



**X-Author Contracts Cloud
on Apttus Intelligent Cloud™**

Winter 2017 User Guide

08 December 2017

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Apttus X-Author Contracts Cloud gives contract administrators and legal teams full access to powerful contract negotiation tools inside Salesforce, Dynamics and other leading CRMs. Log in to Apttus Contract Lifecycle Management (CLM) directly from Microsoft Word, check out your contract template or agreement document and make changes using Word's native features. When you are finished, use the X-Author add-in to check-in your document, reconcile clauses, fields and other contract elements in an easy-to-use interface. Negotiating parties can insert and modify contract terms and clauses and add non-legal language, then check in redlined, clean and final versions back to the agreement record. Advanced reconciliation capability also allows users to reconcile any terms or clauses that may have changed during the approval process and update them in the Apttus CLM directly. Apttus Contract Management Document Versioning integrates with X-Author, meaning document versions can be tracked with ease. Furthermore, users who are already familiar with Microsoft Word will also be comfortable using X-Author, as many Word capabilities such as the tracking of changes and commenting are already a part of the tool.

X-Author for Contracts Cloud is fully integrated with the **Apttus Intelligent Cloud™** platform.



X-Author is compatible with agreement documents created from templates using the FX2 format only.

About this Guide

Throughout this document you will encounter tasks that refer to a property or setting that may affect behavior in X-Author or Apttus CLM depending on how it is configured. To get more information on specific properties and settings and how to configure them, refer to the *Apttus Contract Lifecycle Management Administrator Guide* available on the Apttus Documentation Portal.

Hint

Click on any image in this guide to enlarge the view.

Getting Started

System Requirements

Your computer must meet the minimum requirements listed below to use X-Author Contracts.

 • Microsoft Office 365 Online or Cloud applications do not support plugins. X-Author Contracts can only be used from Microsoft Word running in a Mac OS environment.

• Requirements which have changed since the last update are highlighted in **bold**.

System Requirement	Minimum Supported Version
Mac OS	<p>El Capitan version 10.11.3</p> <p><i>New features and technologies are continuously deployed in new releases by Apttus X-Author Contracts, and they are supported by Apttus where the associated Microsoft Office versions are also still supported by Microsoft. As Microsoft ends its own support for any Office version, subsequent new Apttus releases will no longer be developed, tested, or committed to support the application on any Office version which is no longer supported by Microsoft.</i></p>
Microsoft Office	Microsoft Word 2016 version 15.32

 Versioning behavior and naming conventions differ when working with documents, depending on whether or not Contract Document Versioning is enabled. To learn more about document versioning, refer to the latest *Apttus Contract Management Administrator Guide* (available on the Apttus Documentation Portal).

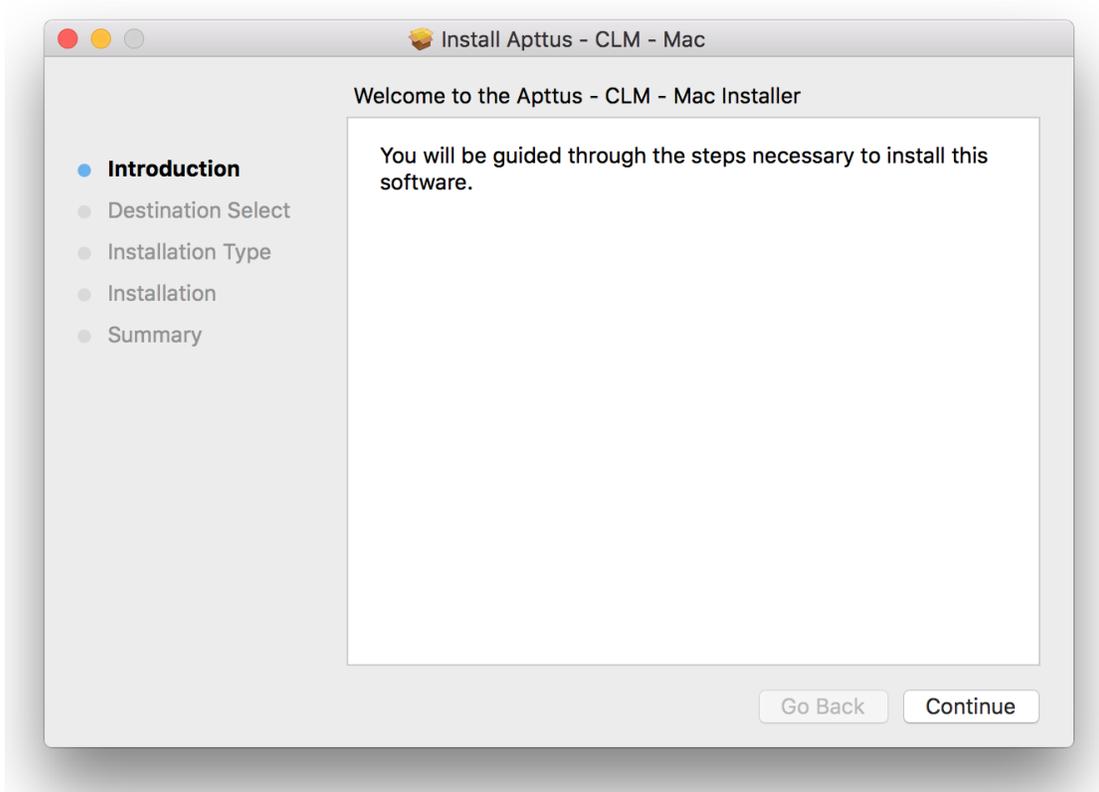
Installing X-Author Contracts

X-Author for Contracts Cloud is a Microsoft Word add-in that requires a package installer.

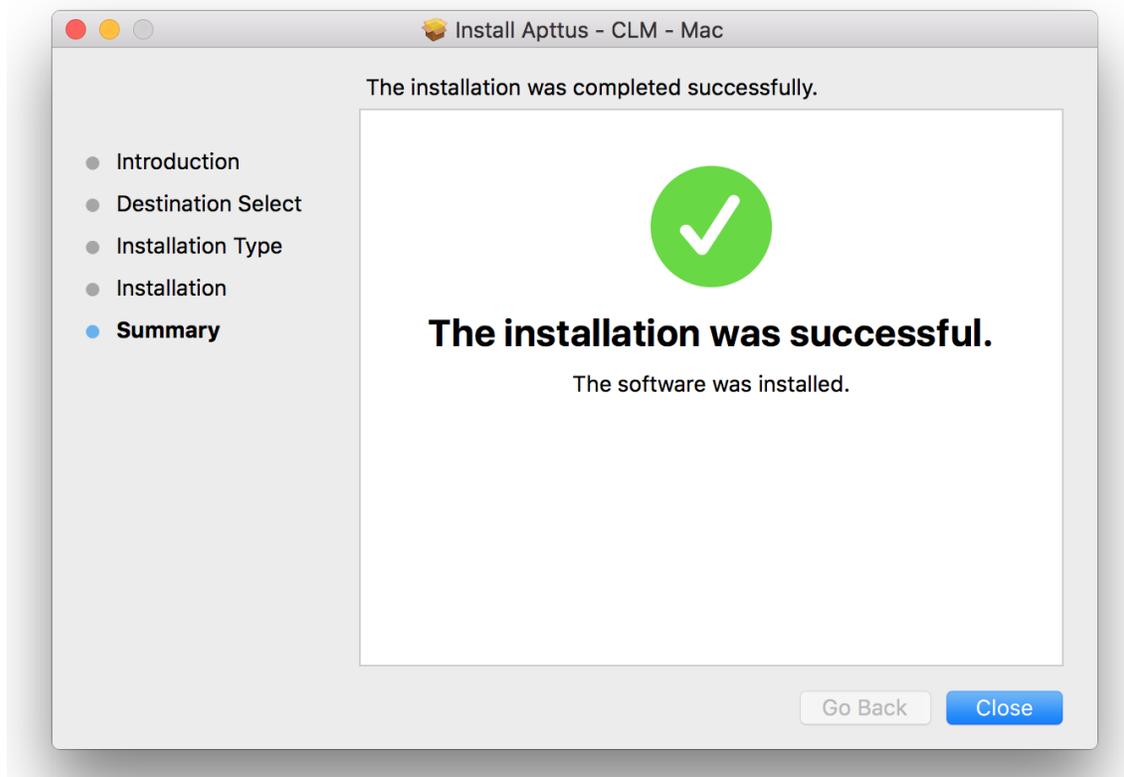
 In future releases, the add-in will be available from the Microsoft Office store.

To install the X-Author Contracts add-in

1. Download the X-Author Contracts for Mac **pkg** file using the link provided by your Apttus representative.
2. Double-click the **pkg** file (right-click and Open if file is untrusted).



3. Follow the installation instructions to complete installation.

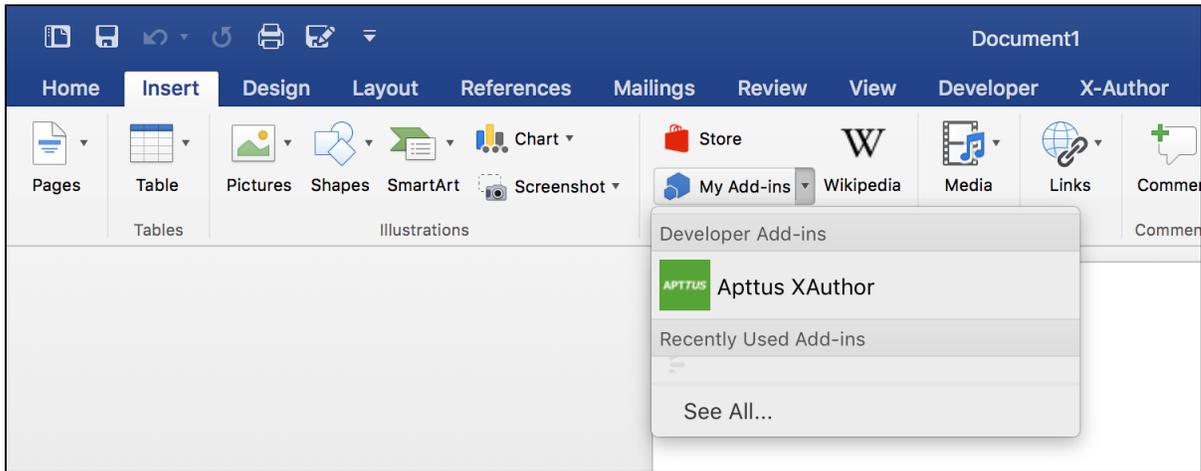


4. Quit any open instances of Microsoft Word.

To launch the X-Author Contracts add-in

1. Open Microsoft Word.
2. Go to **Insert > My Add-ins**.

3. Choose **Apttus X-Author** from the list of add-ins displayed in the drop-down. Apttus X-Author loads in a new pane to the right of the document window.



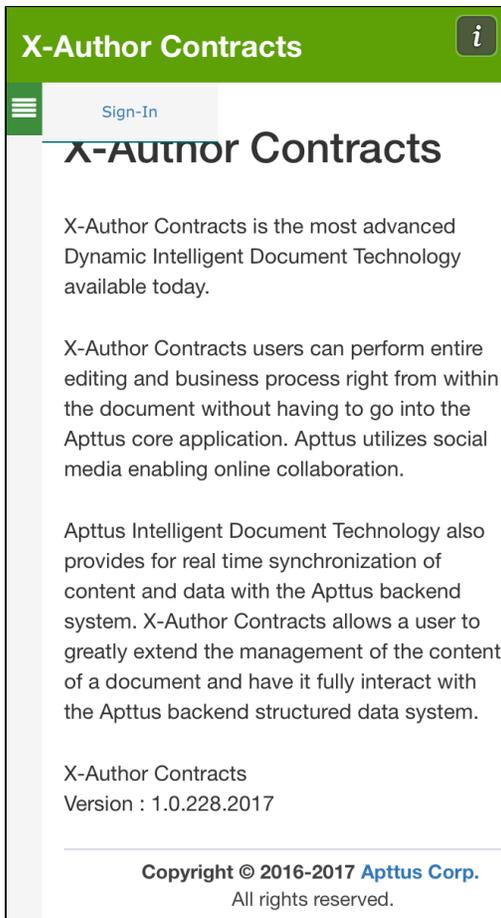
Logging in to X-Author Contracts

Before you can work with your agreement documents in X-Author, you must log in to Apttus CLM through the add-in.

To log in to X-Author Contracts

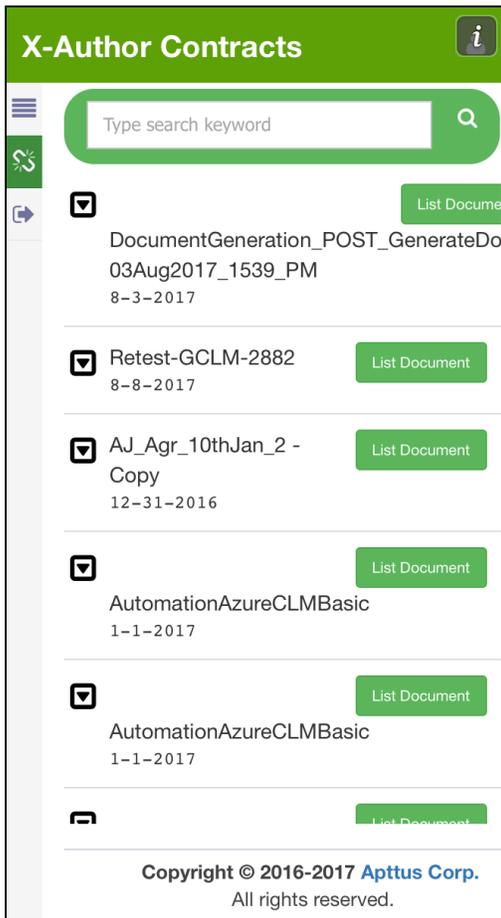
1. Launch Microsoft Word. Open a new document or the document you want to work with.
2. Launch the X-Author add-in as described in [Installing X-Author Contracts](#).

3. After the X-Author add-in pane loads, hover over the icon on the left-hand side to display the login menu and click Sign-In.



4. Enter the host URL for your instance of Apttus CLM and click **Submit**.
 - a. For Salesforce environments, use either <https://login-sfdc.apttuscloud.com> (production) or <https://test-sfdc.apttuscloud.com> (sandbox).
 - b. For AIC environments, please get the URL from your implementation team.
5. If it is the first time you are logging into CLM from the add-in, you may be prompted to allow access to X-Author. Click **Allow** to proceed.
6. Enter your host credentials (email and password) and click **Sign In**. Custom domains and SSO are supported.

7. After successful login, the X-Author pane refreshes to display the agreement documents list.



Checking Out an Agreement

To begin working with an agreement document in X-Author, you must *check it out first*.

There are three common ways for you to check out a document, depending on how you are accessing the document itself. Open your DOCX document using one of the following methods:

- Checking out the document directly from Microsoft Word.
- Download the document directly from the Apttus CLM record.
- Download the document from an email attachment (e.g., Outlook).

In the first case, you open and check out the document in Word at the same time. In the last two cases, you are downloading the document onto your computer, then opening it in Word and checking it out.

In all cases, X-Author marks the document as checked out in Salesforce and locks the document. You are the only individual who can work on the document after it is checked out.

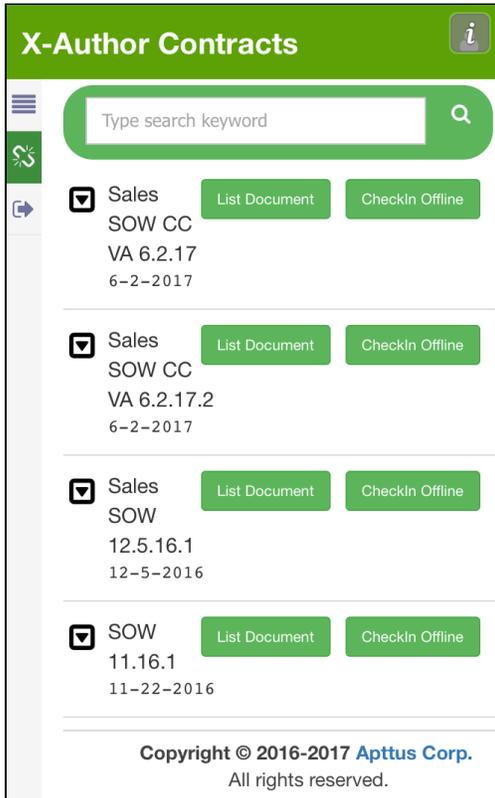
 If you are working with third party paper and need to check it in to CLM for redlining, refer to [Importing Offline Agreements](#).

To check out a document

1. Open Microsoft Word. If you have already downloaded the document from another location, open the document in Word. Otherwise, choose a blank document.
2. Go to **Insert > My Add-ins > Apttus X-Author**.
3. [Log in to X-Author Contracts](#).
4. **(Document currently open in Word)** The document is automatically checked out and locked by you (you will see a message).

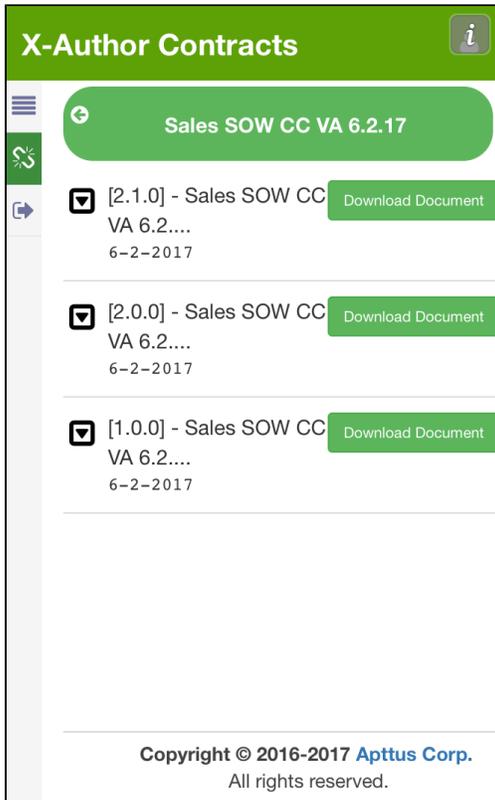
 Note: if the document is already checked out by another user, you will not be able to work with the document until it is checked in or the lock is released. See [Locking and Unlocking Documents](#) for more information.

5. **(No Document open)** Click the  **List Agreements** icon to browse all agreement records you have permission to access.



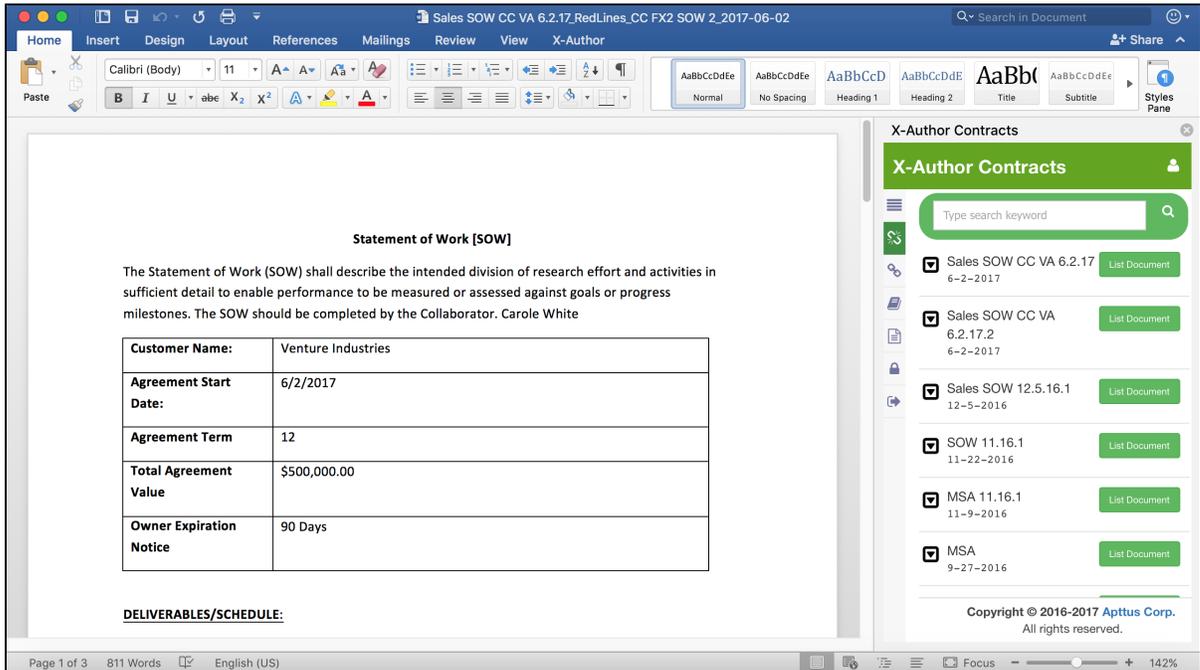
6. **(No Document open)** Scroll through the list of agreements or use the **Search** tool at the top to search for your agreement record by keyword(s). Click the  icon to view additional details about the agreement.

7. **(No Document open)** Click the **List Document** button to the right of the agreement record name to display a list of document versions attached to that record.



8. **(No Document open)** Click the **Download Document** button to the right of the agreement version you want to work with. The Document Version is downloaded to your computer.
9. Open the downloaded document in Word.

10. You will see the message "Document is locked by you." All menu options are enabled.



Locking and Unlocking Documents

When you check out a document in X-Author, the document is locked for editing and cannot be checked out by anyone else. Anyone with proper permissions for the document's agreement record can still view and/or download the document, but they cannot make edits and check the document back in while you have it locked.

You can always check the lock status of a document by clicking on the  **Lock Status** tab.

Locks can only be released when a user either manually releases the lock or checks in the document.

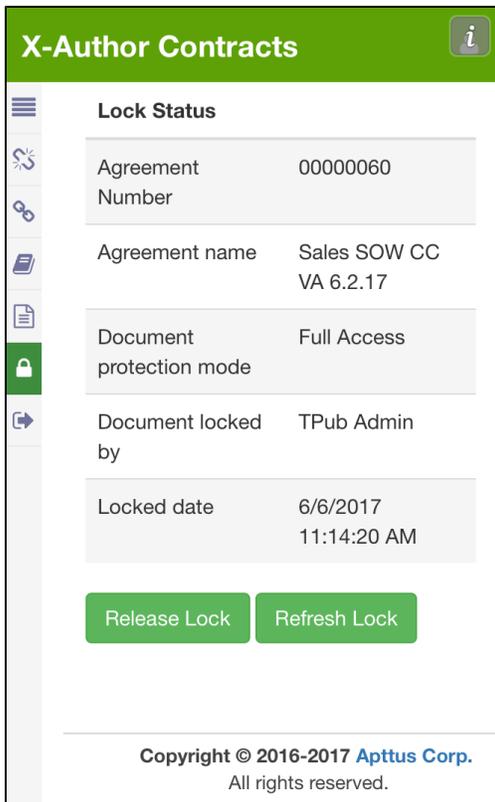
Note

If the agreement document remains locked after it has been checked in, then it is likely that the agreement record itself is locked due to setting configuration. Refer to the *Apttus Contract Management Administrator Guide* for more information on the specific setting related to agreement locks.

To release a document lock

Before you can release a lock on a document, it must be checked out. Releasing a lock reverts the check-out of the document you are working on *without checking it in*. You can only release a lock when you have the document open in X-Author.

1. From the X-Author pane, click on the  **Lock Status** tab icon. The Lock Status page shows agreement details and information on the current document lock.



X-Author Contracts 

Lock Status

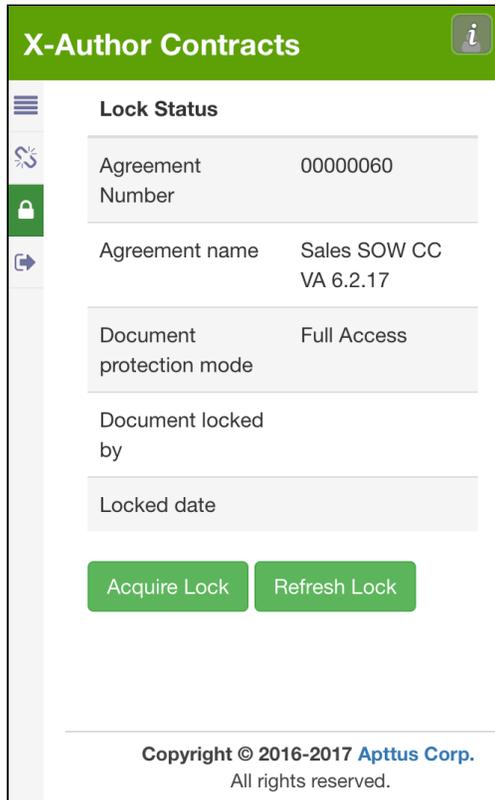
Agreement Number	00000060
Agreement name	Sales SOW CC VA 6.2.17
Document protection mode	Full Access
Document locked by	TPub Admin
Locked date	6/6/2017 11:14:20 AM

[Release Lock](#) [Refresh Lock](#)

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2. Click **Release Lock** on the Lock Status page.

3. If you chose to release the lock, the document check-out is reverted. Any changes you made while the document was checked out are not saved. The page refreshes to reflect unlocked status and most menu options are disabled.



Note

If you release a document lock in error and want to continue working with the document, go to the Lock Status page and click **Acquire Lock**.

Refreshing document lock status

Because more than one user may have access to agreement documents on an agreement record, you may come across a situation where another user has checked out the document.

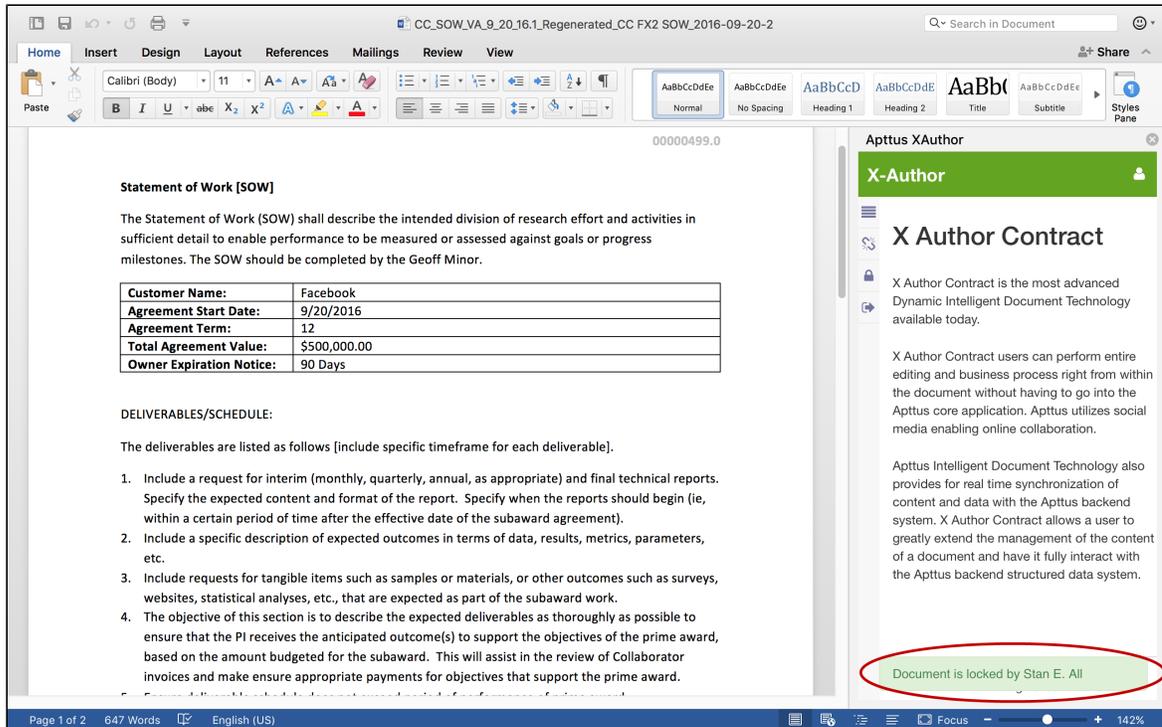
From the Lock Status tab, you can click the **Refresh Lock** button at any time to display the current lock status for the open document (except for when you have checked out the document already). If the document is checked out by another user, the only actions you can take are to **List Agreements** and Refresh Lock.

Consider the following example:

Use Case: Reacquiring the document lock from another user

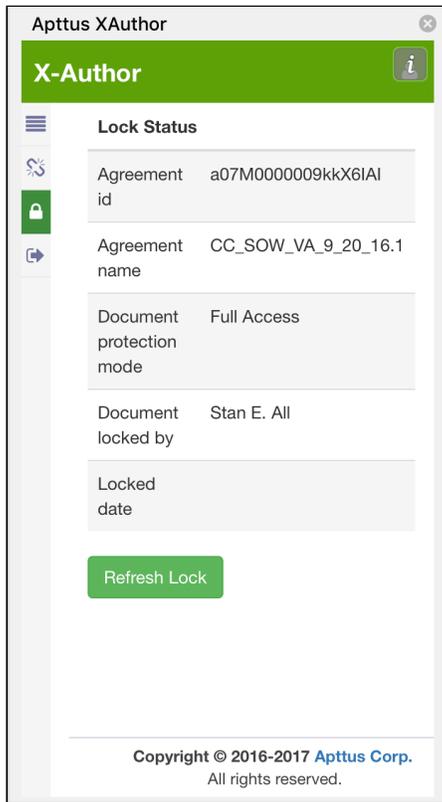
You have downloaded a contract document version from the agreement and opened it in Microsoft Word. Another user checks out the document before you.

A message is displayed showing that the other user controls the lock.

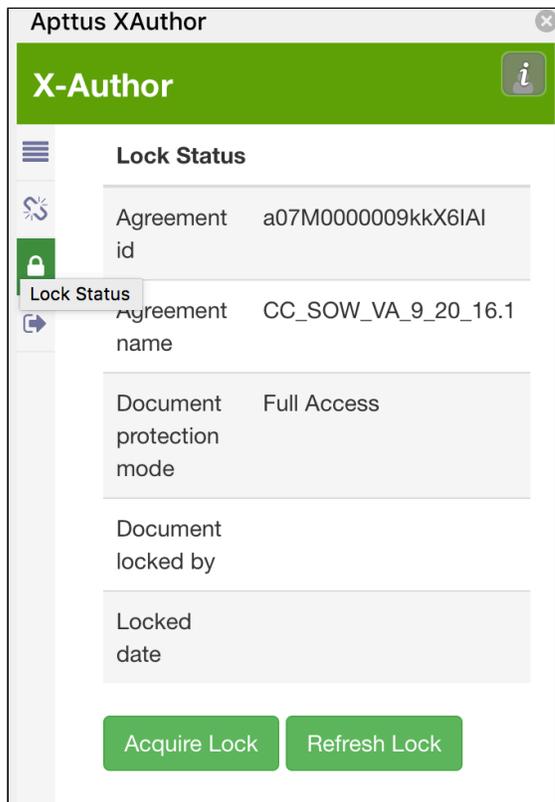


The document cannot be checked out, because another user has already locked it.

You click on the **Lock Status** tab to view the current lock status. The "Document locked by" field shows the document is locked by another user.



The other user releases the document lock or checks in a new version. You click **Refresh Lock** to refresh the current lock status. The pane refreshes, showing updated lock status details.



You click **Acquire Lock** to lock the document and start working. All menu items are enabled.

Opening a Document You Have Already Checked Out

In some situations, you may close an open document in X-Author which you have checked out, without releasing the lock or checking in the document. The document remains locked by you, and cannot be edited by anyone else until you release the lock or complete a check-in.

When you open an agreement document in X-Author that is already locked by you, you should see the following message displayed at the bottom of the X-Author pane.

Document is locked by you.

Continue working on the document as normal.

Working with Agreements

After you have checked out your document, you are ready to begin the negotiation and redlining process.

The following sections describe the features you can use in X-Author when working with agreement documents.

Smart Fields

Smart fields are specialized fields that can retain the Apttus field definition even after Merge Service generates an agreement document. Whereas normal fields are generated in documents as static text, smart fields can be changed and reconciled back to affect data on the agreement record in Apttus CLM. In a typical scenario where an agreement document is sent to an external party for negotiation, the external party will make changes to the document as part of the negotiation. If the changes to the document involve data belonging to the agreement record, reconciliation provides the mechanism to ensure the values in the document and the Agreement record are reconciled.

Smart fields in generated documents always follow the format of the same field in CLM, such as dates and strings. **Text Area**, **Rich Text fields**, formula fields for **LongDate** and **Multi-Select Picklists** are not supported as smart fields.

Smart Clauses

Smart clauses, like smart fields are parts of a contract that can be reconciled between versions of an agreement, and noted in the agreement record. This can be used during negotiations when clauses are redlined. Clauses that have been changed will be reconciled when you choose the reconciliation option at **Check-In**. Clauses can only be smart in the context of a generated contract document.

In the process of negotiations, a contract may get redlined multiple times. During these redlines, a user may choose to accept the changes made to the contract. Smart Clauses provide visibility into the changes made in the contract document by allowing the user to view the changed clauses in at **Check-in** and when the clause change has been checked in, on the Agreement Clauses related list.

A Note on Agreement Documents and Templates

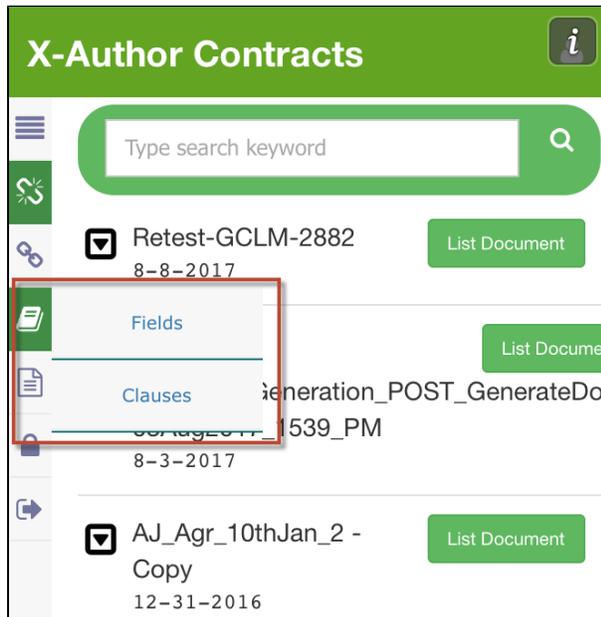
All generated agreement documents (as opposed to imported offline agreements) use document templates saved in Apttus CLM. These templates contain merge fields which, upon generation, pull Apttus field values from the agreement to create distributable documents. For more information, refer to [Working with Templates \(Salesforce Beta\)](#).

Using Playbook

The Playbook allows you to access a library of previously defined clause templates in Apttus CLM for use with your document agreement type during negotiations. Instead of editing clauses already in the document or inserting static text, you can insert clauses from Playbook directly into the agreement document and track and manage changes to clause content as negotiations proceed. You can also use Playbook to mark text as clauses or fields, applying Apttus properties to these clauses and fields when the document is checked in and reconciled.

 Unless explicitly stated, any mention in this guide of fields or clauses should be considered a reference to smart fields and clauses.

To use Playbook, hover over the  **Playbook** icon in the X-Author pane to display two menu choices: **Fields** and **Clauses**.



You can use Playbook to:

- Insert clauses into the agreement document.
- Mark document text as a clause.
- Mark document text as a field.

When text is marked as a clause or field, the element becomes **smart**, meaning that it adopts Apttus properties as a clause or field and users can take various actions on data, allowing them to reconcile changes that are reflected in the associated agreement record. For more explicit definitions of smart clauses and smart fields, see [Working with Agreements](#).

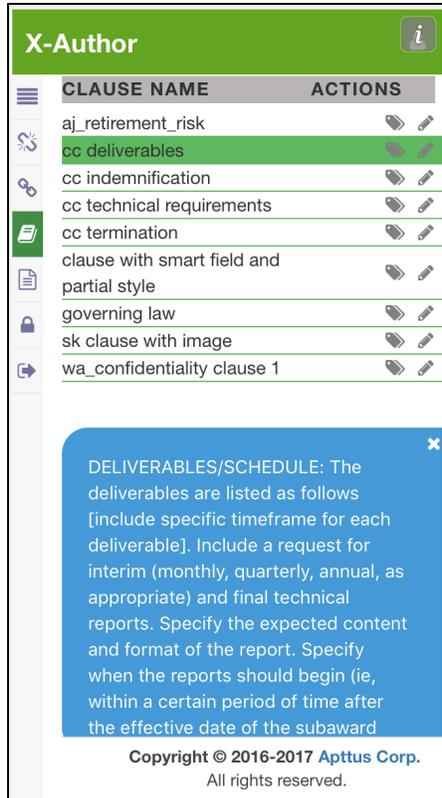
Inserting Clauses

Playbook lists all clauses available for the specific agreement type associated with the document. Clause content typically includes only static text, but it can also contain smart fields, including header level and lookup merge fields. When you insert a clause that contains smart fields, field values are automatically populated with values from the associated agreement record in CLM.



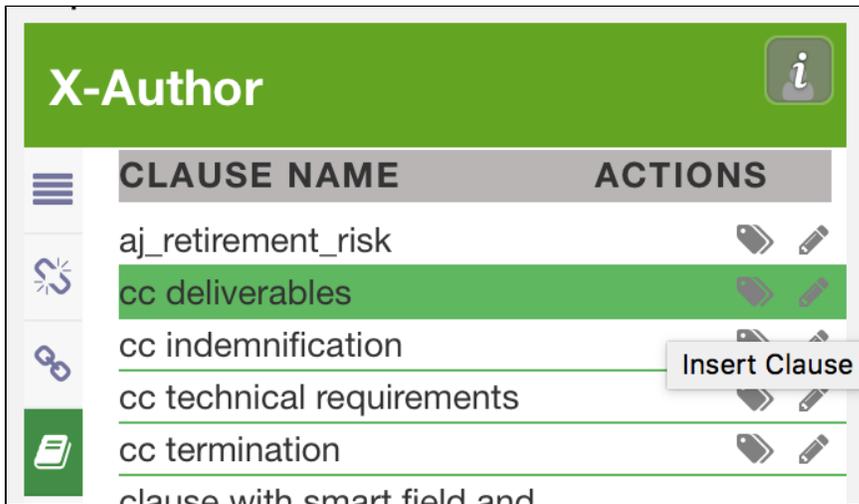
When you insert an agreement clause into a document, it is only valid for that specific agreement document.

To view the content of a clause listed in the Playbook panel, click on the **Clause Name**. A section displaying the Text of the clause is displayed below the clause list. Click on the clause text to scroll.

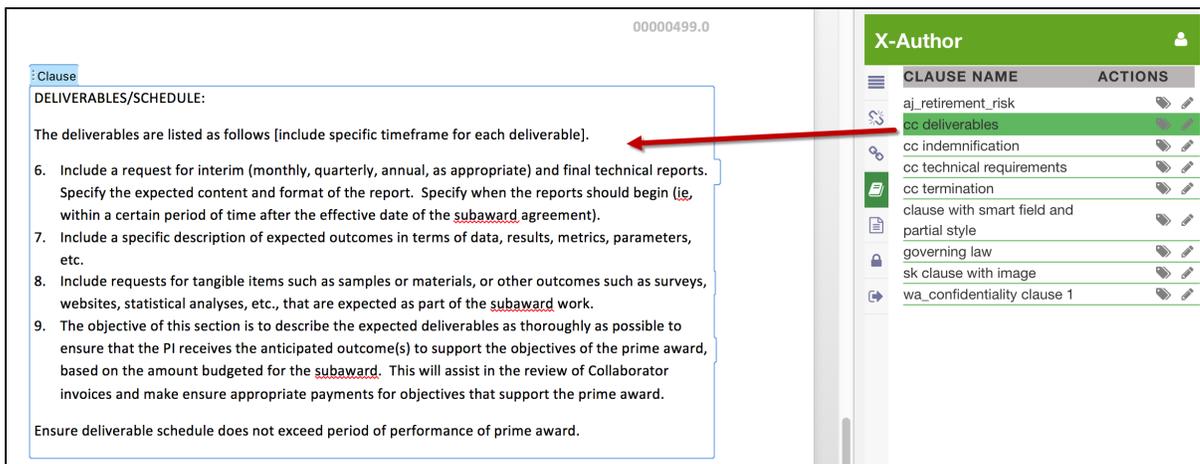


To insert a clause

1. Hover over the **Playbook** tab and select **Clauses** to display a list of clauses in your library.
2. Scroll to the place in your document where you want to insert the clause. Place your cursor at the point of insertion.



3. Click the  **Insert Clause** icon to insert the clause into your document.



The inserted clause is automatically marked as a smart clause (shown with a grey border). You can go to **Document > Clauses** in the X-Author pane to confirm the clause is now recognized in the document. If you decide you want to remove clause properties and revert the clause to static text, use the Document panel to [unmark the clause](#). When you check in the document, any smart clauses can be reconciled to the agreement and information for the inserted clause is added to the Agreement Clause related list on the agreement record.

To learn how the Agreement Clause related list is populated with each insert, modify and delete action, refer to the *Apttus Contract Management Administrator Guide*.

 At this time, clauses can only be inserted in documents with "Full Access" protection.

Marking Clauses

During the process of negotiation, you may find a section of text that you would like to mark as smart. Mark document content as a clause when:

- You are with a third party offline agreement created or imported into the agreement record that contains language which should be tagged as clauses.
- An external party adds language to the agreement document that constitutes a clause.

By marking this text as a clause in your agreement document, the text adopts the properties of the marked clause. You can even choose to replace text in the agreement with text from a pre-existing clause in your Playbook. When the agreement document is checked in and reconciled to the agreement record, information on marked clauses is added to the **Agreement Clauses** related list.

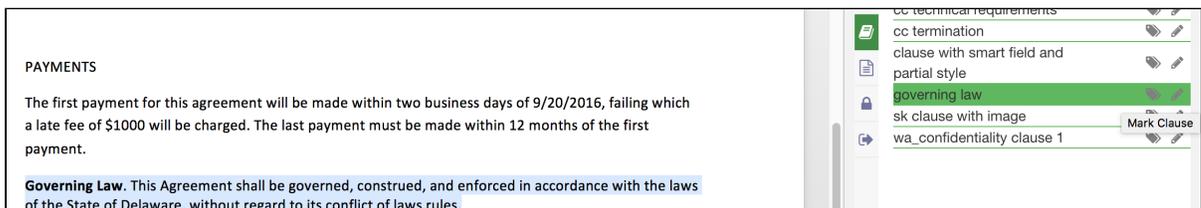
 Clauses can only be smart in the context of single generated or offline Apttus agreement document.

To mark a clause in an agreement

1. Hover over the **Playbook** tab and select **Clauses** to open the Playbook.
2. Highlight the content in the contract to be marked as a clause.

Governing Law. This Agreement shall be governed, construed, and enforced in accordance with the laws of the State of Delaware, without regard to its conflict of laws rules.

3. Click on the  **Mark Clause** icon next to the clause in the Playbook which you want to associate with the content.



The Mark Clause form appears inside the X-Author pane.

4. The clause will be automatically marked as a 1-off instance of the clause for this agreement. Specify the following fields for marking the clause.

Field	Description
Clause Name	Enter a new name for the clause, or leave unmodified (Playbook clause name displayed by default).
Action	By default, <i>Inserted</i> is chosen and is Read-Only.
Category	Select a category for your clause.
Sub Category	Select a sub category for your clause. Options in the list will change based on the category you selected.
Exception	Select a term exception record from the drop-down list to associate with your clause.

Field	Description
Risk Rating	Select an appropriate risk rating for your clause. Valid values are: <ul style="list-style-type: none"> • Green • Red • Yellow
Materially Significant	Select this check box if you want to make your clause materially significant.
Clause Text (Selected)	This text area shows the selected text which you want to mark as a clause.

Note

Scroll past the Clause Text to view additional fields and buttons required to mark the clause.

5. Compare the text you have highlighted with the clause library text displayed in the Playbook panel. Select **Replace current clause selection with the clause from library** if you want to replace the document content with the text of the clause from Playbook.
6. Click **Save** to apply Apttus clause properties to the highlighted content and mark the content as a smart clause. When you check in and reconcile your agreement document, the clause will be displayed as inserted in the **Agreement Clauses** related list and is listed in the Document panel under **Clauses**.



If you decide you want to unmark a clause during the same session in which you marked it, you must use the [Document Panel](#) to remove Apttus clause properties. Note that if you chose to replace the text with a clause from the library, you cannot choose to unmark the clause, it can only be deleted.

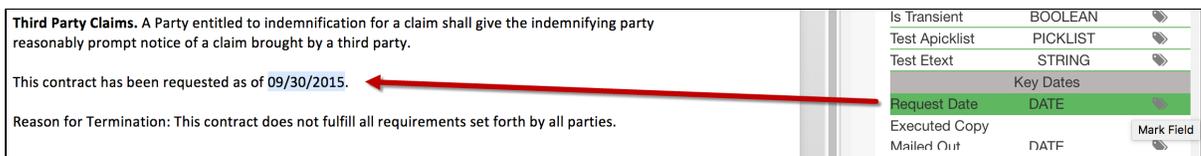
Marking Fields

Using Playbook, you can mark small chunks of agreement document content as fields. When you mark content in an agreement document as a field, it becomes a smart field. Smart field values can be reconciled with data in the agreement record when the document is checked in, allowing changes made during negotiation to be accurately reflected and managed as data in Apttus CLM. Content marked as a field must map to the data type of existing fields in your agreement record.

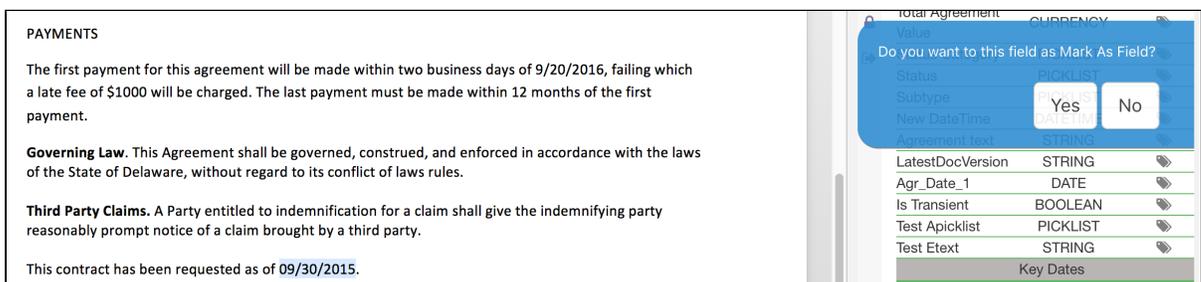
i Marking a field in a single agreement does not mark the field across all other documents for the same agreement record.

To mark a field in an agreement

1. Hover over the **Playbook** tab and select **Fields**.
2. Highlight the content in the contract to be marked as a field.
3. Click on the **Mark Field** icon next to the clause in the Playbook which you want to associate with the content.



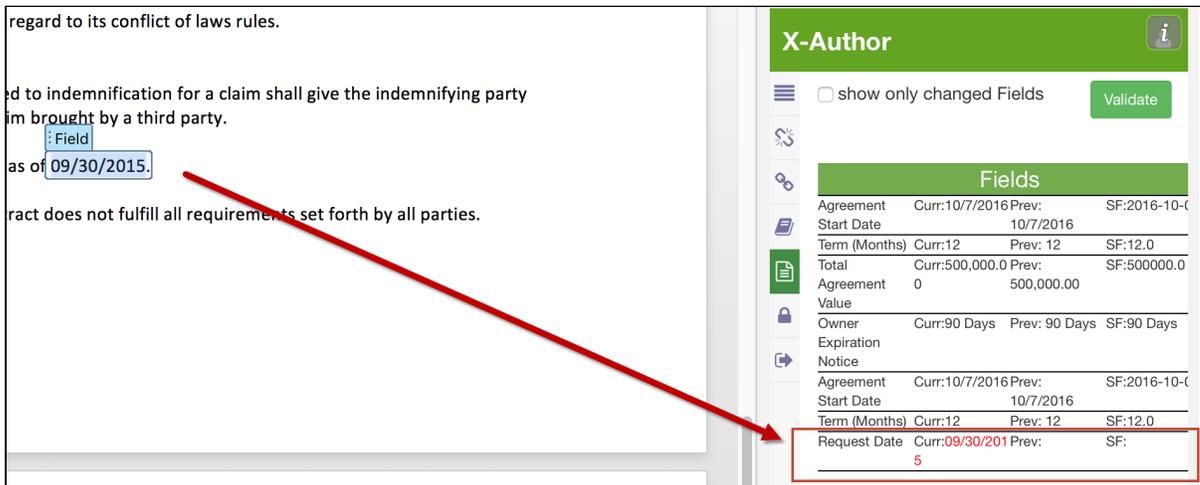
The Mark Field dialog appears.



4. Click **Yes** to mark content as a smart field. The content adopts the properties of the same field on the agreement record.

 Make sure the format of the text you are marking matches the data type you are mapping to. You will receive an error if the text is not valid for the field type you choose.

5. Hover over the **Document** tab and select **Fields** to view changed fields in the Document pane. The marked field will be visible in the list.



The screenshot shows the X-Author interface. On the left, a document snippet is visible with a field marked as 'Field' containing the date '09/30/2015'. On the right, the 'X-Author' pane is open, showing a 'Fields' table. A red arrow points from the marked field in the document to the 'Request Date' field in the table, which has the value '5' and is highlighted with a red box.

Fields			
Agreement	Curr:10/7/2016	Prev:	SF:2016-10-C
Start Date	10/7/2016		
Term (Months)	Curr:12	Prev: 12	SF:12.0
Total	Curr:500,000.0	Prev:	SF:500000.0
Agreement	0	500,000.00	
Value			
Owner	Curr:90 Days	Prev: 90 Days	SF:90 Days
Expiration			
Notice			
Agreement	Curr:10/7/2016	Prev:	SF:2016-10-C
Start Date	10/7/2016		
Term (Months)	Curr:12	Prev: 12	SF:12.0
Request Date	Curr:09/30/201	Prev:	SF:
	5		

Make sure to click **Validate** to ensure that the newly marked field is in a valid format for the data type of the field mapped.

When you check in the agreement document and choose to reconcile, values assigned to your smart fields are reconciled to the agreement record in CLM.

Using the Document Panel

The Document panel allows you to view all clauses and fields in your agreement document which can be edited. These clauses and fields are marked as **smart clauses** and **smart fields** in the document template from which the document was generated.

 Unless explicitly stated, any mention in this guide of fields or clauses should be considered a reference to smart fields and clauses.

To use the Document Panel, hover over the  **Document** icon in the X-Author pane to display two menu choices: **Fields** and **Clauses**.



Based on your selection, the Document panel shows either the **Fields** or **Clauses** view. You can use the Document Panel to:

- View changed fields and clauses.
- Modify field values.
- Reject changes to clause content.
- Reject changes to field values.
- Validate values of changed fields.
- Mark clauses for deletion or undelete a clause.
- Unmark marked clauses.

Working with Fields

The **Fields** section of the Document Panel lists all smart fields in the agreement document.

Use the Document Panel to take the following actions on fields in the document:

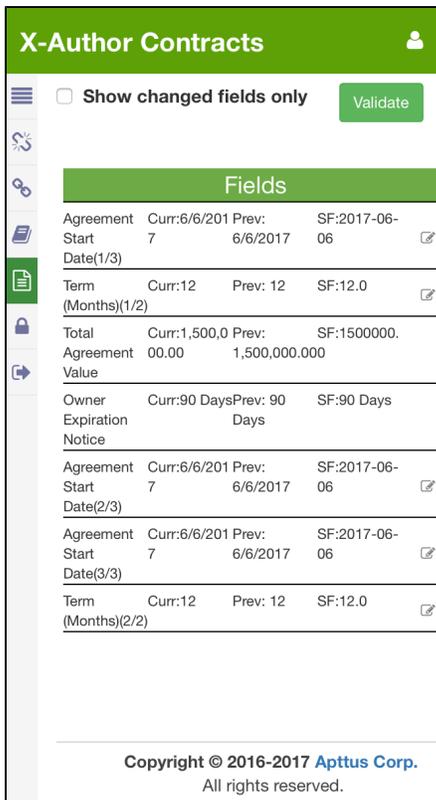
- [View and change field values in the document.](#)
- [Update values for multiple occurrences of the same field.](#)
- [View and/or reject changed field values.](#)
- [Validate field values.](#)
- [Mark fields for deletion.](#)

To view and change fields

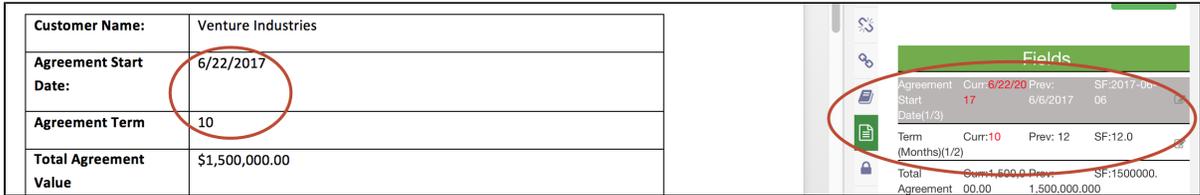
1. Hover over the  **Document** button and select **Fields** to open the Document Panel.



All fields are displayed in a list in the order they appear in the document. Current (document), previous (as of last check-in), and current CRM values are displayed.



2. Click on a field in the list to snap to and highlight the field in the document.
3. To change the current value of a field, place your cursor in the field content control in the document and make changes.



4. Click **Validate** to confirm that the new field value is valid for its corresponding data type.

Did you know?

Changed field values are updated on in the agreement document upon check-in. If you choose to reconcile fields during check-in, they will also be changed on the agreement record.

To reject changes to a field

If changes have been made to smart fields in the document, you can choose to reject these changes in the same session prior to check-in.

To reject changes:

1. Hover over the **Document** button and select **Fields** to open the Document Panel.



2. Click the **Show changed fields only** check box to view a list of changed fields.
3. Right-click on the changed field in the Document pane (highlighted in red) and select **Reject Changes**.

Statement of Work [SOW]

The Statement of Work (SOW) shall describe the intended division of research effort and activities in sufficient detail to enable performance to be measured or assessed against goals or progress milestones. The SOW should be completed by the Geoff Minor.

Customer Name:	Venture Industries
Agreement Start Date:	10/9/2016
Agreement Term:	12
Total Agreement Value:	\$250,000.00
Owner Expiration Notice:	90 Days

DELIVERABLES/SCHEDULE:

The deliverables are listed as follows [include specific timeframe for each deliverable].

show only changed Fields Validate

Fields

Agreement	Curr:10/9/2016	Prev:	SF:2016-10-
Start Date			
Term (Months)	Curr:12		
Total	Curr:250,000.0	Prev:	SF:250,000.0
Agreement Value	0		250,000.00
Owner Expiration Notice	Curr:90 Days	Prev: 90 Days	SF:90 Days
Agreement Start Date	Curr:10/7/2016	Prev:	SF:2016-10-
Term (Months)	Curr:12	Prev: 12	SF:12.0

The field value is reverted to its previous value prior to the change. The Document pane reloads to show the change.

Statement of Work [SOW]

The Statement of Work (SOW) shall describe the intended division of research effort and activities in sufficient detail to enable performance to be measured or assessed against goals or progress milestones. The SOW should be completed by the Geoff Minor.

Customer Name:	Venture Industries
Agreement Start Date:	10/7/2016
Agreement Term:	12
Total Agreement Value:	\$250,000.00
Owner Expiration Notice:	90 Days

show only changed Fields Validate

Fields

Agreement	Curr:10/7/2016	Prev:	SF:2016-10-
Start Date			
Term (Months)	Curr:12	Prev: 12	SF:12.0
Total	Curr:250,000.0	Prev:	SF:250,000.0
Agreement Value	0		250,000.00
Owner Expiration Notice	Curr:90 Days	Prev: 90 Days	SF:90 Days
Agreement Start Date	Curr:10/7/2016	Prev:	SF:2016-10-
Term (Months)	Curr:12	Prev: 12	SF:12.0

To update values for multiple occurrences of a field

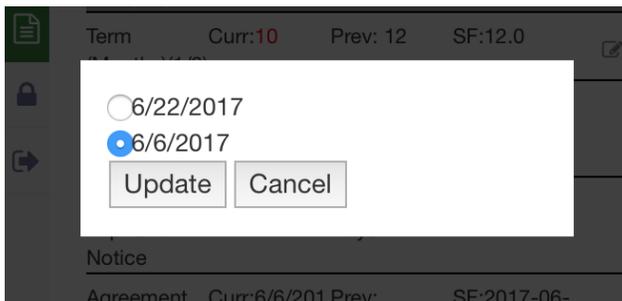
The Fields tab in the Documents pane displays, for each field, how many occurrences of the same field exist in the agreement document. The numbers to the right of the field name indicate where the specific fields appears in the document and how many total occurrences of the field exist. For example, "Agreement Start Date (1/3)" indicates that the field is the first occurrence of the Agreement Start Date, and that there are two more occurrences elsewhere in the document. Each occurrence is displayed in the Fields tab.

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Agreement Start Date(1/3)	Curr: 6/22/2017	Prev: 6/6/2017	SF: 2017-06-06	
Term (Months)(1/2)	Curr: 10	Prev: 12	SF: 12.0	
Total Agreement Value	Curr: 1,500.0	Prev: 1,500,000.000	SF: 1500000.	
Owner Expiration Notice	Curr: 90 Days	Prev: 90 Days	SF: 90 Days	
Agreement Start Date(2/3)	Curr: 6/6/2017	Prev: 6/6/2017	SF: 2017-06-06	
Agreement Start Date(3/3)	Curr: 6/6/2017	Prev: 6/6/2017	SF: 2017-06-06	
Term (Months)(2/2)	Curr: 12	Prev: 12	SF: 12.0	

To update all occurrences of a field in the document to the changed value:

1. Click on the **Edit** icon to the right of the field information on the Document pane.
2. Click the radio button to select the correct value for all occurrences of the field, and click **Update**.



All occurrences of the field in the document are updated to match your selection.

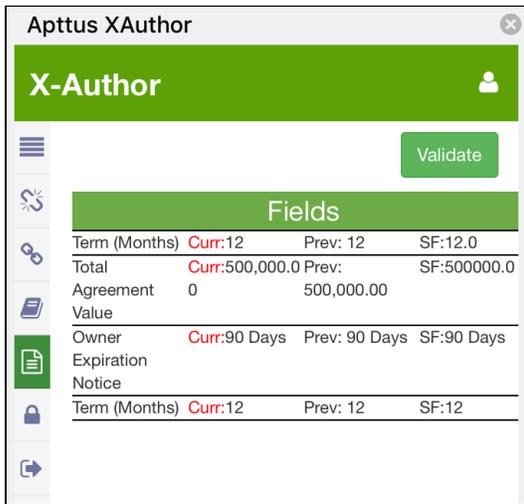
3. Click **Validate** to validate your changes and refresh the field values displayed in the Document pane.

To validate fields

Use the **Validate** action to ensure that all smart fields in your document are in the proper format for their assigned data type (e.g., Date, Number, DateTime, selected values from picklists, etc.). The agreement document cannot be reconciled at check-in unless all fields in your document are valid.

To validate fields:

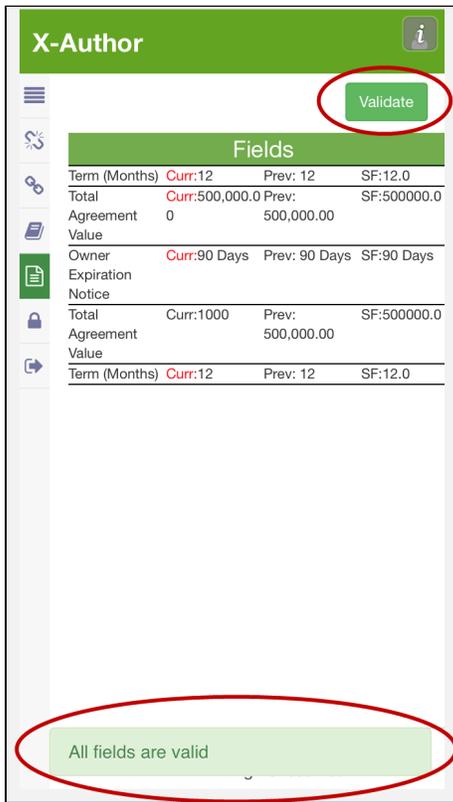
1. Go to **Document > Fields**.



2. Click on the **Validate** button. If any fields are invalid, the field row in the Document pane will be highlighted in red.



3. Make any corrections to invalid fields as needed and click **Validate** again to confirm there are no invalid fields. If all fields are valid, a success message is displayed at the bottom of the pane. You can now check in your document.

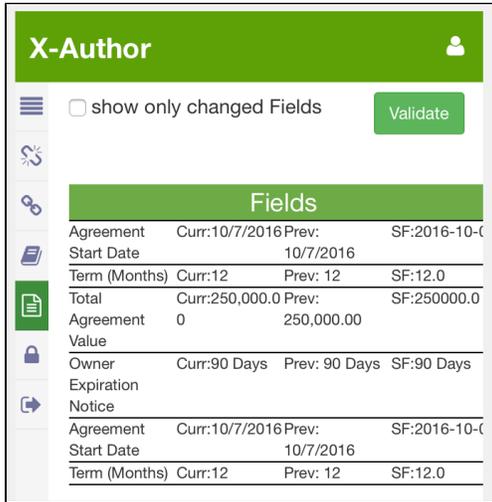


To mark fields for deletion

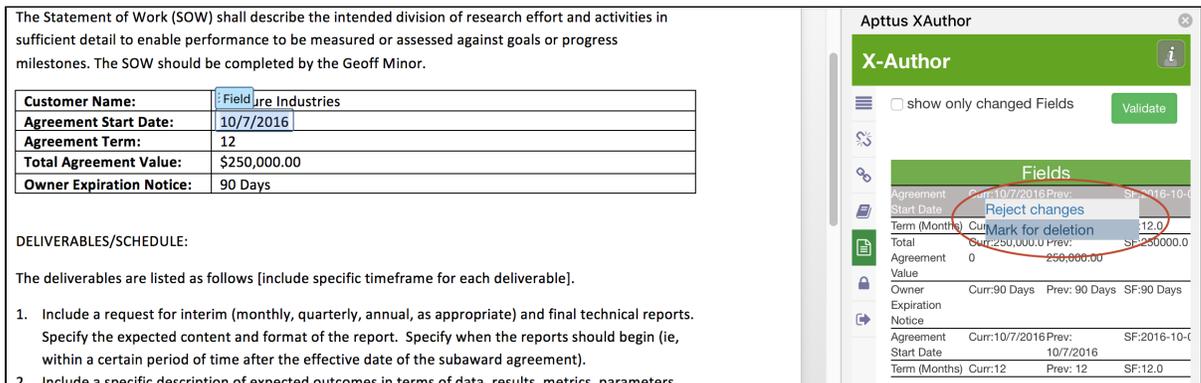
There will be times in the negotiation when a negotiating party wants to remove language from an agreement which contains a smart field. Depending on document protection settings, non-Apttus users can remove content from the agreement, but any smart field content removed will not remove the field itself. Follow the instructions on this page to **mark fields for removal**. You usually want to mark fields for removal when:

- An Apttus user marked static text as a field.
- A Template Admin marked a field as smart.
- You need to delete a smart clause from an agreement document.

1. Go to **Document > Fields**.



2. Right-click on a field and select **Mark for Deletion**.



3. Click **Yes** on the confirmation dialog that appears. The field is marked with a **strikethrough** in the document and the Document pane to denote that it has been marked for deletion.

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The Statement of Work (SOW) shall describe the intended division of research effort and activities in sufficient detail to enable performance to be measured or assessed against goals or progress milestones. The SOW should be completed by the Geoff Minor.

Customer Name:	Field Pure Industries
Agreement Start Date:	10/7/2016
Agreement Term:	12
Total Agreement Value:	\$250,000.00
Owner Expiration Notice:	90 Days

DELIVERABLES/SCHEDULE:

The deliverables are listed as follows [include specific timeframe for each deliverable].

1. Include a request for interim (monthly, quarterly, annual, as appropriate) and final technical reports. Specify the expected content and format of the report. Specify when the reports should begin (ie, within a certain period of time after the effective date of the subaward agreement).
2. Include a specific description of expected outcomes in terms of data, results, metrics, parameters, etc.
3. Include requests for tangible items such as samples or materials, or other outcomes such as surveys, websites, statistical analyses, etc., that are expected as part of the subaward work.
4. The objective of this section is to describe the expected deliverables as thoroughly as possible to ensure that the PI receives the anticipated outcome(s) to support the objectives of the prime award, based on the amount budgeted for the subaward. This will assist in the review of Collaborator invoices and make ensure appropriate payments for objectives that support the prime award.
5. Ensure deliverable schedule does not exceed period of performance of prime award.

TECHNICAL REQUIREMENTS:

Apttus XAuthor

X-Author

show only changed Fields Validate

Fields			
Agreement	Curr:10/7/2016	Prev:	SF:2016-10-
Start Date	10/7/2016		
Term (Months)	Curr:12	Prev: 12	SF:12.0
Total	Curr:250,000.0	Prev:	SF:250000.0
Agreement Value	0	250,000.00	
Owner Expiration Notice	Curr:90 Days	Prev: 90 Days	SF:90 Days
Agreement Start Date	Curr:10/7/2016	Prev:	SF:2016-10-
Term (Months)	Curr:12	Prev: 12	SF:12.0

Field will be deleted on reconciliation.

i Mark multiple occurrences of a field for deletion

In some cases, the field you are marking for deletion will have more the one occurrences in the document. When this occurs, a dialog is displayed prompting you to choose whether to delete all or just one occurrence of the field you are marking.

This field occurs more than once in document. Please choose how you want to mark the field for removal.

Click **Multiple** to mark all occurrences of the field for deletion, **Current** to mark only the field you selected, or **Cancel** to mark no fields.

4. **Check-in** the document and choose **Reconcile**. The field is removed from the document.

To unmark fields for deletion

If you decide in the same session that you want to keep a field in the document that you have already marked for deletion, follow these steps.

1. Go to **Document > Fields**.
2. Right-click on the field in the Document pane that you marked for deletion and select **Undo Delete**.
3. Click **Yes** on the confirmation dialog that appears.

Working with Clauses

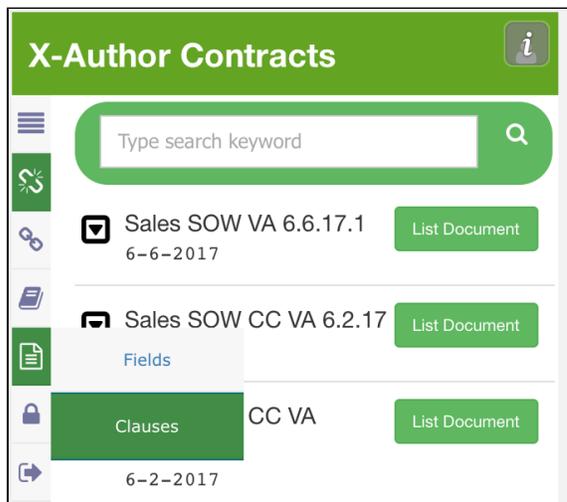
The **Clauses** section of the Document Panel lists all smart clauses in the agreement document.

Use the Document Panel to take the following actions on clauses:

- [Navigate to a clause in the document.](#)
- [Reject changes to a clause.](#)
- [Mark a clause for deletion.](#)
- [Unmark a clause.](#)

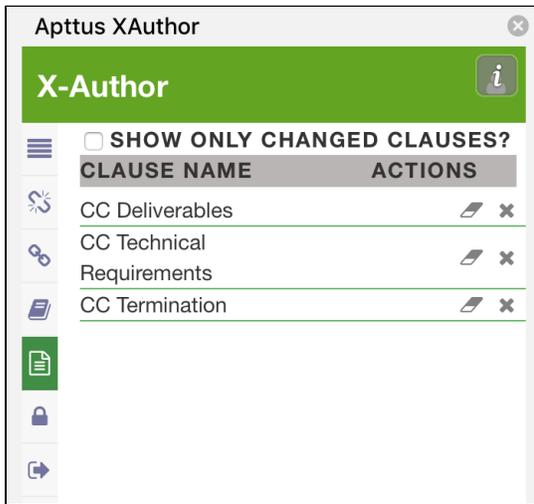
To view a clause

1. Hover over the  **Document** tab and select **Clauses** to open the Documents Panel.

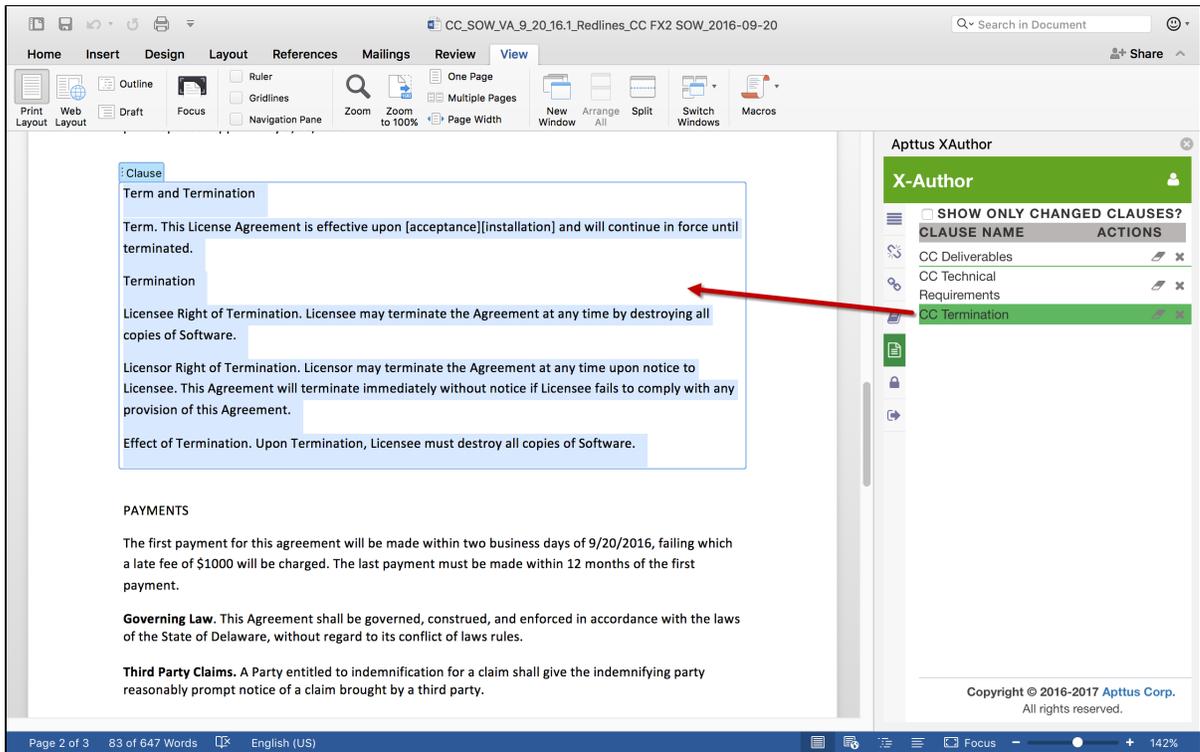


2. To view only changed clauses, select "Show Only Changed Clauses" at the top of the panel.

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3. Click on a clause name in the list. The document scrolls to highlight the selected clause.



Sections and supporting documents do not display in the list of clauses if they contain a smart field.

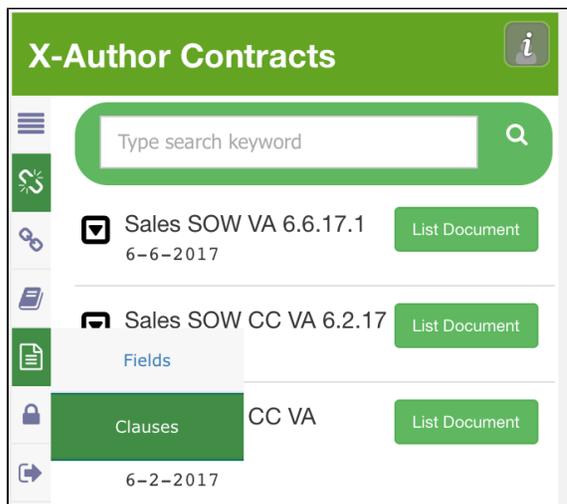
To reject changes to a clause

During multiple rounds of negotiation, the text of a clause in your agreement is likely to be modified.

Changes to clauses can be tracked over multiple check-ins, as long as redlining is preserved. Changes to clauses only become permanent when the document is checked in and [reconciled](#).

To reject the changes to a clause:

1. Hover over the  **Document** tab and select **Clauses** to open the Documents Panel.



2. Click on **Show Only Changed Clauses** to display a list of clauses with changes since the last check-in.
3. Right-click on the changed clause in the Document pane (highlighted in red) and select **Reject Changes**. The clause is reverted to its previous value prior to the change. The Document pane reloads to show the change.

To mark a clause for deletion

When you delete a clause from an agreement, the entire clause is removed from the text of the document.

1. Go to **Document > Clauses**.
2. Click the  icon to delete the selected clause. A dialog is displayed in the X-Author pane asking you to confirm the deletion.

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sufficient detail to enable performance to be measured or assessed against goals or progress milestones. The SOW should be completed by the Geoff Minor.

Customer Name:	Venture Industries
Agreement Start Date:	10/7/2016
Agreement Term:	12
Total Agreement Value:	\$250,000.00
Owner Expiration Notice:	90 Days

Clause
DELIVERABLES/SCHEDULE:

The deliverables are listed as follows [include specific timeframe for each deliverable].

1. Include a request for interim (monthly, quarterly, annual, as appropriate) and final technical reports. Specify the expected content and format of the report. Specify when the reports should begin (ie, within a certain period of time after the effective date of the subaward agreement).
2. Include a specific description of expected outcomes in terms of data, results, metrics, parameters, etc.
3. Include requests for tangible items such as samples or materials, or other outcomes such as surveys, websites, statistical analyses, etc., that are expected as part of the subaward work.
4. The objective of this section is to describe the expected deliverables as thoroughly as possible to ensure that the PI receives the anticipated outcome(s) to support the objectives of the prime award, based on the amount budgeted for the subaward. This will assist in the review of Collaborator invoices and make ensure appropriate payments for objectives that support the prime award.
5. Ensure deliverable schedule does not exceed period of performance of prime award.
6. Ensure timelines for deliverables are accurately followed.

X-Author

SHOW ONLY CHANGED CLAUSES?

CLAUSE NAME	ACTIONS
CC Deliverables	x
CC Technical Requirements	x

Do you want to mark clause for deletion?

Yes No

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3. Click **Yes** to mark the clause for deletion. The clause is marked with a ~~strikethrough~~ in the document and the Document pane. You can click the  **Undo** icon to remove the mark at any time in the same session.
4. **Check-in** the document and choose **Reconcile**. The clause is removed from the document and a "Deleted" entry is recorded in the Agreement Clause related list on the agreement record in Salesforce.

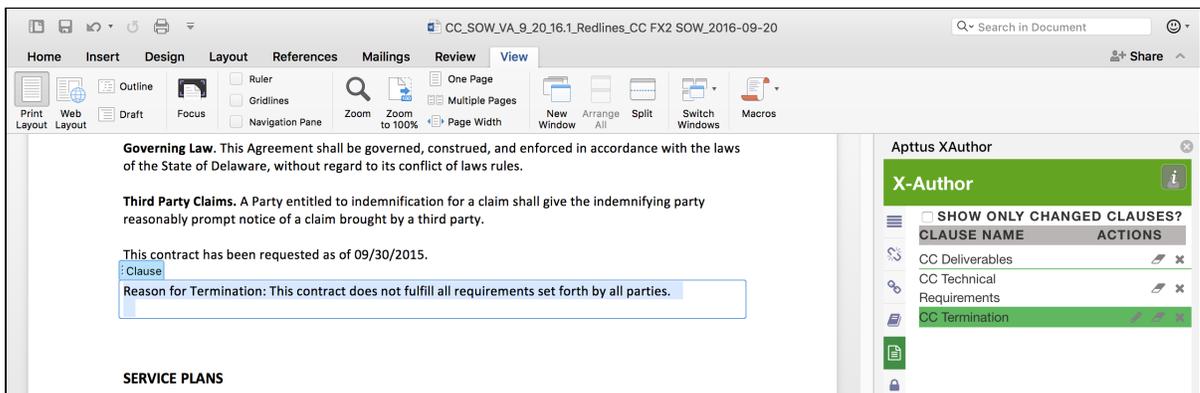


For more information on tracking clauses and clause activity in your agreements, refer to the *Contract Management Administrator Guide* for the Salesforce platform.

To unmark a clause

You must have **marked static text in the agreement document as a clause** in the same session using Playbook. Unmarking a clause removes Apttus clause properties and returns the text to a static state.

1. Go to **Document > Clauses**.
2. Click on the clause name in the list. The document scrolls to highlight the selected clause.



3. Click the  **unMark** icon. The Panel refreshes and the clause no longer appears in the list. The clause boundary is removed from the marked text and it returns to its previous state.

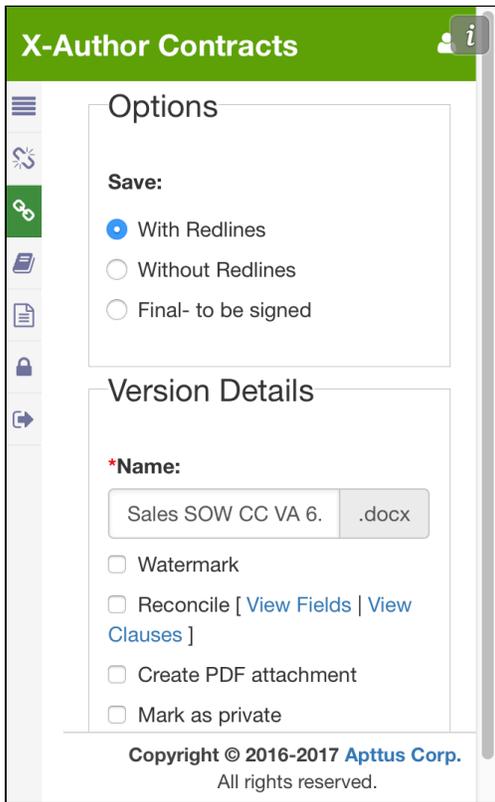
Checking in an Agreement Document

Whether you are saving a redlined version, clean version, or final version, the process for each is similar and each makes use of X-Author's Check-In feature.

Only Microsoft Word documents in DOCX format are supported for maintaining versions and checking in and checking out agreement documents. When you check in from X-Author, the document you are working on is converted back to the same document format as when it was first checked out.

To check in an agreement document

1. From the X-Author pane, click  **Check In**. The Check-in Options page is displayed.



2. Under **Options > Save**, choose one of three options for saving the document:

Option at Check-in	Description
With Redlines	This saves a draft version of the agreement document with all markups and <i>Redlines</i> is used as the action in your org's configured default document naming convention. A DOCX version of the document is saved in Notes & Attachments . If Contract Document versioning is enabled, selecting this option creates a Minor version under the Document Version Details related list in your Agreement record.
Without Redlines	This saves a draft version of the document without markups and is typically done before sending an agreement to a third party for review. Track changes /redlines are automatically removed from the Word file and <i>_Clean</i> is used as the action in the configured default document naming convention. A DOCX

Option at Check-in	Description
	version of the document is saved in Notes & Attachments . If Contract Document Versioning is enabled, selecting this option creates a Major version under the Document Version Details related list in your Agreement record.
Final - to be signed	This saves a version of the document without markups and also enables a PDF version of the document to be created. If this option is selected, a PDF file will be saved to the agreement's Notes & Attachments related list. By default, <i>_Final</i> is used as the action in the configured default document naming convention. If Contract Document Versioning is enabled, selecting this option creates a Major version (DOCX) under the Document Version Details related list in your Agreement record.



When you select "Final - to be signed" as the check-in option, **Create PDF attachment** is automatically checked if you have the Comply System Property **Auto Enable PDF for Final Docs** enabled. For more information on Comply System Properties, refer to the *Contract Management Administrator Guide* on the Apttus Doc Portal.

3. In the **Name** field, enter the required name for the document or leave it as the name suggested by X-Author. The default name includes the agreement name, revision number, and version type. You do not need to specify a file extension in the **Suggested Name** field, as X-Author automatically saves it in DOCX format.
4. Select the required watermark option.
 - Select **Include Watermark**, to add one to a non-final version. This option is available with the **With Redlines** and **Without Redlines** options.
 - **Include Watermark** is automatically deselected (greyed out) if you are saving the document as **Final - to be signed**.



If the document already contains a watermark, the watermark will be removed instead when this option is chosen.

5. Select **Reconcile Document** to synchronize the Salesforce Agreement object fields with those that were updated in the document. See [Reconciliation](#) for more details.
6. Select **Mark as private** to enable the *Private* indicator for this agreement (only for use in custom implementations—see the Apttus Contract Management Administrator Guide for more information).
7. Click **Submit** to confirm check-in of the document. The document is checked in to Salesforce and the *new document version is downloaded* from the agreement record.
8. Close the document you just checked in (no need to save) and load the newly downloaded document to continue working with the agreement, if necessary.

Note

If there are any invalid fields in your agreement, a message is displayed and the check-in is not completed. Return to [Document > Fields](#) to validate fields and make corrected as needed.

For information on enabling Contract Document Versioning and how it works, refer to the *Contract Management Administrator User Guide* for the Salesforce platform.

Reconciliation

X-Author provides a reconciliation feature which enables changes made to smart fields in an agreement document, outside of the Salesforce/X-Author environment, to be reconciled with the data held in the Agreement record in Salesforce.

In a typical scenario where an agreement document is sent to an external party for negotiation, the external party will make changes to the document as part of the negotiation. If the changes to the document involve data belonging to the Agreement record, reconciliation provides the mechanism to ensure the values in the document and the Agreement record are reconciled.

To check in and reconcile smart fields and clauses

1. From the X-Author pane, click  **Check In**. The Check-in Options page is displayed.

The screenshot shows the 'X-Author Contracts' interface. The 'Options' section has three radio buttons: 'With Redlines' (selected), 'Without Redlines', and 'Final- to be signed'. The 'Version Details' section includes a text input field for the name, currently containing 'Sales SOW CC VA 6.' and a file extension dropdown set to '.docx'. Below the name field are four checkboxes: 'Watermark', 'Reconcile [View Fields | View Clauses]', 'Create PDF attachment', and 'Mark as private'. The footer contains the copyright notice: 'Copyright © 2016-2017 Apttus Corp. All rights reserved.'

2. Choose the **Options** for saving your document:
 - To check in the document with redlines, choose *With Redlines*.
 - To check in the document without redlines (clean), choose *Without Redlines*.
 - To check in the document as final, choose *Final - to be signed*.
3. To reconcile fields in your document, click **View Fields**. This loads the **Document > Fields** page.
4. Review the Current and Previous values for smart fields in your document, make any changes as needed and click **Validate**. If any invalid values exist, correct them and perform the validation again.
5. To reconcile clauses in your document, click **View Clauses**. This loads the **Document > Clauses** page. Click **Show Changed Clauses** to review any changed smart clauses in your document and make changes as required.
6. Click  **Check In** to return to the Check-in screen. Repeat Step 2 to choose document options again.
7. Select the **Reconcile** check box.



If you choose to check in the document without reconciling, changed smart field values will not be updated in the agreement record and changes to clauses will not be reflected in the Agreement Clauses related list. If you chose to check in the document with redlines, redlines and comments will be retained.

8. Click **Submit** to check in the document with reconciliation.



If there are invalid values for smart fields in your document, the check box will not enable. An error message is displayed.

Agreement documents cannot be reconciled with the agreement record as long as invalid values exist in the document for smart fields. Go to **Document > Fields** to perform a validation and correct any invalid fields.

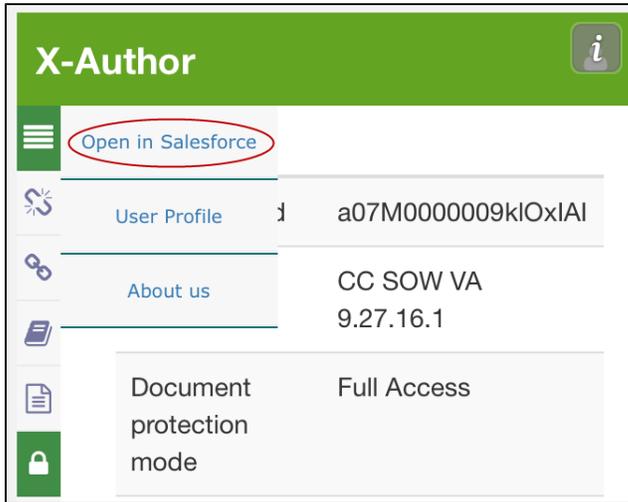
Opening Agreements in Salesforce

You can easily view the Agreement record associated with your document by choosing "Open in Salesforce" from X-Author.

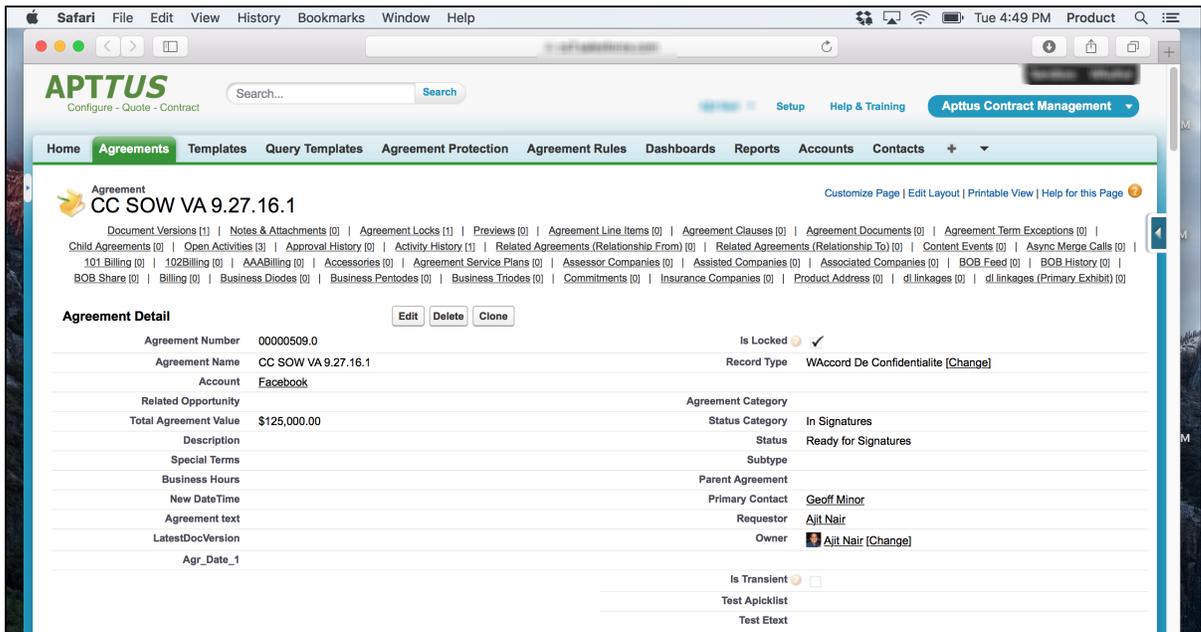
To open an agreement in Salesforce

1. [Connect to X-Author Contracts](#).
2. [Check-out](#) the agreement document for the agreement you want to view.

- From the X-Author menu, hover over the  icon and click **Open in Salesforce**.



A separate browser window is opened and the agreement is loaded in Salesforce (you may have to log in again).



Working with Templates (Salesforce Beta)

An Apttus template is a common set of sections, clauses, text, and placeholders for terms and conditions. Templates can be merged with structured data to generate agreements or proposals. Templates are stored within an Apttus template repository, and are used to create quotes and contracts. An Apttus template can be termed as a blueprint or mold for creating distributable documents.

In a typical scenario where an agreement/proposal document is sent to an external party for negotiation, the external party makes changes to the document as part of the negotiation.

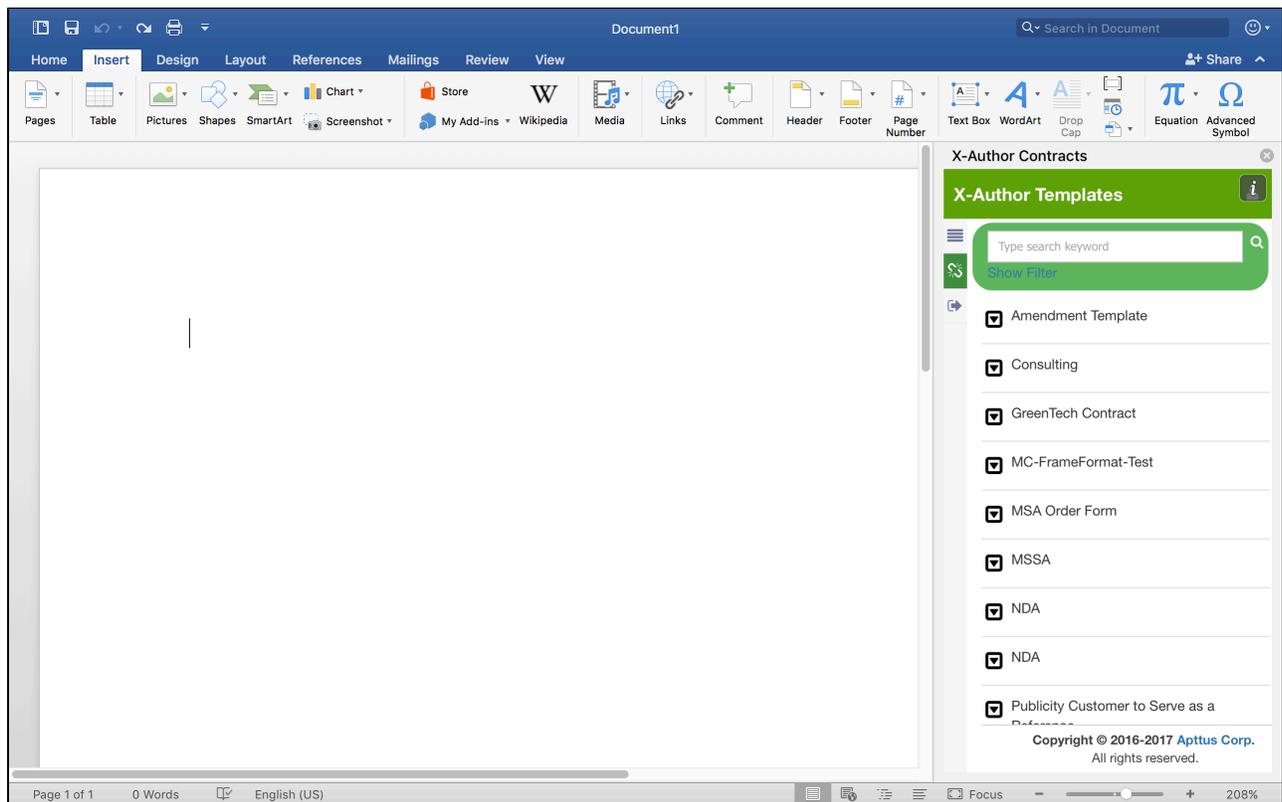
Using X-Author, you can check out an agreement template from the repository and make changes to static text and other content in the document. When you are finished, you can check in the template and modify properties as needed (for example, changing which agreement types it is associated with).

Note

X-Author Templates is currently in beta with limited functionality (Salesforce platform only). Integration with other CRMs and feature parity with our legacy client is planned for future releases, including the ability to work with Apttus fields and clauses.

To open X-Author Templates

1. Open Microsoft Word and launch the add-in.
2. Log in to X-Author for Contracts, as described [here](#).
3. Click on the menu icon in the task pane and select **X-Author Templates (BETA)**. The list of templates is displayed.



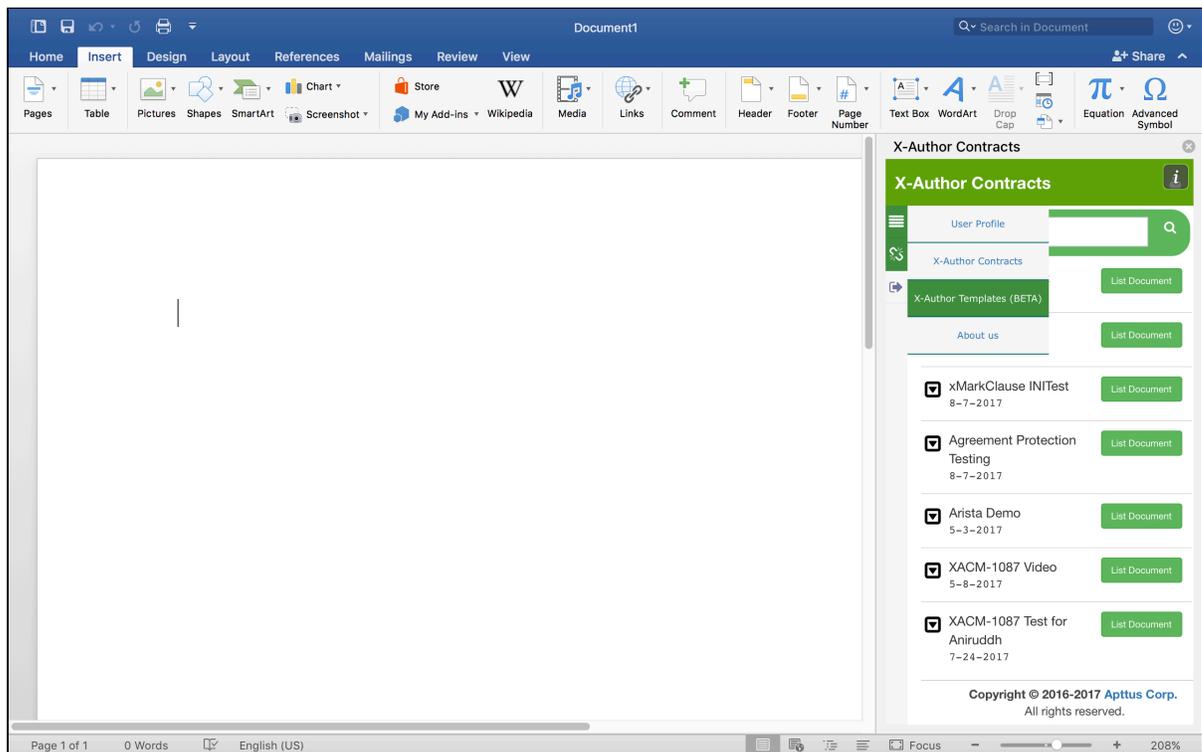
Checking Out Templates

You can check out a template from Apttus CLM and make changes to text or other static content. You cannot modify merge fields or other "smart" content that is tagged with Apttus properties.

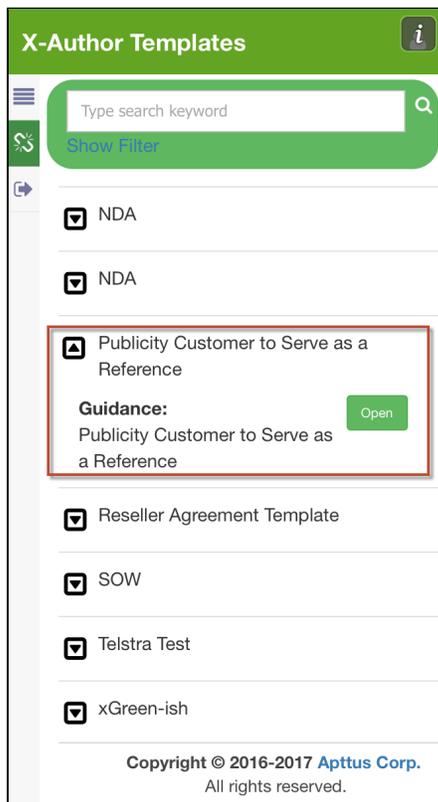
To check out a template

1. From X-Author Contracts, click on the menu icon and select X-Author Templates

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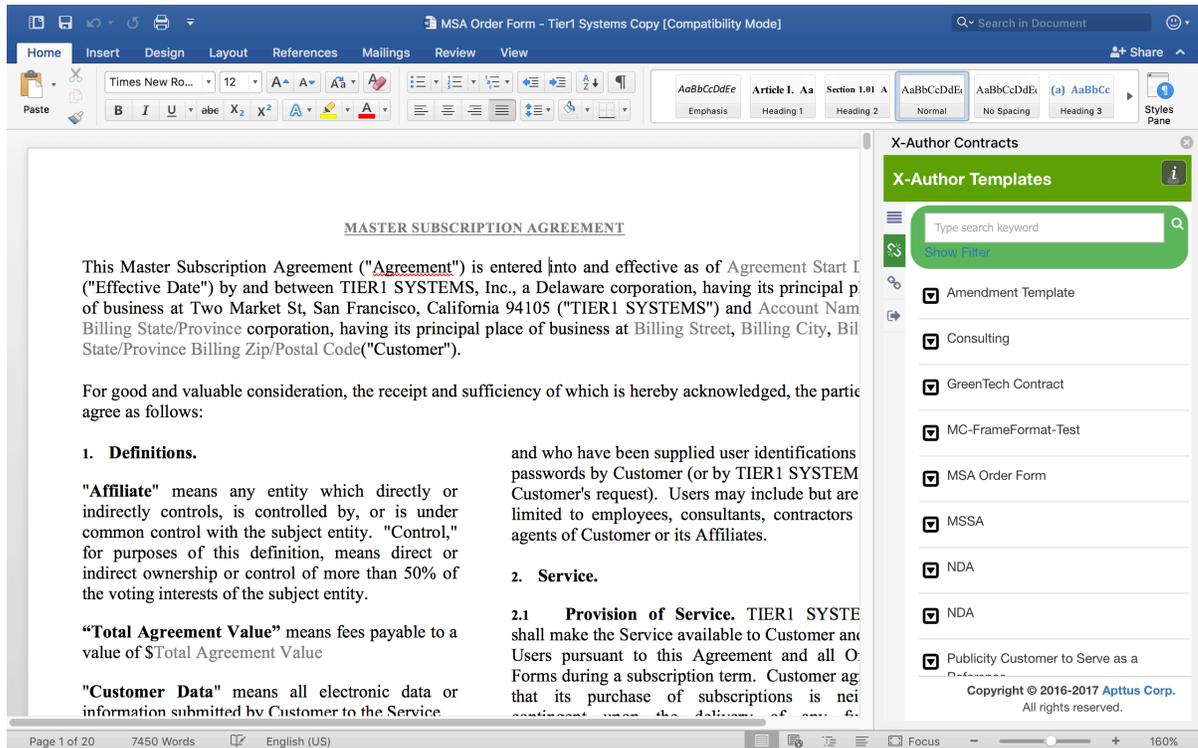


2. Use the Search box to search for an agreement template by keyword. Click **Show Filter** to expose drop-down menus that can help you to refine your search.
3. From the list of documents, click on the down arrow  to expand and view guidance for the template.



4. Click **Open** to download a copy of the template.
5. Check your Downloads folder for the file and open it in Word.

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6. Edit text and other static content in your agreement. When you are finished, click the  icon to [check in your template](#).

 Do not make changes to anything in the document bounded by a content control that has Apttus properties (such as a merge field or smart clause) as the document may become corrupted or create errors when you check it in.

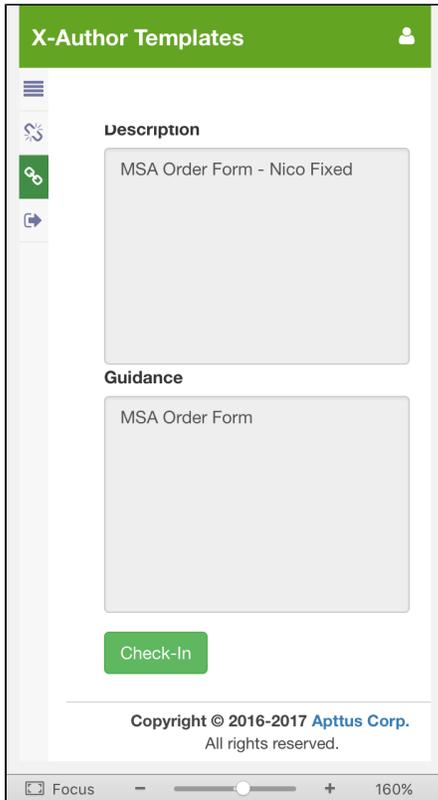
Checking In Templates

After making changes to a template, you can check it in to Apttus CLM as a new version.

To check in a template

1. [Check out the template](#) you want to make changes to.
2. Make changes and when finished, click the  icon to load the Check-In screen.
3. Scroll past the Template properties and click **Check-In**.

i You cannot modify any template properties using X-Author Templates (Beta). Use the X-Author for Contracts legacy add-in or edit the Template record directly in Salesforce to change template properties.



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