

APTTUS[®]

Max on Salesforce Winter 2019 Release Notes

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Table of Contents

About Release Notes.....	3
Packages	4
System Requirements and Supported Platforms.....	5
New Features.....	6
Max Admin Console	6
Lookup Accounts.....	6
Lookup Contacts.....	6
Submit for Approval.....	6
Update Opportunity Teams	7
Enhancements	8
Question Answering: Yes-No Questions	8
Enhanced Rich Content Support.....	8
Enhanced Query Handling	8
Contextual Referencing	8
Resolved Issues	9
Known Issues.....	10
Apttus Copyright Disclaimer	12


About Release Notes

Apttus Release Notes contain the following information about Max Winter 2019 Release on Salesforce

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

- [What's New](#) in *Max on Salesforce Winter 2019 User Guide* or
- [What's New](#) in *Max on Salesforce Winter 2019 Administrator Guide*

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

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Packages

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

Package	Latest Certified Version
Apttus Max (New)	Microsoft Azure: 0.0.1-1279 IBM Cloud: 1.1.0.161

System Requirements and Supported Platforms

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

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

New Features

The following features are new to Max on Apttus Omni:

- [Max Admin Console](#)
- [Lookup Accounts](#)
- [Lookup Contacts](#)
- [Submit for Approval](#)
- [Update Opportunity Teams](#)

Max Admin Console

With Max Admin Console, administrators can launch a Max chatbot and can also configure the fields on display cards.

Get Started

For more information, refer to [Max Admin Console](#) in *Max on Salesforce Winter 2019 Administrator Guide*.

Lookup Accounts

Max on Apttus Omni introduces the Lookup Account conversational flow, using which you can lookup for an account and account fields. You can perform follow-up actions on accounts such as view more details, view related opportunities, view related quotes, and email an account report to yourself. You can also ask Max to create an NDA agreement as a followup action on Lookup Accounts.

Get Started

For more information, refer to [Lookup Accounts](#) in *Max on Salesforce Winter 2019 User Guide*.

Lookup Contacts

Max on Apttus Omni introduces the Lookup Contacts conversational flow, using which you can lookup for contact information and contact fields. You can also perform follow-up actions on contacts such as view more details, view related opportunities, view related quotes, and email the contact report to yourself.

Get Started

For more information, refer to [Lookup Contacts](#) in *Max on Salesforce Winter 2019 User Guide*.

Submit for Approval

Using Max, you can now submit your agreements and quotes for Approval. Max uses Apttus Intelligent Workflow Approvals to perform the approval actions.

Get Started

For more information, refer to [Submitting an Agreement for Approval](#) or [Submitting a Quote for Approval](#) in *Max on Salesforce Winter 2019 User Guide*.

Update Opportunity Teams

Max can now update opportunity team members. You can ask Max to add or remove an existing member from opportunity teams.

Get Started

For more information, refer to [Updating Opportunities](#) in *Max on Salesforce Winter 2019 User Guide*.

Enhancements

The following section describes existing features that are changed (or are no longer supported) in this release.

- [Question Answering: Yes-No Questions](#)
- [Enhanced Rich Content Support](#)
- [Enhanced Query Handling](#)
- [Contextual Referencing](#)

Question Answering: Yes-No Questions

Max can now reply to your yes-no question with a generated statement answering your question query.

Get Started

For more information, refer to [Max Advanced Features](#) in *Max on Salesforce Winter 2019 User Guide*.

Enhanced Rich Content Support

Max features improved display cards to highlight the updated or requested fields. Max now greets you by name and uses your personal avatar in the conversation.

Enhanced Query Handling

Max features improved handling of complex natural language queries. Max supports different variations of nested queries and also includes a secondary search for initial null result queries. Max also handles informal field references when performing field updates.

Contextual Referencing

Max now has improved contextual understanding to handle relative data references, successive filtering, and sorting of results. Max can now handle single-step requests while retaining the broader context of the conversations.

Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
N/A	MAX-3465	If you invoked the topic switch mechanism of Max, it did not support the <i>go back</i> or <i>cancel</i> navigation command. This prevented you from backing out of the topic switch.
N/A	MAX-3888	If you asked Max to lookup Lost Opportunities , Max incorrectly displayed the Closed Lost Reason field as empty.
N/A	MAX-3900	If you gave an update command without an explicit reference to the previous object, Max asked you whether you want to discard the context. If you said yes, it opened an invalid user path.
N/A	MAX-3914	After updating an opportunity, MAX did not retain the context of the follow-up actions.
N/A	MAX-3969	For Question Answering response queries that returned more than 20 results, Max displayed a text saying there were 21 results.
N/A	MAX-3970	Max did not include the New Contract Duration field in the card results, even if you used it as search parameter.
N/A	MAX-3971	Max did not number the card results of view more details followup action.
N/A	MAX-3975	If you gave an update command and used the term, end , Max would incorrectly ask you to provide the new Valid Until Date as well to update.
N/A	MAX-3982	If you gave a combined update instruction involving a date value, Max returned incorrect results.
N/A	MAX-4069	If you gave a combined instruction as an initial command, Max returned incorrect results.
N/A	MAX-4207	MAX did not handle the ' all ' operator correctly in all contexts.
N/A	MAX-4242	If you searched for opportunities with a past due date, Max also included opportunities that were not past due date. This issue occurred because Max also considered the opportunity child line items that were past the due date.

Known Issues

The following are the known issues for this release.

Apttus Internal ID	Description
N/A	Max shows up the typing indicator even though it is not processing anything. To continue, type your next command in the chat window.
N/A	While processing a complex query, Max ignores the query part which it can not process.
N/A	Max cannot refer to a quote with a space in its name. Workaround: To refer to a quote with its name, use the quotation marks(" ").
N/A	When working with Quote, Max interprets Close date as the Expected End Date of the quote.
N/A	Max throws an error if you use an apostrophe (!) in a conversational input.
N/A	You cannot update fields with Long Text (for example: description, next step) through combined instructions.
MAX-2771	Max sometimes returns error while completing the send for proposal workflow. Max also incorrectly updates the proposal templates and changes the recipients.
MAX-3095	If you express date range in the format, <date> to <date>, Max understands the end date incorrectly.
MAX-3540	Max does not support the X.X date format.
Max-3555	Although Max supports the conversation for updating the Price Book ID of a quote, you cannot update the Price Book ID field of the quote using Max.
MAX-3635	Max does not display the latest values of the sales discount for a quote line item.
MAX-3642	If you ask Max to update a quote line item from a quote line item lookup results, Max displays the updated quote line item card incorrectly.
MAX-3885	You cannot access Max via Microsoft Edge browser.
MAX-3894	If you reference a date in a query, as "show me<object> for <date>", Max incorrectly tags the date as a name and returns incorrect results.
MAX-4041/ MAX-4241	If you give a combined input to update the line item owner, Max ignores the name of the owner that you provided in the input and asks you for the new owner value. In the confirmation step, Max displays the owner ID instead of the owner name.
MAX-4393	The hyperlinks for Proposal ID and Created By fields in quote cards are incorrect.
MAX-4465	Max provides incorrect answers to yes-no questions pertaining to the existence of an object.
MAX-4493	If you ask Max to create an NDA and there no accounts missing an NDA, Max does not display the account options for you to select a parent account.

Apttus Internal ID	Description
MAX-4495	When you create a quote header through Max, Max does not populate the price list. Workaround: Set the price list manually.
MAX-4503	You cannot remove opportunity team members using combined instructions.
MAX-4509	If you ask Max to create an NDA in a conversation that causes Max to ask you a follow-up topic switch question, Max does not retain the name mentioned in the initial command if you click Yes.
MAX-4518	If you click Submit after entering text using Keyboard Dictation, the text is not cleared right away and remains in the dictation window. This issue is observed in phones using version 13.2.3 of iOS 13.
MAX-4536	After you update the quantity or discount of a quote and select a line item, you cannot update the value of another field. Max ignores your input and asks you for the new value of quantity or discount of the quote.
MAX-4538	When you ask Max to update a specific product in the update quote conversation, it replies saying the specific line item cannot be found. Although, Max displays the existing line items matching your query.
MAX-4543	If you use the date format, "Jan 2020 thru Dec 2021" in a lookup query, Max limits the date range to the first month only.
MAX-4549	If you update a quote and submit it for approval, you cannot search for your most recent quote. Max replies saying it cannot understand your input.
MAX-4551	Max does not include the quantity of the products in the line item display cards in the update quote workflow. This issue is observed if you are using combined instructions.
MAX-4555	Searching for opportunities past the due date returns incorrect results.
MAX-4567	If you search for an opportunity line item in Lost Stage with a specific loss reason, Max continues to look for open opportunity line items.
MAX-4568	If you search for opportunity line items by their associated product names, Max provides incorrect results. This issue is observed with long product names.
MAX-4574	If you search for an opportunity line item by the name of the line item, Max displays incorrect search results by using the line item name as Amount TCV.
MAX-4582	While configuring card display fields using Max Admin Console, the Field(API) Name is not populated sometimes. Workaround: Administrators can enter the Field(API) Name manually.
MAX-4585	Explain Yourself functionality is not available for chatbots launched using the Admin Console.

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