

**APTTUS<sup>®</sup>**

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## **X-Author Contracts For Cloud On Salesforce Spring 2018 User Guide**

18 May 2018

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## Overview

**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. When you are finished, use the X-Author add-in to check-in your document, reconcile clauses, fields and other contract elements in an easy-to-use interface. Negotiating parties can insert and modify contract terms and clauses and add non-legal language, then check in redlined, clean and final versions back to the agreement record. Advanced reconciliation capability also allows users to reconcile any terms or clauses that may have changed during the approval process and update them in the Apttus CLM directly. Apttus Contract Management Document Versioning integrates with X-Author, meaning document versions can be tracked with ease. Furthermore, users who are already familiar with Microsoft Word will also be comfortable using X-Author, as many Word capabilities such as the tracking of changes and commenting are already a part of the tool.

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

## About this Guide

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

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

# Getting Started

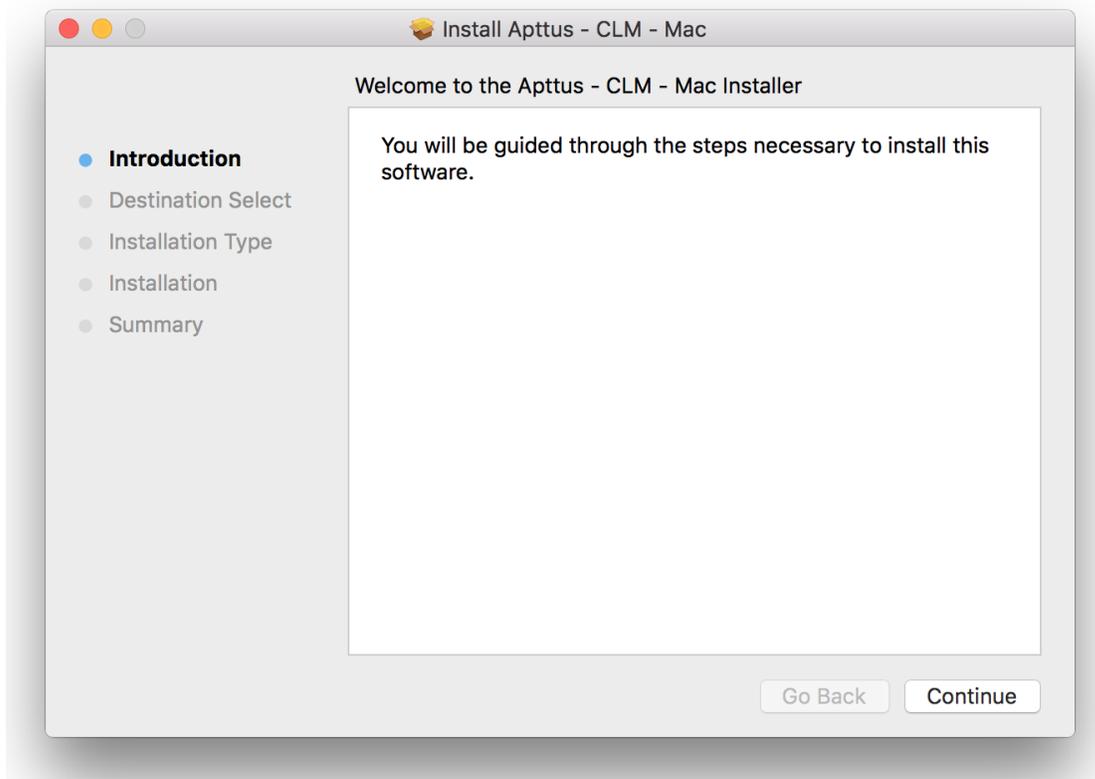
## Installing X-Author Contracts

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.

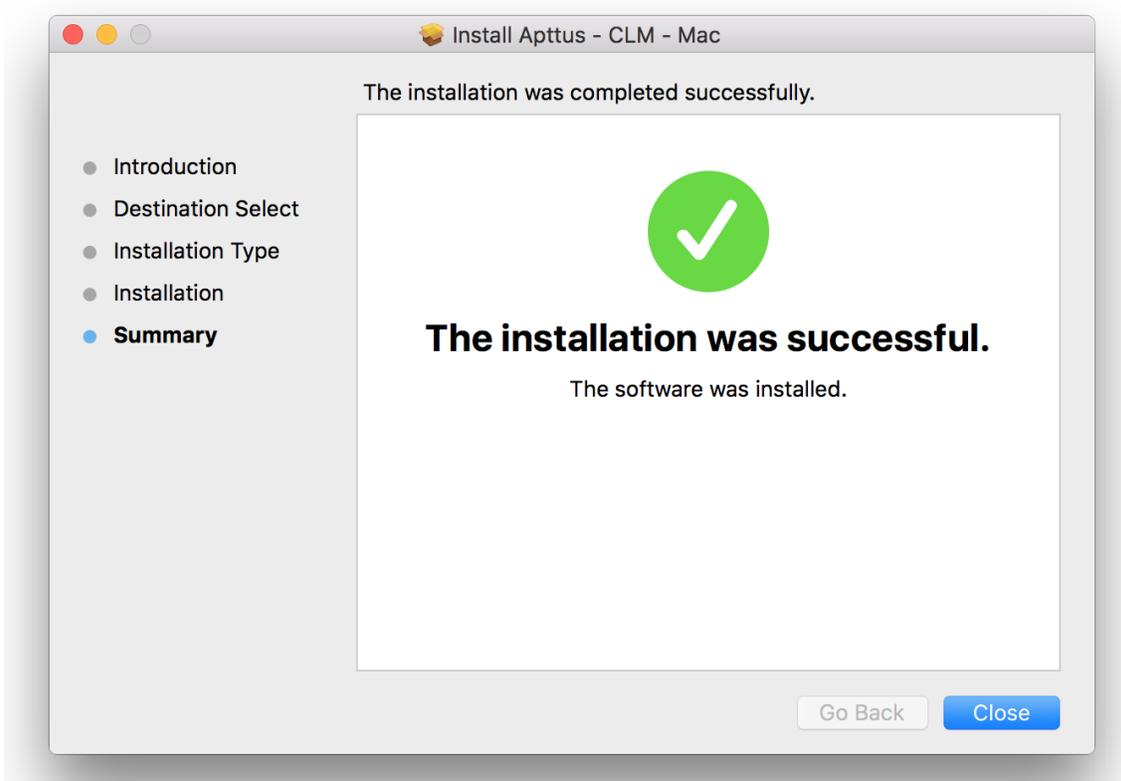
 In future releases, the add-in will be available from the Microsoft Office store.

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

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



3. Follow the installation instructions to complete installation.



4. Quit any open instances of Microsoft Word.

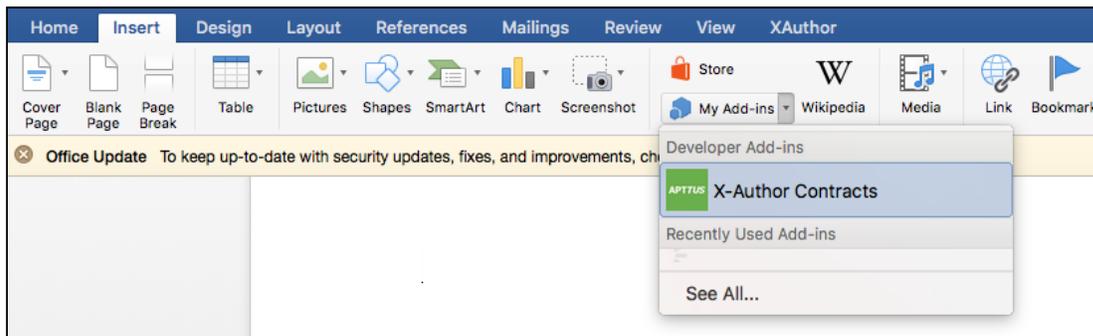
### To configure the manifest file in your system

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**.
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.



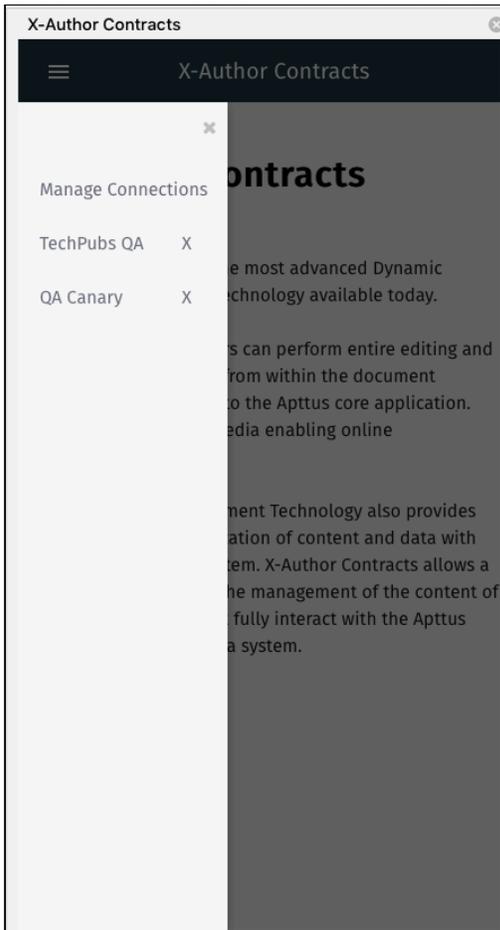
## Logging in to X-Author Contracts

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.apptuscloud.com> (production) or <https://test-sfdc.apptuscloud.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.

## 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 check out a document, depending on how you are accessing the document itself. Open your DOCX document using one of the following methods:

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

In the first case, you open the document in Word at the same time. In the last two cases, you download the document onto your computer, then open it in X-Author Contracts in Word. After opening a document in X-Author Contracts, only one person can work on the document at a time.

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

## To check out a document

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

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

4. **(No Document open)** In the X-Author Contracts pane, go to **Start tab > Search > Search Agreements**.
5. Scroll through the list of agreements or use the **Search** tool at the top to search for your agreement record by keyword(s). Click the expand icon  to view additional details about the agreement.
6. Click the **Documents** button under the agreement record name to open the **Agreement Details** page that displays a list of document versions attached to that record.
7. To open a version, click more icon  next to the version and click **Open**. The selected document is downloaded to your computer.
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').

Your agreement document is opened.

## Locking and Unlocking Documents

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

You can always check the lock status of a document by clicking on 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 **Release Lock**. If you have accidentally unlocked a document, you can lock it again by clicking **Acquire Lock**. If your document is not locked by anyone, and you click **Refresh Lock** to check the status and then click **Acquire Lock**, the document is locked and you are redirected to the **Work** tab of X-Author Contracts.
- **Refresh Lock:** This button checks the lock status of your document.
- **Cancel:** Takes you back to the previous screen that you were working on.

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

## To release a document lock

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

1. From the X-Author pane, click on 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.

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

## Refreshing document lock status

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

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

Consider the following example:

### Use Case: Reacquiring the document lock from another user

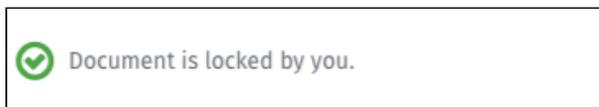
You have downloaded a contract document version from the agreement and opened it in Microsoft Word. Another user checks out the document before you. A message is displayed showing that the other user controls the lock.

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

1. You click on the **Lock Status** button to view the current lock status. The "Document locked by" field shows the document is locked by another user.
2. The other user releases the document lock or checks in a new version. You click **Refresh Lock** to refresh the current lock status. The pane refreshes, showing updated lock status details.
3. You click **Acquire Lock** to lock the document and start working. All menu items are enabled.

## Opening a Document You Have Already Checked Out

In some situations, you may close an open document in X-Author which you have checked out, without releasing the lock or checking in the document. The document remains locked by you, and cannot be edited by anyone else until you release the lock or complete a check-in. When you open an agreement document in X-Author that is already locked by you, you should see the following message displayed at the top of the X-Author pane.



Continue working on the document as normal.

## Working with Agreements

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

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

### Smart Fields

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

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

### Smart Clauses

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

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

#### A Note on Agreement Documents and Templates

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

## Using Playbook

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

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

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

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

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.

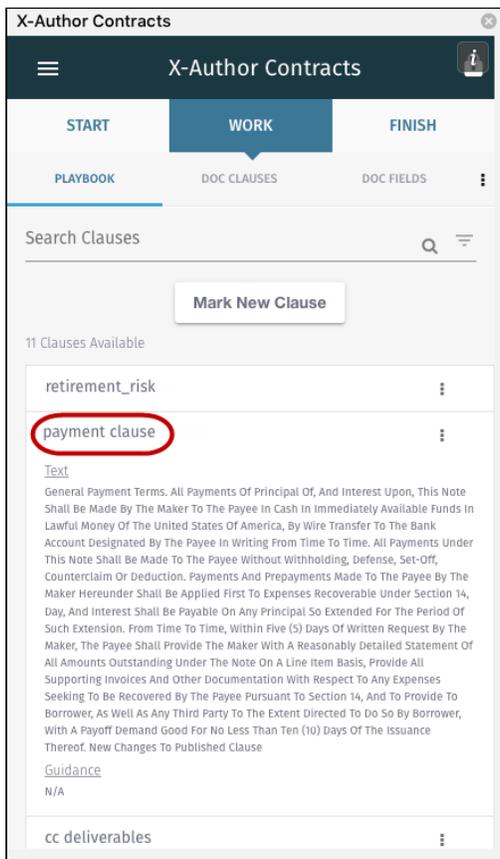
For more explicit definitions of smart clauses and smart fields, see [Working with Agreements](#).

## 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.

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

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



## To insert a clause

1. 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  next to the clause name and click **Insert Clause** to insert the clause into your document.

You get a success message and the inserted clause is automatically 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*.

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.

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

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.
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.

Field	Description
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.

4. 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 acquired 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.

## 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 receive the 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.

**i** 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.

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

### To mark a field in an agreement

1. 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 <b>_Clean</b> 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, <b>_Final</b> 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 User Guide* for the Salesforce platform.

## Reconciliation

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

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

## To check in and reconcile smart fields and clauses

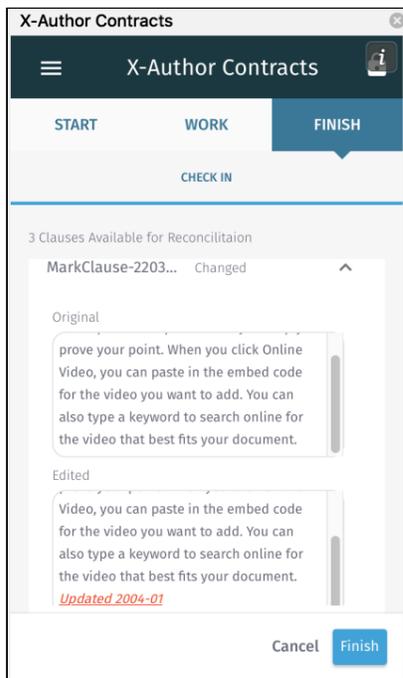
1. From the X-Author pane, click **Finish** to open the Check-In page.

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 **Previous 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.

**i** 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 CLM

**Update from CLM** is an action located in the X-Author Contracts ribbon you can use to update smart fields and updatable fields in your agreement document where fields have been updated in Apttus CLM 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.

- i**
- If you choose to update fields from Apttus CLM, all changed smart field values and updatable 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 CLM

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 get success message when the fields are updated in the agreement.

- ✔ Fields updated from Apttus CLM will not be marked in the Control Panel as changed.

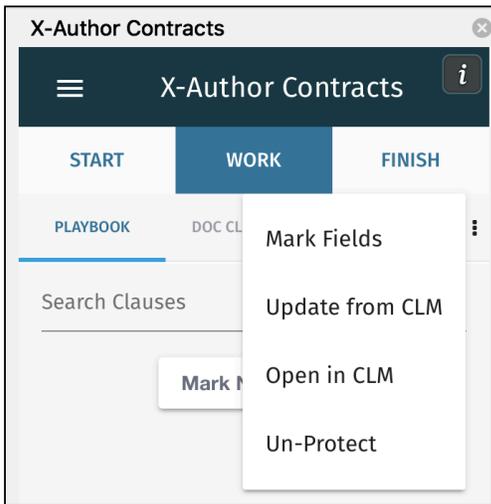
## Opening Agreements in CLM

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

### To open an agreement in CLM

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 CLM (You may be prompted to log in again to your CLM 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 Aptus 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.

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.
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 CRM 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.

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