



Max



Table of Contents

Release Notes.....	6
Spring '21 Release Notes.....	6
Packages.....	6
System Requirements and Supported Platforms.....	7
New Features.....	7
Enhancements.....	8
Resolved Issues.....	8
Known Issues.....	9
What's New in Max Documentation.....	11
Max for Administrators.....	15
Getting Started with Max.....	15
Max Admin Console.....	15
Max Connected App.....	15
Launching Max.....	16
Setting Up Basic Configurations.....	16
Enabling Conversations.....	18
Configuring Display Cards.....	18
Defining Synonyms.....	19
Max Setup on Salesforce.....	20
Installing Max in Salesforce.....	20
Salesforce Mobile App Setup.....	23
Notification Control Center.....	25
Creating and Activating a Notification Flow.....	26
Setting Up Notifications.....	28
Max for Users.....	33
Getting Started.....	33
Getting Started Video Cards.....	34
Quick Action Buttons.....	35
Look Up Accounts.....	35

Looking Up Accounts with Max.....	35
Looking Up Account Fields with Max.....	39
Follow-Up Actions for an Account.....	40
Look Up Contacts.....	42
Looking Up Contacts with Max.....	42
Looking Up Contact Fields with Max.....	46
Follow-Up Actions for a Contact.....	47
Look Up Approvals.....	49
Follow-Up Actions for an Approval.....	51
Opportunity Max Flow.....	54
Look Up Opportunity and Fields.....	54
Follow Up Actions for an Opportunity.....	64
Updating Opportunities.....	67
CPQ Max Flow.....	69
Lookup Quote and Fields.....	69
Follow Up Actions.....	81
Emailing Proposal Reports.....	83
Sending Proposals.....	84
Updating Quotes.....	86
Submitting a Quote for Approval.....	91
Generating Quotes.....	92
Cloning Existing Quotes.....	95
Contract Management Max Flow.....	97
Creating Non-Disclosure Agreements.....	97
Lookup Agreements and Fields.....	103
Sending an Agreement for e-Signatures.....	111
Sending an Agreement for Review.....	114
Emailing Agreements.....	117
Submitting an Agreement for Approval.....	117
Creating Agreements.....	118
Mobile Notifications.....	119
Slack Connectivity.....	122
Installing Max from Slack Directory.....	122

Enabling Max Interactions with Slack.....	123
Using Conga Max with Slack.....	123
Creating a Non-Disclosure Agreement Shortcut in Slack.....	124
Max Advanced Features.....	124
Contextual Help.....	128
Explain Yourself.....	131
Max for REST API Developers.....	132
Authenticating Max APIs.....	132
Authentication.....	132
Endpoint.....	132
Versions.....	132
Content Type.....	133
Errors.....	133
Connecting Max APIs with Conga CLM.....	133
API URL.....	133
API Token.....	134
Conga Max REST APIs.....	134
Conga IDD REST APIs.....	134
Max Features by Release.....	135
Features by Release.....	135

Learn how to converse with Max and use artificial intelligence to enhance your middle-office workflows.

Release Notes

Discover what's new in the latest release of Max.


- [Spring '21 Release Notes](#)

Spring '21 Release Notes

Conga Release Notes contain the following information about Max Spring '21 Release.

For more information on new features, enhancements, and document improvements refer to [What's New in Max Documentation](#).

- **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

 This documentation may contain descriptions of software features that are optional and for which you may not have purchased a license. As a result, your specific software solution and/or implementation may differ from those described in this document. Please contact your CSM or AE for information on your specific features and licensing.

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)	4.0.0.710 4.710
Conga Contract Lifecycle Management (New)	12.605

System Requirements and Supported Platforms

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

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

New Features

The following features are new to Conga Max:

REST APIs for Document Analysis and Config Discovery Management

Conga Max introduces the following APIs in this Release:

- **Config Discovery and Management:** You can use Config Discovery and Management APIs to register the provider information.

- **Document Analysis:** You can use Document Analysis APIs to perform text analysis of large documents and extract the required information.
- **Document:** You can use Document APIs to convert documents from one format to another, extract certain parts from them, and prepare reports.

Get Started

For more information, refer to [Conga Max REST APIs](#) and [Conga IDD REST APIs](#) in *Max Spring 2021 REST API Guide*.

Support for Queries with NOT Operator

Max now supports queries containing NOT operators for searching documents.

Get Started

For more information, refer to [Max Advanced Features](#) in *Max Spring 2021 User Guide*.

Enhancements

The following enhancement is new in this release:

Suppressed Event Notification Triggers for Irrelevant Changes

Event Notifications are now triggered only when there are relevant changes to the object. For example, if there is a change in the agreement name, a notification is not triggered.

Get Started

For more information, refer to [Notification Control Center](#) in *Max Spring 2021 Administrator Guide*.

Resolved Issues

There are no resolved issues in this release.

Known Issues

The following are the known issues for this release.

Conga Internal ID	Description
N/A	Max shows up the typing indicator even though it is not processing anything. To continue, type your next command in the chat window.
N/A	While processing a complex query, Max ignores the query part which it can not process.
N/A	Max has a limited ability to recognize record names (for example: Quotes, Opportunities, Accounts), if there are more than 2 words. Workaround: To increase the accuracy of Max's understanding, use quotation marks(""). For example: Show me all quotes for "ABC Corp Distribution".
N/A	When working with Quote, Max interprets Close date as the Expected End Date of the quote.
N/A	You cannot update fields with Long Text (for example: description, next step) through combined instructions.
MAX-2771	Max sometimes returns an error while completing the send for proposal workflow. Max also incorrectly updates the proposal templates and changes the recipients.
MAX-4536	After you update the quantity or discount of a quote and select a line item, you cannot update the value of another field. Max ignores your input and asks you for the new value of quantity or discount of the quote.
MAX-4582	While configuring card display fields using Max Admin Console, the Field(API) Name is not populated sometimes. Workaround: Administrators can enter the Field(API) Name manually.
MAX-5417	Max conversation disappears after you click a link in the Salesforce mobile app. Workaround: To redisplay your conversation, ask Max to Go back or Help .

Max

Conga Internal ID	Description
MAX-5434	When you ask Max to lookup multiple records on Teams, Max returns out of order results.

DOC ID: MAXSPR21RN20210302

What's New in Max Documentation

This section lists changes in the documentation to support each release.

Spring 2021

Document	Topic	Description
Spring 2021	Max Advanced Features	Updated topic. Added information about NOT Query feature.
	Conga IDD REST APIs	New topic. New REST APIs introduced in this release.
	Conga Max REST APIs	Updated topic. Added new REST APIs introduced in this release.

Winter 2020

Document	Topic	Description
Winter 2020	Notification Control Center	Modified topic. Added information about event notifications.
	Conga Max REST APIs	New topic. New REST APIs introduced in this release.
	Authenticating Max APIs	New topic. Information on authenticating Max REST APIs.
	Creating Agreements	New topic. New feature for this release.

Summer 2020

Document	Topic	Description
Summer 2020	Getting Started	Modified topic. Added information about quick action buttons.
	Follow-Up Actions for an Approval	Modified topic. Added information about the following action buttons: <ul style="list-style-type: none"> • Reassign • View Approval Chain

Document	Topic	Description
	Slack Connectivity	Modified topic. Added information about installing Max from Slack directory.
	Notification Control Center	New topic. New feature for this release.
	Setting Up Notifications	New topic. New feature for this release.
	Configuring Proactive Notifications	Deleted topic. Refer to Notification Control Center

Spring 2020

Document	Topic	Description
Spring 2020	Generating Quotes	New topic. New feature for this release.
	Cloning Existing Quotes	New topic. New feature for this release.
	Look Up 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.
	Setting Up Basic Configurations	Modified topic. Updated the topic to include the Edit Tenant feature.
	Defining Synonyms	New topic. New feature for this release.
	Configuring Proactive Notifications	New topic. New feature for this release.

Winter 2019

Document	Topic	Description
Winter 2019	Defining Synonyms	New topic. New feature for this release.
	Configuring Proactive Notifications	New topic. New feature for this release.
	About Max - Admin Guide	New topic to conform with Conga Documentation standards.
	Max Setup on Salesforce	New topic. New feature for this release.
	Max Admin Console	New topic, New feature for this release.
	Submitting a Quote for Approval	New topic. New feature for this release.
	Look Up Contacts	New topic. New feature for this release.
	Look Up Accounts	New topic. New feature for this release.
	Follow Up Actions for an Opportunity	Modified topic. Updated the topic to add Opportunity Team Members field.
	Submitting an Agreement for Approval	New topic. New feature for this release.
	Max Advanced Features	Modified topic. Updated the topic to add Yes/No Questions.

Summer 2019

Document	Topic	Description
Summer 2019	Opportunity Max Flow	New topic. New feature for this release.

Document	Topic	Description
	Updating Quotes	New topic. New feature for this release.
	Getting Started	Modified topic. Updated the topic to include the Getting Started Video Cards feature.
	Explain Yourself	New topic. New feature for this release.
	Verbose Mode	Removed Topic. See Explain Yourself .

Spring 2019

Document	Topic	Description
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 Proactive Greetings feature.
	Contract Management Max Flow	Modified topic. Updated the screenshots to reflect the UI changes.

Max for Administrators

Select one of the following topics for more information:

- [Getting Started with Max](#)
- [Max Admin Console](#)
- [Max Setup on Salesforce](#)
- [Notification Control Center](#)

Getting Started with Max

Max is a conversational, intelligent virtual assistant for the Middle Office. It is available embedded within Salesforce, as a standalone chat window in supported browsers, as well as on mobile devices through channels Slack, Microsoft Teams, and Skype for Business.

Max Admin Console


Max Admin Console is an interface for Max administrator to launch the Max chatbot. With Max Admin Console, you can customize Max's responses according to your business needs.

Max Connected App

A connected app is required to access Max outside the Salesforce platform. You do not need to create a connected app for accessing Max in an embedded form in your salesforce org.

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

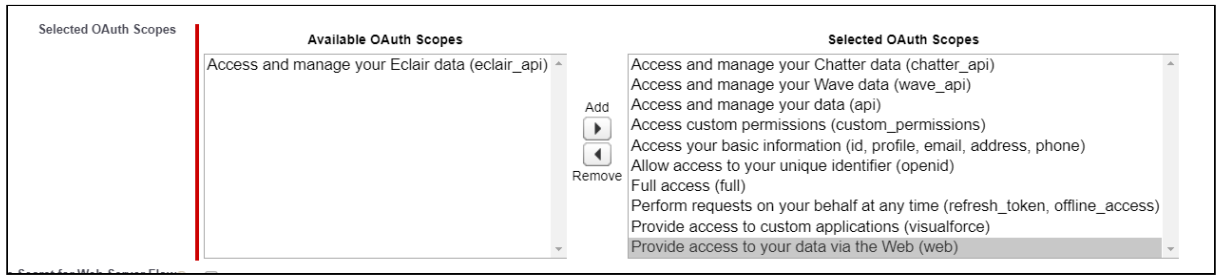
To create a connected App, refer the Salesforce Documentation on [creating a connect app](#).

 Conga recommends that you name the connected app as **Max**.

When you create a connected app, ensure:

- **Enable OAuth Settings** is set as true.

- **Selected OAuth Scopes** is set as:



To access Max outside Salesforce, enter the OAuth Callback URL displayed by Max Admin Console in the **Callback URL** field under API section.

Launching Max

Launching a chatbot is a one-time activity.

To access Max Admin Console, click **More Menu** → **Max Admin Console** in your Salesforce Org.

⚠ If **Max Admin Console** tab is not available in your Salesforce org, get in touch with your Conga Contact.

Configuring Max chatbot is a three-step process as follows:

1. [Setting up basic configurations](#)
2. [Enabling Conversations](#)
3. [Configuring Display Cards](#)

Setting Up Basic Configurations

To onboard Max, perform the following steps:

1. Enter the following company details:

Field	Description
Company Name	Enter the name of your organization. If the company name already exists, Max auto-populates the rest of the configurations done for that company.

Field	Description
Domain URL	Enter your Salesforce Instance URL. You can retrieve your instance URL from Setup → Company Settings → My Domain.

2. Enter the following Connection Details for Max:

Field	Description
Consumer Key	Enter your consumer key. To retrieve your consumer key, go to Setup → App Manager. Under the <i>Connected Apps</i> section, click Max. Get the ConnectedApp Id from the Consumer Key field under the API section.
Consumer Secret	Enter your consumer secret key. To retrieve your consumer key, go to Setup → App Manager. Under the <i>Connected Apps</i> section, click Max. Get the ConnectedApp Secret from the Consumer Secret field under the API section.

3. Click **Save and Next**.

After saving the basic configurations, you must [enable conversational flows](#) for Max chatbot.

Editing Configurations of an Existing Chatbot

Using Max Admin Console, you can edit the configurations of an existing Max chatbot. You can also edit the configuration of draft tenants. Draft tenants are tenants that are partially configured and not submitted.

You can edit the basic configurations, enabled conversations, and settings for card display fields.

 You can only edit tenants that were configured using Max Admin Console.

To edit an existing chatbot

1. Select your tenant from the Tenant dropdown menu. Max auto-populates the configuration details of the tenant.
2. Make your required changes.

3. Click **Save and Next**.

 Ensure that you submit your changes by clicking **Submit** after the preview screen.

Enabling Conversations

To enable conversational workflows for Max chatbot, enter the related conversation codes.

The following CRM conversations are enabled by default:

- Lookup Account
- Lookup Contact
- Lookup Opportunity

To enable conversations apart from the default conversations, refer to the conversational codes provided in your Max Statement Of Work(SOW) contract.

To enable a conversational workflow,

1. Enter the conversation code and press Enter. Your conversational workflow is added to the list of available conversations.
2. Click **Save and Next**.

After enabling the conversational flow, you must [Configure the Display Fields](#) for each conversational workflow.

Configuring Display Cards

For each conversation that you enable, you can configure how the relevant fields are presented on the cards displayed by Max as part of query response. For each field, you can:

- Change the Display Label
- Set the Lookup Field
- Select the Display Card

Max displays the available fields that you can add to Max display cards. Available fields are standard Salesforce fields that are available for the related conversation.

To configure display fields


1. Select your conversation from the conversation dropdown menu.
2. From the Available Fields, select a field to configure it. You can,
 - Change the Display Label
 - Select the Lookup Field


 For custom fields, the lookup field can only be the ID of the parent object.

- Select the display card. You can set it as:
 - **Yes, Primary:** If you select this option, the field is available in the primary card displayed by Max as a response to the lookup query.

 You can only display 10 primary fields at a time.

- **Yes, View more details:** If you select this option, the field is visible when the user clicks the **View More Details** action button.
- **No:** Select this option to remove the field from the display.

 For header fields, you can only change the display labels. You cannot edit the lookup field or change the display card settings.

3. To add additional fields, select the Field API Name from the dropdown menu, set the Display Label, set the Lookup Field, select the Display Card and click .
4. **Select another conversational flow from the conversation dropdown menu. Click Save.**
5. **Repeat this procedure for all the conversations.**
6. **Click Save and Next.**


You can now define synonyms to customize your conversations with Max. For more information, refer to [Defining Synonyms](#).

Defining Synonyms

You can personalize the conversational workflows in Max by defining synonyms for Salesforce fields. This feature helps you in personalizing your Max experience according to your organizational needs. You can define multiple synonyms for a single field. After you have configured the synonyms, you can address the field using your defined synonym and Max understands the fields you are referring to.

To Define a Synonym

1. Select a conversational flow from the *conversation* dropdown menu. Max displays the standard fields of the selected conversational flow. Max also displays the out of the box provided synonyms.
2. Enter the synonym next to your field and press **Enter**.

 For fields with data type as picklist, you can also provide synonyms for the picklist values.

To define synonym for the picklist values, click  next to your field.

3. Click **Save and Next**.

Max displays a summarized view of all the configured data. The preview screen displays the basic configurations and the configuration of conversational flow.

Click **Submit**. Your Max bot is now created.

Embedded Max Configurations

After the successful creation of Max chatbot, the Admin Console displays the data required to embed Max in your Salesforce Instance.

Copy and save the value of the **Custom Label**, **Named Credentials** and **OAuth Callback URL**. You will need these values while embedding Max in Salesforce UI.

Download the Tenant Config file.

Max Setup on Salesforce

You can setup and embed Max in Salesforce Classic, Lightning and the Salesforce Mobile app.

Installing Max in Salesforce

1. Download the zip file named "Max Implementation Package.zip" from the link you received from your Conga contact and save it to your local machine.
2. Login to your Salesforce Org. Go to Setup → Custom Labels.
3. Click the **New Custom Label** button. Create the following custom labels:

Short Description	Value	Name
Store platform name	SFDC	APTS_Domain
Header key to be send in HTTP request	Content-Type	APTS_HTTP_Header_Key
Header value to be send in HTTP request	application/json	APTS_HTTP_Header_Value
Method which is used to send HTTP request	POST	APTS_HTTP_Method
Named Credentials details	callout:APTS_MAX_Connection	APTS_MAX_End_Point
Maximum time limit for HTTP request	120000	APTS_Max_Time
Quantity discount based Rule type	Quantity Discount Based	APTS_QuantityDiscountBased
Supported Currencies	Supported Currencies	APTS_Supported_Currencies

4. Create one more custom label as follows using the value provided by the Max Admin Console:

Short Description	Value	Name
MAX Bot chat URL	<Value displayed by Max Admin Console>	APTS_Max

5. Navigate to Setup → Named Credentials.
6. Click **New Named Credential** button to create a name named credentials as follows:

Label	Name	URL
APTS_MAX_Connection	APTS_MAX_Connection	<Value provided by Max Admin Console>

7. Open your Salesforce Developer Console. Perform the following steps to create the apex classes, visualforce pages, and components required for Max.
- Go to File → New → **Apex Class** and name it as '**APTS_UserDetails**'.

- b. From your downloaded files, open the 'APTS_UserDetails.cls' class file in notepad. Copy and paste the class file content in the New Apex Class window and click **Save**.
- c. Go to File → New → **Apex Class** and name it as 'APTS_getUserDetails'.
- d. From your downloaded files, open the 'APTS_getUserDetails.cls' class file in notepad. Copy and paste the class file content in the New Apex Class window and click **Save**.
- e. Go to File → New → **Apex Class** and name it as 'APTSMD_API_CommonUtils.cls'.
- f. From your downloaded files, open the 'APTSMD_API_CommonUtils.cls' class file in notepad. Copy and paste the class file content in the New Apex Class window and click **Save**.
- g. Go to File → New → **Apex Class** and name it as 'APTSMD_getProperties.cls'.
- h. From your downloaded files, open the 'APTSMD_getProperties.cls' class file in notepad. Copy and paste the class file content in the New Apex Class window and click **Save**.
- i. The following classes are required to leverage specific Max features. Follow steps **a** and **b** for all the required classes.

Class Name	Feature
APTSMD_PresentProposal.cls	Send Proposal
APTSMD_PresentProposalTest.cls	
APTSMD_API_CLM_GenerateDocumentAgreement.cls	Create NDA
APTSMD_ComplyCustomAPI.cls	
APTSMD_SendAgmtForDocuSign.cls	
APTSMD_SendToDocuSignHandler.cls	
APTSMD_SendAgmtForEchoSign.cls	
APTSMD_SendToEchoSignHandler.cls	
APTSMD_SendForReview.cls	

- j. Go to File → New → **Visualforce Page** and name it as 'APTS_Max_LT'.


- k. From your downloaded files, open the '**APTS_Max_LT.page**' file in notepad. Copy and paste the file content in the New Visualforce page window and click **Save**.
 - l. Go to File → New → **Visualforce Page** and name it as '**APTS_Max**'.
 - m. From your downloaded files, open the '**APTS_Max.page**' file in notepad. Copy and paste the file content in the New Visualforce page window and click **Save**.
 - n. Click File → New → **Lightning Component** and name it as '**APTS_Max**'.
 - o. Click the **Component** button available on the right-hand side.
 - p. From your downloaded files, open the '**APTS_Max.cmp**' file in notepad. Copy and paste the file content in the New Component window and click **Save**.
8. Switch to Salesforce Lightning.
 9. Go to Setup → App Manager.
 10. Click **Edit** next to **Sales** app.
 11. Go to Utility Items, click **Add Utility Item** and *Select APTS_Max* from custom tab.
 12. Select an Icon and enter Name, Height, and Width. Click **Save**.
 13. Go to Home page and open Sales app.

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

Salesforce Mobile App Setup

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

Setup>Administer>Mobile Administration>Salesforce Navigation

 The position of the Max among the other apps can be adjusted, so Max is 2nd on the list for example, with the up/down buttons.

Mobile Navigation [Help for this Page](#)

Add Salesforce productivity items, smart search items, Visualforce tabs, or Lightning Page tabs to the mobile app navigation menu.

When organizing the menu items, put the items that users will want most at the top. The first item in the Selected list becomes the landing page for mobile users. The Smart Search Items element can expand into a set of eight or more menu items in the mobile app, and it may push other elements below the scroll point if you put it near the top of the menu. Anything you put below the Smart Search Items element will appear in the Apps section of the navigation menu.

The Today menu item is only available for Salesforce for Android and iOS.

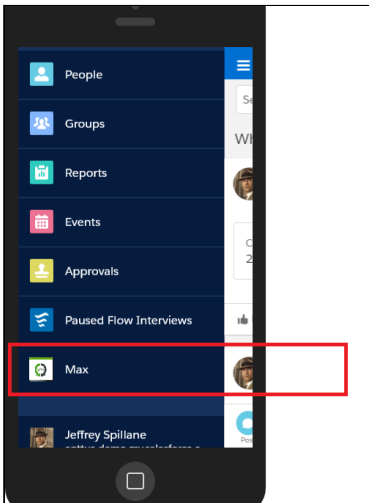
Navigation Menu Items Save Cancel

Available		Selected	
Partner Home Apttus CPQ eSign Manager Scorecard Setup Console	Add ▶ Remove ◀	Max Einstein Insights Chatter Today Dashboards Tasks Notes News Smart Search Items People	Up ▲ Down ▼

Use SHIFT + click or click and drag to select a range of adjacent items. Use CTRL + click to select multiple items that are not adjacent.

Save Cancel

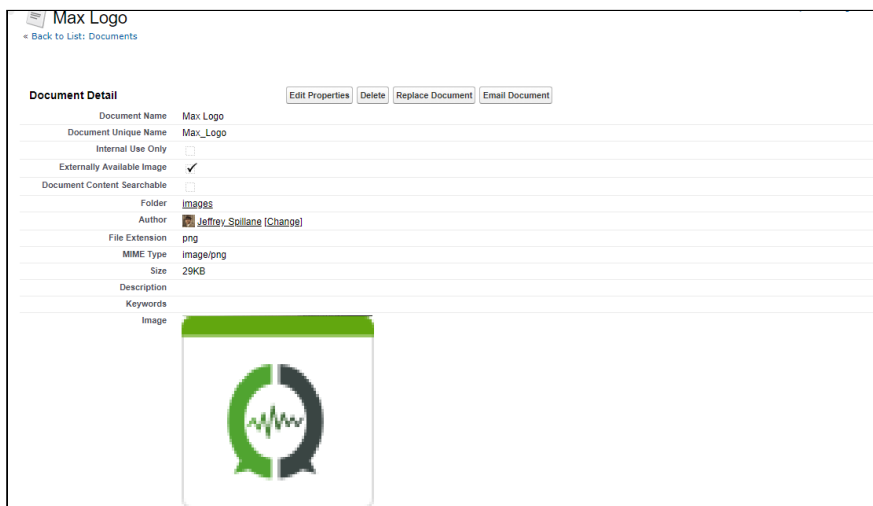
Max in Mobile app:



To display Max Logo under Mobile App:

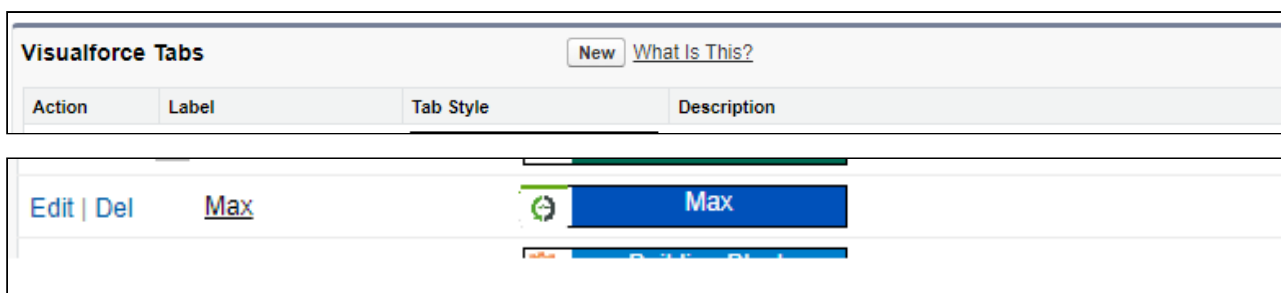
Navigate to All Tabs -> Documents -> Upload the below image:





Navigate to Setup>Build>Create>Tabs>Visualforce Tab

Click on Edit Max Tab and select the Tab Style>Create your own Style>Select the above image.



Notification Control Center

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

Notifications are available across the following communication channels:

- Slack
- Microsoft Teams
- Webchat
- Directline

Notifications are triggered simultaneously on all active channels. Users can act on the notification, dismiss it or snooze it.

Max supports the following types of notifications:

- **Reminders**

Reminder notifications are triggered on a scheduled basis and apply to actions that are pending, where you made to remind the relevant stakeholder to take the next action. For example, reaching out to an assigned approver or a contract reviewer about pending items that you have submitted to them.

- **Upcoming Events**

Upcoming event notifications are triggered on a scheduled basis and suggest actions that the relevant stakeholder can take preemptively to stay on top of their customer interactions. For example, create a new agreement when the existing agreement is terminating soon, or cloning a quote which is set to expire in the upcoming days.

- **Event Notifications**

Event notifications are triggered when there is a change in the object status. Note that event notifications are provided only for Agreement object. Event notifications notify the stakeholders when changes are made to the agreement status. Event notifications are provided out-of-the-box for agreement updates and you need to activate them. After you have activated event notifications, the user will receive a pop-up notification whenever an agreement is completed or canceled.

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


Creating and Activating a Notification Flow

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

To Create Notification Flow

Navigate to Max Notification Control Center:

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

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

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

Field	Description
Name	Enter the name of the notification trigger.
Field Name	Select the API name of the field to create the notification trigger.
Notification Type	<p>Select one of the following:</p> <ul style="list-style-type: none"> • Reminder • Upcoming Event <p>If you set Notification Types as an Upcoming Event, you need to select the follow-up action to perform after the notification triggers.</p> <p>Follow-up actions can be <i>create NDA</i>, <i>create Quote</i>, or <i>send for eSignature</i>.</p> <p><i>Event Notifications</i></p>
Query	<p>Enter the query for the notification trigger in natural language. For example:</p> <ul style="list-style-type: none"> • Show me all quotes expiring in next 15 days • Remind to send my agreements for signature
Recurrence	Select the frequency of the notification flow. You can set it as Once, Daily, or Weekly.
Date	Select the date from which you want to start the notification flow.
Time	Select the time on which you want to receive the notification.

5. Click **Save**.

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

To Activate the Notification Flow

1. Click Activate to enable the notification flow.
2. Enable the notification flow for your desired communication channels.


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

Setting Up Notifications

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


Prerequisites:

Download the zip file named “Max Implementation Package.zip” from the link you received from your Conga contact and save it to your local machine.

 Ensure that embedded Max is setup in your Salesforce Org. For information on setting up embedded Max, refer to [Max Setup on Salesforce](#).

Updating Named Credential

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

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

Adding Max Token Label

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

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

4. Click **Save**.

Enabling Notifications

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

Field	Values
Custom Notification Name	MaxNotification
API Name	MaxNotification

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

Adding Custom Notification Flow

1. Go to **Setup → Flows**.
2. Click **New Flow**.
3. Select *Autolaunched* Flow and click **Create**.
4. Click and drag Action in the main window.
5. Select *Notifications*.
6. Click on the search bar and Click **Send Custom Notification**. Edit SendCustom Notification screen appears.
7. Click edit next to *Custom Notification Type ID*.
8. Click **New Resource** and create a new resource as follows:
 - a. Select **Variable** as Resource Type.
 - b. Set API name as *NotifTypeId*.

- c. Select **Text** as Data Type.
 - d. Select Available for Input.
 - e. Click **Done**.
9. Repeat step 8 for the following:
 - a. Notification Body. Set API name as **NotifBody**
 - b. Notification Title. Set API name as **NotifTitle**
 - c. Recipient IDs. Set API name as **NotifRecipients**. Note that this variable needs to be a collection, so ensure to check the *Allow multiple values* checkbox.
 - d. Target ID. Set API name as **NotifTarget**
 10. Connect the Start node to the Action node
 11. Click **Save** and provide a name for the flow.
 12. After saving, click the **Activate** button

Creating Apex Classes

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

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

Creating Apex Triggers

You need to create two Apex triggers as follows:

Agreement (Apttus__APTS_Agreement__c)

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

Review Cycle (Apttus_ReviewCycle_c)

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

Scheduling Flows

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

Notification Flow	fieldToSave	notificationType	query
PendingApprovals	Apttus_Approval_Initial_Submitter__c	pendingApprovals	show all the agreement approval requests that were created before yesterday and are assigned
ReviewCycleInProgress	CreatedById	reviewCycleStatus	pull up review cycles in the last 30 days that are in progress

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

Creating Custom Object: CongaEvent

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

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

3. Create the following fields:

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

4. Create a button as follows:

Details																									
Fields & Relationships	Conga Event Custom Button or Link Launch Max Back to Custom Object: Conga Event																								
Page Layouts																									
Lightning Record Pages																									
Buttons, Links, and Actions	<p>Custom Button or Link Detail Edit Window Open Properties Delete Where is this used?</p> <table border="1"> <tr> <td>Label</td> <td>Launch Max</td> <td>Object Name</td> <td>Conga_Event</td> </tr> <tr> <td>Name</td> <td>Launch_Max</td> <td>Link Encoding</td> <td>Unicode (UTF-8)</td> </tr> <tr> <td>Behavior</td> <td>Display in existing window with sidebar</td> <td>Display Type</td> <td>Detail Page Button</td> </tr> <tr> <td>Button or Link URL</td> <td colspan="3">https://max1.lightning.force.com/lightning/r/APTSMO_Max</td> </tr> <tr> <td>Height (in pixels)</td> <td colspan="3">600</td> </tr> <tr> <td>Description</td> <td colspan="3"></td> </tr> </table> <p>Created By: Glad Turbaho 7/27/2020 1:15 PM Modified By: Glad Turbaho 7/27/2020 1:17 PM</p> <p>Edit Window Open Properties Delete Where is this used?</p>	Label	Launch Max	Object Name	Conga_Event	Name	Launch_Max	Link Encoding	Unicode (UTF-8)	Behavior	Display in existing window with sidebar	Display Type	Detail Page Button	Button or Link URL	https://max1.lightning.force.com/lightning/r/APTSMO_Max			Height (in pixels)	600			Description			
Label	Launch Max	Object Name	Conga_Event																						
Name	Launch_Max	Link Encoding	Unicode (UTF-8)																						
Behavior	Display in existing window with sidebar	Display Type	Detail Page Button																						
Button or Link URL	https://max1.lightning.force.com/lightning/r/APTSMO_Max																								
Height (in pixels)	600																								
Description																									
Compact Layouts																									
Field Sets																									
Object Limits																									

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

Notifications setup is complete. To enable notifications, refer to [Notification Control Center](#).

Max for Users

Select one of the following topics for more information:

- [Getting Started](#)
- [Look Up Accounts](#)
- [Look Up Contacts](#)
- [Look Up Approvals](#)
- [Opportunity Max Flow](#)
- [CPQ Max Flow](#)
- [Contract Management Max Flow](#)
- [Slack Connectivity](#)
- [Max Advanced Features](#)

Getting Started

Max is a conversational, intelligent virtual assistant for the middle office. It is available embedded within the Salesforce web, Salesforce1 mobile app, and 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 Max's greeting and login procedure:

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 log in. <i>Hi! I'm happy to help you!</i> <i>Please log on to Salesforce.</i>
Login	You click the link and sign in		Your login to Salesforce was successful. Should I save this information for future auto-login?

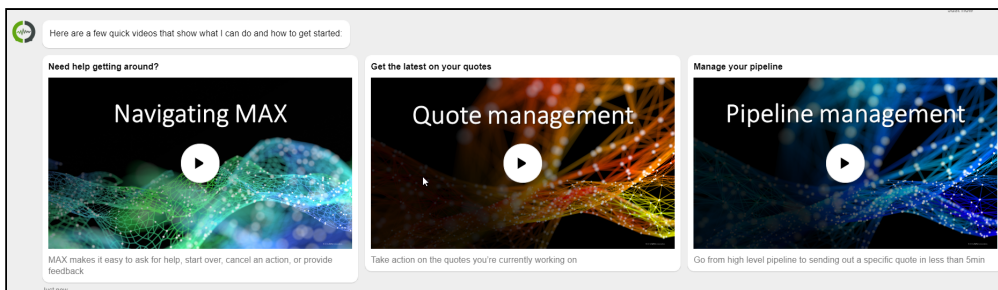
Workflow Step	Description	Conversational Input	Response from Max
	You choose the auto-login preference		Max asks if you want to save your credentials for auto-login.
Getting Started Video Cards	Max provides a rotating set of short instructional videos.	Help Show me the videos Home	Max plays a video card.

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:

- Navigating Max: 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

Look Up Accounts

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

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

Looking Up Accounts with Max

When you ask Max to look up an account, Max:

1. Selects candidate accounts. If there are no candidate accounts or the lookup query is too generic, Max returns the top 20 accounts, sorted by the last modified date.
2. For each account Max selects, it fetches:
 - Account Name
 - Type
 - Account Owner
 - Industry
 - Billing Address
 - Created By
 - Last Modified On
3. Displays a summary of the retrieved accounts.

Conversational Flow: Look Up 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	<ul style="list-style-type: none"> Show me the last account 	Shows the last modified account	You can also use the following terms for "last": <ul style="list-style-type: none"> latest most recent past recent
	<ul style="list-style-type: none"> 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 terms for "first": <ul style="list-style-type: none"> top oldest earliest
Multiple accounts	<ul style="list-style-type: none"> Show me the last 3 accounts Show me the 3 most recent accounts 	Shows the three most recently modified accounts.	
Accounts you created	Show me the last 3 accounts that I created	Shows the three accounts most recently created by the current user.	You can also use the term "authored" instead of "created".
	<ul style="list-style-type: none"> 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 the three accounts most recently updated by the current user.	You can also use the following terms for "updated": <ul style="list-style-type: none"> modified changed worked on

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
Look up account within a specific time duration	<ul style="list-style-type: none"> • 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 the three most recent accounts created by "John Snow" in the past two months.	<p>You can also use the following phrases for looking up accounts during a specific period:</p> <ul style="list-style-type: none"> • 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)
	<ul style="list-style-type: none"> • 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 the three accounts the user most recently updated in the past week.	
Look up account based on account data	Show me my last 3 accounts in the healthcare industry	Shows the three accounts the user most recently updated that have "Healthcare" included in their Industry field.	

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
Look up account sorted by specific criteria	Show me my last 3 accounts in the healthcare industry sorted by created date in descending order	Shows the three accounts the user most recently updated that have "Healthcare" included in their Industry field, sorted in descending order by date of creation (most recent account first).	
	Show me my last 3 accounts in the healthcare industry sorted by created date in ascending order	Shows the three accounts the user most recently updated that have "Healthcare" included in their Industry field, sorted in ascending order by date of creation (oldest account start date first).	
Look up accounts with no specific criteria	Look up accounts	Max returns the 20 most recently modified accounts.	

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
Look up an invalid account	Show me Jamba account	Max returns the error, "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 look up an account field, Max:

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

Conversational Flow: Look Up Account Fields

The following table shows 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 accounts the user created.

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	<ul style="list-style-type: none"> • Show me more details • Click the View more details button. 	Max displays additional fields for all accounts.
Show related quotes	View quotes related to your accounts	<ul style="list-style-type: none"> • Click Show related quotes. • Enter one of: <ul style="list-style-type: none"> • 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 quotes related to your accounts.

Workflow Type	Description	Conversational Input	Max Response
Show related opportunities	View opportunities related to your accounts	<ul style="list-style-type: none"> • Click Show related opportunities action button. • Enter one of: <ul style="list-style-type: none"> • 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	Send the account report to your email address	<ul style="list-style-type: none"> • 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.

Workflow Type	Description	Conversational Input	Max Response
Search for fields	Search for a specific field	<ul style="list-style-type: none"> • What is the billing address and shipping address? • Show me billing address and shipping address • You click Search for fields. Max: Which field(s) would you like to see? You: Billing Address, Annual Revenue 	Max displays the field details you specified.

You can also ask Max to create an NDA as a follow-up 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](#).

Look Up Contacts

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

The Lookup workflow is triggered by entering lookup queries for contacts.

Looking Up Contacts with Max

When you ask Max to look up a contact:

1. Max selects the candidate contacts, If there are no candidate contacts or the lookup query is too generic, Max returns the top 20 contacts, sorted by Last Modified Date.
2. For each candidate contact it selects, Max fetches:
 - Contact Name
 - Account Name
 - Title

- Contact Owner
- Phone Number
- Email
- Mailing Address
- Created By
- Last Modified On

3. Max displays a summary of the retrieved contacts.

Conversational Flow: Look Up Contacts

The user and Max may enjoy the following conversational flow for looking up contacts.

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
Single contact	<ul style="list-style-type: none"> • Show me the last contact 	Shows the last modified contact	You can use the following terms instead of "Last": <ul style="list-style-type: none"> • latest • most recent • past • recent
	<ul style="list-style-type: none"> • Show me Joe's contact Info 	Shows the oldest (modified) contact with the name matching the substring "Joe"	
Multiple contacts	<ul style="list-style-type: none"> • Show me the last 3 contacts • Show me the 3 most recent contacts 	Shows the three most recently modified contacts.	
Contacts created by you	Show me the last 3 contacts that I created	Shows the three contacts most recently created by the user.	You can use the term "Authored" instead of "Updated".

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
	<ul style="list-style-type: none"> • 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 the three contacts most recently updated by the user.	<p>You can also use these terms instead of "Updated"</p> <ul style="list-style-type: none"> • modified • changed • worked on
Look up contact within a specific time duration	<ul style="list-style-type: none"> • 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 the three contacts most recently created by John Snow in the specified period.	<p>You can also use the following phrases to specify a search period:</p> <ul style="list-style-type: none"> • 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)
	<ul style="list-style-type: none"> • 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 the three contacts the user most recently updated in the past week.	

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
Lookup contact based on contact data	Show me the contacts of the Acme account	Shows the three most recent contacts updated by the user that have "Acme" in their Account field.	
Look up contact sorted by specific criteria	Show me my last 3 contacts of the Acme account sorted by created date in descending order	Shows the three most recent contacts updated by the user that have "Acme" in their Account field. Max displays the resultant contacts, sorted in descending order, most recent contact first.	
	Show me my last 3 contacts of the Acme account sorted by created date in ascending order	Shows the three most recent contacts updated by the user that have "Acme" in their Account field. Max displays the resultant contacts, sorted in ascending order, the oldest start date first.	
Look up contacts with no specific criteria	Look up contacts	Max returns the 20 most recently modified contacts.	

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
Look up an invalid contact	Show me Jamba contact	Max returns the error: "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 look up a contact field:

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

Conversational Flow: Look Up 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 for contacts that partially match the user's search criteria.

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	<ul style="list-style-type: none"> Show me more details Click the View more details button. 	Max displays additional fields for all contacts.
Show related quotes	View the quotes related to your contacts	<ul style="list-style-type: none"> Click the Show related quotes button. Enter one of the following: <ul style="list-style-type: none"> 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 quotes related to your contacts.

Workflow Type	Description of the Workflow	Conversational Input	Max Response
Show related opportunities	View the opportunities related to your contacts	<ul style="list-style-type: none"> • Click the Show related opportunities button. • Enter one of the following: <ul style="list-style-type: none"> • 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 opportunities related to your contacts.
Show related accounts	View the accounts related to your contacts	<ul style="list-style-type: none"> • Click the Show related accounts button. • Enter one of the following: <ul style="list-style-type: none"> • Show me the accounts for this contact • Show me the accounts on the third contact 	Max displays the accounts related to your contacts.
Send it to me	Send the contact report to your email address	<ul style="list-style-type: none"> • 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	Search for a specific field	<ul style="list-style-type: none"> • What is the email and phone number? • Show me billing address and shipping address • You click the Search for fields button. <p>MAX: Which field(s) would you like to see? You: Phone number</p>	Max displays specific field details.

Look Up Approvals

You can ask Max to look up approval records using conversational flows. Max supports approvals for quotes and agreements. For information on submitting for 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 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 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 button to view the most recent approval records.

Conversational Flow: Look Up Approvals

This table describes possible conversational flows between you and Max for looking up quote 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	<ul style="list-style-type: none"> Show me the last 3 Approvals Show me the 3 most recent quote approvals 	Shows the three most recently modified approvals
Approvals submitted by you	Show me approvals I submitted	Shows approvals recently submitted by the user.
Look up approvals based on approval data	Show me the approvals I created that are on hold	Shows approvals submitted by the user with "On Hold" status.
	Show approvals where the approver is John Smith	Shows approvals assigned to John Smith
Look up approval status	What is the status on the last approval I submitted	Shows the value of the Approval Request Status
	Show me my open approvals	Max displays approvals with a "Notified", "Submitted", "Assigned", "Reassigned", "Approval Required", or "Pending Approval" status.
	Show me my closed approvals	Max displays approvals with a "Cancelled", "Approved", or "Rejected" status
Look up approvals with no specific criteria	Look up approvals	Max returns the 20 most recently modified approvals related to you.

Type of Lookup	Conversational Input from User	Response from Max Result
Complex queries	Show me approvals that I submitted recently for ABC that are on hold	Max displays approvals where you are either the initial submitter or are the assignee, the related account or quote matches the substring "ABC", 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.

You can also approve or reject approvals submitted to you as a follow-up action to an approval lookup. 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	<ul style="list-style-type: none"> Show me more details Click View more details. 	Max displays additional fields for all approvals.
Add comments	Add comment to a specific approval	Add comments	<p>After you select an approval, Max asks for your comment.</p> <p>Max: What would you like the comment to say?</p> <p>You: Need approval in five days</p> <p>Max: Comment saved successfully.</p>

Workflow Type	Description of the Workflow	Conversational Input	Max Response
Send it to me	Send the approval details to your email address	<ul style="list-style-type: none"> • 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. 	After confirming your email address, Max emails the approval details there.
Approve	This button is only visible if approvals are assigned to you.	Click Approve.	<p>Max updates the Approval Required status to "Approved".</p> <p>You can also add comments to your approval:</p> <p>You: Click Update Comments.</p> <p>Max: What would you like the comment to say?</p> <p>You: Approved</p> <p>Max: Comment saved successfully.</p> <p>Max saves the approval with your comments and changes the Approval Required status to "Approved".</p>

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 .	<p>Max updates the Approval Required status to "Rejected".</p> <p>You can also add comments to your approval:</p> <p>You: Click Update Comments.</p> <p>Max: What would you like the comment to say?</p> <p>You: Rejected due to inconsistent data.</p> <p>Max: Comment saved successfully.</p> <p>Max saves the approval with your comments and changes the Approval Required status to "Rejected".</p>
Reassign		Click Reassign .	<p>Max displays the child line 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.</p>

Workflow Type	Description of the Workflow	Conversational Input	Max Response
View approval chain		Click View Approval Chain	<p>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.</p> <p>The display card color-codes approvals as follows:</p> <ul style="list-style-type: none"> • Red: Rejected • Green: Approved • White: On Hold • Blue: Assigned

Opportunity Max Flow

Max supports the following conversational flows for an Opportunity:

- [Look Up Opportunity and Fields](#)
- [Follow Up Actions for an Opportunity](#)
- [Updating Opportunities](#)

Look Up Opportunity and Fields

You can look up Opportunities or Opportunity fields using conversational flows in Max.

The Look Up workflow is triggered when you enter lookup queries for opportunities or fields.

Looking Up an Opportunity with Max

When you ask Max to look up an opportunity:

1. Max 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. For all selected candidate opportunities, Max fetches these fields:
 - Opportunity Name
 - Account Name
 - Owner
 - Stage Name
 - Amount
 - Close Date
 - Created By
 - Last Modified On
3. Max displays the standard fields as a summary of the retrieved opportunities.

Conversational Flow: Look Up 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	<ul style="list-style-type: none"> • 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' : <ul style="list-style-type: none"> • latest • most recent • past • recent
	<ul style="list-style-type: none"> • 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' : <ul style="list-style-type: none"> • top • oldest • earliest

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
	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' : <ul style="list-style-type: none"> • 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' : <ul style="list-style-type: none"> • about to • shortly
	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' : <ul style="list-style-type: none"> • haven't worked • haven't been touched • neglected
Multiple opportunities	<ul style="list-style-type: none"> • 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'.

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
	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' : <ul style="list-style-type: none"> • modified • changed • worked on
	<ul style="list-style-type: none"> • 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' : <ul style="list-style-type: none"> • engaged • touched

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
Lookup opportunity within a specific time duration	<ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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' : <ul style="list-style-type: none"> • 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' : <ul style="list-style-type: none"> • 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' : <ul style="list-style-type: none"> • won • closed and won
Lookup an opportunity with no specific criteria	<ul style="list-style-type: none"> • lookup opportunities • pull up deals 	Max returns the 20 most recently modified opportunities.	You can also use the following replacements for, 'Opportunities' : <ul style="list-style-type: none"> • 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.

i 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	<ul style="list-style-type: none"> • 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.	<p>You can also ask Max to retrieve the following fields:</p> <ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Click Show related Quotes action button. • Type one of the following: <ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • Click Show Opportunity Products action button. • Type one of the following: <ul style="list-style-type: none"> • show me products • show me the products for the second opp • show me the products on the first one 	<p>I can do that! Which opportunity would you like to view the products for?</p> <ol style="list-style-type: none"> 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	<ul style="list-style-type: none"> • 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.	<p>MAX: Which field(s) would you like to see?</p> <p>You: ACV, template, account, start date and end date</p> <p>Max displays specific field details.</p>


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	<ul style="list-style-type: none">• 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.

Workflow Step	Possible Conversational Inputs	Response from Max
Identify the opportunity	<ul style="list-style-type: none"> • update this opportunity • push out the close date on my opportunities • change the stage of my "ABC" opportunity to Validated 	<p>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:</p> <ol style="list-style-type: none"> 1. Close Date 2. Stage 3. Opportunity Name 4. Owner 5. Description 6. Amount <div data-bbox="911 815 1426 1256" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> 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.</p> </div> <p>Note: You can also update the fields that are not listed by Max.</p>
Identify fields	<ul style="list-style-type: none"> • 2 • Close Date • Owner 	<p>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:</p> <p><i>The current value in the Close Date field is Sat Jun 01 2019.</i></p> <p><i>What would you like the new Close Date to be?</i></p> <p>If you ask Max to update multiple opportunities, Max only asks for the new field value.</p>

Workflow Step	Possible Conversational Inputs	Response from Max
Identify field and get value	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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': <ul style="list-style-type: none"> • latest • most recent • past • recent

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
	<ul style="list-style-type: none"> • 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 .	<p>You can also use the following replacements for, 'First':</p> <ul style="list-style-type: none"> • top • oldest • earliest
Multiple quotes	<ul style="list-style-type: none"> • 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 Conga CPQ system.	You can also use the term 'Authored' in replacement of the term 'Created'.
	<ul style="list-style-type: none"> • 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 Conga CPQ system.	<p>You can also use the following replacements for, 'Updated':</p> <ul style="list-style-type: none"> • modified • changed • worked on

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
	<ul style="list-style-type: none"> • 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 	<p>Shows at the most 3 quotes associated with the account Acme most recently updated by the user logged into the Conga CPQ system.</p>	<p>You can also use the following replacements for, 'Worked on':</p> <ul style="list-style-type: none"> • engaged • touched <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>i Worked on can also refer to objects that the account team or opportunity team has worked on.</p> </div>

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
Lookup quote within a specific time duration	<ul style="list-style-type: none"> • 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.	<p>You can also use the following phrases for looking up quotes within a specific time duration:</p> <ul style="list-style-type: none"> • 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)
	<ul style="list-style-type: none"> • 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 Conga CPQ in the past week.	

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
<p>Lookup quote based on quote data</p>	<p>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</p>	<p>Shows at the most 3 recent quotes of the account Acme Inc updated by the user logged into Conga 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.</p>	
<p>Lookup quote sorted by specific criteria</p>	<p>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</p>	<p>Shows at the most 3 recent quotes on account Acme Inc updated by the user logged into Conga 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.</p>	

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
	<p>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</p>	<p>Shows at the most 3 recent quotes on account Acme Inc updated by the user logged into Conga 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.</p>	
<p>Lookup quotes based on quote status</p>	<p>show me the last 3 quotes that I created that are in draft stage</p>	<p>Shows the 3 most recently created quotes by the user logged into Conga CPQ, that are in draft stage</p>	<p>You can also use the following replacements for, 'In Draft Stage':</p> <ul style="list-style-type: none"> • still being drafted • drafted right now • currently drafted
	<p>show me the last 3 quotes that I created that are in accepted stage</p>	<p>Shows the 3 most recently created quotes by the user logged into Conga CPQ, that are in accepted stage</p>	<p>You can also use the following replacements for, 'In Accepted Stage':</p> <ul style="list-style-type: none"> • are/were accepted • approved by the customer • confirmed

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
	show me the last 3 quotes that I created that are declined	Shows the 3 most recently created quotes by the user logged into Conga CPQ, that are in declined stage	You can also use the following replacements for, ' In Declined Stage ': <ul style="list-style-type: none"> • have been declined • were not accepted • got rejected
	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 Conga CPQ, that do not have status as accepted or declined	You can also use the following replacements for, ' Not Yet Accepted ': <ul style="list-style-type: none"> • prior to the acceptance stage • are in a presented or earlier stage
Lookup a quote with no specific criteria	<ul style="list-style-type: none"> • 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	

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
Lookup a 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:

Okay, I found 2 relevant quotes :

 **#1 [Carmen Sandiego found](#)**

 **[abc](#)**
Account

 **[Jane Smith](#)**
Primary Contact

Proposal ID
[Q-01105461](#)

Opportunity Name
[CarmenSandiegoOpp](#)

Approval Stage
Approval Required

Net Price
\$ 75288

Payment Term
Net 30 Days

Created Date
Thu Mar 07 2019

Created By
Manda Sutjono

Owner
Manda Sutjono

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	<ul style="list-style-type: none"> • 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 Conga CPQ	<p>You can also ask Max to retrieve the following fields:</p> <ul style="list-style-type: none"> • 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)

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
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.	
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 end 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	<ul style="list-style-type: none"> • show me line items over 50k • show me line item QL-000046597 • can i see the MaxS360 line items • pull up line items for the first one <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>i Looking up quote line items is a followup action for lookup quote.</p> </div>	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	<ul style="list-style-type: none"> • Show me more details • Click on 'Quick Action' 	Max asks you to select the quote.
	Drill down using conversational input	<ul style="list-style-type: none"> • 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.

Workflow Type	Description of the Workflow	Conversational Input	Max Response
Show related accounts	You want to view the accounts related to your quote	<ul style="list-style-type: none"> • Click Show related Accounts action button. • Type one of the following: <ul style="list-style-type: none"> • 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.
Send proposal	You want to send a quote as an official proposal to a customer	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • what is the ACV, account, start date and end date? • show me the ACV, account, start date 	Max displays specific field details.

Workflow Type	Description of the Workflow	Conversational Input	Max Response
		You click 'Search for fields' quick action button.	MAX: Which field(s) would you like to see? You: 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	<ul style="list-style-type: none"> • 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:

Ok, do I have the right contact info for you? [Type -- @bochenek@agilus.com]

Send it

Change Details

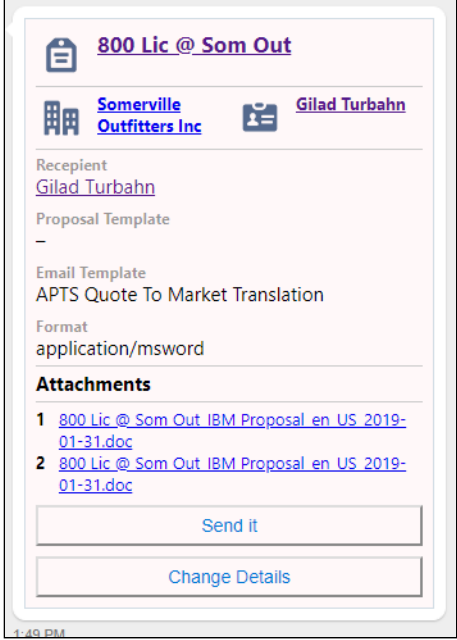
You can change the recipient details by clicking, **"Change Details"**.

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:

Workflow Step	Possible Conversational Inputs	Max Reply
Send Confirmation	<ul style="list-style-type: none"> • Send it! • Change details 	<p>Max takes the relevant information from the conversation in order to format it and send it as an email.</p>  <p>If there is no attachment, Max replies: <i>Sorry! That quote does not have any attachments to send.</i></p>

Workflow Step	Possible Conversational Inputs	Max Reply
You confirm	MAX shows you the intended recipient and their email address. User clicks <i>Send It</i> , to proceed	All set! I've sent your proposal to Smith 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.
	You ask MAX to send it to a different recipient than the one suggested by MAX. <ul style="list-style-type: none"> • no change the recipient to abc@conga.com • no send it to ABC abc@conga.com 	All set! I've sent your proposal to ABC at Conga 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: <ul style="list-style-type: none"> • yes • looks great • looks good • lets go • lets do it • ok • sure • go for it • cool • proceed • go ahead 	All set! I've sent your proposal to ABC at Conga and I've cc'd you on the email. Let me know if there is anything else I can help with.

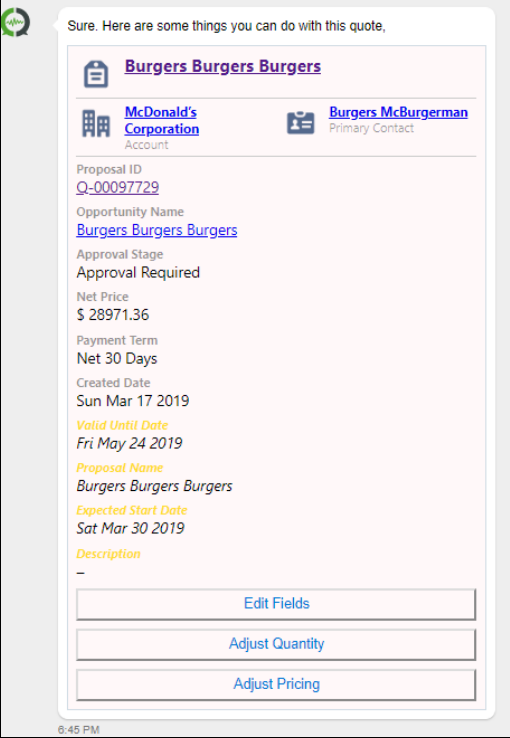
Workflow Step	Possible Conversational Inputs	Max Reply
	<p>You say "go back".</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>ⓘ This step applies only if there is a valid context to go back to. If you looked up quotes and invoked review and decided to go back, this option will take you to the last major step.</p> </div>	<p>Max displays the Quote details.</p>
<p>You want to change details</p>	<p>You clicked Change Details.</p>	<p>What would you like to change?</p> <ol style="list-style-type: none"> 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:

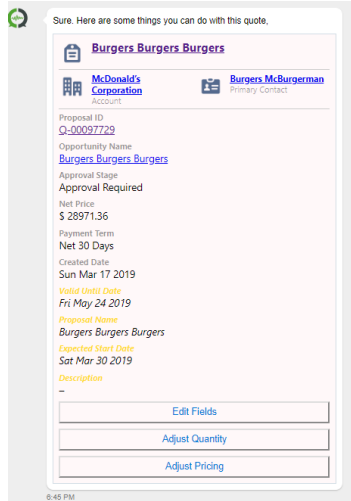
- [Quote Header Fields](#)
- [Quantity](#)
- [Discount Percentage](#)

Quote Header Fields

Workflow Step	Possible Conversational Inputs	Response from Max
Identify the quote	<ul style="list-style-type: none"> • update this quote • adjust pricing • edit the fields on this quote • i want to update the start date 	
Editing the quote	Click Edit Fields	<p>Ok, Which field would you like to update?</p> <ol style="list-style-type: none"> 1. Start Date 2. Name 3. Valid Until Date 4. Description
Identify fields	<ul style="list-style-type: none"> • 2 • Start Date 	<p>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:</p> <p><i>The current value in the Start Date field is Sat Jun 01 2019.</i></p> <p><i>What would you like the new Start Date to be?</i></p>

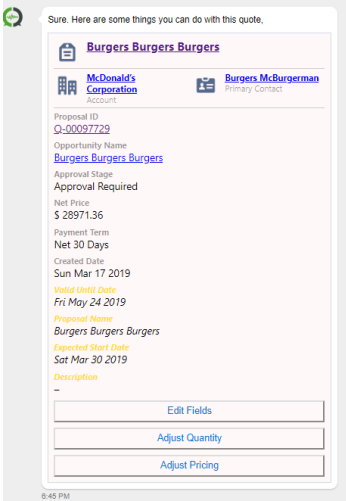
Workflow Step	Possible Conversational Inputs	Response from Max
Identify field and get value	<ul style="list-style-type: none"> • Next friday • Jan 1 2020 	Max displays the updated quote or quote line item and asks for confirmation to save it. You can also change the field value again before saving it.
Save	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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

Workflow Step	Possible Conversational Inputs	Response from Max
Identify field and set value	<ul style="list-style-type: none"> • increase the quantity of the Watson line item • update the quantity 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 card, 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	<ul style="list-style-type: none"> • increase discount by 15% for the MaaS360 licenses on this quote • update this quote 	 <p>Sure. Here are some things you can do with this quote.</p> <p>Burgers Burgers Burgers</p> <p>McDonald's Corporation Burgers McBurgerman (Primary Contact)</p> <p>Proposal ID: Q-00097729 Opportunity Name: Burgers Burgers Burgers Approval Stage: Approval Required Net Price: \$ 28971.36 Payment Term: Net 30 Days Created Date: Sun Mar 17 2019 Valid Until Date: Fri May 24 2019 Proposal Name: Burgers Burgers Burgers Expiration Date: Sat Mar 30 2019</p> <p>Buttons: Edit Fields, Adjust Quantity, Adjust Pricing</p>
Adjusting Quantity	Click Adjust Pricing	Select your quote line item. Max displays the selected quote line item
Identify field and set value	<ul style="list-style-type: none"> • 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 card, the updated field is displayed in Red font. You can also change the field value again before saving it.

Workflow Step	Possible Conversational Inputs	Response from Max
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 *Conga Intelligent Workflow Approvals* application to manage approval flows. For information on configuring an approval process for quotes, refer to [Creating an Approval Process](#).

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

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



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	<ul style="list-style-type: none"> • Generate quote • generate the quote for the first one • generate #2 <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> You can only generate one quote at a time.</p> </div>	<p>Sure I can do that. Which one do you want me to use?</p> <p>Max also displays the latest quotes in card view asking you to select the quote for generating the quote document.</p> <div style="border: 1px solid #ffc107; padding: 5px; margin-top: 10px;"> <p> 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.</p> </div>
You confirm	<ul style="list-style-type: none"> • generate a quote for the first one • generate #1 • the first one • #2 	<p>Max displays the preview card containing the following action buttons:</p> <ul style="list-style-type: none"> • Generate it • Change Details
You want to change details	You clicked Change Details .	<p>Which detail would you like to change?</p> <ol style="list-style-type: none"> 1. Document format 2. Proposal template 3. Watermark

Workflow Step	Possible Conversational Inputs	Max Reply
	Document Format	<p>Which document format should I use to generate this proposal?</p> <ul style="list-style-type: none"> • DOC • DOCX • PDF • RTF <p>After you select the document format, Max redisplay the preview card.</p>
	Proposal Template	<p>Which proposal template should I use?</p> <ol style="list-style-type: none"> 1. Template A 2. Template B 3. Template C 4. Template D <p>After you select the proposal template, Max redisplay the preview card.</p>
	Watermark	<p>Would you like to include a draft watermark on the proposal document?</p> <ul style="list-style-type: none"> • Yes • No <p>After you provide your selection, Max redisplay the preview card.</p>
Quote Generation	<ul style="list-style-type: none"> • You clicked Generate it • Go ahead 	<p>Alright, I have successfully generated your proposal! Here is the link to the new proposal document.</p> <p>Max provides a download link for your generated quote.</p>

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	<ul style="list-style-type: none"> • Clone quote 	<p>Sure I can do that. Which one do you want me to use?</p> <p>Max also displays the latest quotes in card view asking you to select the quote to clone</p>
	<ul style="list-style-type: none"> • Clone the first one • the first one 	<p>Max displays the preview quote card and asks you to provide confirmation.</p>

Workflow Step	Possible Conversational Inputs	Max Reply
Change Details	Click Change Details	<p>Max displays the list of quote header fields that you can edit.</p> <p>Max: Okay, Which field would you like to edit?</p> <ul style="list-style-type: none"> • Expected End Date • Valid Until Date • Proposal Date • Expected Start Date • Presented Date <p>You: Expected End Date</p> <p>Max: What date you</p> <p>You: March 31</p> <p>Max: Great, Here are the details I going to use to create your new quote.</p> <p>Max displays the preview quote card.</p>
You Confirm	<ul style="list-style-type: none"> • Click Go Ahead • Looks Good 	<p>After the successful creation of the new quote, Max displays the quote card and provides a link for you to navigate to it.</p>

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.

Conga 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 Conga 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? <ol style="list-style-type: none"> 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 Conga	<p>Max first checks if an NDA exists for the account mentioned.</p> <p>The account Conga already has 1 NDA(s) in place. Link(s): [Conga NDA]</p> <p>Let me know if I can help with anything else.:</p> <ol style="list-style-type: none"> 1. Continue with creating an agreement 2. Cancel 	NDA already exists for Conga
Continue	Click Go Ahead to generate the NDA document.	NDA is created for Conga
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.	<p>Okay, which field would you like to edit?</p> <ol style="list-style-type: none"> 1. Name 2. Document Format 3. Start Date 4. End Date 5. Template 	Select the appropriate response.

User	Max	Description
Change Agreement Name	<p>Max: OK, what do you want to call this NDA?</p> <p>User:testnda</p>	Click Go Ahead to generate the NDA document.
Change Format	<p>Max: Okay, which document format should I use?</p> <ol style="list-style-type: none"> 1. DOCX 2. PDF <p>You: PDF</p>	Click Go Ahead to generate the NDA document.
Change Template	<p>Max: Okay, which template should we use?</p> <ol style="list-style-type: none"> 1. Self Service NDA - Workday 2. NDA 3. NDA 4. Amended MSA Agreementforgenerixscript 5. Max NDA 6. Barclays Loan 7. Executive Summary <p>You: 1</p>	Click Go Ahead to generate the NDA document.
<p>To proceed with the NDA request, reply with any of one of the following:</p> <ul style="list-style-type: none"> • yes • go ahead • proceed • cool • go for it • sure • ok • letsdo it • letsgo • looks good • looks great 	<p>Got it! Here are the new details of your NDA.</p>	click Go Ahead to generate the NDA document.

User	Max	Description
<p>To cancel the NDA request, reply with any one of the following:</p> <ul style="list-style-type: none"> • no • hold on • cancel • stop • abort • not quite • nah • nope 	<p>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'.</p>	

Changing NDA parameters using Combined Instructions

User	Max	Description
<p>Change Agreement Name</p> <ul style="list-style-type: none"> • name it testnda • let's call it testnda • have it named testnda • change the name to testnda 	<p>Max changes the NDA name to testnda.</p>	<p>Click Go Ahead to generate the NDA document.</p>
<p>Change Format</p> <ul style="list-style-type: none"> • make it a PDF • change it to PDF • change the format to PDF 	<p>Max changes the NDA format to PDF.</p>	<p>Click Go Ahead to generate the NDA document.</p>
<p>Change Template</p> <ul style="list-style-type: none"> • change the template to Barclays • lets use the Barclays template • use the Barclays template 	<p>Max sets the NDA template as Barclays.</p>	<p>Click Go Ahead to generate the NDA document.</p>

User	Max	Description
Set Start Date, End Date, and Term <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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' : <ul style="list-style-type: none"> • latest • most recent • past • recent

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
	<ul style="list-style-type: none"> • 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 .	<p>You can also use the following replacements for, 'First':</p> <ul style="list-style-type: none"> • top • oldest • earliest
Multiple Agreements	<ul style="list-style-type: none"> • 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 Conga CLM system.	You can also use the term 'Authored' in replacement of the term 'Updated'
	<ul style="list-style-type: none"> • 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 Conga CLM system.	<p>You can also use the following replacements for, 'Updated':</p> <ul style="list-style-type: none"> • modified • changed • worked on

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
	<ul style="list-style-type: none"> • 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 	<p>Shows at the most 3 agreements associated with the account Acme most recently updated by the user logged into the Conga CLM system.</p>	
<p>Lookup agreement within a specific time duration</p>	<ul style="list-style-type: none"> • 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 	<p>Shows at the most 3 recent agreements created by John Snow in the past 2 months.</p>	<p>You can also use the following phrases for looking up agreements within a specific time duration:</p> <ul style="list-style-type: none"> • 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)

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
	<ul style="list-style-type: none"> • 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 Conga CLM in the past week.	
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 Conga 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 Conga 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 Conga 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 Conga CLM, that are awaiting signatures.	You can also use the following replacements for, 'Pending Signatures' : <ul style="list-style-type: none"> • 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 Conga CLM, that awaiting signature by John Snow.	

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
	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 Conga CLM.	You can also use the following replacements for, 'Signed' : <ul style="list-style-type: none"> • esigned • completed • accepted
	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 Conga CLM, that were in the signature process.	You can also use the following replacements for, 'Rejected' : <ul style="list-style-type: none"> • 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 Conga CLM, that are no longer valid.	You can also use the following replacements for, 'No longer valid' : <ul style="list-style-type: none"> • recalled • voided • canceled • invalidated
Lookup an agreement with no specific criteria	<ul style="list-style-type: none"> • lookup agreements • lookup contracts 	Max returns the 20 most recently modified agreements.	

Type of Lookup	Conversational Input from User	Response from Max Result	Useful Tips
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	<ul style="list-style-type: none"> • 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 Conga CLM	<p>You can also ask Max to retrieve the following fields:</p> <ul style="list-style-type: none"> • 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 Conga 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
<p>After Max displays the eSignature information, Click Send it.</p> <p>or</p> <p>Say Proceed. You can use one of the following commands:</p> <ul style="list-style-type: none"> • yes • go ahead • proceed • cool • go for it • sure • ok • lets do it • lets go • looks good • looks great 	<p>Alright! I've sent your agreement to usermail@user.com for signature. Let me know if I can help with anything else.</p>	
<p>Click Change Details to change the details of the recipient.</p>	<p>Max: What is the name of the signing party?</p> <p>User: TestUser</p> <p>Max: And what is their email address?</p> <p>User: usermail@user.com</p> <p>Max: Alright! I've sent your agreement to usermail@user.com for signature.</p>	

User	Max	Description
<p>Say Cancel or Stop to abort the workflow. You can use one of the following commands:</p> <ul style="list-style-type: none"> • no • hold on • cancel • stop • abort • not quite • nah • nope 	<p>Alright, I am canceling the request for signature. Let me know if you need help with anything else.</p>	
<p>Say Go back to revert to the last major step.</p>		<p>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</p>

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
<p>After Max displays the agreement details, Click Send it.</p> <p>or</p> <p>Say Proceed. You can use one of the following commands:</p> <ul style="list-style-type: none"> • yes • go ahead • proceed • cool • go for it • sure • ok • lets do it • lets go • looks good • looks great 	<p>Alright! I've successfully sent the attachments of your NDA to John Snow for review.</p>	

User	Max	Description
<p>Click Change Recipient to change the details of the recipient.</p>	<p>Max: What is the name of the reviewer?</p> <p>User: TestUser</p> <p>Max: And what is their email address?</p> <p>User: usermail@user.com</p> <p>Max: Alright! I've successfully sent the attachments of your NDA to John Snow for review.</p>	
<p>Say Cancel or Stop to abort the workflow. You can use one of the following commands:</p> <ul style="list-style-type: none"> • no • hold on • cancel • stop • abort • not quite • nah • nope 	<p>Alright, I am canceling the request for review. Let me know if you need help with anything else.</p>	
<p>Say Go back to revert to the last major step.</p>		<p>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</p>

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 *Conga Intelligent Workflow Approvals* application to manage approval flows. To configure an approval process for Agreements, refer to [Creating Approvals Processes](#).

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

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 out 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.

Type of Notification	Triggering Event	Quick Actions
<p>Event Notifications</p> <p>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.</p>	<p>Agreement stage changes to <i>Ready for Signatures</i></p>	<p>Send for Signature</p>
	<p>Agreement state moves to <i>Approved Request</i></p>	<p>Send for Review</p>
	<p>Agreement state changes to <i>Approval Required</i></p>	<p>Submit for Approval</p>
	<p>Review Cycle is <i>Cancelled / Completed</i></p>	<ul style="list-style-type: none"> • Send for Review • Send for Signature • Submit for Approval

Type of Notification	Triggering Event	Quick Actions
<p>Reminder Notifications</p> <p>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.</p>	<ul style="list-style-type: none"> • Approval requests were not replied for two days • Review cycle still in progress after one week 	<p>Get in touch with the current owner</p> <ul style="list-style-type: none"> • Phone number linked for a quick call • Email link with pre-filled subject & body
<p>Upcoming Event Notifications</p> <p>Upcoming Event Notification alert you about upcoming contract milestones and suggest proactive actions to get you in front of customer interactions.</p>	<p>NDA's expiring in the next month.</p> <p>MSA's expiring in the next 3 months.</p>	<p>Create NDA</p> <p>Create MSA</p>

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**.

i Installation of Max must be performed by Slack and Conga administrators. Use of Conga 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 Conga point of contact.

Using Conga 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:

- [Look Up Accounts](#)
- [Look Up Contacts](#)
- [Look Up Approvals](#)
- [Opportunity Max Flow](#)
- [CPQ Max Flow](#)
- [Contract Management Max Flow](#)

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

\$ #6 MaaS360 American Marketing & Publishing Extension

Account American Marketing & Publishing	Primary Contact FirstName00525032 LastName00525032
Quote ID Q-00239419	Opportunity Name MaaS360 American Marketing & Publishing Extension.
Quote Status In Review	Net Price USD 0.00
Payment Term Net Due Upon Receipt	Created Date Wed Sep 11 2019
Owner Manda Sutijono	Last Modified On Wed Feb 05 2020

If you are looking for a different quote, try saying things like:

- * How about quotes with net price more than \$5k?
- * OK, what about proposals I worked on for ABC Company
- * Can you pull up the proposals on the Company X account?

Creating a Non-Disclosure Agreement Shortcut in Slack

You can create non-disclosure agreements (NDAs) in Max using conversational commands. For the Create NDA conversational workflow, see [Creating Non-Disclosure Agreements](#).

Create an NDA Shortcut in Slack


To use the Create NDA conversation as a shortcut action in Slack:

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

You can also invoke the Create NDA shortcut outside of direct message interactions with Max. If you are in another channel or chatting with another user, follow the steps above to create an NDA. Max creates an NDA and gives you a link to the created agreement record in Salesforce. Max also sends a notification.

Max Advanced Features

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

Functionality	Description
Processing Indicators	<ul style="list-style-type: none"> • 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: <i>create nda for Alpha Gas and send it to Bob Schank <bschank@acme.com> for signature.</i>
Zero input workflows	<ul style="list-style-type: none"> • Max makes smart on-the-spot-decisions on your behalf. For example: <ul style="list-style-type: none"> • 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.

Functionality	Description
Handling unsupported intents	<p>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:</p> <p><i>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 Conga team by clicking here.</i></p>
Contextual help	<p>Max understands the context of the user conversation and responds with the correct help text. For examples of Contextual Help, refer to Contextual Help.</p>
Provide Feedback	<p>You can provide feedback to Max at any stage in your conversation. To provide feedback, type Feedback 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.</p>
Navigation	<p>All major conversation steps provide you with the following options:</p> <ul style="list-style-type: none"> • <i>Proceed</i>: User can respond affirmatively and proceed with the action • <i>Change Details</i>: User can opt to change details first and then proceed • <i>Abort</i>: User can abort the operation by canceling the request • <i>Go back</i>: User can go back to the previous major workflow step when applicable. • <i>End</i>: Ends the conversation by typing "Bye"

Functionality	Description
Quick Answers	<p>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:</p> <p style="padding-left: 40px;"><i>The Valid Until Date for Google Dec-2018 is Fri Dec 14 2018. Here are the details of the quote:</i></p>
Yes/No Questions	<p>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:</p> <p style="padding-left: 40px;"><i>Yes, The Google quote is Accepted.</i></p>
Response Relevance	<p>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.</p>
Conversational Analytics	<p>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.</p>
Proactive Greeting	<p>In the embedded mode, Max proactively greets you when you click the Max pop-up window.</p>
NOT Queries	<p>You can ask Max to look up agreements that do not contain a particular string. For example, you can ask Max to pull up the service clauses for agreements over \$20K with the verbiage tax credits but not refunds. Max replies by displaying all agreements over \$20K containing Tax Credits in the Agreement Name and not containing Refunds in the Agreement Name.</p>

Functionality	Description
Proactive tips	<p>Max offers proactive tips to the user based on the conversation context.</p> <p>For example:</p> <p><i>Let's get started! What can I do for you?</i></p> <ul style="list-style-type: none"> • <i>You can create an agreement by saying: 'create an nda and send it to John Snow for signature'</i> • <i>You can search for agreement(s) by saying: 'help me find the last NDAs I created on 08/01/2018'</i> • <i>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'</i> • <i>You can search for quote(s) by saying: 'help me find the last quote I created in 2018'</i> • <i>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'</i>

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	<p>Here are a few example queries I can handle:</p> <ul style="list-style-type: none"> • 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'

Context of the Conversation	Help Text from Max
Create NDA – account selection step	<p>You can do things like:</p> <ul style="list-style-type: none"> • Search for accounts by either full or partial match. (e.g. 'IBM' will return 'IBM', 'IBM_Test', etc...)
Create NDA – confirmation step	<p>You can say things like:</p> <ul style="list-style-type: none"> • 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	<p>You can do things like:</p> <ul style="list-style-type: none"> • Click the attachment links to download it • Type 'cancel' to cancel the request • Click 'Send It' to proceed or 'Change Details' to change the recipient
Agreement Review – confirmation step	<p>You can do things like:</p> <ul style="list-style-type: none"> • Click the contact to view the email address • Click the agreement link to view it • Type 'go back' to go back to the last step if this was a follow up to agreement search
Lookup Agreement	<p>You can do things like:</p> <ul style="list-style-type: none"> • 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	<p>Here are a few example queries I can handle:</p> <ul style="list-style-type: none"> • 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	<p>You can do things like:</p> <ul style="list-style-type: none"> • 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	<p>You can do things like:</p> <ul style="list-style-type: none"> • 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	<p>You can do things like:</p> <ul style="list-style-type: none"> • 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	<p>You can do things like:</p> <ul style="list-style-type: none"> • 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	<p>You can do things like:</p> <ul style="list-style-type: none"> • 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, what 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:

You said:

"show me quotes that expire soon for opps over 50k that close soon"

Based on what you said, I figured you want to:

Lookup Quotes related to Opportunities

Specifically, I understood the following:

Quotes
expiring soon
'Valid until' is more than 2019-06-07 AND 'Valid until' is less than 2019-07-07

Opportunities
over 50k
Amount(TCV) is more than 50000
close soon
'Close Date' is more than 2019-06-07 AND 'Close Date' is less than 2019-07-07
owner
'Owner' contains 'Bryce Bochenek'

Max for REST API Developers

Select one of the following topics for more information:

- [Authenticating Max APIs](#)
- [Connecting Max APIs with Conga CLM](#)
- [Conga Max REST APIs](#)
- [Conga IDD REST APIs](#)

Authenticating Max APIs

The purpose of this page is to describe the headless Max API service that enables rapid experience-first commerce development and applications.

Max API follows a microservice architecture that enables commerce into any part of an application and is built on the JSON API specification, follows predictable REST URLs, and supports cross-origin resource sharing.

Authentication

To authenticate iChronos APIs, you require an API Key. For authenticating Search APIs, you need API Key and Bearer Token (Salesforce Access Token).

Endpoint

Max APIs can be exposed to external applications via a Salesforce site or community. Max APIs have the following base URL:

```
https://max-azseprod.apttuscloud.com/
```

Versions

The Max API ensures backward compatibility by properly versioning any changes to the APIs. Should changes to the API structure need to be made, it will occur within a new version and older functionality will be preserved.

Content Type

Requests made to the API must be encoded as JSON and contain the header

Content-Type: application/json

Errors

Any request that returns an error follows a standard format. The Max APIs will return an array of errors that contains objects containing the status, title and data with the error details.

Code	Response
400	Invalid JSON
429	Rate Limit Exceeded
422	Validation Error
500	Something went wrong on our end

Connecting Max APIs with Conga CLM

To enable Conga CLM to leverage Max APIs, API developers need API Token and API URL. API developers need to provide API Token and API URL in [Intelligent Discovery Setting](#). For more information, refer to [Configuring Intelligent Discovery Settings](#).

API URL

In Intelligent Discovery Settings, enter the URL as `https://{URL}/api/v1/{tenant}/ichronos`

Here, URL is the URL of the Salesforce instance of Max tenant and tenant is the tenant name.

API Token

To generate the API Token,

1. Login to your Azure Portal.
2. Navigate to your Key-Vault. Click Create/Generate.
3. Enter values for the following fields:

Field	Description
Upload Options	Manual
Name	Enter name in the following format: MAX-API-Secret-<Tenant Name>
Value	Enter the value returned by admin/apikey API
Enabled	Yes

4. Click **Create**.
5. Navigate to your Key-Vault and select your resource.
6. Click **Show Secrets**.
7. Copy the API Key and use it in the API Key field of Intelligent Discovery Settings.

Conga Max REST APIs

(Open API documentation is only available to view online)

Conga IDD REST APIs

(Open API documentation is only available to view online)

Max Features by Release

Review the latest Conga Max Features by Release document.

- [Features by Release](#)

Features by Release

This document contains an overview of features introduced in each major release of Conga Max. For more information, see [Conga Max Features by Release](#).

Conga Copyright Disclaimer

Copyright © 2022 Apttus Corporation (“Conga”) and/or its affiliates. All rights reserved.

No part of this document, or any information linked to or referenced herein, may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written consent of Conga. All information contained herein is subject to change without notice and is not warranted to be error free.

This document may describe certain features and functionality of software that Conga makes available for use under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not, in any form, or by any means, use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part of the software. Reverse engineering, disassembly, decompilation of, or the creation of derivative work(s) from, the software is strictly prohibited. Additionally, this document may contain descriptions of software modules that are optional and for which you may not have purchased a license. As a result, your specific software solution and/or implementation may differ from those described in this document.

U.S. GOVERNMENT END USERS: Conga software, including any operating system(s), integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are “commercial computer software” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

Neither the software nor the documentation were developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Conga and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Apttus, AI Analyze, Conga, Conga AI, Conga AI Discover, Conga Batch, Conga Collaborate, Conga Composer, Conga Conductor, Conga Connect, Conga Courier, Conga Grid, Conga Mail Merge, Conga Merge, Conga Orchestrate, Conga Sign, Conga Trigger, Digital Document Transformation, True-Up, and X-Author are registered trademarks of Conga and/or its affiliates.

The documentation and/or software may provide links to web sites and access to content, products, and services from third parties. Conga is not responsible for the availability of, or any content provided by third parties. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Conga is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Conga is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

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