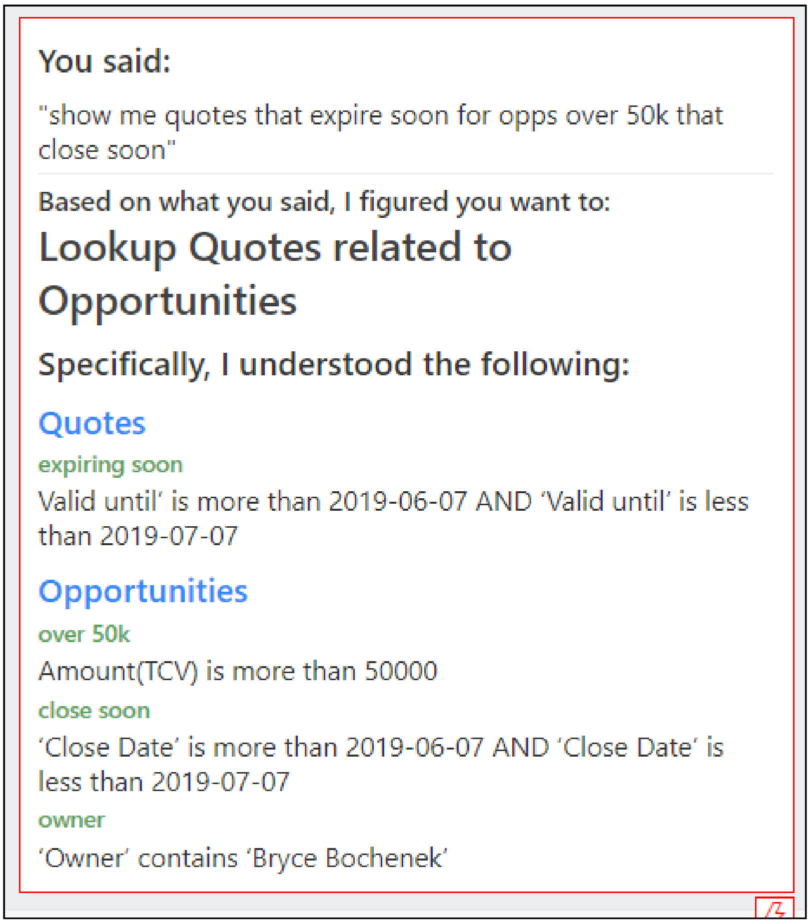
You can invoke this feature by using the following conversational inputs:

- explain yourself
- how did you come up with these results?
- why did you pull these up?

For example, if you provide the following conversational input to Max:

Show me quotes that expire soon for opps over 50k that close soon.

Max displays the following card:



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