



# **X-Author Contracts for Cloud on Salesforce Spring 2019 User Guide**

04/03/2019

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## About this Guide

With the X-Author Contracts for Cloud User Guide, you can find out how Apttus X-Author Contracts for Cloud works and how to manage your organization's and your customers' contracts.

| Topic            | Description  |
|------------------|--|
| What's Covered   | This guide walks the X-Author Contracts for Cloud user through an entire contract lifecycle inside Microsoft Word while complying with approval workflows and using the latest terms and clauses from your legal playbook. It covers step-by-step instructions, and use cases for the features provided by X-Author for Contracts for Cloud. |
| Primary Audience | Individuals who are working on any aspect of contracts: contract managers, contract creators, contract negotiators, and contract reviewers   |
| IT Environment   | Refer to the latest X-Author Contracts for Cloud on Salesforce Release Notes for information on System Requirements and Supported Platforms.   |
| Updates          | For a comprehensive list of updates to this guide for each release, see the <a href="#">What's New</a> topic.  |
| Other Resources  | <ul style="list-style-type: none"> <li>Contract Management Admin Guide: Refer to this guide for installing and setting-up Contract Management in your organization.</li> <li>Contract Management User Guide: Refer to this guide to set-up the entire contract management process.</li> </ul>  |

This guide describes the following tasks:

- Creating a template
- Managing templates
- Creating offline agreements
- Using playbook
- Marking clauses and fields
- Using template expression builder
- Updating fields from Contract Management

Before using X-Author Contracts for Cloud, you must be familiar with the following:

- Basic Salesforce administration
- Microsoft Word
- Apttus terms and definitions

## What's New

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

| Release     | Topic   | Description  |
|-------------|---|--|
| Spring 2019 | <a href="#">Preview Reconciliation</a>                      | New topic. A new feature for this release.   |
|             | <a href="#">Hiding or Showing Smart Boundaries</a>          | New topic. A new feature for this release.   |
|             | <a href="#">Inserting Fields in a Template as a Table</a>   | New topic. A new feature for this release.   |
|             | <a href="#">Inserting Fields in a Template as a Section</a> | New topic. A new feature for this release.   |
|             | <a href="#">Setting Segments in Templates</a>               | New topic. A new feature for this release.   |
| Winter 2018 | <a href="#">Making Fields Read Only in a Template</a>       | New topic. A new feature for this release.   |
|             | <a href="#">Refreshing Clauses in a Template</a>            | New topic. A new feature for this release.   |
|             | <a href="#">Opening an Agreement Document</a>               | Modified topic. This topic is updated to add information about the number of agreements displayed on logging in. |
| Summer 2018 | <a href="#">Template Expression Builder</a>                 | New topic. A new feature for this release.   |
|             | <a href="#">Setting Conditional Segments in Templates</a>   | New topic. A new feature for this release.   |
|             | <a href="#">Deleting Smart Elements</a>                     | New topic. A new feature for this release.   |
|             | <a href="#">Promoting Clauses</a>                           | New topic. A new feature for this release.   |
|             | <a href="#">Inserting Inline Clauses</a>                    | Modified topic. This topic is updated to add information about the new inline clauses feature.                   |
|             | <a href="#">Tracking Clause Activity</a>                    | New topic. This topic is added for enhancement to Clause Tracking feature.                                       |
|             | <a href="#">Making Clauses Condition-based</a>              | New topic. A new feature for this release, as part of the <a href="#">Template Expression Builder</a> feature.   |

| Release | Topic                  | Description  |
|---------|------------------------|--|
|         | About Template Clauses | Renamed to <a href="#">About Template Clauses Menu</a> . |

## About X-Author Contracts for Cloud

Apttus X-Author Contracts Cloud gives contract administrators and legal teams full access to powerful contract negotiation tools inside Salesforce CRM. 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. You can 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 Contract Management 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.



## Getting Started

The X-Author Contracts for Cloud Add-In is designed for contract administrators and/or legal users to help streamline the process of creating and maintaining contracts and associated contract and clause templates. Using X-Author Contracts for Cloud, contract administrators can manage complex negotiation cycles with clause and contract templates easily. The X-Author Contracts for Cloud Add-In is not a required component, but adds tremendous value to the contract administrator by leveraging the power of Apttus within Microsoft Word.

The X-Author Contracts for Cloud Add-In provides support for versioning of agreements, where contract administrators can save redlined, clean, and final versions of non-standard language in a Microsoft Word document opened either from Salesforce or locally. When saving final versions, the X-Author Contracts for Cloud Add-In also helps the user to reconcile any terms that might have changed during the approval process. Contract and Clause templates can also be managed, including the ability to insert, save as, and replace them to and from Apttus. Finally, users can compare versions of a contract.

The X-Author Contracts for Cloud Add-In also provides support for creating conditional text within a contract or clause template. This allows contract administrators to create sophisticated conditional clauses that can include or exclude certain text or clauses depending on how a conditional expression containing valid agreement related merge fields or FX2 fields are evaluated.

This section covers:

- [Installing X-Author Contracts](#)
- [Installing X-Author Contracts Without an Installer](#)
- [Logging in to X-Author Contracts](#)

## Installing X-Author Contracts

X-Author for Contracts Cloud is a Microsoft Word add-in that requires a package installer. Alternatively, your DevOps team may also provide you an X-Author Contracts manifest file which you can configure or install in your Mac system to start using X-Author Contracts. This section would describe how to install X-Author Contracts on your Mac system using both the installer or the manifest file.

## System Requirements

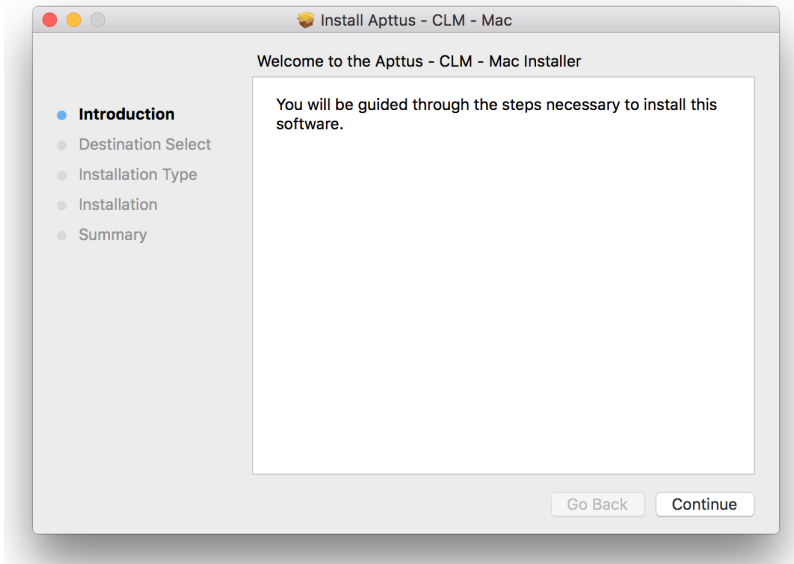
Your computer must meet the minimum requirements listed below to use X-Author Contracts for Cloud.

 Microsoft Office 365 Online or Cloud applications do not support plugins.

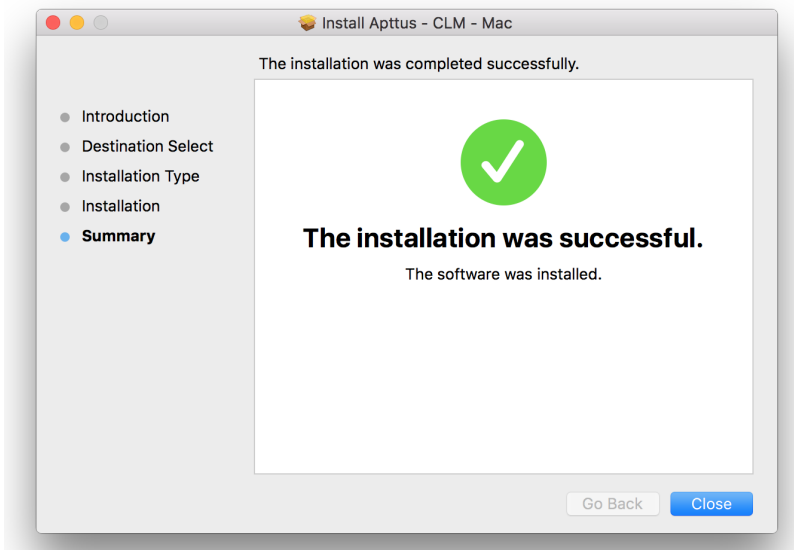
| Supported Component | Minimum Supported Version  |
|---------------------|--|
| Mac OS              | El Capitan version 10.11.3<br>Mac OS High Sierra version 10.13.3 |
| Microsoft Office    | Microsoft Word 2016 for Mac, version 15.41 or later              |

## 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 configure the manifest file in your system

**i** This is an alternate method of installing X-Author Contracts for Cloud. If you have an X-Author Contracts for Cloud installer, you do not need to perform the steps described under this topic. You need to perform these steps only if you do not have an installer file and your Apttus representative has shared only the XML manifest file with you.

1. Download the manifest file provided by your DevOps team.
2. Copy the manifest XML file and paste it in the following folder location: **~/Library/Containers/com.microsoft.Word/Data/Documents/wef**
3. Close the Microsoft Word application on your system (if open) and open it again.
4. In Microsoft Word, go to **Insert > My add-in**.

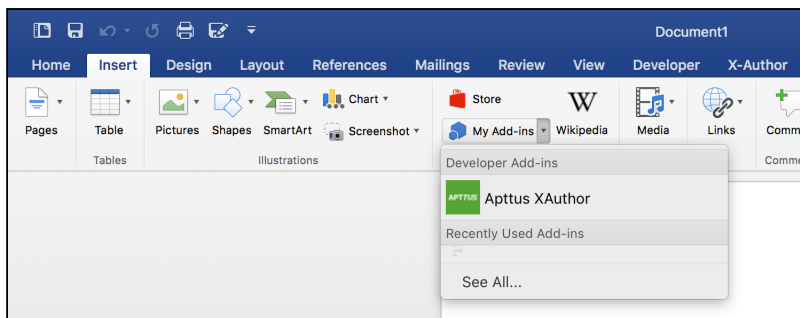
You will now see X-Author Contracts add-in.

## To launch the X-Author Contracts add-in

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

**✓** Don't confuse the Microsoft Word **Insert** option with the Mac menu bar **Insert** option. Going to Mac **Menu bar > Add-ins > My Add-ins** does not list the Apttus X-Author add-in.

3. Choose **X-Author Contracts** 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.



## Installing X-Author Contracts Without an Installer


This is an alternate method of installing X-Author Contracts for Cloud. If you have an X-Author Contracts for Cloud installer, you do not need to perform the steps described under this topic. You need to perform these steps only if you do not have an installer file and you need to create an XML manifest file.

### To create an XML manifest file:

1. Open a text editor such as Notepad.
2. Copy the following lines and paste them into the text editor:

```
<?xml version="1.0" encoding="UTF-8"?>
<!--Created:cb85b80c-f585-40ff-8bfc-12ff4d0e34a9-->
<OfficeApp xmlns="http://schemas.microsoft.com/office/appforoffice/1.1"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xmlns:bt="http://schemas.microsoft.com/office/officeappbasictypes/1.0"
  xmlns:ov="http://schemas.microsoft.com/office/
taskpaneappversionoverrides"
  xsi:type="TaskPaneApp">
  <Id>f28a4a81-39b5-4fe7-8806-c8505c24d311</Id>
  <Version>1.0.228.2017</Version>
  <ProviderName>Apttus Corporation</ProviderName>
  <DefaultLocale>en-US</DefaultLocale>
  <DisplayName DefaultValue="X-Author Contracts" />
  <Description DefaultValue="X Author Contracts"/>
  <IconUrl DefaultValue="https://XAJS_HOSTNAME/ui/xajs/Images/icon_32x32.png" />
  <HighResolutionIconUrl DefaultValue="https://XAJS_HOSTNAME/ui/xajs/Images/
icon_64x64.png" />
  <SupportUrl DefaultValue="https://www.apttus.com" />
  <AppDomains>
    <AppDomain>https://XAJS_HOSTNAME</AppDomain>
  </AppDomains>
  <Hosts>
    <Host Name="Document" />
  </Hosts>
  <DefaultSettings>
    <SourceLocation DefaultValue="https://XAJS_HOSTNAME/ui/xajs/App/index.html" />
  </DefaultSettings>
  <Permissions>ReadWriteDocument</Permissions>
</OfficeApp>
```

3. Replace XAJS\_HOSTNAME with your hostname.

 Contact your implementation Or CloudOps team to obtain XAJS\_HOSTNAME.

4. For Multi-Tenant Environment OR Salesforce Platform:
  - a. Add the following app domain in the app domains section, if it is not in manifest XML.


```
<AppDomains>
<AppDomain>https://test.salesforce.com</AppDomain>
<AppDomain>https://login.salesforce.com</AppDomain>
<AppDomain>https://xajs.apttuscloud.com</AppDomain>
</AppDomains>
```

5. Select **File > Save As**.
  - b. In the Save as type dropdown list, select **All Types**.
  - c. In the Filename text box type the filename including the .xml extension.
6. Copy the manifest XML file and paste it in the following folder location in mac:  
`~/Library/Containers/com.microsoft.Word/Data/Documents/wef`
7. Close the Microsoft Word application on your system (if open) and open it again.
8. In Microsoft Word, go to **Insert > My add-in > X-Author Contracts**.

## 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, click the menu icon  on the left-hand side to display the **Manage Connections** option, if you are logging in for the first time. If it is your subsequent login, select the connection name from the left hand menu to login.
4. In the Manage Connections screen, enter:
  - a. **Connection Name**: Enter the connection name for your connection.
  - b. **Host Name**: Enter the host URL for your instance of Apttus CLM and click **Save**. For Salesforce environments, use either <https://login-sfdc.apttuscloud.com> (production) or <https://test-sfdc.apttuscloud.com> (sandbox). This redirects you to the Sign-in page.
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**.

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

## 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.

- [Opening an Agreement Document](#)
- [Using Playbook](#)
- [Doc Clauses](#)
- [Doc Fields](#)
- [Checking in an Agreement Document](#)
- [Updating Fields from Contract Management](#)
- [Opening Agreements in Contract Management](#)
- [Creating Offline Agreements](#)
- [Importing Offline Agreements](#)
- [Tracking Clauses in your Agreement Document](#)


### Opening an Agreement Document

To work with any version of an agreement document associated with an agreement record in CRM, you must open it directly in X-Author Contracts. There are three common ways for you to open a document, depending on how you are accessing the document itself. Open your DOCX agreement document using one of the following methods:

- Open the document directly from Microsoft Word.
- Download the document directly from the Apttus CLM record and open it using Microsoft Word.
- Download the document from an email attachment (e.g., Outlook).


After opening a document, only one person can work on the document at a time.


The agreement list has two options for opening an agreement: **Open**, and **Open And Update**. The difference between the two options is that when you select **Open and Update**, you can update the values of the fields in your agreement document from the CLM agreement record.


 If you are using X-Author Contracts for Cloud on MacBook Air, you might see an error message related to "Add-in memory usage" when you work with a document of size 2 MB or more. This is due to a limitation of Microsoft Word. You can continue working after closing this warning message. However, to avoid high memory usage related issues, Apttus recommends that you close any unused applications on your system while working with X-Author Contracts for Cloud.


#### To open an agreement document


1. Open Microsoft Word and choose a blank document.

 If you have already downloaded the document from another location, open the document in Word. The document is automatically locked by you (You'll see a message saying 'Document is locked by you'). If the document is already opened by another user, you will not be able to work with it until it is checked in.



2. Go to **Insert > My Add-ins > X-Author Contracts**. Log in to X-Author Contracts.
3. From the X-Author Contracts add-in pane in Microsoft Word, click menu icon  and select **X-Author Contracts** options to open X-Author Contracts pane.
4. In the **X-Author Contracts** pane, go to **Start tab > Search > Search Agreements**.

 Maximum of 50 agreements are displayed in one instance in the X-Author Contracts pane. When you search agreements using filters, 20 agreements are displayed in one instance based on the search results and if you scroll further, 20 more agreements are displayed.

5. Enter the agreement name or number as the search term and click the search icon.
6. From the search results, click the expand icon of the agreement you want to download. In the expanded description, click **Documents**. This opens the **Agreement Details** page.
7. The Agreement Details page lists all the versions of the document. To open a version, click the more icon  next to the version and click **Open**. Your document is downloaded.
8. Open the downloaded document in Microsoft Word. The document is automatically opened and locked by you (You'll see a message saying 'Document is locked by you'). This means that your agreement is opened.

 The automatic locking of your document is controlled by a Product Setting in Contract Management, **EnableAutoCheckOut**. The document is automatically locked on opening only if the value of **EnableAutoCheckOut** is set to *True* in Contract Management.

## To open and update an agreement document

1. From the X-Author Contracts add-in pane in Microsoft Word, click menu icon  and click X-Author Contracts.
2. In the **X-Author Contracts** pane, go to **Start tab > Search > Search Agreements**.
3. Enter the agreement name or number as the search term and click the search icon.
4. From the search results, click the expand icon of the agreement you want to download. In the expanded description, click **Documents**. This opens the Agreement Details page.
5. The Agreement Details page lists all the versions of the document. To open and update a version, click more icon  next to the version and click **Open And Update**. The selected document is downloaded.
6. Open the downloaded document. You'll get a message saying 'Document is locked by you' and the X-Author Contracts pane directly opens the **Update from CLM** page. This page lists all the fields whose values have changed in the CLM record since the last Check-in.
7. You can view both the **Current Value** and the **CLM Value** of the fields. Click **Update**, to update the values of the listed fields with the latest values from the corresponding agreement record in CLM. If

you click **Cancel**, the agreement would simply open without updating the field values.

X-Author Contracts

<

Update From CLM

5 Updates Available


| Field Label           | Current Value    | CLM Value         |
|-----------------------|------------------|-------------------|
| Total Agreement Value | 1,200,000.00     | 135,000.0000<br>0 |
| Agreement Start Date  | April 1, 2018    | 4/1/2018          |
| Agreement End Date    | October 31, 2018 | 10/1/2018         |
| Name                  | ASingh SLA       | ASingh SLA        |
| Agreement Start Date  | April 1, 2018    | 4/1/2018          |
| Agreement Start Date  | April 1, 2018    | 4/1/2018          |

Cancel

Update



## Locking and Unlocking Documents

When you open a document in X-Author Contracts, 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 the  **Lock Status** button. This opens the Lock Status page with the following information:

- **Agreement Name:** Shows the name of the agreement.
- **Document protection mode:** Shows the protection level of the agreement document. The values could be *Full Access*, *Insert Comment and Track Changes Only*, *Track Changes Only*, *Fill in form fields only* and *Read Only*.
- **Document locked by:** Shows the name of the user who has locked the document. If the document is locked by another user, this field will show the name of the user who has locked the document.
- **Locked date:** Shows the date and time of locking.
- **Release Lock** or **Acquire Lock:** This is a toggle button. If a document is already locked you can unlock it using the **Release Lock**. If you have accidentally unlocked a document, you can lock it again by clicking **Acquire Lock**.
- **Refresh Lock:** This button checks the lock status of your document. If your document is not locked by anyone, and you click **Refresh Lock**, the document is locked and you are redirected to the **Work** tab of **X-Author Contracts**. You need to click **Refresh Lock** when you open a new document, to start editing it.
- **Cancel:** Takes you back to the previous screen that you were working on.

When you open an agreement document, depending on the product configuration, it is automatically locked. Locks can only be released when you either manually release the lock or check in the document. The automatic locking of your document is controlled by a Product Setting in Contract Management, **EnableAutoCheckOut**.

- If the value of **EnableAutoCheckOut** set to *True*, your agreement document is automatically locked when you open it in X-Author Contracts.
- If the value of **EnableAutoCheckOut** set to *False*, your agreement document is not automatically locked and the **Work** and **Finish** tabs are disabled for you. To start editing the document you have to first lock it using **Refresh Lock**.

## To release a document lock

Before you can release a lock on a document, it must be opened in X-Author Contracts.

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

The document page refreshes and shows the **Start** tab of X-Author Contracts. You cannot access the **Work** and **Finish** tabs of X-Author Contracts after releasing the lock. When you click the **Lock Status** icon, the **Acquire Lock** button replaces the **Release Lock** button in the Lock Status page.

**i** If you released a document lock by mistake and want to continue working with the document, go to the **Lock Status** page and click **Acquire Lock**.

## 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.

**i** 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, go to **Work** tab in X-Author Contracts pane and select **Playbook** tab. You can use the Playbook to

- Insert inline clauses in the agreement document
- Insert smart clauses in the agreement document
- Mark document text as a clause
- Promote marked clauses to the Playbook

When a text is marked as a clause, the element becomes **Smart**. Smart clauses adopt Apttus properties and you can take various actions on the clause content, and reconcile them to reflect them in the associated agreement record.

For more explicit definitions of smart clauses and smart fields, see [Working with Agreements](#).

## Inserting Clauses

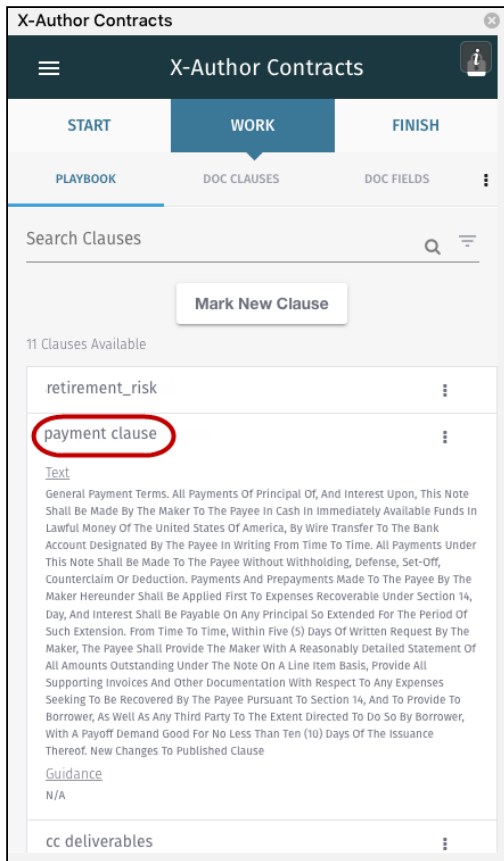
Playbook lists all clauses available for the specific agreement type associated with the document. Clause content typically includes only static text, but it can also contain smart fields, including header level and lookup merge fields. When you insert a clause that contains smart fields, field values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

- **Inserting as an inline clause:** An inline clause is a clause which does not have a content-control border around it. The inline clause contains static text and the content of the clause cannot be edited in an agreement document. Moreover, when you insert an inline clause it is not recorded in the **Doc Clauses** list and the clause reconciliation page. If you insert a clause containing smart fields as an inline clause, the values in the smart fields are converted to plain text and do not have a content-control border.
- **Inserting as a smart clause:** A smart clause is a clause with content-control border. A smart clause contains text that can be edited in an agreement document. When you insert a clause as smart, you



can see it in the clause list of the **Doc Clauses** tab of X-Author Contracts. Additionally, when you make changes to the content of a smart clause, those changes are tracked through redlines and you can see the changes recorded on the clause reconciliation page.


**i** 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 the **Clause Name**. A section displaying the text of the clause is displayed below the clause list. Click the clause text to scroll.



## To insert a clause

1. In the X-Author Contracts pane, go to **Work > Playbook > Search Clauses**.
  2. In **Search Clauses**, click the search icon to list all the available clauses or enter a search string to search a specific clause. You can also click clause filter icon  to get filtering options. You can also filter your clause search based on clause **Category**, **Subcategory**, **Locale**, **Language**, and **Type**.
  3. In the agreement document, place your cursor at the point of insertion.
  4. Select the clause from the **Playbook** pane, click more icon  next to the clause name and click **Insert** to insert the clause as an inline clause (or non-smart clause) in your document.
- OR**

Select the clause from the **Playbook** pane, click more icon  next to the clause name and click **Insert Smart** to insert the clause as a smart clause in your document.

You get a success message and if you have selected **Insert Smart**, the inserted clause is marked as a smart clause (shown with a grey border). The text of the inserted clause appears redlined in the agreement document if the agreement's protection level is set to *Insert Comments and Track Changes*.

If you have inserted the clause as smart, you can go to **Work tab > Doc Clauses** to confirm that the clause is now recognized in the document. When you check in the document, any smart clauses can be reconciled to the agreement and information of 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*.

## Marking Clauses in an Agreement

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. In the X-Author Contracts pane, go to **Work > Playbook**.
2. Highlight the content of the contract to be marked as a clause and click **Mark New Clause** in the Playbook tab.
3. In the Mark Clause form, specify the following fields for marking the clause. The clause will be automatically marked as a 1-off instance of the clause for this agreement.

| Field       | Description   |
|-------------|---|
| Clause Name | Enter a new name for the clause.                        |
| Action      | By default, <i>Inserted</i> is chosen and is Read-Only. |
| Category    | Select a category for your clause.                      |


| Field                  | Description   |
|------------------------|---|
| 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.   |
| Risk Rating            | Select an appropriate risk rating for your clause. Valid values are: <ul style="list-style-type: none"> <li>• Green</li> <li>• Red</li> <li>• Yellow</li> </ul> |
| 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.  |

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

- 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**.

Your clause is successfully marked and acquires content control border like the other smart clauses.

After inserting the clause, you can go to **Work tab > Doc Clauses** to confirm that the clause is now recognized in the document. When you check in the document, any smart clauses can be reconciled to the agreement and information of the inserted clause is added to the Agreement Clause related list on the agreement record.

 If you decide you want to unmark a clause during the same session in which you marked it, you must use the **Doc Clauses** tab to remove Apttus clause properties.


## Promoting Clauses to Playbook

You can promote a marked clause from an agreement to the playbook to make that clause a part of the Playbook's clause repository. When you mark a text as a clause in an agreement, the highlighted text acquires smartness and becomes a clause. However, a marked clause is only considered a clause for that agreement instance and when you regenerate the agreement, the marked clause is lost. If you want to reuse the same marked clause for that agreement record even after regenerating the document or want to make the marked clause available for other agreements and users, you can use **Promote Clause** to make it a part of the Playbook.

### Pre-requisites

- You must have a marked clause in X-Author Contracts.

## To promote a clause to the Playbook

1. Go to **Work tab > Promote Clauses**. If you cannot see Promote Clauses under the **Work** tab, click the more icon  and from the menu, select **Promote Clauses**.
2. From the list of marked clauses, select the clause you want to promote to the clause library and click **Promote Clause**.
3. In the Promote Clause form, specify the following details,

| Field       | Description   |
|-------------|---|
| Clause Name | Enter a new name of the clause.   |
| Category    | Select a category for your clause. The values of the categories are defined by your admin and help in filtering the clauses.                              |
| Subcategory | Select a sub category for your clause. Options in the list will change based on the category you selected.  |
| Language    | Choose the default clause language.   |
| Description | Enter a new description or modify the existing description for the clause. Maximum of 255 characters (an error will be thrown if this limit is exceeded). |
| Guidance    | Enter new guidance or modify existing guidance to help users determine the purpose of the clause.   |
| Keywords    | Enter comma-separated keywords to associate with the template. Keywords make it easier to search the templates.   |

4. Click **Save**.


You have promoted the clause to the Playbook. You can open the Playbook and search the promoted clause to use it in any other document or template.


## Preview Reconciliation

The preview reconciliation feature allows you to preview and compare the changes in a generated document with the Contract Management values when you perform any of the following tasks.

- Modify a smart field
- Mark a field
- Modify a marked field
- Modify a smart clause
- Insert a clause
- Modify a marked clause
- Mark a clause for deletion

## To preview reconciliation

1. Go to **Work tab > Preview Reconcile**. If you do not see Preview Reconcile under the **Work** tab, click the more icon () and from the menu, select **Preview Reconcile**.  
The Preview Reconcile tab displays all the modified smart fields, modified mark fields, and new marked fields. Review the CLM Value and Current Value of the changed smart fields in your document.
2. Click **Next**.

 If you have only one change in the agreement document, the **Cancel** button is displayed instead of the **Next** button.

3. The Preview Reconcile tab displays the modified smart clauses, marked clauses, inserted clauses, and clauses marked for deletion. Expand a clause from the list to review the Original and Edited content of the clause.
4. Click **Back** to navigate to the previous screen.


## Hiding or Showing Smart Boundaries


Smart fields and smart clauses in an agreement document are represented in Microsoft Word as a content control, with a bounding box. You can control the visibility of bounding boxes using the **Hide Smart Boundary** and **Show Smart Boundary** options.

### Prerequisite


Ensure that the checked out document contains smart fields or clauses.

## To hide smart boundaries in an agreement document

1. In the X-Author Contracts pane, go to **Work** tab and click the more icon ().
2. Click **Hide Smart Boundary**.  
This hides all smart boundaries of smart fields and smart clauses.

 Regardless of the **Hide/Show Boundary** option selected before checking in, the boundaries are displayed after checking out the document.

## To see smart boundaries in an agreement document

1. In the X-Author Contracts pane, go to **Work** tab and click the more icon ().
2. Click **Show Smart Boundary**.  
This shows all smart boundaries of smart fields and smart clauses.


## Doc Clauses

The **Doc Clauses** tab lists all smart clauses in the agreement document. You can take the following actions on clauses from the **Doc Clauses** tab:


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

### To view a clause

1. Go to **Work > Doc Clauses** tab.
2. Click on a clause name in the list. The document scrolls to highlight the selected clause in the agreement document.


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

### To mark a clause for deletion

1. Go to **Doc Clauses > Available Clauses** list.
2. Search the clause you want to delete or select the clause from the available clauses list and click the more icon  next to the clause name.
3. Click **Delete**.
4. You will get a confirmation message, select **Delete** again.

You'll get a message, "Your clause will be deleted on reconciliation" and the clause text in the document is marked with a ~~strikethrough~~. You can click **Undo Delete** from the more options next to the clause name, to remove the mark at any time in the same session.

Check-in the document and choose **Reconcile**. The content of the deleted 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.

### Unmarking a Clause

Unmarking a clause removes Apttus clause properties and returns the text to a static state. If you decide you want to unmark a clause during the same session in which you marked it, you can use the **Doc**



**Clauses** pane 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.

### Pre-requisites

- You must have [marked static text in the agreement document as a clause](#) in the same session using Playbook.

### To unmark a clause

1. Go to **Work > Doc Clauses**.
2. Search the clause using Search Clauses or select the clause from the **Available Clauses** list.
3. Select the marked clause and click the more icon.
4. Click **Unmark**.

You will see a confirmation message and the clause will be removed from the available clauses list too. The clause will also lose the content control border after your **Unmark** it.


## Doc 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](#)
- [Mark Fields](#)
- [Reject changed field values](#)
- [Validate field values](#)
- [Mark fields for deletion](#)

### To view and change fields


1. Go to **Work > Doc Fields** tab. All fields are displayed in a list in the order they appear in the document. **Previous** (as of last check-in), **CLM**, and **Current** (document), 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. To view the updated field value in the **Doc Fields** list, click on some other tab and then click back on **Doc Fields** tab.
4. Click **Validate** to confirm that the new field value is valid for its corresponding data type.

 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.

### Marking Fields


Using **Doc Fields**, 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.

 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. Go to **Work > Doc Fields**.
2. Highlight the content of the contract to be marked as a field.
3. In the Doc Fields pane, click the more icon and select **Mark Fields** to open the Mark Fields form.
4. The **Mark Fields** form lists all the available CLM fields with their name and type that could be made smart. These fields are grouped into different categories according to the field type, like *Information*, *Key Dates*, *Miscellaneous*, etc.
5. Use Search Fields to enter the field name and search or scroll through the list of fields to select the field to be applied to the selected text.
6. Click the more icon next to the field name and click **Mark Field**. You will get a confirmation message.
7. Select **Mark** in the confirmation message to mark the selected text as a smart field.

 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.

You will get a success message and the selected text in the contract will acquire content control boundary. The content adopts the properties of the same field on the agreement record.

## Rejecting 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. Go to **Doc Fields >** list of doc fields.
2. Click on more options on the changed fields in the Doc Fields pane and select **Reject changes**.

The field value is reverted to its previous value prior to the change. The **Doc Fields** pane reloads to show the change.

## Validating 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 **Doc 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 the fields are valid, you'll see a success message displayed at the top of the pane. You can now check in your document.

## Marking 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.

### To mark fields for deletion

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.
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.


## 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, opening and checking in 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 Contracts pane, click **Finish** tab. The Check-in page is displayed.
2. From **Save Options**, 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 Redlines is used as the action in your org's configured default document naming convention. A DOCX version of the document is saved in <b>Notes &amp; Attachments</b> . If Contract Document versioning is enabled, selecting this option creates a Minor version under the <b>Document Versions</b> 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 _Clean is used as the action in the configured default document naming convention. A DOCX version of the document is saved in <b>Notes &amp; Attachments</b> . If Contract Document Versioning is enabled, selecting this option creates a Major version under the <b>Document Versions</b> 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 <b>Notes &amp; Attachments</b> related list. By default, _Final 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 <b>Document Versions</b> 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 **Agreement 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. X-Author automatically saves the agreement 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 **Finish** to confirm check-in of the document. If you have selected the Reconcile option, you will see **Save and Next** button which takes you to the reconciliation page.

The document is checked in to Salesforce and the new document version is downloaded from the agreement record. 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.

 If there are any invalid fields in your agreement, a message is displayed and the check-in is not completed. Return to [Doc 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 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 **Finish** to open the Check-In page.
2. Choose the **Save Options** for saving your document:
  - a. To check in the document with redlines, choose *With Redlines*.
  - b. To check in the document without redlines (clean), choose *Without Redlines*.
  - c. To check in the document as final, choose *Final - to be signed*.
3. Select the **Reconcile** checkbox and click **Save & Next**.

4. This page shows all the smart field with changed values that are available for reconciliation. Review the **CLM Value** and **Current Value** of the changed smart fields in your document and click **Save & Next**.
5. This page shows the changed smart clauses that are available for reconciliation. Expand a clause from the list to review the **Original** and **Edited** content of the clause.

 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 Clauses related list in Contract Management. If you choose to check in the document with redlines, redlines and comments will be retained


6. Click **Finish** to check in the document with reconciliation.

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

## Updating Fields from Contract Management

**Update from CLM** is an action located in the X-Author Contracts ribbon you can use to update smart fields and Readonly fields in your agreement document where fields have been updated in Apttus Contract Management since the document was generated. **Update from CLM** updates all header, 2nd, and 3rd level smart fields located in your document, including:


- Smart fields in the body of the agreement document.
- Smart fields in sections.
- Smart fields in tables or repeating datasets. Adding a new line item in Apttus Contract Management and updating will create a new row in the table.
- Smart fields in generated clauses.

 • If you choose to update fields from Apttus CLM, all changed smart field values and Readonly field values will be updated. You cannot select only specific fields.

• Adding new line items to an Apttus CLM record and updating will only add a new row to the agreement document if a table exists containing those fields.

• Fields cannot be updated to or from an empty (null) value.

### To Update from Contract Management

1. Check out your agreement document and go to **X-Author Contracts > Work tab** and click the more icon .
2. In the menu, click **Update from CLM** to display a dialog showing all header-level fields in the document. Field values that have been changed on the Apttus CLM record are highlighted in red.



3. Review the changed values and click **Update** to update the field values. If your agreement contains sections and tables, click **Next** to view fields contained in sections and tables.
4. Review the changed values and click **Finish** to update the field values.

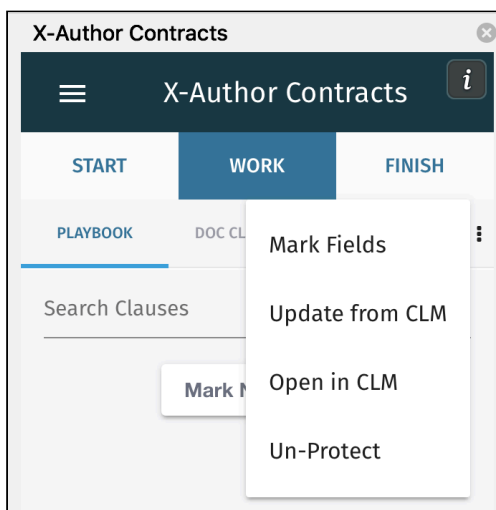
You'll see a success message when the fields are updated in the agreement.

## Opening Agreements in Contract Management

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

### To open an agreement in Contract Management

1. Connect to X-Author Contracts.
2. Open the agreement document for the agreement you want to view.
3. From the X-Author menu, hover over the menu icon  and click **X-Author Contracts**.
4. Under the X-Author Contracts pane, click the **Work** tab.
5. In the Work tab, click more icon  and select **Open in CLM**.



A separate browser window is opened and the agreement is loaded in Contract Management (You may be prompted to log in again to your Contract Management account in the browser).

## Creating Offline Agreements

Offline Agreements can be created directly in X-Author Contracts, by taking a pre-existing Microsoft Word document that was created outside of CRM and has not previously been associated with an Agreement and checking it in. When you have a document without Apttus properties open in Microsoft Word and you can create a new agreement record by checking it in as an offline agreement.

## To create an offline agreement

The document you want to use must not have previously been uploaded.

1. Open the document in Microsoft Word and connect to X-Author Contracts.
2. Select the X-Author Contracts option from the left-hand menu and go to **Start > Create**. The Create New Offline Agreement page is displayed.

X-Author Contracts

START WORK FINISH

SEARCH CREATE

Create New offline Agreement

Record Type \*  
MSA

Name \*  
John Doe

Account \*  
Automation Account Name

Primary Contact \*  
Automation Name

Start Date  
Tue Apr 17 2018

End Date  
Wed Feb 20 2019

Cancel Save

3. In the Create New Offline Agreement window, enter the following details (fields marked with an asterisk are required):

| Fields           | Description  |
|------------------|--|
| Record Type*     | Select the Record Type from the picklist.                    |
| Name*            | Enter the agreement name.                                    |
| Account*         | Select the Account from the picklist.                        |
| Primary Contact* | Select the primary contact from the picklist.                |
| Start Date       | Select the start date of the agreement from the date picker. |



| Fields   | Description  |
|----------|--|
| End Date | Select the end date of the agreement from the date picker. |

4. Click **Save**. You will see a confirmation message.

A new agreement record is created in Apttus Contract Management and the document is attached to the Notes & Attachments related list.

## Importing Offline Agreements

Using X-Author Contracts you can import a document which has not previously been saved in CLM and attaches it to a pre-existing agreement record. Like creating a new agreement, when you choose to associate the document with a pre-existing agreement record, it is added to the **Documents** related list for that agreement. Unlike creating new offline agreement, importing an agreement offline does not create a new agreement record, but rather attaches your offline document to a pre-existing agreement record.

### To import an offline agreement

1. With the document open in Microsoft Word, connect to X-Author Contracts.
2. Go to the **X-Author Contracts** pane > **Start > Search Agreements**.
3. In the **Search Agreements** field enter the full or partial agreement name and click the search icon to locate your agreement.
4. from the search result select the agreement name and click **Check In Offline**.

Your document is checked in offline and you can download the checked-in version of the agreement document. You can view the checked in agreement from Documents related list of your agreement record in Contract Management. The imported agreement does not have a template associated with it.

## Tracking Clauses in your Agreement Document

The **Clauses** related list on the Agreement record captures the clause activity for associated agreement documents during contract negotiation. You can open an agreement document in X-Author and make changes to it by inserting, modifying or deleting clauses. When you check-in that agreement document, new records are created in the **Agreement Clauses** Related List that reflect these changes. With each change made to the clauses, either from Playbook or to the new clause marked in an agreement document, you can see corresponding entries in the Agreement Clauses Related List of your agreement record in the Apttus CLM.

Agreement Clause activity is recorded in the related list during negotiation when you insert, modify or delete a clause in the initial session or a subsequent session. A session can be defined as the time between opening a document and checking it in. You can insert, modify or delete the content of a clause in an agreement document by doing any of the following:

- Inserting the clause from Playbook.
- Deleting a clause by marking it for deletion.

In the Agreement Clauses related list available for each agreement record, you can view the following changes in the agreement clauses as a result of the above mentioned actions with subsequent Check-In actions.

- For insert clause action, creates a single record with comment Inserted clause '<Clause Name>'.
- For any other action like deleting a clause, a single entry with clause number and no comments are created.

- ❗ After the agreement document is generated and checked out for the first time, a record is created in the Related List for all smart clauses present in the generated document with the **Action** as *Original*.  
When you check in an agreement document as Final, the **Action** status of the smart clauses in the document is recorded as *Final*.

The precedence for the value of clause's **Action** field is as follows,

| User Action   | Action Column Status                         |
|---|--|
| If you insert a clause in the document  | <i>Inserted clause '&lt;Clause Name&gt;'</i> |
| If you mark a clause in a document  | <i>Inserted clause '&lt;Clause Name&gt;'</i> |
| If you edit the clause text, the value of the field inside a clause, and the user added comment | <i>Modified</i>                              |
| If you edit the clause text, and the value of the field inside a clause                         | <i>Modified</i>                              |
| If you edit the clause text and Add/ Update the comment   | <i>Modified</i>                              |
| If you edit the value of the field inside a clause  | <i>FieldChangeOnly</i>                       |

## Working with Templates

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

- [Opening Templates](#)
- [Creating New Templates](#)
- [Checking In Templates](#)
- [Clauses](#)
- [Fields](#)
- [Deleting Smart Elements Using Delete or Backspace Key](#)
- [Cloning a Template](#)
- [Template Expression Builder](#)
- [Setting Segments in Templates](#)

### Opening Templates

Using X-Author, you can open 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).

#### To open a template


1. Open Microsoft Word and launch the X-Author add-in.
2. Log in to X-Author Contracts, as described [here](#).
3. From X-Author Contracts pane, click the left-hand menu icon  and select **X-Author Templates**.
4. In the X-Author Templates pane, go to **Start tab > Search > Search Templates**.
5. Use the **Search** box to search for an agreement template by keyword. Click the filter icon  to expose drop-down menus that can help you to refine your search according to Template Type, Category, Subcategory, Locale, and Language.
6. From the list of documents, click the down arrow  to expand and view guidance for the template.
7. Click **Open** to download a copy of the template.
8. Check your Downloads folder for the file and open it in Word.

Your template will be opened. Edit text and other static content in your template. When you are finished, click Check-in to check-in your template.

## Creating New Templates

To get started with creating a new Agreement or Clause template in X-Author, you must first define the basic properties for your template.

### To create a new template

1. Open an existing document or a blank document in Microsoft Word and log in to X-Author Contracts.
2. From X-Author Contracts pane, click the left-hand menu icon  and select **X-Author Templates**.
3. In the X-Author Template pane, go to **Start > Create**.
4. In the Create New Template pane enter the following details:

| Field Name      | Description  |
|-----------------|--|
| Type            | From the drop-down choose the type of template. You can choose from- <i>Template, Clause, and Supporting Document</i> .                                      |
| Business Object | Choose the the business object for your template from the drop-down. You can choose from- <i>clm_Agreement, cpq_Quote, bil_Invoice, and bil_CreditMemo</i> . |

5. Click **Save** to confirm the template properties.

You can now work with your template.


## Checking In Templates

A template is the blueprint using which an agreement is generated and clauses or supporting documents are created. Template outlines the content and the format of an agreement, clause, and a supporting document. After you create a new template or make changes to an existing template, you can check-in the template to update its contents in the CRM.

### To check-in a template

1. Log into X-Author Contracts and select the X-Author Templates tab from the left-hand navigation menu.
2. In the X-Author Templates pane, click the **Finish** tab.
3. Under Check-in, enter the value of the following fields, (the fields marked with asterisk \* are required)

| Field | Description                     |
|-------|---------------------------------|
| Name* | Enter the name of the template. |

| Field              | Description  |
|--------------------|--|
| Agreement Types    | From the drop-down you can select multiple Agreement types to associate with your template. The value of Agreement Types decides which templates are available at the time of agreement generation. If your Template's Agreement Type matches with the Agreement Type of your agreement record, you will see that template in list of available template at the time of document generation. |
| Category           | Choose the category from the drop-down. The categories are defined by the administrator, in Contract Management.   |
| Subcategory        | The subcategory is a dependent field. The Subcategories are populated, based on the value chosen for Category. The subcategories are defined by the administrator, in Contract Management.   |
| Language           | Choose the default template language   |
| Locale             | Select the locale from the drop-down.  |
| Enable Formatting  | <p>Select this check box to enable locale formatting at the template level for this template.</p> <div>  X-Author Contracts for Cloud does not support localization for Date format, Currency format, and Number or Currency precision fields. </div>   |
| Keywords*          | Enter comma-separated keywords to associate with the template. Keywords make it easier to search the templates.  |
| Next Revision Date | Identify a date for the next revision of the template.   |
| Description        | Enter a new description or modify the existing description for the template. Maximum of 255 characters (an error will be thrown if this limit is exceeded).  |
| Guidance           | Enter new guidance or modify existing guidance to help users determine the purpose of the template.  |
| Activate           | Select the Active switch to 'On' to activate the template. You must activate a template to use it for generating an agreement document.  |

#### 4. Click **Check In**.

Your template is checked in to Apttus Contract Management. A new template record is created for the template if this is the first check-in or modified if it already exists. A DOCX copy of the template is attached to the List of Templates in Contract Management.

## Clauses

Clauses are modular blocks of text that are used frequently across multiple templates. You create clauses as described in [Creating New Agreement Templates](#). After a clause is created, you can use Playbook to insert it into a template as static text.

The following sections explain how you can use clauses in your agreement template:


- [Using Playbook for Templates](#)
- [About Template Clauses Menu](#)
- [Making Clauses Smart in a Template](#)
- [Making Clauses Condition-based in a Template](#)
- [Marking Clauses in a Template](#)
- [Refreshing Clauses in a Template](#)

### Using Playbook for Templates

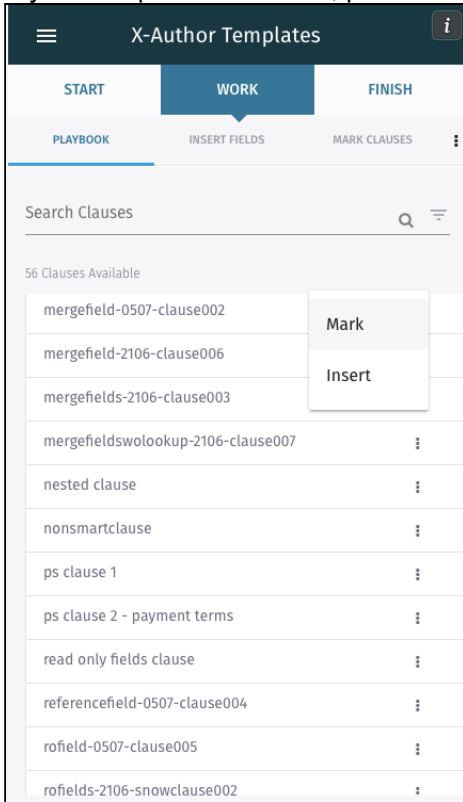
Playbook is a library of clauses, or clause templates, that each contain modular blocks of contractual language that can be reused across multiple agreement templates. Playbook helps you to search for clauses or supporting documents that can be inserted into the template as inline text.


**i** You cannot use the Playbook to insert clauses unless the template you are working with has already been checked in at least once. If you are in the process of creating a new template, check in the template and open it again to start using Playbook.

### To insert a clause from Playbook into a template

1. In the X-Author Templates pane, go to **Work > Playbook > Search Clauses**.
2. In the Search Clauses field, click the search icon to list all the available clauses or enter a search string to search a specific clause.
3. You can also click clause filter icon  to get filtering options. You can filter the clause based on clause Category, Subcategory, Locale, Language, and Type.

4. In your template document, place the cursor at the point of insertion.



5. Click a clause from the list to view the clause text and guidance. Select the clause from the Playbook pane, click more icon  next to the clause name and click **Insert** to insert the clause into your template as inline text.

You see a success message on successfully inserting a clause. The clause content is marked by a content control boundary in your template.

## To delete a clause

Select the clause text in the template and press **Delete**. The selected clause text would be deleted from the template.

## About Template Clauses Menu

The **Template Clauses** menu lists all the clauses and fields present in the currently opened template. The fields contained within a clause are shown hierarchically. From this menu you can take following actions on a clause or a field:

- [Navigate to a clause in the template](#)
- [Mark a clause as smart](#)
- [Mark a field as smart](#)



- [Mark a field as read only](#)

## To view a clause

1. Go to **Work > Template Clauses** tab.
2. Click on a clause name in the list. The document scrolls to highlight the selected clause in the template.

Newly marked clause are also displayed in the Template Clauses list.

## Making Clauses Smart in a Template

You can use X-Author Contracts for Cloud to make a clause in your template smart. A standard contracting process begins with a generated document, and ends with a final agreement. In between the initial document and the final signed agreement, the document gets redlined and negotiated. Smart clauses help track the differences between different versions of the agreement document.

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.


When you use a template which has smartness attribute enabled for its clauses, the generated agreement document will have smart clauses that can be tracked.

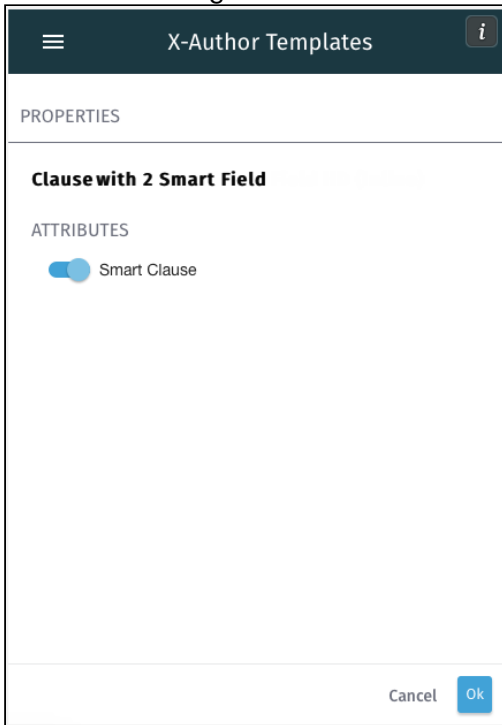
### **A Note on Agreement Documents and Templates**

All generated agreement documents (as opposed to imported offline agreements) use document templates saved in Apttus Contract Management. These templates contain merge fields which, upon generation, pull Apttus field values from the agreement to create distributable documents.

## To make a clause smart in a template

1. Open the template in X-Author Contracts.
2. Log in to X-Author Contracts and from the left-hand navigation select X-Author Templates.
3. In the X-Author Templates pane, go to **Work >Template Clauses**.

- The Template Clauses pane lists all the clauses present in your template. Select a clause from the list and click the gear icon next to the clause name .




- In the **Properties** pane, slide the switch to turn on the **Smart Clause** attribute and click **Ok**.

Your template clause will now have smartness property. To remove the smartness property of a clause, you can slide the **Smart Clause** attribute switch to off position (greyed out).

## Making Clauses Condition-based in a Template

You can use condition-based clauses in your template to make more customized and flexible agreement templates. The condition for the condition-based clauses can be simple or complex expressions that you can make using the expression builder. The clause conditions are evaluated at the time of agreement generation and the clause text is included in the generated document only if the associated condition resolves to *True*.

### To add a condition to a clause

- Open the template in X-Author Contracts.
- Log in to X-Author Contracts and from the left-hand navigation select X-Author Templates.
- In the X-Author Templates pane, go to **Work > Template Clauses**.
- The Template Clauses pane lists all the clauses present in your template. Select a clause from the list and click the gear icon  next to the clause name.
- In the **Properties** pane, click **Add Condition** to open the template expression builder.

6. Create your condition expression in the **Make Conditional** page and click **Add**. For more information on how to create simple and complex condition expressions, refer to the [Expression Builder](#) section.
7. Click **Ok** to save the condition. The properties page now shows the condition that you created.

Your clause is made conditional and you will see a success message.

## Marking Clauses in a Template

You can use the mark Clause menu to apply clause boundary and smartness property to a block of text. On generating a document, only the clauses marked as smart have the clause boundaries.

While constructing a template, you may have a block of text that you may not want in the playbook, but in the context of an agreement template (and later a contract), you would like to add the smartness property. Using **Mark Clauses** feature, you can add smartness property to an inline text in the agreement template. Any clause formed from the **Mark Clauses** feature will, by default, have **Smart Clause** property turned on.

While marking a clause, you have to keep in mind the following points:

- Apttus recommends to only mark clauses which are not inserted from the Playbook. In other words, you cannot mark a clause as smart inside an existing clause record.
- After you mark a block of text as a clause, you cannot mark any other clause within the boundary of the marked clause.

## To mark a clause in a template

1. Log in to X-Author Contracts and select X-Author Templates from the left-hand navigation.
2. Go to **Start** tab in the X-Author Templates pane and search and open a template.
3. Highlight the content (inline text) of the template that you want to mark as a clause.
4. After highlighting the content, go to **Work Tab > Mark Clauses**. If you cannot see the **Mark Clauses** option in the **Work** tab, click the more option and select **Mark Clauses**.
5. In the Mark Clause form, specify the following details for marking a clause,

| Field       | Description  |
|-------------|--|
| Clause Name | Enter a new name of the clause.  |
| Category    | Select a category for your clause. The values of the categories are defined by your admin and help in filtering the clauses.   |
| Subcategory | 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.  |
| Risk Rating | Select an appropriate risk rating for your clause. Valid values are: <ul style="list-style-type: none"> <li>• <i>Green</i></li> <li>• <i>Red</i></li> <li>• <i>Yellow</i></li> </ul> |

| Field                  | Description   |
|------------------------|---|
| Materially Significant | Select this check box if you want to make your clause materially significant. |

6. Click **Save**.

Your clause is successfully marked and acquires content control border. After marking the clause you can go to **Work > Template Clauses**, to confirm that the marked clause is recognized in the document.

## Refreshing Clauses in a Template

*Refresh Clauses* functionality allows you to keep your agreement template up to date. If the agreement contains clauses, and one clause has been changed but not published, this functionality can update the clause in the agreement template in context. The clauses having any of the following changes will appear in the Refresh Clauses list:

- Change in clause name, subcategory, or category
- Addition, deletion, or modification in clause content
- Change in the smart or merge fields

## Prerequisite

Ensure that you have checked in the clause after editing it.

## Restrictions

Nested clauses and clauses with repeat table or repeat section cannot be refreshed.

## To refresh clauses in a template

1. In the X-Author Templates ribbon, click **Refresh Clauses**.  
If the Template contains clauses with no changes, you will see a message stating, *All clauses are up-to-date*.  
If the Template contains clauses with changes, you will receive a message showing which clauses need to be refreshed.
2. Click **Refresh** to update all of the clauses that are within your main Template. This displays the confirmation stating *All clauses are refreshed successfully*.

## Fields

Fields that you insert in your template, or "merge fields" as they are sometimes called, represent the contractual terms and metadata from your Agreement record in Apttus Contract Management. When you generate a contract document, the values of the fields are retrieved from the agreement record and

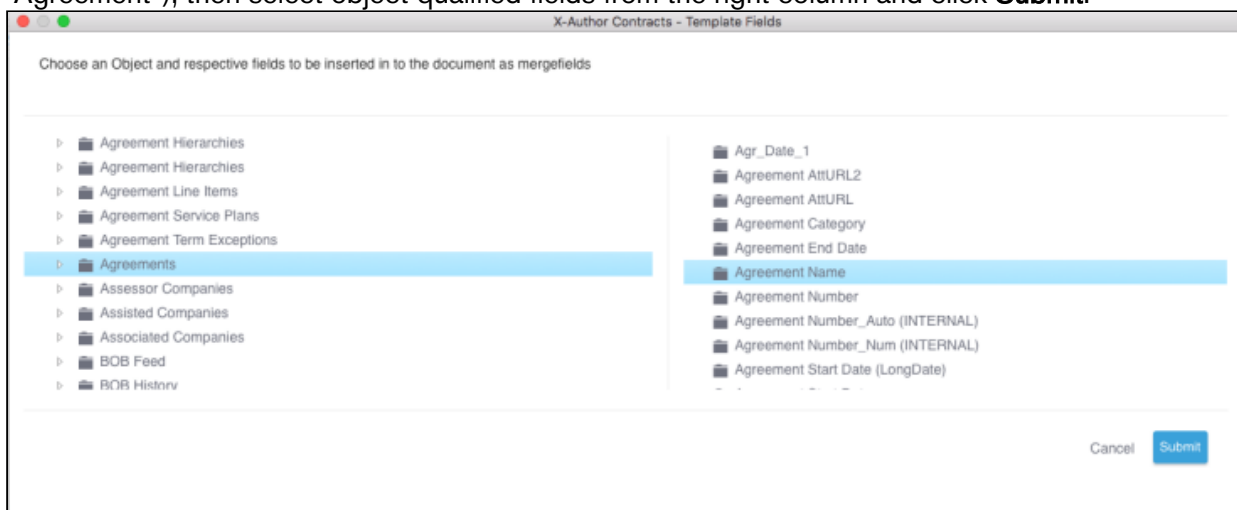
populated in the document. As a template administrator, you are responsible for building your template to include fields, as static text, as read only fields or as content-control bound "smart" fields that can be changed and reconciled to the Agreement record during the negotiation process.

Following sections explain how you can use fields in your agreement template:

- [Inserting Fields in a Template](#)
- [Making Fields Read Only in a Template](#)
- [Making Fields Smart in a Template](#)
- [Inserting Fields in a Template as a Table](#)
- [Inserting Fields in a Template as a Section](#)

## Inserting Fields in a Template

1. Open a template in X-Author Contracts.
2. From the left navigation pane, select **X-Author Templates**.
3. Go to **Work** tab > **Insert Fields**.
4. Place the cursor in the section of the template text, where you want to insert a field and click **Insert New Fields**.
5. In the Insert New Fields page, from the left column select the field's Object context (i.e., "Agreement"), then select object-qualified fields from the right column and click **Submit**.



The fields are inserted in the template. To view the inserted fields click **Template Fields** under the Work tab. Template Fields page shows the list of all the fields present in your current template. Select a field from the list to highlight it in the template document.

## Making Fields Read Only in a Template

Read Only fields are fields with content control border and their values can be updated after document generation only using **Update from CLM**. These fields are different from smart fields and merge fields in that they are not inline like merge fields and their values cannot be edited like smart fields.



If you have generated an agreement document using a template containing the read-only fields and later want to update the values of the field without generating or regenerating another document, you can click

Update from CLM and the values of the read-only fields will be updated from the Contract Management agreement record. This is useful when you need to use the same agreement as a baseline document for creating another agreement with the same content but for a different agreement record. All the fields which are not marked as smart but need to be updated with the values from the new agreement record can be made read-only fields.

Read Only fields have the following characteristics:

- Any field can be made a read-only field or smart field but not both.
- Read-only fields cannot be made Smart.
- Read-only fields can only be defined in a template.
- The value of the read-only fields cannot be edited in the generated agreement document and can only be updated.
- Read Only fields show a content control boundary in the generated agreement documents.
- Fields in repeat table and repeat section can also be marked as Readonly.


### To mark a field read-only

1. Insert the field into your template by following the steps in Inserting Fields into a Template.
2. From the X-Author Templates pane, go to **Work tab > Template Fields**. If you cannot see the Template Fields tab, click more  icon and select **Template Fields**.
3. The Template Fields page shows the list of all the fields present in your template. Search for and click the field name in the list to highlight it in the document.
4. Click the gear icon  adjacent to the selected field name to open the Properties page.
5. In the attributes list, turn on the **Readonly Field** switch and click **Ok**.



Your field will be made read-only.

### Making Fields Smart in a Template


Smart fields are specialized fields that can retain the Apttus field definition even after the Merge Service generates the Agreement document. This feature helps for reconciling the document which is explained in detail in the [Reconciliation](#) section. Smart fields are intended for parts of an agreement that would normally be negotiated. Smart fields are usually represented by small chunks of text, such as dates, categories, and numeric values. Smart fields are not intended to hold large amounts of text—if necessary, use smart clauses instead.

-  Smart fields have the following limitations:
- Text Area data type fields and formula field for LongDate are not supported.
  - You cannot mark Lookup fields as smart.
  - Smart fields cannot be used in the headers or footers of agreement documents.

## To mark a field as Smart

1. Insert the field into your template by following the steps in [Inserting Fields into a Template](#).
2. From the X-Author Templates pane, go to **Work tab > Template Fields**. If you cannot see the Template Fields tab, click more  icon and select **Template Fields**.
3. The Template Fields page shows the list of all the fields present in your template. Search for and click the field name in the list to highlight it in the document.
4. Click the gear icon  adjacent to the selected field name to open the **Properties** page.
5. In the attributes list turn on the **Smart Field** switch and click **Ok**.


Your field will be Smart.



 If you want to turn off the smartness property of a field, turn off the Smart Field switch, under Properties.


## Inserting Fields in a Template as a Table


You can insert fields as a table in your template and the inserted table is added as a repeat table. When template with repeat table is used to generate an agreement, the repeat table of a header row with inserted fields and their values in the preceding rows.

1. Open a template in X-Author Contracts.
2. From the left navigation pane, select **X-Author Templates**.
3. Go to the **Work** tab.
4. Place the cursor in the section of the template text, where you want to insert a field and click **Insert New Fields**.  
This displays the Insert Fields window.
5. From the left column select a line item object, such as **Agreement Line Items**.
6. In the window to the right, hold **command** and select one or more fields from the list. Each field you select is displayed in a column in the table.

 Fields are inserted as columns in the table based on the order you select. Do not move your cursor when the fields are being inserted.

7. Select the checkbox **Insert as a table**.
8. Click **Submit**. A Repeat table is inserted into your template with each field displayed as a separate column.
9. To search inserted fields:
  - a. Navigate to the **Template Fields** tab. This displays the Repeat Table (object name) and the fields in the repeat table.
  - b. Enter the field name in the search field and click the search icon (  ).
10. To make an inserted field smart field or readonly:
  - a. Click the gear icon (  ) adjacent to the selected field name to open the **Properties** page.


- b. In the attributes list, turn on the **Smart Field** or **Readonly** switch based on your requirement and click **Ok**.
11. To show or hide captions for a generated table:
  - a. Click the gear icon (  ) adjacent to the Repeat Table.
  - b. In the Table Attributes section, turn on the **Show Caption** switch.
12. To select table formatting when no data is present:
  - a. Under the Table Display Attributes, click **Format**. This displays a drop-down menu. Select one of the following options based on your requirement.
    - i. To show table captions and one empty row, select **Show captions and one empty row**.
    - ii. To show captions only and no rows, select **Show captions only**.
    - iii. To remove the entire table from the generated document, select **Remove whole table**.
  - b. Click **Ok**.



 Fields inserted in a table cannot be made conditional.

## Inserting Fields in a Template as a Section

You can insert fields as a section in your template and the inserted section will be added as a repeating section. This inserts each specified field on a new line when you select multiple fields (in the selected order).

1. Open a template in X-Author Contracts.
2. From the left navigation pane, select **X-Author Templates**.
3. Go to the **Work** tab.
4. Place the cursor in the section of the template text, where you want to insert a field and click **Insert New Fields**.  
This displays the Insert Fields window.
5. From the left column, select a line item object, such as **Agreement Line Items**.
6. In the window to the right, hold **command** and select one or more fields from the list.

 Fields are inserted one below the other based on the order you select. Do not move your cursor when the fields are being inserted.

7. Select the checkbox **Insert as a Section**.
8. Click **Submit**. A repeat section is inserted into your template with each field displayed one below the other.
9. To search inserted fields:
  - a. Navigate to the **Template Fields** tab. This displays the Repeat Section (object name) and the fields in the repeat section.
  - b. Enter the field name in the search field and click the search icon (  ).
10. To make an inserted field smart field or readonly:
  - a. Click the gear icon (  ) adjacent to the selected field name to open the **Properties** page.



- b. In the attributes list, turn on the **Smart Field** or **Readonly** switch based on your requirement and click **Ok**.
11. To make inserted fields conditional, see [Template Expression Builder](#).

## Deleting Smart Elements Using Delete or Backspace Key

You can now use the **Backspace** or **Delete** key to delete clauses, fields, nested clauses, smart clauses, smart fields and read-only fields from an agreement document. Clauses or fields deleted from the document are recorded in the reconciliation screen as deleted. This feature improves the usability experience of X-Author Contracts.

Earlier smart elements like smart fields or smart clauses could be deleted only by marking them for deletion from the control panel and then reconciling them. This feature removes that limitation. Also, if you are not an Apttus user and do not have X-Author installed, you would still be able to delete smart elements from the agreement document. Additionally, earlier it was difficult to remove static text if it was in between two smart elements. That problem is solved with this feature.

### Prerequisites

- To delete a smart element you must ensure that the value of the Comply System Property, **UnlockSmartElements** is set to *True* in Contract Management. Only then the smart elements become available for deletion.  
For more information on how to configure the comply system property, refer to Contract Management on Salesforce Administrator Guide.

### To delete a smart field, smart clause or repeat section

1. Select the smart element in the document. Highlight the text value of the field, clause, section or table with your mouse.
2. Press **Delete** or **Backspace**. This only deletes the field value but the content border remains.
3. Press **Delete** or **Backspace** again to completely delete the smart element. Now, the content border is also deleted.

OR

1. Identify the smart element in the document.



2. Click the vertical ellipsis icon on the content control border of the element.
3. Press **Delete** or **Backspace**.

The content control border of the fields, as well as the field value, will be deleted.

### To delete a repeat-table

1. Identify the smart table in the document.



2. Click the vertical ellipsis icon on the content control border of the table.

3. Press **Delete** or **Backspace**.

The cell values are deleted but the table remains with blank cells. When you delete a cell value within a table, the changes are shown as strikethrough in the reconcile smart fields in table screen. The new value column remains blank and the previous value is shown as strikethrough. However, this practice is not recommended because if you delete a cell in a repeat a table, you may see some issues during reconciliation.

### To delete a read only field

1. Select the read only field in the document (Protection Mode= *Full Access*).
2. Press **Delete** or **Backspace**.

OR

1. Select the read only field in the document (Protection Mode= *Insert Comments and Track Changes*).
2. Press **Delete** or **Backspace**.
3. You will see a Microsoft Word's warning message, click **Yes** to continue with the delete operation.
4. Go to Microsoft Word ribbon and click **Review** tab.
5. Click **Accept**, to accept the delete changes. The content control of the read only field is deleted but the text value remains.
6. Select the text value and again press **Delete** or **Backspace**.
7. Repeat steps 3 and 4. You have to **Accept** the delete changes twice.

Now the complete read only field is deleted.

### Best Practices and X-Author Contracts Behavior When Deleting Smart Elements or Read Only Fields

Smart elements can be deleted using the Del or Backspace key but, while doing it you must adhere to the following recommended best practices to avoid errors.

- Existing documents would not support delete using Delete or Backspace key unless they are regenerated from Contract Management or checked out in X-Author Contracts.
- Deleting with Backspace and Delete keys may not work with custom fields.
- Apttus recommends not to delete fields or smart elements in the following scenarios:
  - If the fields are part of a nested clause, sections, X-Author Tables, Headers, or Footers.
  - If the smart elements are part of a section with third level X-Author table.

#### When Document Protection is set to *Full Access*

- You must **Accept** or **Reject** each change in the **Review** tab of Microsoft Word, before checking in the document using X-Author Contracts.
- If you delete a field by selecting the field value text and pressing Delete or Backspace, hit Backspace or delete twice to remove the text and the content control border of the field. If you fail to do so, you'll see a validation error on reconciliation or while validating the fields using **Validate Fields**.

#### When Document Protection is set to *Insert Comments and Track Changes*

- In *Insert Comments and Track Changes* protection mode, it is mandatory for you to first **Accept** or **Reject** the changes in the document from the **Review** tab of Microsoft Word before you perform any action from X-Author Contracts. Failing to do so will give you validation errors or unexpected behavior in X-Author Contracts. X-Author Contracts actions include performing **Update from Salesforce**, Checking in the document, reconciling the document, **Preview Reconcile**, and **Validate Fields**.
- You must remove the document protection by manually entering the password before you can delete smart elements as well as read-only fields from your document.
- If you select a content control and partially delete the text, the partial text would remain as static text.
- When you delete a smart field in the document and then open the control field, the **Current Value** column of the **Control Panel** will show blank values for the deleted fields.
- When you delete a smart field which has multiple occurrences in the document, the smart field's occurrence index is not updated in the Control Panel unless you check-in the document. The index number helps identify which occurrence of the field you have deleted.


## Cloning a Template

You can clone an existing template that you have opened to make a new copy of the template.

### Pre-requisites:

- You must have an existing template opened in X-Author Contracts.

### To clone a template from an existing template

1. Connect to X-Author Contracts and from the left navigation panel, select **X-Author Templates**.
2. In the X-Author Templates pane, go to the **Work** tab, click the more icon  and select **Clone**.
3. Click **Clone** on the X-Author Templates ribbon in Microsoft Word.
4. In the Clone Template page, change the name of the cloned template, to suit your requirements. By default, the cloned template name has 'Copy' added to the end of the original template name. For example, if you're cloning a template named *Clause Agreement Template* then the default name for the cloned template will be *Clause Agreement Template Copy*. You can edit the values of the other template properties too.
5. Click **Save** to save the cloned template in Contract Management.

## Template Expression Builder

You can use a template expression builder to conditionally display content in your generated agreement document. You can write a conditional expression using the expression builder; this expression is evaluated to include or exclude the conditional content. The expression builder can be used with clauses, sections, segments or tables for their conditional rendering.

The expression builder has three main components or fields,

- **Fields** are object fields. **Fields** lists all the available fields of the selected business object. It is a drop-down list which shows the field names listed according to their hierarchy. Each expression condition requires the identification of the field control to which the condition will apply.
- **Operator** lists the logical operators for carrying out the logical operation.
- **Value** is the value of the object field selected earlier. The value finishes the expression and is used to determine whether the condition evaluates to *True* or *False*.

## Adding Filter Logic

The Expression Builder allows you to **Add Row** to add more expression conditions, where two or more conditions are joined in the overall expression by the **Filter Logic**. In the absence of a filter logic, the default relationship between the rows is the Boolean operator AND.

You can add up to nine rows of condition expressions which can be used in a single expression using the filter logic. The supported filter logic operators are AND and OR. You can use parentheses for setting the precedence. For example, if you have five rows you can create a filter logic like, (((1 AND 3) OR (2 AND 4)) AND 5). To add filter logic click **Add Filter Logic** and enter your logic in the field. Click **Apply Logic** to check whether your filter logic expression is correct. If your logic is incorrect, you'll see message in red.

**Make Conditional**  
Build expression to make selection conditionally shown

| Field              | Operator  | Value      |
|--------------------|-----------|------------|
| Agreement Name     | Contains  | TechPubs   |
| Agreement End Date | Less than | 12/31/2018 |

Logic applied successfully


Add row Clear All (1 AND 2) Apply logic Clear logic Cancel **Add**

Click **Add** to finalize your conditional expression.

## Setting Segments in Templates



Set Segment feature allows you to set condition and style for the highlighted text in your agreement template. The condition for the segment's visibility can be set from the expression builder. The segment can consist of highlighted text, a clause, a group of text across clauses, or text with fields. You can leverage this feature to create a template that can show or hide different segments of text in the generated agreement based on the conditions set by you. The expression builder is fully integrated with the objects and fields in your Salesforce Org.

## To make a Segment Conditional in a template


1. In the X-Author Templates pane, go to **Work** tab, click the more options icon () and select **Set Segment**.
2. Highlight a block of text in your template and click **Set Conditional**. This opens the **Make Conditional** window which has the expression builder.
3. In the make **Make Conditional** window, you can create a conditional expression and also create a complex expression using logical operators between multiple rows of conditions. To create an expression you must enter the values of the following three fields:

| Field Name | Description  |
|------------|--|
| Field      | Select the field which you want to set as the criteria for the condition. The <b>Field</b> drop-down shows the Agreement object and its fields from your Salesforce org. You must select a field name. The fields are listed and grouped according to their hierarchy. |
| Operator   | You must select the logical operator from the drop-down. This forms the relationship between the <b>Field</b> and its <b>Value</b> .   |
| Value      | Enter the value of the field name selected in the <b>Field</b> .   |

You can add multiple rows of conditions. To do this click Add Row and set your condition. Click **Add Filter Logic** to add a logical relation between multiple rows.




4. Click **Add**.  
You will see the success message and your segment will be added as Segment Conditional (Conditional) to the segments list in the **Set Segment** pane. Selecting the segment name from the list highlights that segment in the template document.
5. To view or edit a segment condition, select the Segment Conditional (Conditional) from the segments list in the **Set Segments** pane and click the gear icon () next to the segment name. This opens the **Segment Conditional** page and you can see the condition expression set for that segment. To edit the conditional, click the pencil icon () next to **Condition**.  
At the time of agreement generation, if your conditional's value evaluates to true, the associated segment is shown in the agreement document.

## To delete a conditional segment in a template


1. Go to the **Work tab > Set Segment** tab in X-Author Templates.
2. Select the segment from the segment list. The selected segment is highlighted in the template.
3. Click the gear icon () next to the segment name to open the **Segment Conditional** page.
4. Click **Delete**. You will see a confirmation message. Click **Delete** again.

Your segment is successfully deleted and the content control boundary of your segment is removed.

## To set a style for a segment in a template

1. In the X-Author Templates pane, go to the **Work** tab, click the more options icon () and select **Set Segment**.
2. Highlight a block of text in your template and click **Set Style**. This opens the **Select Styles** window that lists custom styles.
3. Select a custom style or select the **Show built-in styles** checkbox and select a style.
4. Click **Select**.  
The segment is added as Segment Regular to the segments list in the **Set Segment** pane. Selecting the segment name from the list highlights that segment in the template document.
5. To view or edit a segment style:
  - a. Select **Segment Regular** from the segments list in the **Set Segments** pane and click the gear icon () next to the segment name.  
This opens the **Segment Regular** page with the segment style set for that segment.
  - b. To edit the style, click the pencil icon () next to **Style**.
6. To add a segment condition, click **Add Condition**. This opens the **Make Conditional** window which has the expression builder. For more information, see [To make a Segment Conditional in a template](#). Segment Regular style segment changes to Segment Conditional after you add a condition.  
When you generate a document using a template with style segments, you can view different styles applied in the generated document.

## To delete a style for a segment in a template

1. Go to the **Work tab > Set Segment** tab in X-Author Templates.
2. Select the segment from the segment list. The selected segment is highlighted in the template.
3. Click the gear icon () next to Segment Regular to open the **Segment Regular** page.
4. Click **Delete**. You will see a confirmation message. Click **Delete** again.

Your segment is successfully deleted and the content control boundary of your segment is removed.

# Appendix

This section covers:

- [Troubleshooting Manifest File Change Errors](#)

## Troubleshooting Manifest File Change Errors

Sometimes after upgrading your X-Author Contracts for Cloud application, you're not able to access the new settings or configurations, or configurations show the old values. Also, if you change your X-Author Contracts manifest file to switch between different environments, the connections are not configured properly, and you get an 'Undefined error'.

To overcome these configuration problems, after an upgrade or after switching the manifest file, you must clear your system's cache. The following section describes the steps to clear cache on different Mac machines including the iMac and the MacBook.

### Clearing cache from iMac (Desktop)

#### Pre-requisites

1. You must close the Microsoft Word application on your system.

#### To remove the Microsoft application cache

1. Go to **Finder** and enter the following path: *~/Library/Containers/com.Microsoft.OsfWeb Host/Data/Library*
2. Select the **Caches** folder and right-click.
3. Select **Move to Trash** and click **OK**.

After this open Microsoft Word and open the X-Author Contracts Add-in.

#### To remove Library cache

1. Go to **Menu bar > Go > Home**.
2. From the left navigation pane, select the logged in user.
3. Go to **Library > Caches**.
4. Right-click on **Cache** and select **Move to Trash**.

### Clearing cache from Macbook

#### Pre-requisites

1. You must close the Microsoft Word application on your system.

### To remove the Microsoft application cache

1. Go to **Menu Bar > Go > Go to Folder**.
2. In the go to Folder dialog box enter the following path and click Go: *~/Library/Containers/com.Microsoft.Word/data/Library/Caches/*
3. In the **Caches** folder, select the folders starting with 'com.microsoft..'
4. Right-click on the selected folder name and select **Move to Trash**.

After this open Microsoft Word and open the X-Author Contracts Add-in.

### To remove Library cache

1. Go to **Menu bar > Go > Home**
2. From the left navigation pane, select the logged in user.
3. Go to **Library > Caches**
4. Right-click on **Caches** and select **Move to Trash**.



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