



X-Author Contracts on Salesforce Spring 2018 User Guide

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Overview

Apttus X-Author Contracts gives Legal teams the best of both worlds—the familiarity of Microsoft Word, and the enterprise performance of Salesforce. Apttus X-Author Contracts enables Legal to execute an entire contract lifecycle inside Microsoft Word while complying with Salesforce approval workflows, collaborating in Chatter, and pulling the latest terms and clauses from your legal playbook. With Apttus X-Author Contracts, Legal can improve contract visibility, control, and accountability, while working inside a system they already know and like.

[Let's Get Started](#)

Key Capabilities

- **Increase Visibility and Control:** Check-in, check-out, versioning, redlining, comparison and advanced reconciliation
- **Contract Template Creation**
- **Centrally Controlled Contract Library:** Easily access pre-approved clause library, contract templates, and business terms
- **Word Based Processes:** Execute contract processes and approvals all from Microsoft Word
- **One Click Third-Party Paper Import**
- **Offline Capability**
- **Salesforce1 Compatible:** Merge data from opportunities, accounts and any other objects into contracts
- **Non-Standard Alerts:** Get notified when non-standard language or terms are used
- **Audit Trails:** Follow changes and actions
- **Conditional Fields and Table Rows**

Benefits

- **Quick System Adoption:** Reduce training time for attorneys and others
- **Smoother Cycle:** Quickly create, negotiate, version, and approve contracts
- **Vastly Reduced Risk:** Limit inaccurate contract data or non-standard language
- **Word Based Processes:** Perform all contract creation, negotiation, and versioning entirely in Word
- **Chatter Collaboration Feed:** Get quick access to contracts with instant sharing capabilities

Installing X-Author Contracts

In This Section

- [Installation Overview](#)
- [Installation Components](#)
- [Installing the X-Author Contracts Add-in for Microsoft Word](#)
- [Installing the X-Author Contracts for Outlook Add-in](#)
- [Post-Package Install Configuration](#)
- [Registering X-Author Contracts with Microsoft Word](#)
- [Setting Microsoft Word Protected View Options](#)
- [Enabling Proxy Authentication](#)

Installation Overview

To use X-Author Contracts, along with installing the *Microsoft Word Add-In*, system administrators may need to configure Salesforce objects to ensure X-Author Contracts is correctly associated with Microsoft Word.

For the X-Author Contracts Add-In to work, the Apttus Contract Management package must be installed in your Salesforce org. This is required so that the various dialog boxes available in X-Author Contracts can display the correct fields. Once this is done by your system administrator, you will be able to install the X-Author Contracts Add-In and begin using it.

[Installing the X-Author Contracts Add-In](#)

[Registering X-Author Contracts with Microsoft Word](#)

Installation Components

Your computer must meet the minimum requirements listed below to use X-Author Contracts. Apart from Microsoft Word, the other components listed will be automatically installed during the X-Author Contracts Add-In installation process if they are missing.



- You cannot use a Mac OS X operating system with X-Author Contracts; however, it can be used with a Mac running a Windows Virtual Machine in a Citrix environment.
- Microsoft's Office 365 Online or Cloud applications do not support plugins; therefore, the Apttus X-Author Contracts can only be used in a Windows desktop environment.
- Requirements which have changed since the last update are highlighted in **bold**.

Supported Component	Supported Version
Apttus X-Author Contracts	Apttus X-Author Contracts 5.0 or higher
Windows OS	<p><i>New features and technologies are continuously deployed in new releases by Apttus X-Author Contracts, and they are supported by Apttus where the associated Microsoft OS and/or Microsoft Office versions are also still supported by Microsoft. As Microsoft ends its own support for any OS and/or Office version, subsequent new Apttus releases will no longer be developed, tested, or committed to support the application on any Microsoft OS and/or Office version which is no longer supported by Microsoft.</i></p> <p>Windows 10</p> <p>Windows 8 & 8.1</p> <p>Windows 7</p> <p>*X-Author supports both the 32-bit & 64-bit versions of the above Operating Systems.</p>

Supported Component	Supported Version
Microsoft Office	<p>Microsoft Word 2016 or Office 2016</p> <p>Microsoft Word 2013 or Office 2013</p> <p>Microsoft Word 2010 or Office 2010</p> <p>Microsoft Word 2007 with Service Pack 3 and hotfix 976477</p> <p>*Where applicable, X-Author supports 32-bit and 64-bit versions of the above applications.</p> <p>**The above versions assume you are using Professional or Enterprise versions of Office. Home & Student or other limited versions of Office are not supported and may or may not prove to be compatible with X-Author Contracts.</p>
Microsoft .NET	Microsoft .NET Framework 4.5 or higher
Microsoft VSTO	Microsoft Visual Studio 2010 Tools for Office Runtime
Microsoft Office PIA	Microsoft Office 2010 Primary Interop Assemblies
Salesforce	Unlimited, Enterprise, and Developer Product Editions are supported.

If there are issues during the installation, please see [Appendix C - Troubleshooting Component Installation](#) for more details.

Installing the X-Author Contracts Add-in for Microsoft Word

X-Author Contracts is a Microsoft Word Add-In that adds two new ribbons/tabs to the application: *X-Author Contracts* and *X-Author Templates*.

The installation process creates a folder on your computer containing the files required to use X-Author Contracts. The folder will be created either in your *Program Files* or *Program Files(x86)* directory, depending on which Windows Operating System version you use.

To install the X-Author Contracts Add-In

Before installation, please check that you have the following:

- *ApttusInstaller_<<version>>_.exe* for X-Author Contracts (download from the Install Center).
 - You must be logged into the target machine with Administrator permissions.
 - You must not have any instances of Microsoft Office products running.
 - You must be connected to the Internet.
1. Double-click the *ApttusInstaller_<<version>>_.exe* to display the InstallShield Wizard. In certain instances, a restart of Windows may be required. Click **Yes** to confirm the restart and once you log back into Windows, the installer should resume automatically.
 2. Click **Next** to start the wizard.
 3. On the License Agreement screen, select **I accept...** and then click **Next**. If you do not accept the terms of the agreement, X-Author Contracts will not be installed on your computer.
 4. Click **Install** to begin the installation process. If any components need to be installed for X-Author Contracts to work as expected, they will be automatically detected as missing and installed automatically.
 5. Once X-Author Contracts and any required components have been installed, click **Finish** to close the wizard and complete the installation.

The X-Author Contracts and X-Author Templates ribbon tabs are available in Microsoft Word. If the ribbon tabs are not displayed, you may need to [register X-Author Contracts with Microsoft Word](#).

Installing the X-Author Contracts for Outlook Add-in

X-Author Contracts for Outlook is a Microsoft Word Add-In that adds a new *X-Author Contracts* ribbon to the application. Unless otherwise stated, the system requirements for installing this add-in are the same as for the X-Author Contracts add-in.

The installation process installs a folder on your computer containing the files required to use X-Author Contracts for Outlook. The folder will be installed either in your *Program Files* or *Program Files(x86)* directory, depending on which Windows Operating System version you use.

To install the X-Author Contracts for Outlook Add-In

Before installation, please check that you have the following:

- *ApttusXAuthorContractsforOutlook_<<version>>.exe* for X-Author Contracts for Outlook (download from the Install Center).
 - You must be logged into the target machine with Administrator permissions.
 - You must not have any instances of Microsoft Office products running.
 - You must be connected to the Internet.
1. Double-click the *ApttusXAuthorContractsforOutlook_<<version>>.exe* to display the InstallShield Wizard. In certain instances, a restart of Windows may be required. Click **Yes** to confirm the restart and once you log back into Windows, the installer should resume automatically.
 2. Click **Next** to start the wizard.
 3. On the License Agreement screen, select **I accept...** and then click **Next**. If you do not accept the terms of the agreement, X-Author Contracts for Outlook will not be installed on your computer.
 4. Click **Install** to begin the installation process. If any components need to be installed for X-Author Contracts for Outlook to work as expected, they will be automatically detected as missing and installed automatically.
 5. Once X-Author Contracts for Outlook and any required components have been installed, click **Finish** to close the wizard and complete the installation.

The **X-Author Contracts** ribbon tab will now be available in Microsoft Word. If the ribbon tab is not displayed, you may need to [register X-Author Contracts for Outlook with Microsoft Word](#).

Post-Package Install Configuration

After installing the Apttus Contract Management package, the following configuration must be completed to ensure you can use all of the features of X-Author Contracts.

Enabling User Profile Permissions and Attributes for Custom Objects

The following permissions must be granted to user profiles.

Navigate to **Setup > Administration Setup > Manage Users > Profiles > System Administrator**.

Administrative Permissions	API Enabled
Custom Object Permissions	<ul style="list-style-type: none"> • Create, Read, Edit, and Delete for <i>Agreement</i>, <i>Agreement Clauses</i> • Both <i>Search Filters</i>, and <i>Templates</i>, along with a minimum of Read for all other custom objects.
General User Permissions	Edit Tasks

To be able to use merge fields with X-Author Contracts for custom objects, such as Agreements or Agreement Clauses, you must enable **Enable Reports** and **Track Activities**. Please see the following image:

Custom Object Agreement (Managed) [Help for this Page](#)

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Standard Fields \[5\]](#) | [Custom Fields & Relationships \[131\]](#) | [Validation Rules \[5\]](#) | [Page Layouts \[5\]](#) | [Field Sets \(BETA\) \[0\]](#) | [Search Layouts \[0\]](#) | [Standard Buttons and Links \[8\]](#) | [Custom Buttons and Links \[25\]](#) | [Record Types \[11\]](#) | [Apex Sharing Reasons \[0\]](#) | [Apex Sharing Recalculation \[0\]](#)

Custom Object Definition Detail [Edit](#)

Singular Label	Agreement	Description	Represents an agreement in the system
Plural Label	Agreements	Enable Reports	<input checked="" type="checkbox"/>
Object Name	APTS_Agreement	Track Activities	<input checked="" type="checkbox"/>
Namespace Prefix	Apttus	Available for Customer Portal	<input type="checkbox"/>
API Name	Apttus__APTS_Agreement__c	Track Field History	<input checked="" type="checkbox"/>
		Deployment Status	Deployed
		Help Settings	Standard salesforce.com Help Window
Created By	Salesforce Administrator	Modified By	Salesforce Administrator
	3/3/2010 12:17 PM		3/21/2012 6:49 PM

Package Information

Installed Package	Apttus Contract Management	Available in Versions	3.49 - Current
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Enabling Permissions to Apex Classes and Visualforce Pages

X-Author Contracts utilizes specific Apex Web Services and Visualforce page for its processing, over and above those used for accessing objects from other Apttus packages. The following table lists the various classes and pages that need to be enabled for the user profiles or permission sets that will have access to the product.

Navigate to Setup > Build > Develop > Apex Classes

Name	Namespace	Type
AuthorWebService	Apttus	Apex Class

Navigate to Setup > Build > Develop > Visualforce Pages > Security

Name	Namespace	Type
AuthorPing	Apttus	Visualforce Page
BrowseAgreements	Apttus	Visualforce Page
BrowseGroups	Apttus	Visualforce Page
BrowsePeople	Apttus	Visualforce Page
BrowseTemplates	Apttus	Visualforce Page
CreateOfflineAgreement	Apttus	Visualforce Page
ChatterPage	Apttus	Visualforce Page
ChatterUserPage	Apttus	Visualforce Page

Enabling Visualforce Page for Document Finder Interface

Add the following Visualforce page to all appropriate User Profiles if your version of Apttus Contract Management is **8.4.xxx** or higher to enable Document Finder features.

1. Go to **Setup > Develop > Visualforce Pages**
2. Click **Security** next to the DocumentFinder Visualforce page entry.
3. Add User Profiles as required and click **Save**.

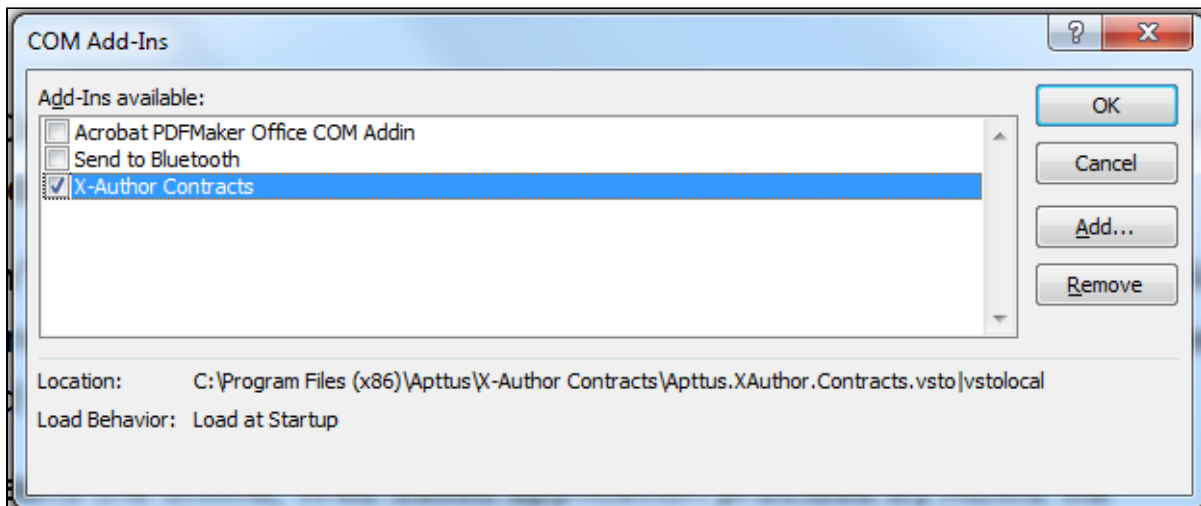
Registering X-Author Contracts with Microsoft Word

When you open Word for the first time after installing X-Author Contracts or X-Author Contracts for Outlook, the Microsoft Office Customization Installer dialog may be displayed. This ensures that the X-Author Contracts Add-In(s) will be available in Microsoft Word.

While the X-Author Contracts Add-In(s) should automatically be added to the Microsoft Word ribbon, you should complete the following task if it is not.

To manually register the X-Author Contracts Add-In

1. Start Microsoft Word or Outlook and select **File > Options** to display the Microsoft Word Options dialog.
2. Select **Add-Ins** and from the **Manage** list, select **COM Add-ins** and click **Go**.
3. Select **X-Author Contracts** and click **OK**.

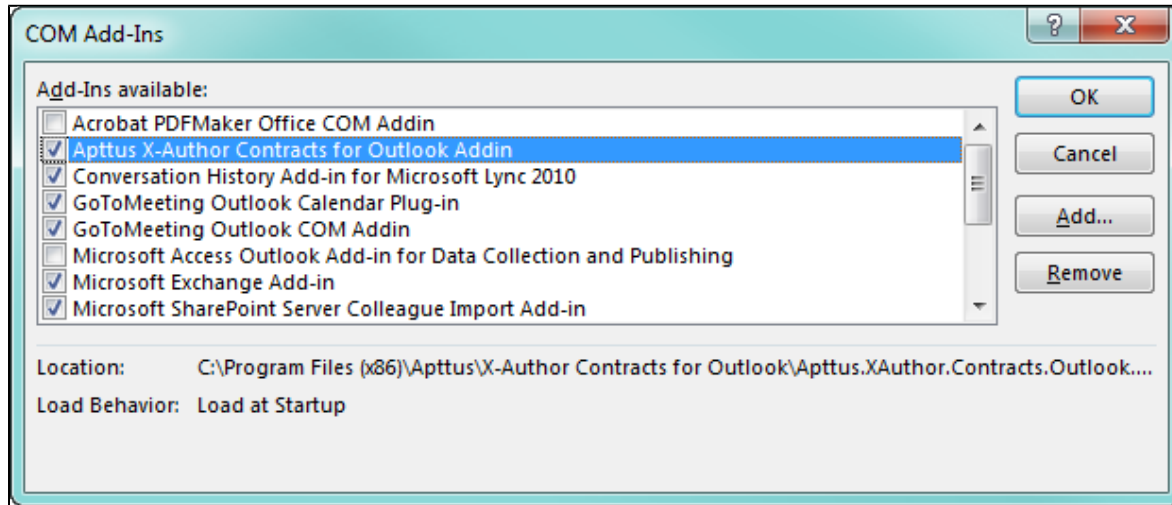


The X-Author Contracts Add-In will now be available in the Word ribbon; however, you may need to restart Microsoft Word for it to be displayed as expected.

To manually register the X-Author Contracts for Outlook Add-in

1. Start Microsoft Outlook and select **File > Options** to display the Outlook Options dialog.
2. Select **Add-Ins** and from the **Manage** list, select **COM Add-ins** and click **Go**.

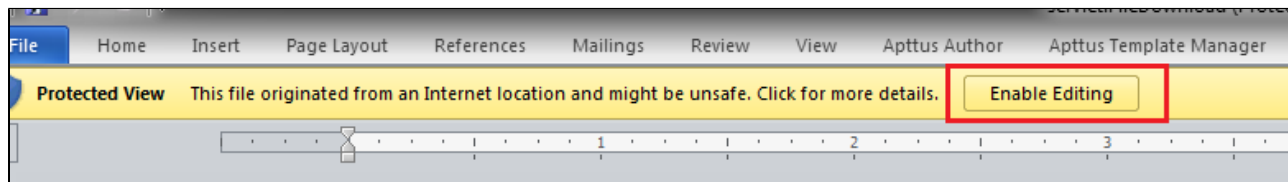
3. Select **Apttus X-Author Contracts for Outlook Addin** and click **OK**.



The X-Author Contracts Outlook Add-In will now be available in the Outlook ribbon; however, you may need to restart Microsoft Word for it to be displayed as expected.

Setting Microsoft Word Protected View Options

Microsoft Word *Trust Center/Protected View* options can impact your ability to see generated Agreement documents and should be disabled before you begin using X-Author Contracts. Clearing the Protected View settings will remove the ribbon displayed when you view a document. If you do not clear these settings, when you click *Enable Editing*, the generated document closes and a new blank Word document is displayed in its place.



To set Protected View Options

1. Start Microsoft Word and select **File > Options** to display the Microsoft Word Options dialog.
2. From the left navigation pane, select **Trust Center > Trust Center Settings > Protected View**.
3. Clear the three **Protected View** options.

4. Click **OK** for each of the two dialog boxes to complete the procedure.

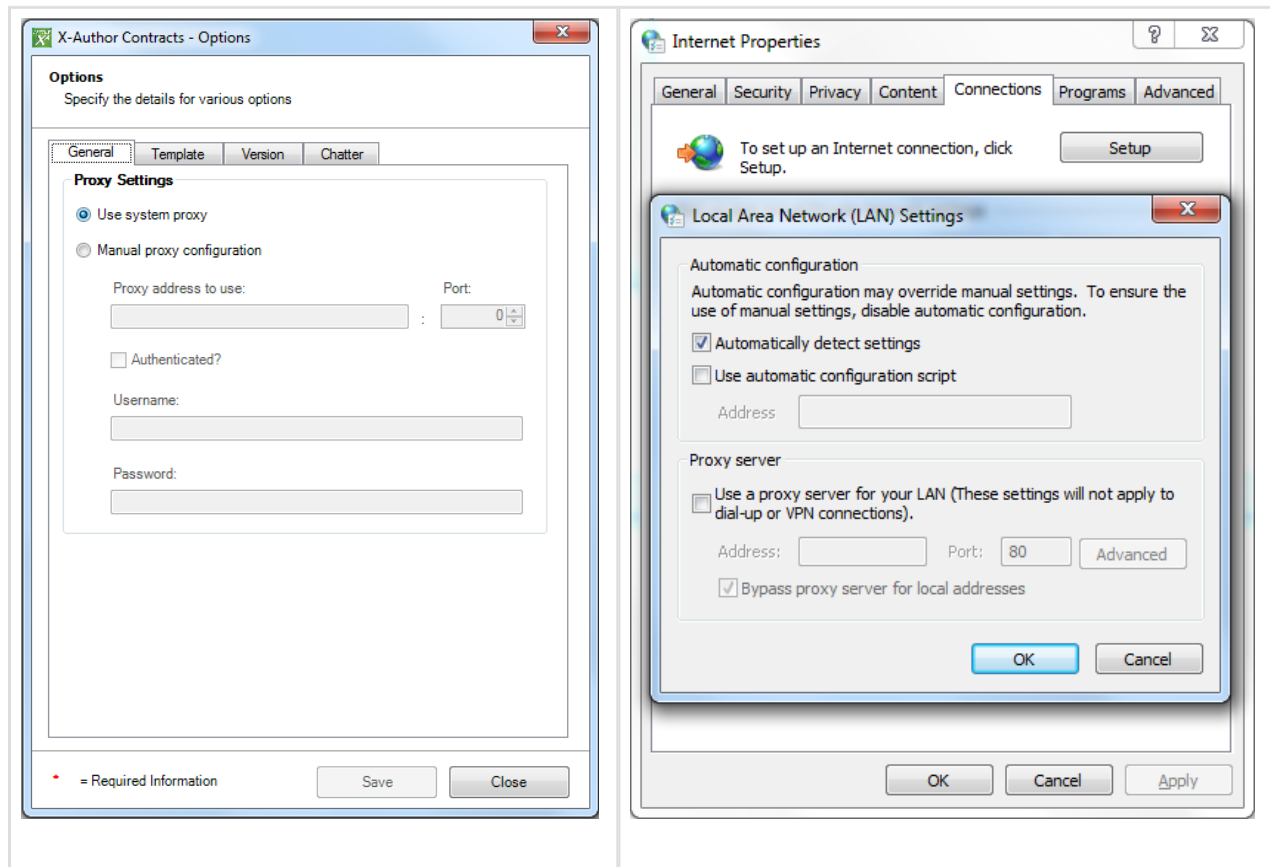
The next time you open a Microsoft Word document from Salesforce, no Protected View ribbon will be displayed at the top of the Microsoft Word window.

Enabling Proxy Authentication

If your work environment is behind a firewall and you need to configure proxy authentication to connect to Salesforce, you must complete the following.


X-Author Contracts proxy settings leverage Microsoft's LAN Settings to resolve proxy server settings automatically, each time you connect to X-Author Contracts. While this makes handling the majority of X-Author Contracts connections easier, you can still manually configure settings, as the options that previously needed to be configured via an XML file can now be set from the X-Author Contracts Options dialog box.

Selecting **Use system proxy** tells X-Author to use **Microsoft's Internet Options > Connections > LAN Settings** for resolving proxy connections. X-Author Contracts uses whichever Internet Explorer LAN option is configured, such as **Use automatic configuration script** or **Proxy server** settings.



To enable X-Author Contracts for proxy authentication

You must not be logged in X-Author Contracts.

1. Open Microsoft Word and from one of the X-Author Contracts tabs, click a Dialog Launcher  to display the Options dialog.
2. Select the **General** tab and then select one of the following:

Option	Description
No proxy	Select this is you do not use a proxy connection.
Use system proxy	

Option	Description
	This is the default option. This uses a Microsoft Internet Options setting (Internet Options > Connections > LAN Settings > Automatically detect settings) to determine if you are behind a proxy server. If so, it will automatically resolve the connection so that you can successfully login to X-Author and connect to your Salesforce org.
Manual proxy configuration	If you know the specific proxy you will be using, use this option. When you select this it enables the Proxy address to use and Port fields, along with the Authenticated check box, which requires a username and password as well.

3. Click **Apply** and then **Close**.

Your system proxy settings are now associated with X-Author Contracts and will take effect the next time you login.

Getting Started

The X-Author Contracts 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, contract administrators can manage complex negotiation cycles with clause and contract templates easily. The X-Author Contracts 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 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 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 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.

In This Section

- [Connecting to X-Author Contracts](#)
- [X-Author Contracts Options](#)
- [Microsoft Windows Text Size Support](#)
- [Tasks and Events](#)

Connecting to X-Author Contracts

To use X-Author Contracts, you do not need to login directly via Salesforce. You can connect from the X-Author Contracts ribbon tab in Microsoft Word. X-Author uses Salesforce OAuth for connecting from X-Author Contracts to Salesforce. By using OAuth, multiple user accounts can be set up on the same computer for logging into X-Author Contracts. Once added, you can simply switch from one user to the other using the **Manage Connections** option.

You may need to change an **Administration Setup > Security Controls > Session Settings > Session Timeout** setting, as this timeout value takes precedence over OAuth and may force you to reconnect to X-Author Contracts more frequently.

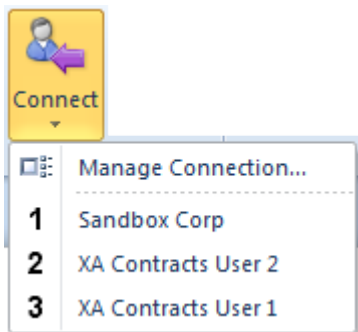
To handle SSO (Single Sign-On) you can also use an Admin Setting to change the default token storage location. If you need to have storage of the session token locally for X-Author Contracts, then set the admin property **APTS_EnableSessionTokenStorageInAuthor** to *True*. If this setting is not available, then you can create it; otherwise, the session token will not be stored locally.

Connecting to Salesforce from X-Author Contracts and X-Author Templates

Connect enables users to connect to a Salesforce Production org or Salesforce Sandbox org from Microsoft Word. You can still create different connections if they work for different Production and Sandbox orgs.



You can connect for the first time, from either ribbon tab by clicking *Connect*. If you wish to connect to a different Salesforce org, you can click *Connect* again and then select *Manage Connections* from the drop-down picklist.



To connect to X-Author Contracts or X-Author Templates

- You must have Microsoft Word open.
 - You must have chosen either the X-Author Contracts or X-Author Templates tab from the Microsoft ribbon.
1. Click **Connect** and select **Manage Connection...**
 2. In the Create a new connection section, enter the first name and last name — as they are stored in Salesforce — of a user and click login.salesforce.com or test.salesforce.com. The name can also be entered by using someone's email or another unique way of identifying a user in the system. The test.salesforce.com is commonly used for sandbox testing purposes.
 3. Click **Authorize** to open the Salesforce login window. Enter your credentials and click **Login**.
 4. If you are connecting to Salesforce via X-Author Contracts or X-Author Templates for the first time, you may need to click **Allow** to continue.

The X-Author Contracts and X-Author Templates ribbon options are enabled and you can now login to Chatter, Check-In and Check-Out files, or additionally display the Translate side menu when logging into Word. Once you have configured connections for multiple users, you can select a different connection.

To revoke a connection

- There must be an existing connection.
1. Select **Connect > Manage Connections** to display the Manage Connections window. The list of users who have been configured for that computer is displayed with the option for the currently logged in user disabled.
 2. Click **Revoke** and then click **Yes** in the confirmation dialog.

That user's login credentials are removed and they cannot login to X-Author Contracts until they have a new connection created.

X-Author Contracts Options

X-Author Contracts allows you to set your own preferences for working with the product. User preferences are stored locally on each client machine. You can access the options by clicking one of the Dialog Launchers from the Word ribbon. Options are split into following tabs: **General**, **Template**, **Version**, **Chatter** and **Language**.

The following list includes important information about the Options settings.

- In the X-Author Contracts Options settings dialog box, selecting the check box for **Template > Store Template / Clause Content as Text** will insert text regardless of choosing this setting. This setting currently does not work for FX2 Templates.
- In the X-Author Contracts Options settings dialog box, selecting the check box for **Version > Use enhanced redlining capability** will not work. This setting currently does not work for FX2 Templates.

General Tab

This tab is used for configuring proxy settings.

For more details, see [To Enable X-Author Contracts Proxy Authentication](#).

Template Tab

The Template tab enables you to set preferences for the authoring of templates.

Show Mergefield errors when updating templates: When this option is deselected, any merge fields that generate errors while saving or updating a template are suppressed. Normally you would want to have this option selected so that the template designer is made aware of any merge field errors that occur when saving to the template.

Store Template/ Clause Content as Text: When this option is checked, the content of the template or clause will be updated to the *Text Content* field in the template record when you check-in a template or create a new one. This option should be selected, as the text that is displayed when you click the link for a template in Playbook comes from *Text Content* for that template record.

Default Image Size: This sets the default Height and Width for images placed in templates via RTF fields.

X-Author Contracts - Options

Options
Specify the details for various options

General Template Version Chatter Language

☐ Show Mergefield errors when updating templates

☐ Store Template / Clause Content as Text

Default Image Size

Height (inches):

Width (inches):

= Applicable only for Pre-FX2 templates

* = Required Information

Save Close

Version Tab

The version tab enables you to capture preferences while saving agreement versions.

Use enhanced redlining capability: Select this if you want the Author to use enhanced redlining. Normally when you select a block of text and replace it with text pasted in from the clause library, the previous selection is marked as a deletion and the text pasted in as an insertion even though only a few words might have changed. Enhanced redlining is a feature that redlines what actually changed instead of marking all of the old text as a deletion and all of the new text as an insertion.

Chatter Tab

If you have installed chatter plugin, you can set chatter related preferences from this tab.

Feed Refresh Duration: Select the chatter feed refresh duration from the picklist. If you want to refresh the feed manually, select **Manual**, otherwise select from the available time duration.

Language Tab

This tab is used for setting the language.

Choose Language: Select the language from the picklist that you want to set as default.

Microsoft Windows Text Size Support

X-Author Contracts can be used with either 100% or 125% Windows text size, as long as you have the correct DPI settings.

100% text size requires 96 DPI and 125% text size requires 120 DPI.

You can access this setting by going to the Windows **Start** menu and selecting **Control Panel > Appearance and Personalization > Display > Make text and other items larger or smaller**.


Tasks and Events

X-Author Contracts allows you to create a new task or event while working on an agreement document. This will create a new task or event in Salesforce related to that Agreement document.

To create a task

You must have opened an Agreement document to create a task.

1. From the **X-Author Contracts** ribbon tab, click New Task.
2. For **Task Information**, enter details for the following:

Option	Description
Assigned To	By default you will be the assignee; however, you can click  to display the Search User dialog and assign the task to someone else in your organization.
Subject	Subject of the task.


Option	Description
Due Date	By default it will be the current date, unless you change it.
Comments	Additional information about the task.

3. Select the **Reminder** check box to select a date and time to alert the assignee the task due date is approaching.
4. Click **Save**.

The task is added to the assignee's My Tasks section in Salesforce.

To create an event

You must have opened an Agreement document to create an event.

1. From the **X-Author Contracts** ribbon tab, click **New Event**.
2. By default you will be the assignee; however, you can click  to display the Search User dialog and assign the task to someone else in your organization.
3. Enter the remaining required information for the event and click **Save**.

The event is added to the assignee's calendar in Salesforce.

The assignee for the event needs to add any required invitees to the event from the Calendar section in Salesforce.

Managing Templates

In This Section

- [Templates Overview: FX2 vs Pre-FX2](#)
- [Working with FX2 Formatted Templates](#)
- [Working with Pre-FX2 Formatted Templates](#)
- [Template Versioning](#)
- [Cloning a Template](#)
- [Using the Playbook](#)
- [Inserting Dynamic Segments](#)
- [Auto Select Options When Finalizing Documents](#)
- [Opening Agreement or Template Record in Salesforce From X-Author](#)
- [Removing Track Changes in Microsoft Word](#)
- [Defining Template Locale](#)

Templates Overview: FX2 vs Pre-FX2

X-Author Contracts now uses a brand new format, FX2, within the entire X-Author Contracts and X-Author Templates ribbon tab functionality.

The new FX2 format is a second-generation format framework within X-Author Contracts. You can create a new Template that uses this new framework by choosing to use it upon clicking *New* in the X-Author Templates ribbon tab. FX2 Templates are more advanced than the pre-existing format for Templates, which enables you to create a more desirable layout and design.

Template Versioning, introduced in November 2016, makes notable changes to Template Management and check-in/check-out screens in X-Author. Follow the link below for Template Versioning if you have Template Versioning enabled in your org.

If, when creating a new Template, you choose not to create an FX2 Template, you can select **No** in the *New* Template dialog box, and all X-Author Contracts pre-existing format and functionality will work as it did before this release.



- Depending on a Template's format you open up in either X-Author Contracts or X-Author Templates, the corresponding version of either ribbon will open to match the correct Template format. For example, if you check out a Template in the pre-existing Template format, the pre-existing X-Author Templates ribbon tab will display the usual options.
- You cannot migrate Templates from the pre-existing format to the new FX2 Template format.

[Working with FX2 Formatted Templates](#)

[Working with Templates in the Pre-FX2 Format](#)

[Template Versioning](#)

Working with FX2 Formatted Templates

Note

Ensure that the template administrator has the profile with the setting **View Setup and Configuration** checked.

Creating New Agreement Templates (FX2 Format)

To get started creating a new FX2 format Agreement or Clause template in X-Author, you must first define the basic properties for your template. FX2 format is the format currently recommended by Apttus for all new templates—improvements have been made to make features more user friendly and accessible in FX2. If you are working with the pre-existing format (Pre-FX2), refer to [Creating New Agreement Templates \(Pre-FX2 Format\)](#).

Note

If you have Template Versioning enabled in your org, the process for creating new templates is different. Refer to [Creating New Template Versions](#) for step-by-step instructions.

To create a new Agreement or Clause Template in X-Author Contracts

1. Open Microsoft Word and [connect to X-Author Contracts](#).
2. Open an existing document or create a new blank document.
3. Click on the **X-Author Templates** tab.
4. Click **New**. The "Specify Template Attributes" dialog is displayed. By default, FX2 format is selected.

Specify Template Attributes
Specify the attributes for this new template.

Do you want to create this template using the FX2 format? ☒ Yes ☐ No

* **Type** Agreement

* **Business Object** Aptus__APTS_Agreement__c

* **Locale** English (United States)

Enable Formatting ☐

Date Format M/dd/yyyy

Currency Format ☐ ISO Code ☐ Currency Symbol ☒ None

Currency Precision 2

Number Precision 0

* = Required Information

OK Cancel

5. Enter values in the fields provided as described in the following table. Fields marked with an asterisk (*) are required.

Field Name	Description
Type	Choose the template type from the picklist (Agreement, Proposal, Clause, etc.).

Field Name	Description
Business Object	Choose the business object for your template (e.g., <i>Apttus__APTS_Agreement__c</i> for Agreement). This picklist is dependent on the value selected for Type.
Locale	Choose an option from the list to change the default locale for the template.
Enable Formatting	Check this box to enable locale formatting and choose locale at the template and field level for this template. This allows you to define locale settings for Currency, Number, Percent and Date formats. To learn how to define locale settings for your template, refer to Defining Template Locale .

6. Click **OK** to confirm template properties. You can now work with your new template.

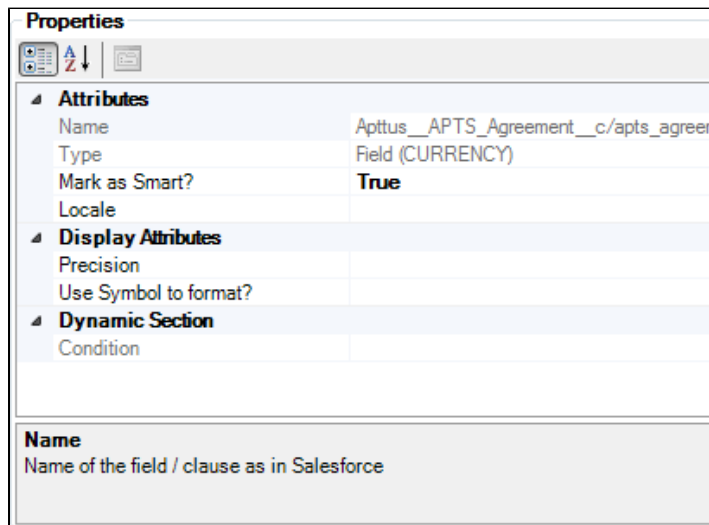
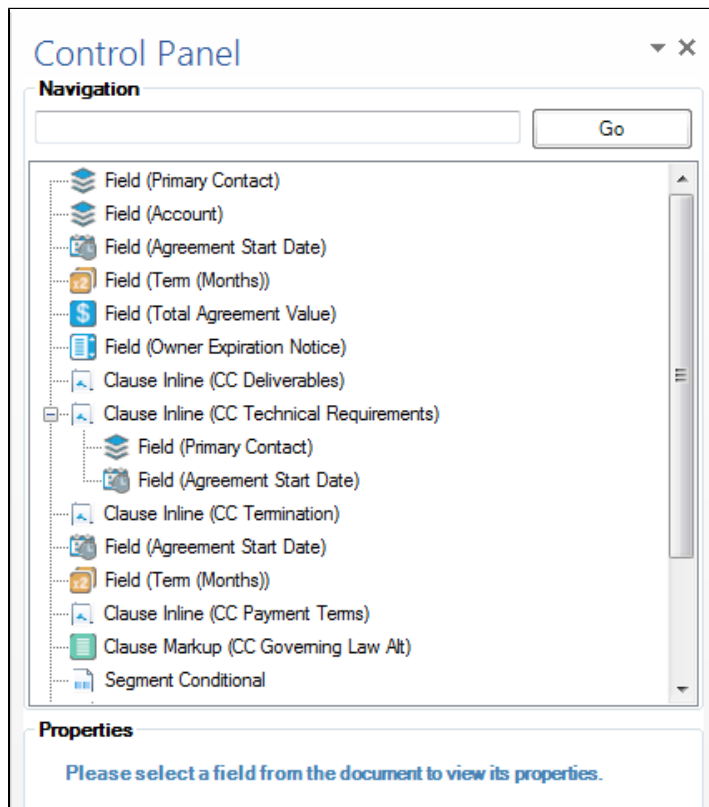
Template Control Panel

The **Control Panel** can be accessed from the X-Author Templates ribbon tab. The **Control Panel** enables you to view all of the fields, clauses, and sections within an FX2 Template.

To access the **Control Panel**, click **Control Panel** in the X-Author Templates ribbon tab and a side panel in Microsoft Word will appear. The **Control Panel** consists of two panes: **Navigation** and **Properties**. Navigation lists all context - fields, clauses, sections, and tables - in the order they appear in the Template. The properties are context aligned with the element selected in the Navigation pane or selected in the document (three way alignment).

Within the **Control Panel**, you can view the fields, clauses, and sections that have been tagged within an FX2 Template.

- Fields - you can view the *Field Name* and the previous value of that field.
- Clauses - you can view the *Field Name* and the previous value of that field.
- Sections - you can view the *Field Name* and the previous value of that field.
- Tables - you can view the *Field Name* and the properties of that table, e.g. *Repeating Table*.




While it is open, you can move the *Control Panel* to other positions within Microsoft Word. By clicking and holding on the grey bar titled, *Control Panel*, you can move the *Control Panel* to the top, left, right, or bottom of Microsoft Word.

Checking Out an FX2 Template

An FX2 template in Salesforce can be checked out for editing by clicking **Check-Out**. Once you click **Check-Out**, you are presented with a browser-based form which loads the browsing of templates Visualforce page. The user can search on various parameters and choose a template to open in Microsoft Word.

This process is the same for the pre-existing Template format and the FX2 Template format.

To check out an FX2 Template

1. Select the X-Author Templates ribbon tab and click **Check-Out**.
2. In the Checkout window, select the template **Type** you want to work on and enter any other search criteria and click .

The **Templates** list displays templates matching the criteria.

3. Click **Open** for the required template.

The template is opened in Microsoft Word. X-Author Contracts automatically detects the document type, Template format - pre-existing or FX2 - and enables corresponding X-Author Templates ribbon tab.

You can now work with the template, such as inserting merge fields, smart fields, and making content conditional. You can also use this pre-existing template as the basis for a new template by cloning it.

Checking In an FX2 Template



This page contains instructions for checking in FX2 format templates without Template Versioning enabled. For instructions on checking in templates with versioning, see [Checking In Template Versions](#) in this guide.

After you create a new template or make changes to an existing template, you can check-in the template to save or update the template record on Salesforce.

To check in a template

1. From the X-Author Templates ribbon, click **Check-In**. The Check-In Template dialog is displayed.

Check-In FX2 Template
Specify the attributes for this template


Type	Agreement	Business Object	Apttus__APTS_Agreement__c
* Name		Keywords	
* Agreement types	NDA MSA Proposal RFP	Next revision date	11/29/2016
* Category	-- Select --	Term exception	
* Subcategory	-- Select --	Is Active?	<input checked="" type="checkbox"/>
* Language	-- Select --	Description	
* Locale	English (United States)	Guidance	
Enable Formatting	<input type="checkbox"/>		
Date Format	M/dd/yyyy		
Currency Format	None		
Number Precision			
Currency Precision			

* = Required Information

Check-In Cancel

2. Enter values into the fields provided as described in the following table (fields marked with an asterisk (*) are required):

Field	Description
Name	Enter a new name for the template.
Category	Choose an option from the list to update the template category.
Subcategory	Choose an option from the list to update the template subcategory.
Language	Choose an option from the list to change the default language for the template.

Locale	<p>Choose an option from the list to change the default locale for the template.</p> <div>  For templates created prior to X-Author Contracts version 9.0.0210, changing the value of this field will not change the template locale and will be treated as metadata only. </div> <p>Refer to the section Changing Locale at Check-In.</p>
Enable Formatting	<p>Check this box to enable locale formatting at the template and field level for this template. This allows you to define locale settings for Currency, Number, Percent and Date formats. Refer to the section Changing Locale at Check-In in the Defining Template Locale page.</p>
Agreement Types	<p>Add or remove Agreement Types to associate with this template.</p>
Keywords	<p>Enter comma-separated keywords to associate with the template. Can be used as tags with Document Finder.</p>
Next Revision Date	<p>Identify a new date for the next revision of the template.</p>
Term Exception	<p>Choose an option from the list to change the term exception applied to this template.</p>
Is Active?	<p>Select this option to make the template active for document generation. You can deselect this option to make the template inactive/unavailable for document generation.</p>

Field	Description
	After you make a template inactive and check it in, you can no longer work with it in X-Author Contracts. You will have to reactivate the template from Contract Management in Salesforce, since X-Author Contracts does not list inactive templates for checkout.
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.

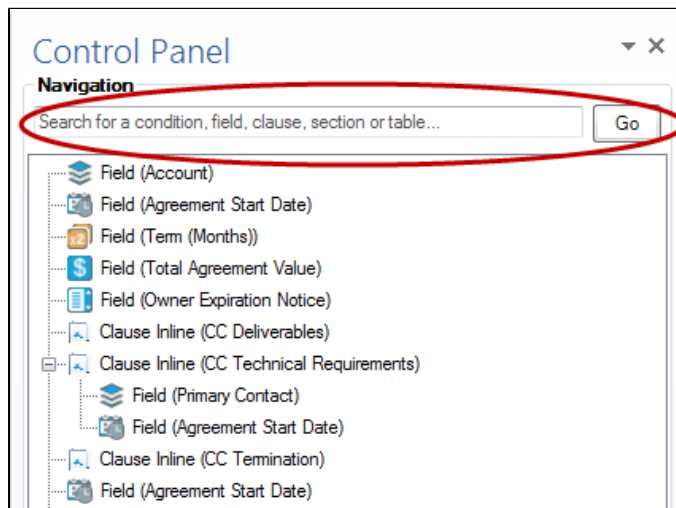
3. Click **Check-In**. The template is checked in to Salesforce. A new Template record is created for the template if this is the first check-in or modified if it already exists. A DOCX copy of the template is attached to the Notes & Attachments related list of the Template record in Salesforce.

To learn more about localization, refer to [Defining Template Locale](#).

Filtering Template Elements in the Control Panel

Because of the way fields and other X-Author elements (clauses, sections, segments) are represented in a Word template as form fields and content controls within the document, it is not always easy to use Word-native search functionality to locate these elements. Furthermore, conditions defined for clauses, sections, tables and segments within the template use fields which are not represented in the list of elements in the Control Panel.

Using a simple, text-based search, you can filter the Navigation pane to display any element which is part of your agreement template, or any element which contains a field or value as part of its condition expression which matches the text-based search.



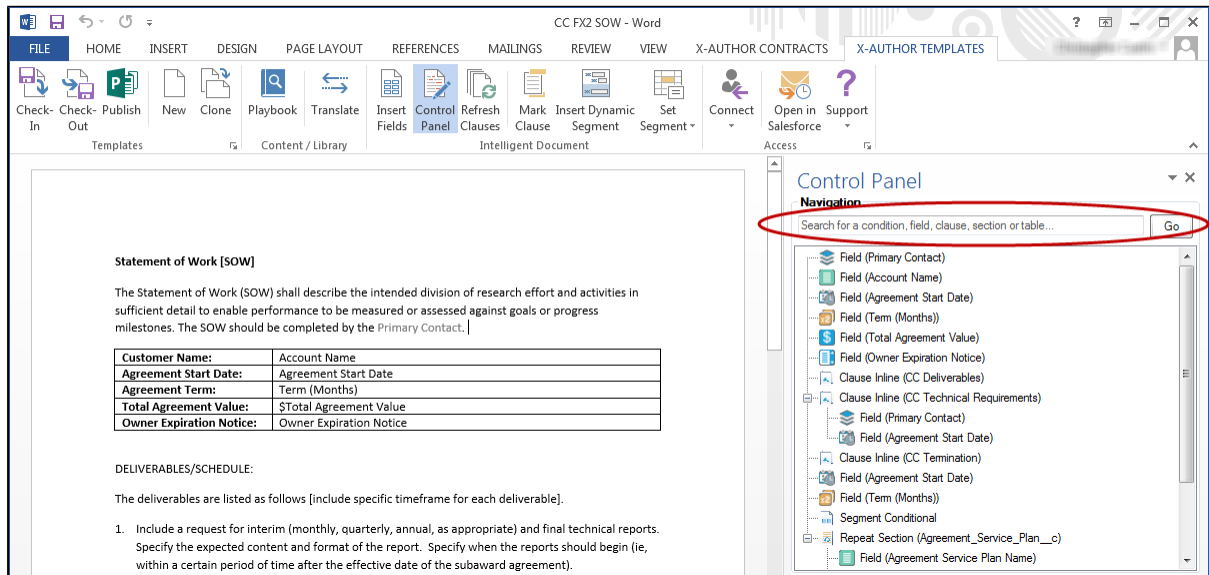
You can use the text search for:

- Fields
- Clauses
- Sections
- Tables
- Segments
- Fields used as conditions in other elements
- Values of conditions

To filter control panel elements

1. Check out your template and navigate to the **X-Author Templates** tab.
2. Click **Control Panel** under the Intelligent Document section of the ribbon to display the Control Panel and Template filter.

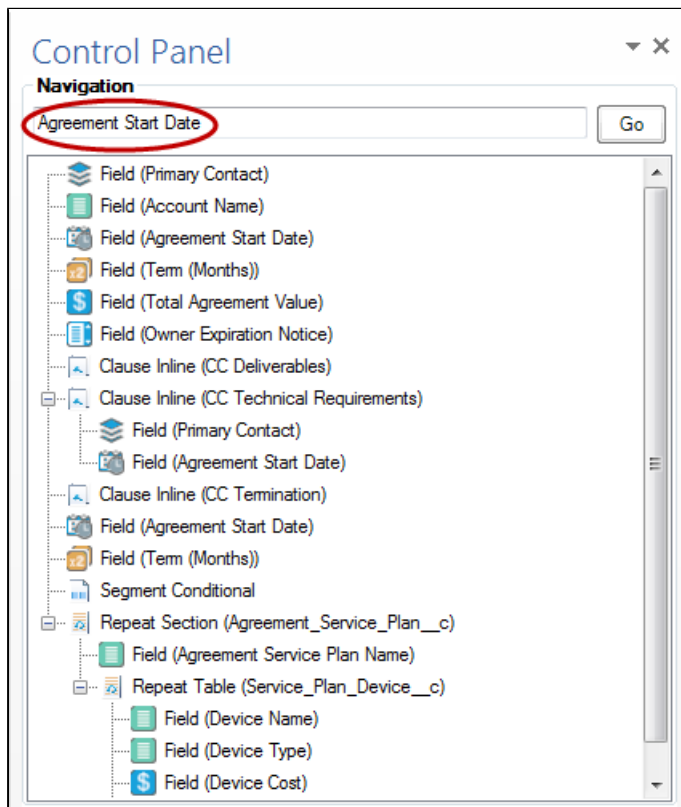
X-Author Contracts on Salesforce Spring 2018 User Guide



3. Enter your search query into the provided field.

When you perform a text-based search, keep the following rules in mind:

- search for fields, clauses, and elements inside clauses, tables, sections and segments using the **field or clause label** (e.g., "Agreement Start Date")
- search for field conditions within clauses, tables, sections and segments using the **API name** (e.g., "Contract_Start_Date"). Entering just the label for fields which are part of conditions/filters will not display the field in the list.
- search for any of the above by entering **partial text** which matches *both the label and API name* (e.g., "Start").



4. Click **Go** or press **Enter** to filter the Control Panel view to match your text search.

Control Panel

Navigation

- Field (Agreement Start Date)
- Clause Inline (CC Technical Requirements)
 - Field (Agreement Start Date)
 - Field (Agreement Start Date)

Properties

Attributes

Mark as Smart?	True
Name	Apttus__APTS_Agreement__c/apts_agreer
Type	Field (DATE)

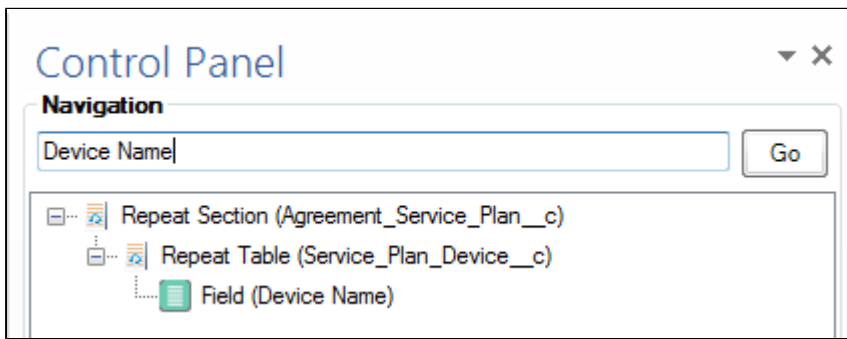
Display Attributes

Format	
--------	--

Name

Name of the field / clause as in Salesforce

Filtered results are always returned in a way which displays the hierarchy of nested elements. For example, the field "Device Name" is used in a table ("Service Plan Device") which is nested inside a section ("Agreement Service Plan"). Searching for "Device Name" returns results displaying the entire hierarchy for the field shown by the filter.

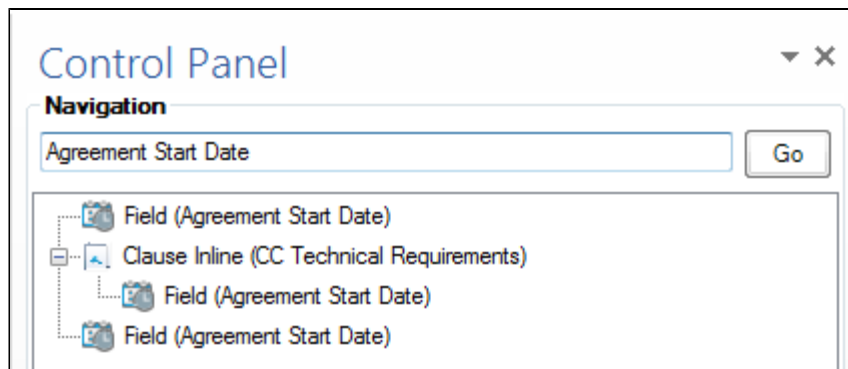


Example: Agreement Start Date Field

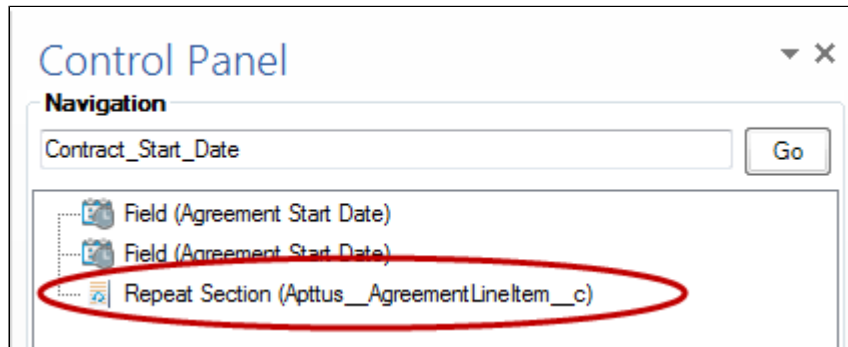
In this example, we'll show how filtering works to help locate different types of references to a single field (Agreement Start Date) in a document.

- Twice inserted into the body of the document.
- Once as a field nested inside a clause.
- Once as part of a condition expression for displaying a section. (Row condition resolves to TRUE if Agreement Start Date \geq 2/2/2016)

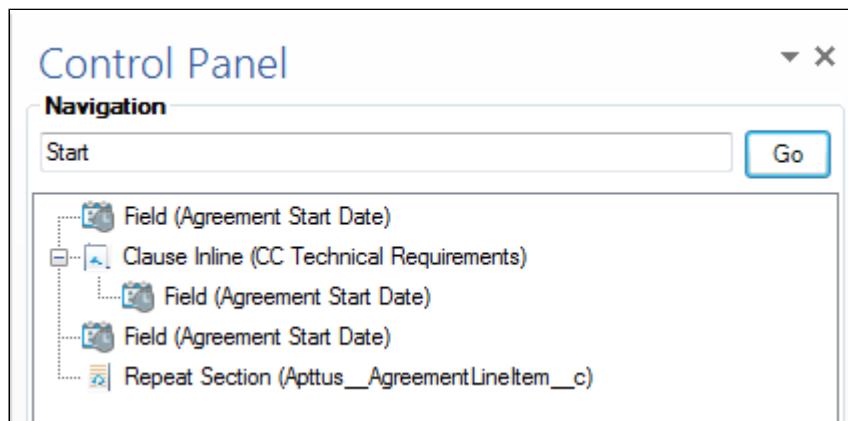
1. To find all instances of the field itself, enter the label name "Agreement Start Date."



2. To find the condition/filter where Agreement Start Date is used in the expression to evaluate whether or not to include the section, enter the API name "Contract_Start_Date."



3. To find all instances of Agreement Start Date either as fields or as conditions, enter text which the label name and the API name both share (e.g., "Start").



Inserting FX2 Fields into an FX2 Template

Place a cursor into the appropriate section of the document where an FX2 field is going to be inserted and select **Insert Fields** from the X-Author Templates ribbon tab.

The Insert Fields dialog lists the objects and associated FX2 fields.

Note

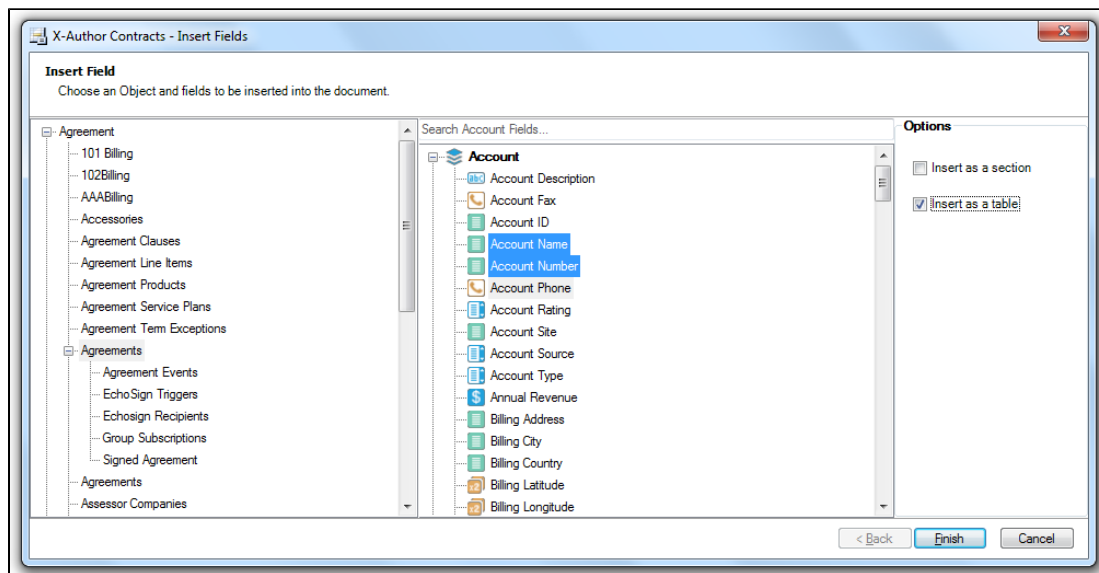
You might view multiple instances of an object, but each of these objects has either a master-detail relationship or a look-up relationship with the parent object. For example, you might view 2 objects named **Agreements** when you click **Insert Fields**. One is the actual agreement object and second is the agreement object for EchoSign Integration with agreements and both these objects have a look-up relationship with the Agreement object.



You can insert a single field, multiple fields, a section, and fields as a table from the *Insert Fields* dialog box.



You can neither insert the fields of Related Agreement object, such as **Relationship From Type** and **Relationship To Type** in an agreement template nor mark these fields in a generated agreement document.

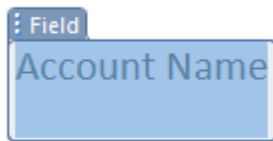


In the left column, you can select the field's object context, e.g. Agreement, and in the right column, you can select the object-qualified fields. **The fields will be inserted in the same order you select them from the list.**

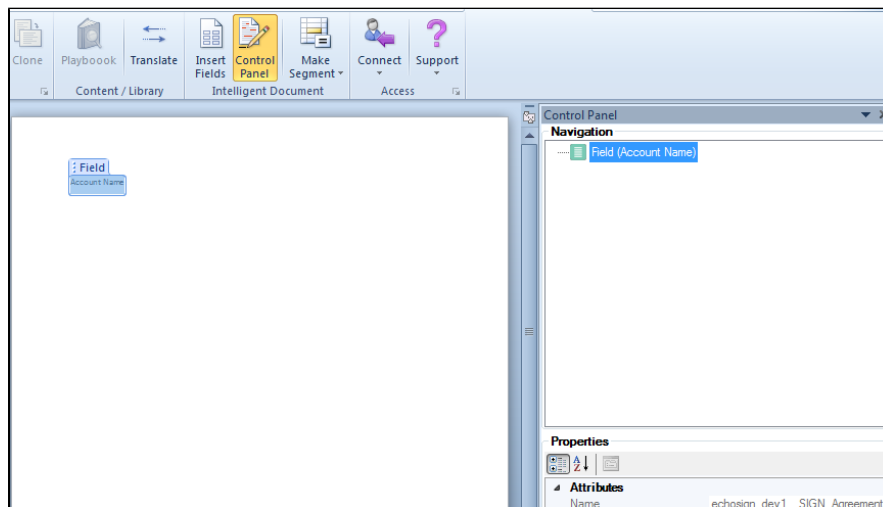
Select *Agreement Fields* in the left column and click on appropriate FX2 field(s) to insert into the agreement template. To deselect an FX2 field hold the Ctrl key down when clicking it.

Click **Finish** to insert the selected fields or click **Cancel** to not insert any fields into the Template.

An inserted FX2 Template field looks like:



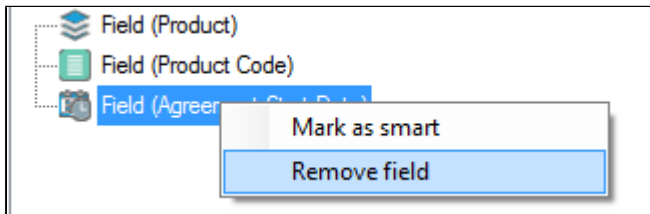
The *Control Panel* will automatically open up and highlight the most recently inserted fields. The *Control Panel* consists of two panes: Navigation and Properties. Navigation lists all context - fields, clauses, sections, and tables - in the order they appear in the Template. The properties are context aligned with the element selected in the Navigation pane or selected in the document (three way alignment).



Removing Fields from Templates

If you want to remove an inserted field from your template, X-Author allows you to remove fields cleanly using the Control Panel. This feature was introduced to help you avoid errors that might arise from manually deleting content controls from the Word document. To remove a field:

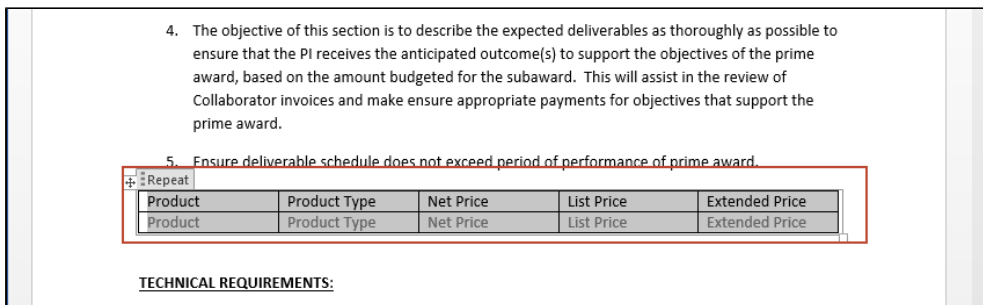
1. From the X-Author Template ribbon, select **Control Panel**.
2. Search for and select the field from the Control Panel Navigation pane.
3. Right-click on the field name and select **Remove field**.



Inserting Line Item Fields as a Table

You can insert FX2 fields for line item objects that have a **Master/Detail** or **Lookup** relationship with the agreement **as a table** in your template. The table is inserted into your template as a Repeat Table, meaning each separate line item record is populated as a row in the table, with field data populated in individual cells by column.

1. To begin, place your cursor in the desired place in your document where you want to insert a table.
2. Click **Insert Fields** to open the Insert Fields dialog.
3. Choose a line item object, such as **Agreement Line Items**.
4. In the window to the right, hold **Ctrl** and select one or more fields from the list. Each field you select will be displayed as a column in the table. *Fields are inserted in the order you select them from the list.*
5. Select the check box **Insert as a table**.
6. Click **Finish**. A Repeat table is inserted into your template with each field displayed as a separate column.



Using Table Display Attributes to Control the Appearance of Tables in Generated Documents

When your agreement document table is generated, default behavior displays line item field names in a header row at the top of the table and the values of the fields in subsequent rows. You may determine in certain cases that you do not want captions displayed for the generated table, or if there is no line item data in your agreement you may want the table to appear empty or to not appear in the document at all.

You can control options for generated tables in your agreement using **Table Display Attributes** in the **Properties** pane in the **Control Panel**.

The screenshot displays the X-Author Control Panel interface. On the left, a document preview shows a section titled "The deliverables are listed as follows [include specific timeframe for each deliverable]." followed by five numbered items. Below this, a table is shown with a "Repeat" button above it. The table has five columns: Product, Product Type, Net Price, List Price, and Extended Price. The first row contains the field names, and the second row contains placeholder values. On the right, the "Properties" pane is open, showing a tree view of the document structure. The "Repeat Table (Apttus__AgreementLineItem__c)" is selected. The "Properties" pane for this table shows the following settings:

- Attributes:** Name: Apttus__APTS_Agreement__c/Aptt, Type: Repeat (Table)
- Condition:** Conditional Expression: ☐
- Table Display Attributes:** Format: Show captions and one empty, Show Caption: True

To show or hide captions for a generated table

1. In X-Author, navigate to **X-Author Templates > Intelligent Document > Control Panel**.
2. Click the table in Control Panel Navigation that you want to configure.
3. In the Properties pane under Table Display Attributes click **Show Caption**. A drop-down menu is displayed.

Properties

Attributes

Name	Apttus__APTS_Agreement__c/Aptt
Type	Repeat (Table)

Condition

Conditional Expression ☐

Table Display Attributes

Format **Show captions and one empty**

Show Caption **True** ▼

True
False

Show Caption
Make the table caption shown or not shown when the document is generated

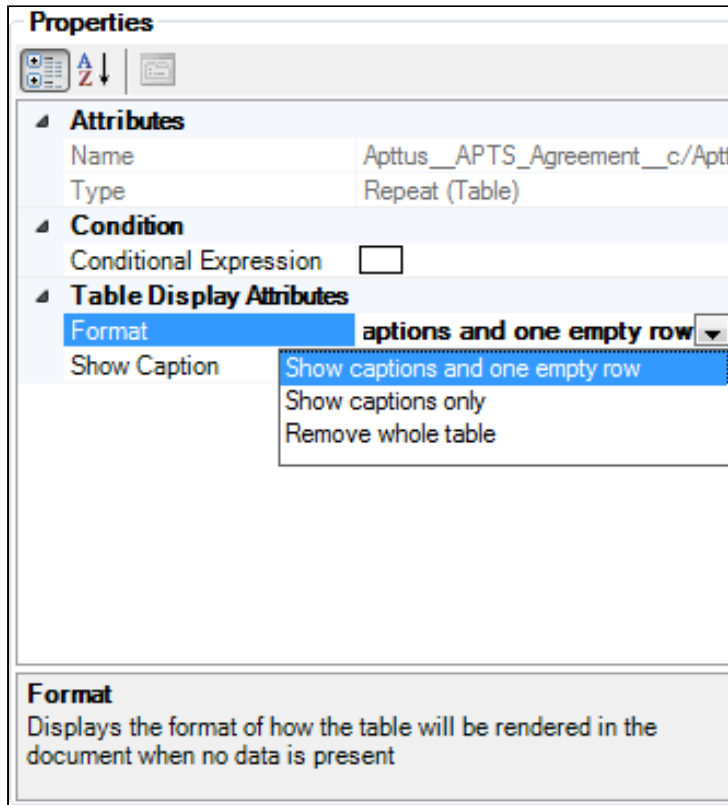
- a. To show captions at the top of the table when the document is generated, do nothing or change the value to **True**.
 - b. To hide captions at the top of the table when the document is generated, change the value to **False**.
4. Check in the new version of your template to confirm changes to the table.

To choose table formatting when no data is present

You may often find in your agreements that no line item data exists for a table in one of your templates. You can use Table Display Attributes to control how the table is rendered in the generated document.

1. In X-Author, navigate to **X-Author Templates > Intelligent Document > Control Panel**.
2. Click the table in Control Panel Navigation that you want to configure.

3. In the Properties pane under Table Display Attributes click **Format**. A drop-down menu is displayed.



- a. To show table captions and one empty row, choose **Show captions and one empty row**.
 - b. To show captions only and no rows, choose **Show captions only**.
 - c. To remove the entire table from the generated document, choose **Remove whole table**.
4. **Check in** the new version of your template to confirm changes to the table.

Inserting Smart FX2 Fields into an FX2 Template

The X-Author Templates Word add-in has support for inserting smart FX2 fields into an agreement or clause template.

Smart FX2 fields are specialized FX2 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

negotiable parts of an agreement. 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.

Note

Smart fields have the following limitations:

- **Text Area** data type fields, formula field for **LongDate** and **Multi-Select Picklists** are not supported for Smart FX2 fields.
- A normal FX2 field or a qualified FX2 field can be inserted as a smart FX2 field. You cannot insert lookup fields as smart FX2 fields.
- You can neither insert the fields of Related Agreement object, such as **Relationship From Type** and **Relationship To Type** in an agreement template nor mark these fields in a generated agreement document.
- Smart fields cannot be used in the headers or footers of agreement documents.

Reconciliation functionality is supported for the fields inserted "as a section" or "as a table." Qualified FX2 fields as smart fields for 2nd and 3rd-level objects are not supported.

For details on Reconciliation, see [Reconciliation](#).

To insert an FX2 Smart Field into an FX2 Template

You must have an FX2 Template checked out or have created a new FX2 Template.

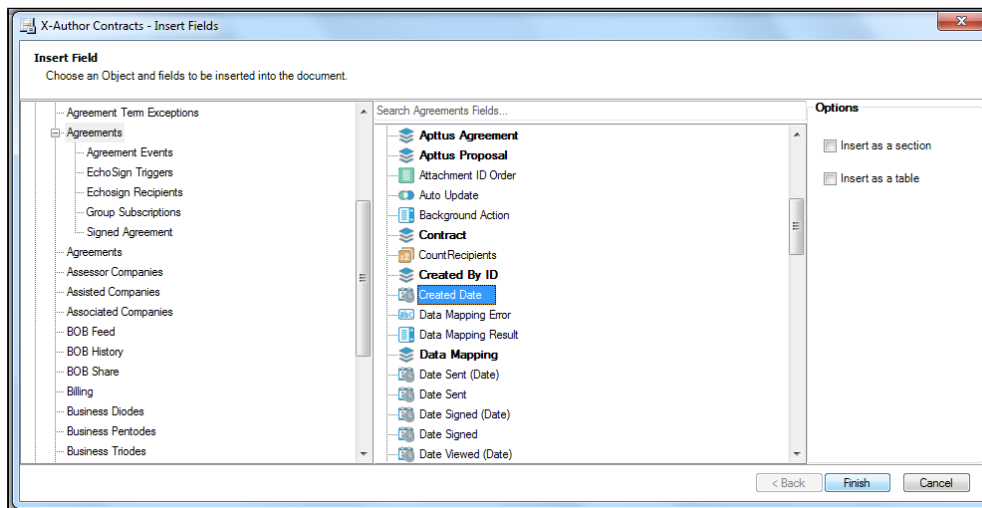
1. Click **Insert Fields** and then select the desired fields in the *Insert Fields* dialog box.

Note

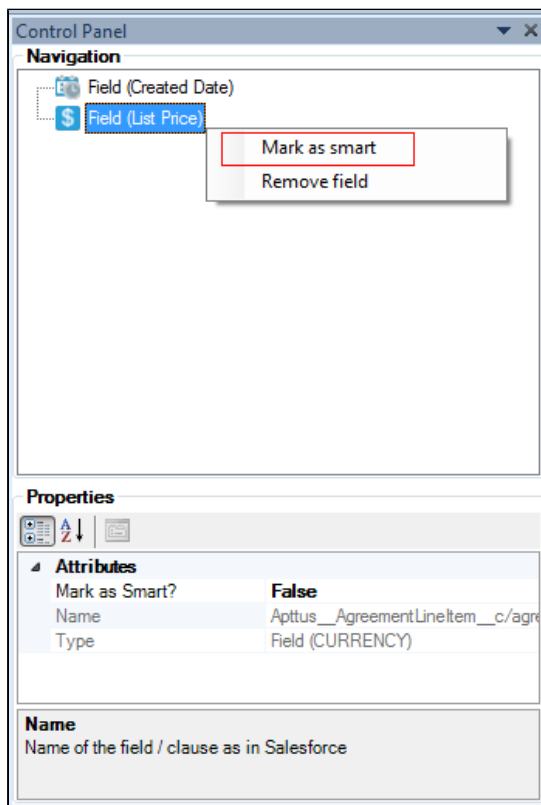
You might view multiple instances of an object, but each of these objects has either a master-detail relationship or a look-up relationship with the parent object. For example, you might view 2 objects named **Agreements** when you click **Insert Fields**. One is the actual agreement object and second is the agreement object for EchoSign Integration with agreements and both these objects have a look-up relationship with the Agreement object.

2. Click **Finish** to confirm the field selection.

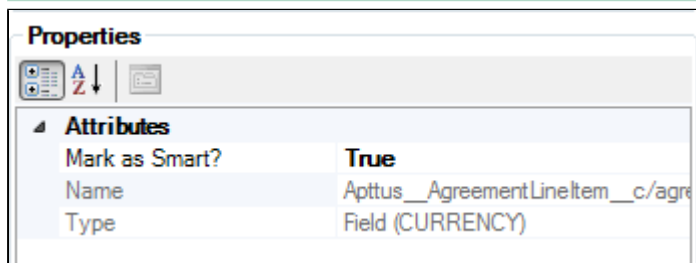
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Notice that the *Control Panel* will open. This is where you will need to change an inserted field to a Smart Field. Right-click the field name in the *Control Panel Navigation Pane* and select **Mark as Smart**.



You can verify that the field has been correctly inserted as a smart field by checking the field values in the *Properties* pane at the bottom of *Control Panel*.



You have successfully inserted a field and then changed it to a Smart Field.

Support for Nested Child Level FX2 Fields

X-Author and Merge Service can support resolving FX2 fields for nested child level items at the child and grandchild levels of an agreement or proposal.

With X-Author you can insert FX2 fields for child relationship objects that have a master/detail child relationship with the agreement and FX2 fields for a third level, the grandchild level objects with a lookup relationship to the original object that is a child object of the agreement.

X-Author supports either master/detail or lookup relationships at the child level, as well as lookup relationships from a grandchild that is related to the original agreement by its relationship to the child agreement. Only lookups at the grandchild or third level are possible.

X-Author supports inserting qualified FX2 fields for objects at both the child and grandchild levels. To summarize, X-Author has:

- The ability to pick standard FX2 fields for object child and grandchild levels
- The ability to pick lookup (qualified) FX2 fields for object child and grandchild levels
- The ability to distinguish between lookups at parent, child, and grandchild levels
- The ability to insert section tags to denote nested child/grandchild levels
- The ability to insert lookup fields in tables and sections
- The ability to insert conditions in tables and sections
- Backward compatibility with pre-existing templates

What this means is you can have Related Lists for Service Plan level information for an agreement, and then easily insert FX2 fields for this information into your templates. You can then define another object, say Service Plan Devices, which is related to a Service Plan by a lookup relationship, and then define merge fields for the agreement service plan devices that can be repeated for each agreement service plan.

The mechanism to support the features described above involves adding section tags to support defining an area to the Merge Service so it can interpret line item merge fields within a section as being grandchildren of the object whose scope enclosed the original section tags.

Although in the FX2 Template format, your inserted FX2 fields will not display mergecode; rather, these fields will display the name of the fields in boxes. The support for nested child level FX2 fields is the same as inserting merge fields into the pre-existing Template format. See: Support for Nested Child Level Merge Fields.

Working with Clauses

Even though you will have standard clauses that you wish to use in every contract, through negotiations, your trading partners will not always agree with them – as you know. We provide the concept of template libraries - alternative clauses or sometimes known as fallback provisions. This simply allows you to select alternative language with differing degrees of risk and acceptability, so that you can replace your current clause with it.

As with contract language templates, clauses also can have embedded merge fields contained within them that get auto populated during agreement creation time. Please ensure that you markup the clause template documents using Microsoft Word to identify the merge fields similar to the language templates.

Creating Clauses

Clauses or clause templates are created and maintained the same way as agreement templates. The difference is that clauses are smaller sections of text that can be manually added during the negotiation process or automatically added to an agreement using conditional logic, whereas agreement templates are comprehensive terms and conditions and can be used by the Apttus Merge Server to generate an actual agreement. Open your clause document in Word or create a new one by pasting a pre-existing clause from the clause library into a new blank document.

As mentioned before, you can keep the clause the way it was or you can add merge fields or FX2 fields, conditional text, or change it any way you like. Once you're sure the clause is the way you want it, select either **Check-In** or **Clone** menu to save the clause to Apttus.

Check-In Template
Specify the attributes for this template

Type	Clause	Business Object	Apttus__APTS_Agreement__c
Name	Sample Clause	Keywords	
Category	Category	Next revision date	2/17/2015
Subcategory	Subcategory	Term exception	-- Select --
Language	English	Is Active?	<input checked="" type="checkbox"/>
Locale	English (United States)	Description	
Agreement types	Default Corporate Other Procurement Sales NDA Proposal Custom Proposal 1	Guidance	

* = Required Information

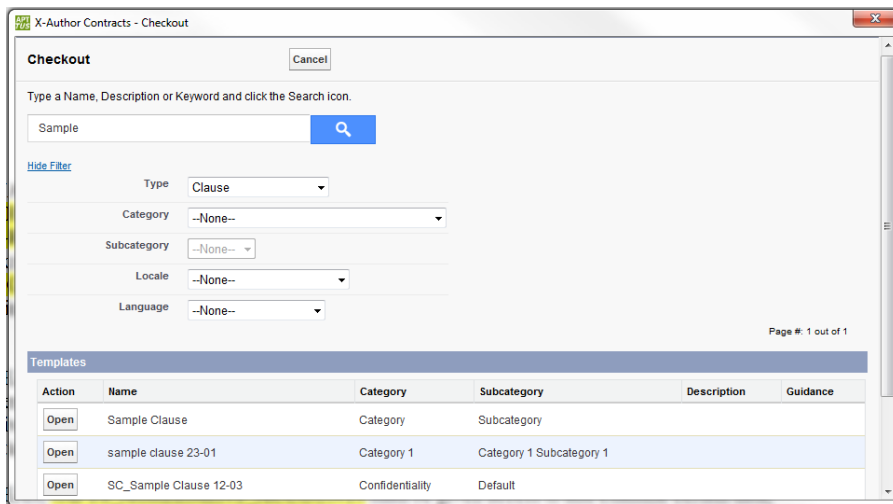
Check-In Cancel

Enter appropriate properties for the clause. You can select multiple agreement types this clause applies to or deselect types by clicking while holding the Ctrl key down. When finished, click **Save** or **Clone**. A message should appear saying the clause template was created.

Updating Clauses

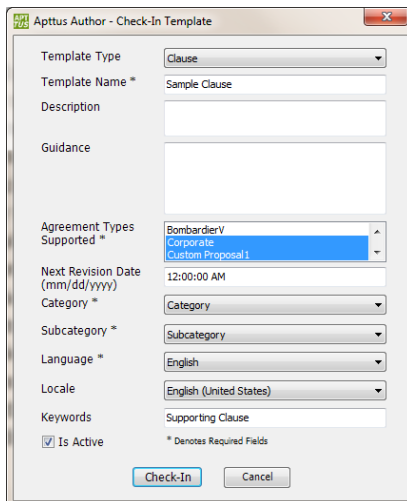
Open a pre-existing clause using **Check-Out**. Note that you should select **Show Filter** and choose **Clause** from the **Type** list before you run your search.

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Action	Name	Category	Subcategory	Description	Guidance
Open	Sample Clause	Category	Subcategory		
Open	sample clause 23-01	Category 1	Category 1 Subcategory 1		
Open	SC_Sample Clause 12-03	Confidentiality	Default		

Make required changes to the clause and click **Check-In**.



Template Type: Clause

Template Name *: Sample Clause

Description:

Guidance:

Agreement Types Supported *: BombardierV, Corporate, Custom Proposal 1

Next Revision Date (mm/dd/yyyy): 12:00:00 AM

Category *: Category

Subcategory *: Subcategory

Language *: English

Locale: English (United States)

Keywords: Supporting Clause

☒ Is Active

* Denotes Required Fields

Check-In Cancel

Set Segment Menu in X-Author Templates

Set Segment allows the user to either set a segment conditional, style, or both. This includes conditionals from the expression builder for conditionals. This also includes built in Microsoft styles and custom styles.

Purpose for the **Set Segment** - Expression Builder Process

- Enables you to highlight content within a Template and then click **Set Segment**, which includes a picklist of additional options that enable you to either make the highlighted content *Conditional* or apply a *Style* to the highlighted content. If *Conditional* is chosen, the *Expression Builder* will open up.

Note

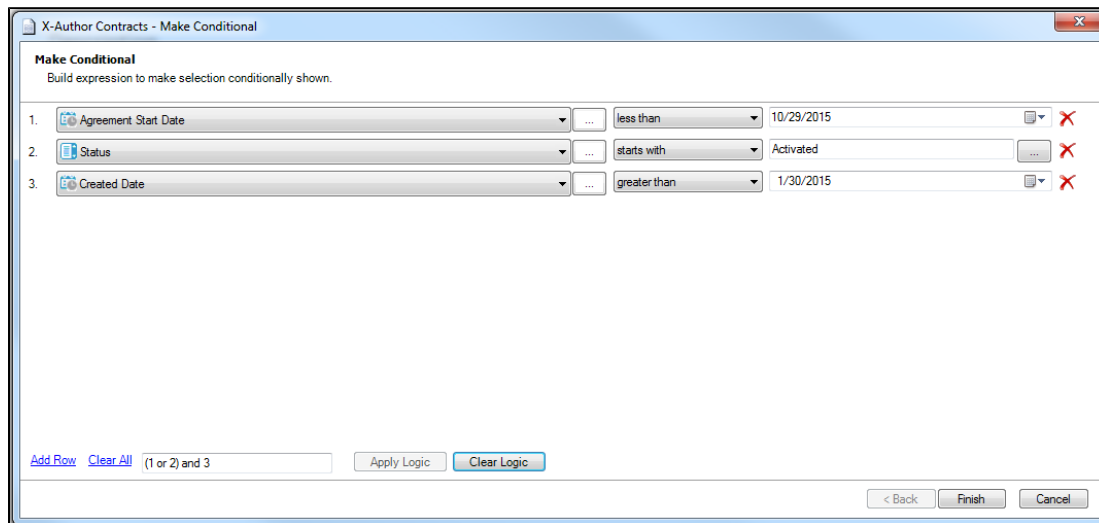
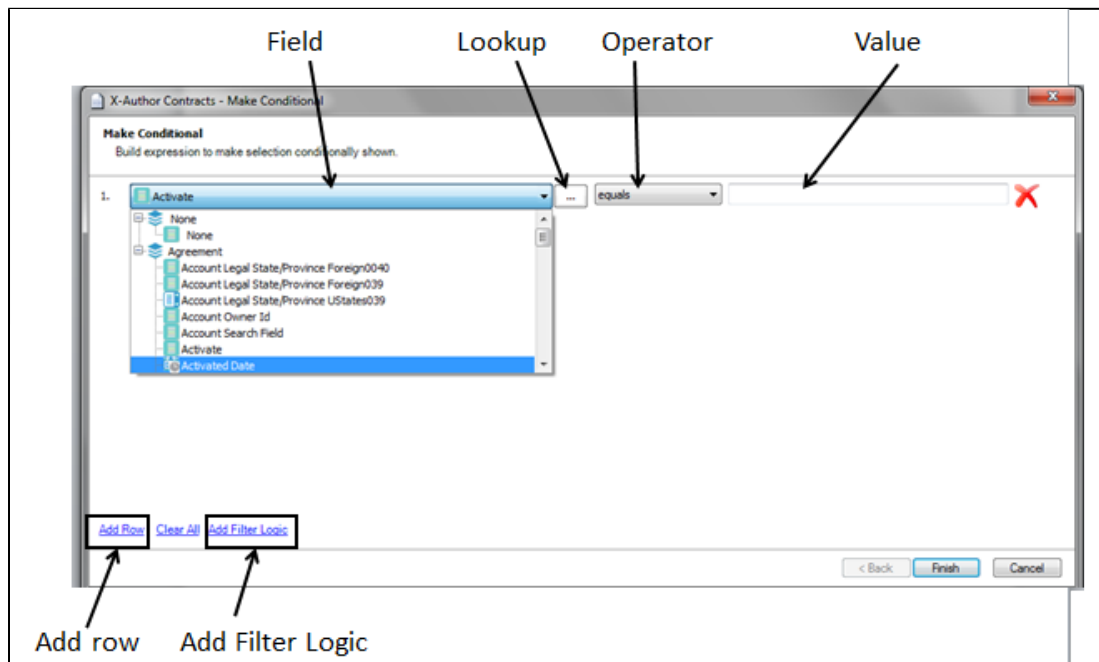
Upon creating a *New* Template and choosing to utilize the new FX2 Template format, X-Author Contracts November 2016 has moved **Make Segment > Dynamic** from the February 2015 release to **Insert Dynamic Section**.

Expression Builder

X-Author Contracts includes a very robust *Expression Builder* that you can use to define and build powerful expressions and expression condition rows, enabling conditional rendering or display of content in generated Agreements. The *Expression Builder* is fully integrated with the objects and fields in your Salesforce org.

The *Expression Builder* is a new way for users to interact with X-Author Contracts. The *Expression Builder* enables you to add conditionality in a simpler way than ever before.

- Up to 9 rows of expression conditions can be used in a single expression for segments, clauses, sections, or tables at one time. From the **Set Segment > Conditional** button or from the individual selection of fields, section, tables in either the document or the navigation pane, and then by using the conditional section in the associated properties, the *Expression Builder* can be accessed from the top of **Control Panel** on individual clauses, tables and segments.
- It can also be accessed at the bottom of the Control Panel or from the **Set Segment** in the X-Author Templates ribbon tab. Whenever a picklist or multi-picklist has been chosen, ellipses will appear at the end of the line to enable you to choose values for the field. The *Expression Builder* can apply filters to add different relationships between expressions.



Expression Builder Important Notes

- The *Expression Builder* enables you to create expressions with up to 9 expression condition rows and apply filter logic that is similar to that in Salesforce. These expressions can be used for segments, sections, and tables.
- The *Expression Builder* gives direct access to the parent object fields. Lookups are accessed through the ellipses in the middle of the *Expression Builder*.

- You can add filter logic, similar to that in Salesforce. Ensure that you have included every added row within the *Expression Builder* inside the filter logic, or else you will be prompted with an error indicating that you have missed a row.
- Clicking **Finish** will apply all included rows in the *Expression Builder* and applied filter logic to the selected or highlighted content in your Template.



You can perform a partial search with picklist values, but not with multi-picklist values.

Using Expression Builder

X-Author Contracts includes a very robust *Expression Builder* that you can use to define and build powerful expressions and expression condition rows, enabling conditional rendering or display of content in generated Agreements. The *Expression Builder* is fully integrated with the objects and fields in your Salesforce org.

Invoking Expression Builder

You must have highlighted content.

The Expression Builder can be invoked in two ways:

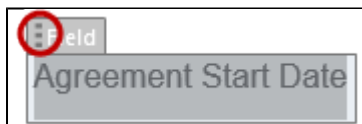
1. Click on Set Segment > Conditional.

Open the **Control Panel**, right-click the desired Segment Conditional, and then select **Edit condition**.

You have successfully invoked the *Expression Builder*.

Highlighting inserted content

To completely highlight content in a Template, click the small tab attached to the surrounding content box.



You have successfully highlighted the content.



This step applies whenever you wish to select content and perform an action on the selected content.

Making content conditional within a template

Using Conditionals

You must have highlighted some text, a clause, a grouping of text across clauses, or text with fields.



You cannot add an action if the conditional resolves to *False*.



1. In the X-Author Templates ribbon tab, click **Set Segment > Conditional**. The Expression Builder dialog box will appear.
2. Within the Expression Builder, you can make selected content conditional. The picklist allows the user to choose the business object context of the Template, to define qualified expression fields.
3. After choosing the business object, all of the fields in that business object will automatically expand, showing you a list of the available fields to choose from. Choose the necessary fields.

Each expression condition requires the identification of the field control to which the condition will apply, the operator to be used in the condition, and the value of the field where the condition shall be *True*.

The Expression Builder allows the user to **Add Row** to add more expression conditions, where 2 or more conditions are joined in the overall expression by the Boolean operator AND.



The default relationship for more than one row in the Expression Builder is 'AND'.

Click the red icon  to delete the expression condition row. You can click  to build advanced expressions using lookup fields of the objects.

4. Click **Finish** to apply the conditional for the highlighted text. The Control Panel will open up and you will see a new field called, Segment Conditional. This confirms that you have made the highlighted content a conditional.

Applying filter logic

You must have at least 2 rows or a maximum of 9 rows in the Expression Builder.

1. In the Expression Builder dialog box, click **Add Filter Logic**.
2. To change the default AND relationship between the rows in the Expression Builder, enter in the filter numbers, separated by the supported operators.

- **AND** - Finds the data which matches where both expression condition rows are True.
- **OR** - Finds the data which matches an enclosed set of expression condition rows or a specific expression condition row.

For example, by using brackets or parenthesis you can enter: ((1 AND 3) or (2 AND 5)) AND 4 or you can enter (1 OR 2) OR 3. If you enter in the filter logic statement incorrectly, you will be presented with a error message in a dialog box that will assist you in applying a valid statement.


3. Click **Apply Logic** to apply the logical statement to the rows in the Expression Builder.

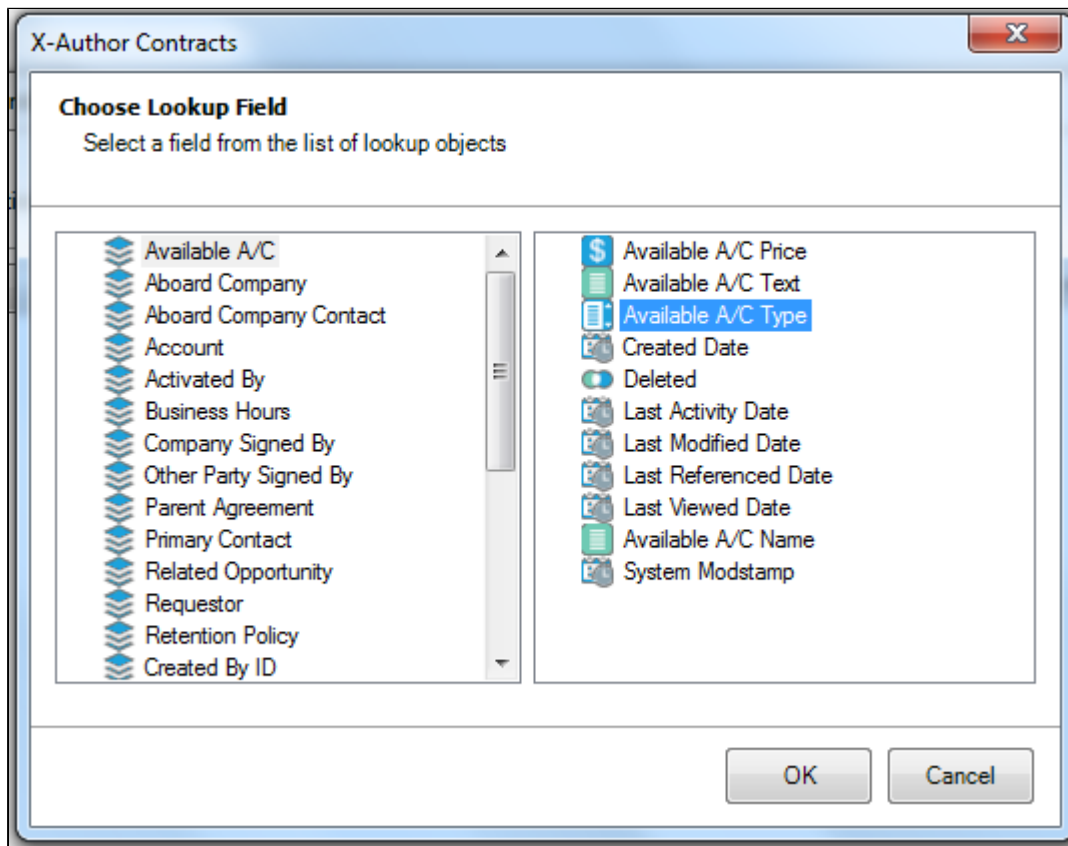
Using a lookup field when making content conditional within a template

You must have highlighted the text or field to make conditional.

Note

You cannot add an action, if the conditional resolves to *False*.

1. In the X-Author Templates ribbon tab, click **Set Segment > Conditional**. The *Expression Builder* dialog box will appear.
2. Within the *Expression Builder*, you can make selected text or a field conditional. The picklist allows you to choose the business object in which the Template is related to.
3. After choosing the business object, all of the fields in that business object will automatically expand, showing you a list of the available fields to choose from. Choose the necessary fields.
4. To use a lookup, click the ellipses  after the object picklist. A dialog box will pop up that allows you to select the object context in the left pane and the corresponding object field from the right pane.



5. Click **OK**.
6. Click **Finish** to apply the conditional for the highlighted text or field. The *Control Panel* will open up and you will see a new field called, *Segment Conditional*. This confirms that you have made the highlighted text conditional.

You have successfully made selected text or a field conditional using the lookup feature in the *Expression Builder* within a Template.

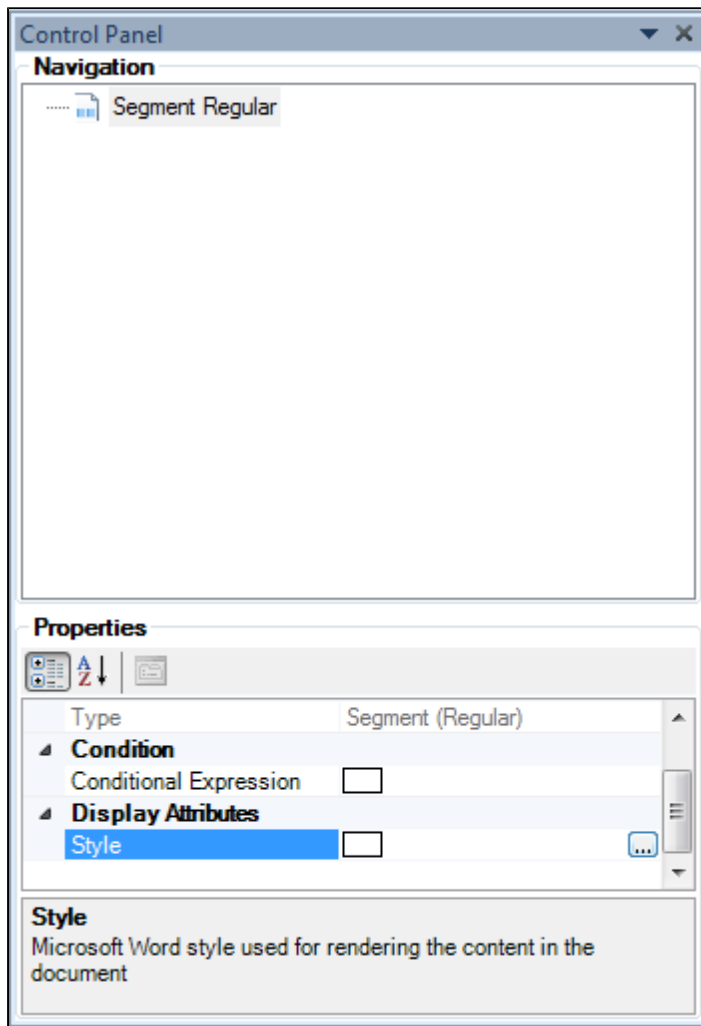
Applying a custom style to a Segment within a template


You must have highlighted the text, field, or segment to make *Regular*.

Note

You cannot add an action if the conditional resolves to *False*.

1. In the X-Author Templates ribbon tab, click **Set Segment > Style**. The *Control Panel* will appear.



2. Click the ellipses icon  , next to the field for *Style*, and the *Select Styles* dialog box will appear.
3. By default, any custom styles will appear in the *Select Styles* dialog box. Click the **Show built-in styles** check box to populate the list with built-in Microsoft Word styles.
4. Select the style you want to apply and click **Select**.
Notice that the name of the selected style is applied to the Style property in the **Control Panel**.

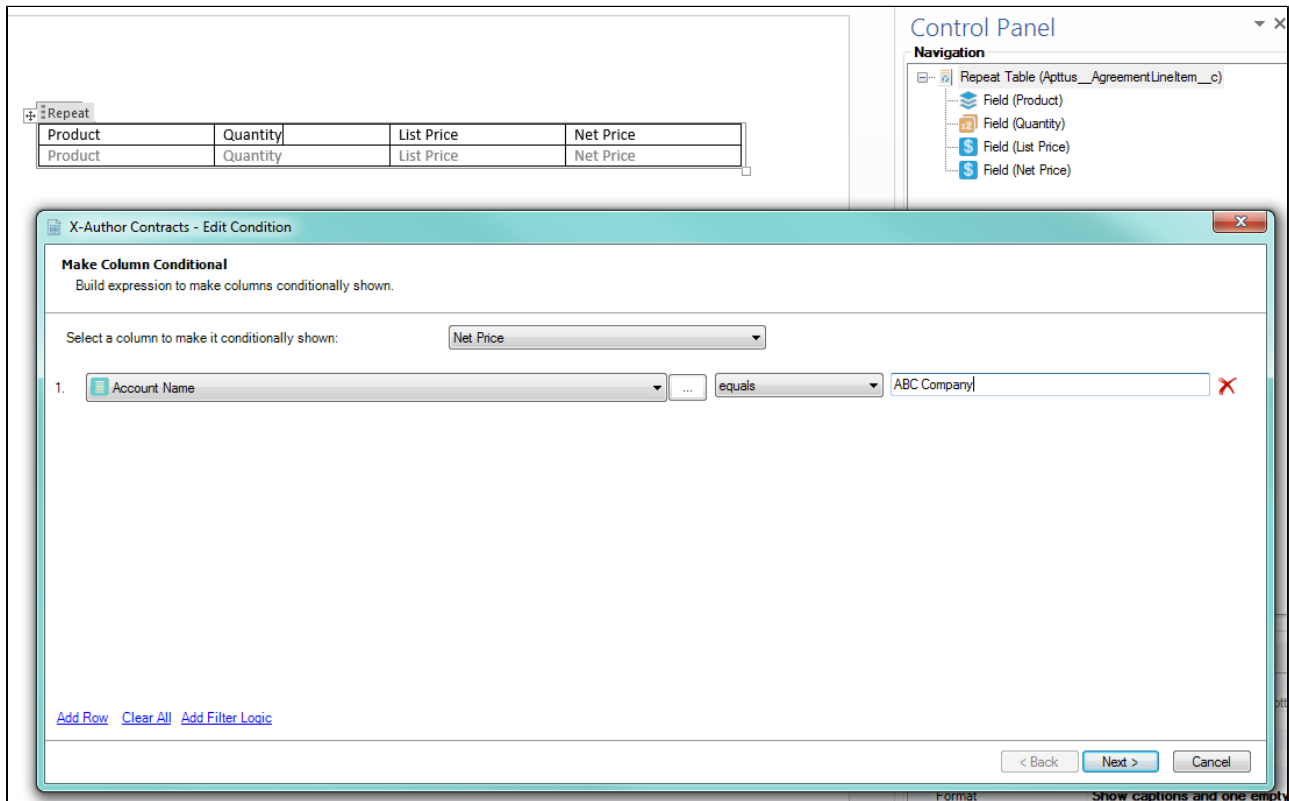
Properties	
Type	Segment (Regular)
Condition Conditional Expression <input type="text"/>	
Display Attributes Style <input type="text"/> Light List - Accent 4	
Style Microsoft Word style used for rendering the content in the document	

You have successfully applied a custom or Microsoft-defined style (Style) to a segment within a Template.

Conditional Columns and Rows in a Table

X-Author Contracts allows you to mark any or all of the rows and columns in a table as conditional. In practice, these conditions operate as filters, allowing rows and columns in the table to be conditionally shown (and populated) or hidden. When you are constructing your template, you define various condition expressions on rows and columns of a table. These conditions are then evaluated at runtime when an agreement document is generated using this template.

For example, your table consists of a 4 columns: **Product Name**, **Quantity**, **List Price** and **Net Price**. You can define a condition to show the **Net Price** column only when the Account Name is ABC Company.



- **Conditional Columns in a Table**

You can make columns conditional in a table when you want to remove columns that do not fit specified criteria (e.g., removing a column where a value is found or not found).

- **Conditional Rows in a Table**

You can make rows conditional in a table when you want to remove rows that do not fit specified criteria (e.g., when quantity or net price is over a certain amount).

You edit table conditions in X-Author from either the *Navigation* pane or the *Properties* pane of the **Control Panel**.

Conditional Columns in a Table

Add conditions to table columns when you want to remove columns from an Apttus-generated table based on specified criteria. This filters out columns in the table when the document is generated whenever any criteria defined for the table are met.



Hint: click on an image on this page to enlarge the view.

To define table column filters

1. Open the **Control Panel** from the Intelligent Document menu in the X-Author Templates ribbon.
2. Right-click on the table in the *Navigation* pane that you want to make conditional and choose **Edit Condition** OR select the table in the *Navigation* pane and click the **Expression Builder** button in the Properties section below the Navigation pane.

The screenshot shows the X-Author Templates interface. The **Control Panel** is open, displaying two tables. The first table, titled 'Repeat', has columns: Product, Quantity, List Price, and Net Price. The second table, titled 'Agreement Service Plan Name', has columns: Device Name, Device Type, Manufacturer's Name, and List Price Exclusive of VAT. The **Navigation** pane on the right shows a tree structure of the document. A red callout points to the 'Edit condition' button next to the 'Repeat (Table)' entry. Another red callout points to the 'Conditional Expression' button in the **Properties** section, which is also circled. The **Properties** section shows the 'Conditional Expression' field with a button to open the Expression Builder. Below it, the 'Table Display Attributes' section shows 'Show captions and one empty' set to 'True'.

3. Select a column from the picklist at the top of the Expression builder that you want to make conditional.

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X-Author Contracts - Edit Condition

Make Column Conditional
Build expression to make columns conditionally shown.

Select a column to make it conditionally shown:

1.

[Add Row](#) [Clear All](#) [Add Filter Logic](#)

< Back Next > Cancel

4. To build an expression, define your criteria:

- using the picklist on the left to choose an Agreement header-level field

X-Author Contracts - Edit Condition


Make Column Conditional
Build expression to make columns conditionally shown.

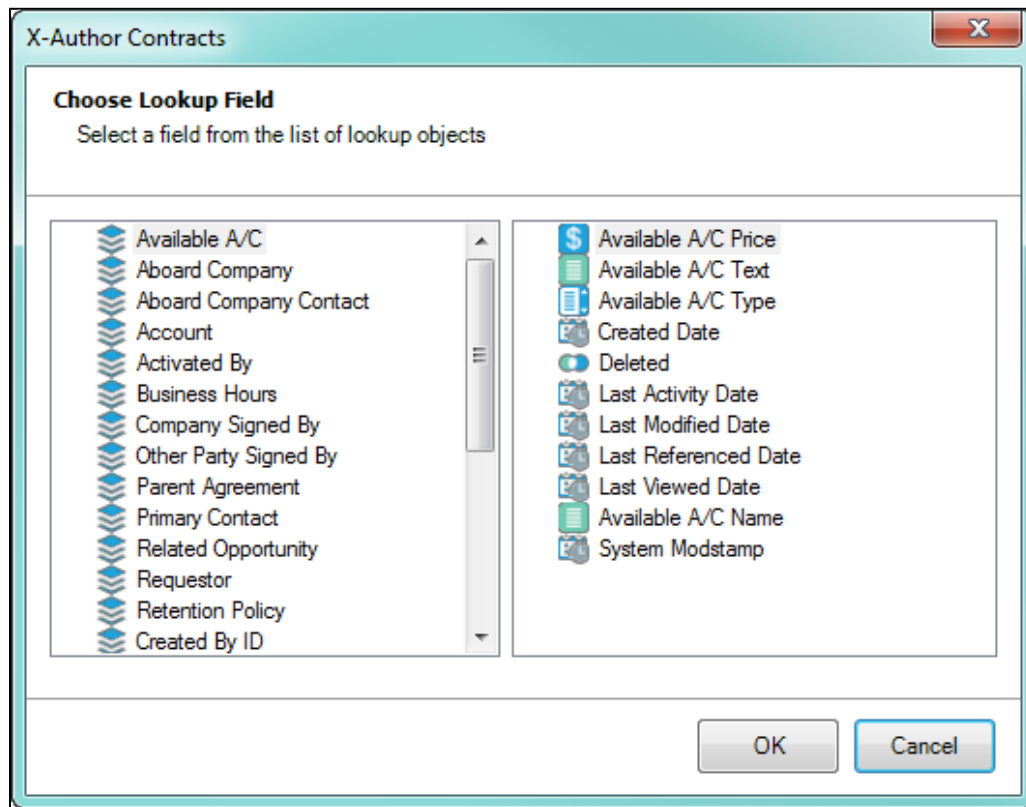
Select a column to make it conditionally shown:

1.

[Add Row](#) [Clear All](#) [Add Filter Logic](#)

< Back Next > Cancel

- by clicking the  Lookup button to the right of the picklist to choose from a list of object fields with a lookup relationship to Agreement



If you are defining column filters for a table inside a section which contains third-level fields, you can use header or second-level fields as criteria or any object fields with a lookup relationship to Agreement or the second-level object.

5. Complete your expression by adding an operator and a value (e.g., "Account Name equals ABC Company")

X-Author Contracts - Edit Condition

Make Column Conditional
Build expression to make columns conditionally shown.

Select a column to make it conditionally shown: Net Price

1. Account Name ... equals ABC Company ✖

[Add Row](#) [Clear All](#) [Add Filter Logic](#)

< Back Next > Cancel

6. Click [Add Row](#) to create additional expressions for the same column. You can create up to a maximum of 9 filters for a single column.
7. By default, all expressions use **AND** logic, meaning all conditions are required for the rule to execute. Click [Add Filter Logic](#) to change condition logic to **OR**, or create your own custom condition (for example, (1 OR 2) AND 3 if you want to make only 1 of the first 2 conditions required).
8. Repeat steps 3 – 7 for each column you want to filter.
9. Click **Next** when you are finished to continue to the next screen in the *Expression Builder* to define any [conditional rows in your table](#) (see the next section for complete instructions).
10. Click **Finish** to save your table filters and return to your document.

Conditional Rows in a Table

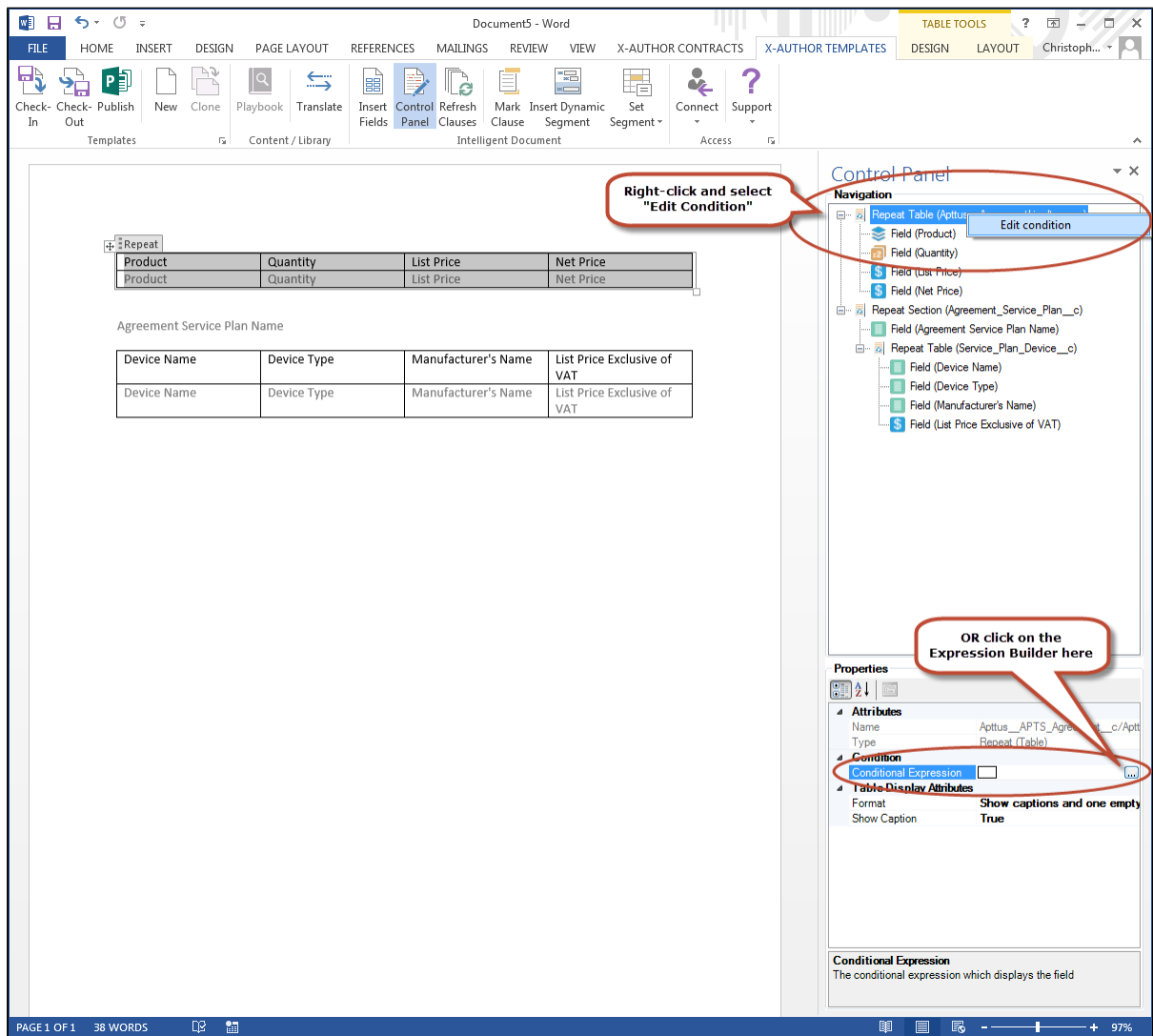
Add conditions to table rows when you want to remove rows from an Apttus-generated table based on specified criteria. This filters out rows in the table when the document is generated containing values for column object fields whenever any criteria defined for the table is met.



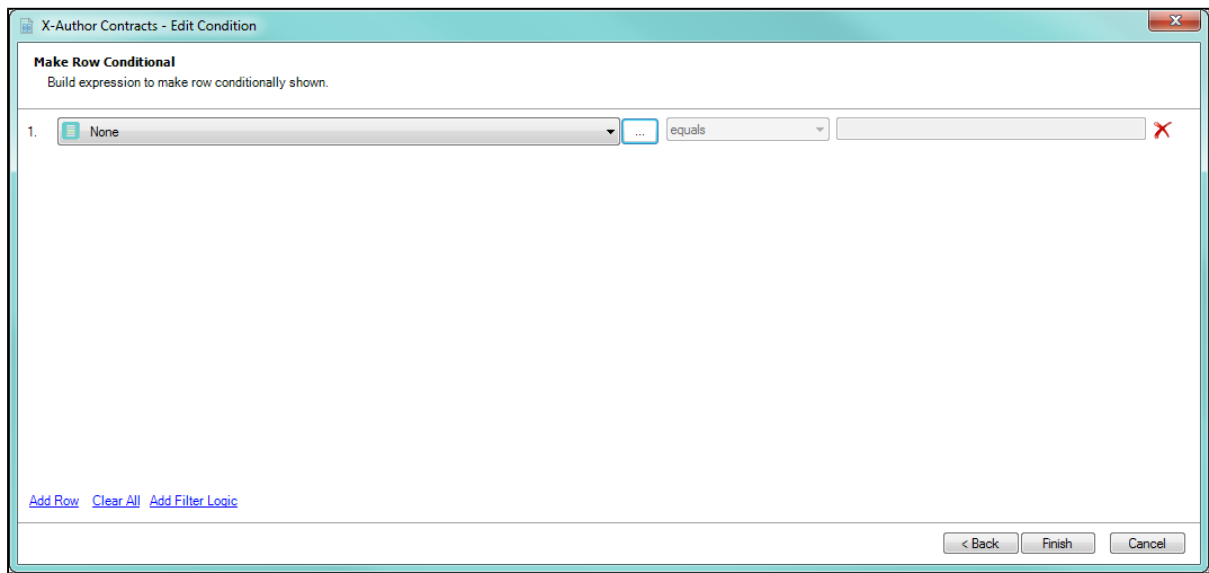
Hint: click on an image on this page to enlarge the view.

To define table row filters

1. Open the **Control Panel** from the Intelligent Document menu in the X-Author Contracts ribbon.
2. Right-click on the table in the *Navigation* pane that you want to make conditional and choose **Edit Condition** OR select the table in the *Navigation* pane and click the **Expression Builder** button in the Properties section below the Navigation pane.

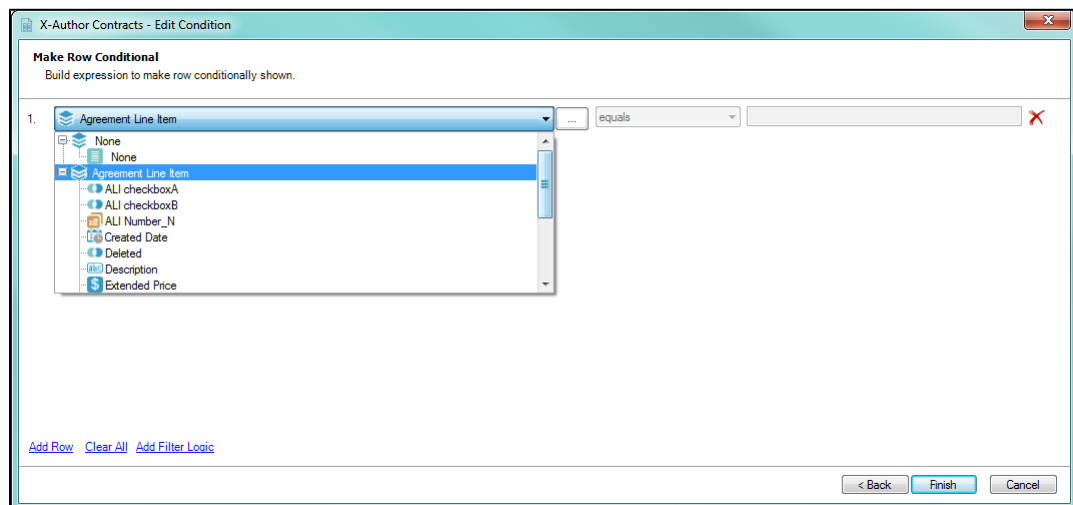



3. Follow instructions [from the previous section](#) to make create column filters (make any columns conditional). Click **Next** to proceed.

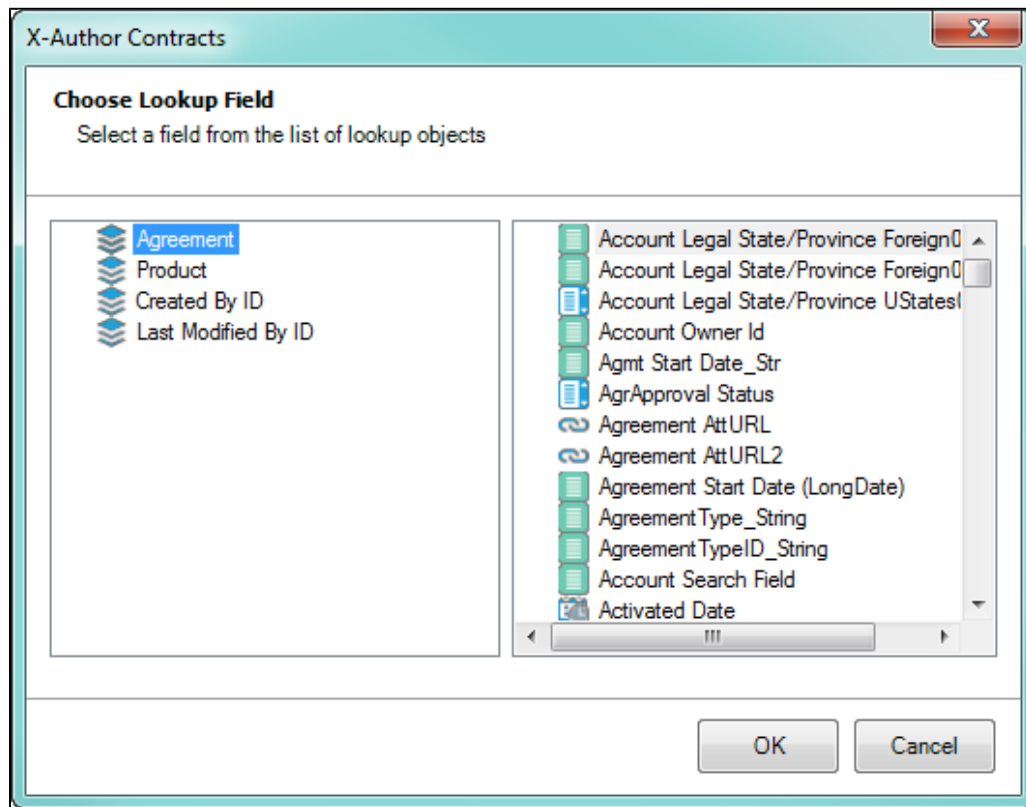


4. To build an expression that will conditionally define which field values are displayed as rows in the table:

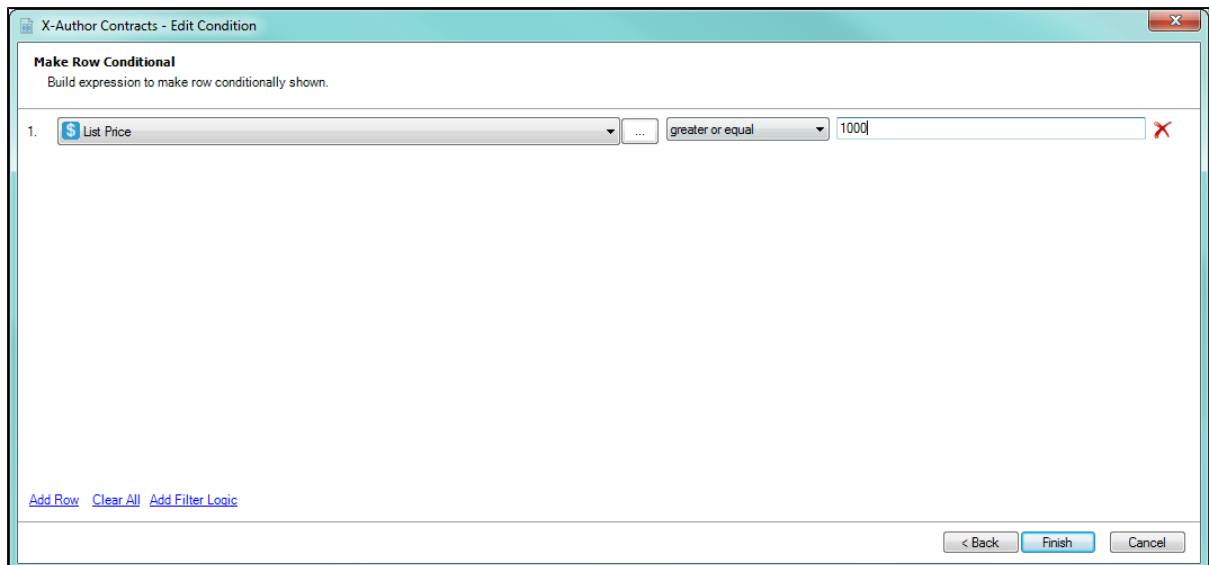
- use the picklist on the left to define a field from *the parent object to which the table belongs* (e.g., for Quantity, the object is Agreement Line Item).



- click the  Lookup button to the right of the picklist to choose from a list of object fields with a lookup relationship to the parent object (e.g., Agreement Line Item) or a header-level Agreement field



5. Complete your expression by adding an operator and a value (e.g., "List Price is greater than or equal to 1000")



6. Click Add Row to create additional expressions for the same column. You can create up to a maximum of 9 row filters for the table.
7. By default, all expressions use **AND** logic, meaning all conditions are required for the rule to execute. Click Add Filter Logic to change condition logic to **OR**, or create your own custom condition (for example, (1 OR 2) AND 3 if you want to make only 1 of the first 2 conditions required).
8. Click **Finish** to save your table filters and return to your document.

Referencing Term Exceptions in FX2 Templates

The Check-In dialog box includes the ability to associate a term exception with a template when it is checked in.

This adds the term exception to the **Term Exception** field on the Template record and also adds an entry in the **Sections/Clauses** related list on the Term Exception for the template.



As well as X-Author Contracts, you must upgrade to Contract Management 7.0 or higher.

To reference a term exception while checking in

1. From the **X-Author Templates** tab, click **New** to display an empty Word doc.
2. Add content to the template and then click **Check-in**.
3. In the Check-In Template dialog box, as you enter details for the template note that the Term Exception list remains empty, as long as no Agreement Types have been selected.

Check-In Template
Specify the attributes for this template

Type	Agreement	Business Object	Apttus__APTS_Agreement__c
Name	Agreement NA 001	Keywords	
Category	-- Select --	Next revision date	2/15/2015
Subcategory	-- Select --	Term exception	-- Select --
Language	-- Select --	Is Active?	<input type="checkbox"/>
Locale	-- Select --	Description	
Agreement types	<ul style="list-style-type: none"> Default Corporate Other Procurement Sales NDA Proposal Custom Proposal1 	Guidance	

* = Required Information

Check-In Cancel

4. Select one or more **Agreement Types** and the **Term Exception** list will be populated with term exceptions that have the same agreement type.

Check-In Template
Specify the attributes for this template

Name		Keywords	
Type	Agreement	Next revision date	2/17/2015
Category	Default	Term exception	-- Select --
Subcategory	Default	Is Active?	<input type="checkbox"/>
Language	English	Description	
Locale	English (United States)	Guidance	
Agreement types	<ul style="list-style-type: none"> Car Dealership MSA Customer Paragon NDA DELL 		

* = Required Information

Check-In Cancel

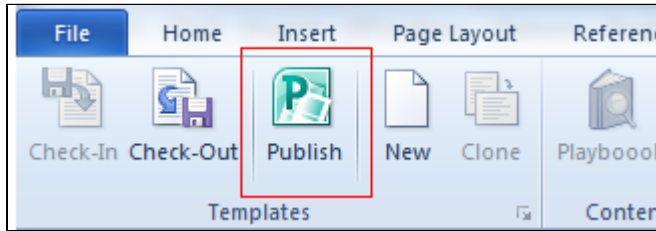
5. Select a term exception and click **Check-In**.

The template record now has the term exception associated with it.

If you edit the template in X-Author later and change the term exception associated with it, the Template record and the old and new Term Exception records will be updated accordingly.

Publish and Auto Publish Templates from X-Author Templates

In X-Author Contracts, you can manually *Publish* and *Auto Publish* one or more FX2 Templates from within the X-Author Templates ribbon tab.



Using the New Publish Button and Check-In to Publish Templates

The new **Publish** ribbon publishes a business object's main Template from the top down, going through each layer of clause and nested child clauses, to ensure that all of the current clause contents are being used when the main Template is applied in the generation of documents.



This Auto Publishing enhancement is available only for FX2 Templates.

General Information for Auto Publishing of Templates

Publishing templates improves document generation performance by taking referenced clauses in a template and publishing them before the template is used to generate a document. This takes the content of the clause and enters it into the template body as static text, as if it was another part of the main template. Auto Publishing enhances this by enabling you to schedule a batch job, which will automatically complete the publishing task that previously needed to be completed manually.

Auto Publishing requires an apex scheduled job, entering a username and password, and then selecting the **Enable Auto Publish** option on the Publish Template dialog box to work. After that, the system automatically handles the process. Even when you have Auto Publish enabled, you can always manually publish templates on an ad hoc basis. Auto Publishing automates an administrative task that previously must have been completed manually.

A scheduled apex job is used to set the frequency of your auto publish jobs, while the Publish Templates dialog box is where you can initiate publishing.

To Publish and Auto Publish Templates Using the New Publish button

You must have upgraded to X-Author Contracts February 2015.

You must have upgraded to Contract Management February 2015.

1. Open a Template in X-Author Templates and click **Publish** in the X-Author Templates ribbon tab.

2. Enter and select the necessary options within the Publish Templates dialog box.

Publish Templates Publish Abort Pending Clear Pending Refresh

Publisher

Publish User Name

Publish User Credentials

Enable Auto Publish ☒

The template publisher uses an API to publish the template in an unattended batch process. To retrieve the template and store the published template via the API, the publisher user name and credentials must be provided. If a security token is required, it must be appended to the user credentials.

MANUAL PUBLISHING

For manual publishing, please follow steps below:

- 1) Enter the Publisher User Name and Credentials
- 2) Select one or more templates from the list and click Publish.

AUTO PUBLISHING

For auto publishing please follow steps below:

- 1) Enter the Publisher User Name and Credentials
- 2) Check the Enable Auto Publish check box. Enabling Auto Publish will store the Publisher User Name and Credentials in Salesforce.
- 3) Please follow the instructions provided to setup the Publish Template Job Scheduler. The Job Scheduler will monitor templates and queue them for publishing when necessary.

Page #: 1 out of 1

Templates

<input checked="" type="checkbox"/>	Name	Type	Description	Language	Locale	Number Of Clauses	Needs Publishing	Publish Status	Published Date
<input checked="" type="checkbox"/>	AP Test CN 2	Agreement		English	English (United States)	0	✓		
<input checked="" type="checkbox"/>	MB Clause Filled Agreement	Agreement		English	English (United States)	2	✓		
<input checked="" type="checkbox"/>	MB MSA Test 2	Agreement		English	English (United States)	1	✓		
<input checked="" type="checkbox"/>	MSA CN 1 Agreement V8	Agreement		English	English (United States)	15	✓		
<input checked="" type="checkbox"/>	Text Only AP CN	Agreement		English	English (United States)	0	✓		

Publish Abort Pending Clear Pending Refresh

3. Click **Publish**.

You have successfully either manually or auto publish triggered an apex scheduled job for the selected Templates.

Check-In for Templates: Auto Publishing and Refresh Features

The FX2 format provides the ability for the user to recognize and update any related templates which are affected by a nested clause template's changes.

It provides this ability through two features which are encountered at template check-in; a template **Refresh**, which brings all lower changed template contents into the current template document, and an Auto Publishing batch process which will allow publishing of all higher-level templates related to the current template document.

If we assume the example of an agreement main template which contains a 1st level clause template, which in turn contains an inserted or nested 2nd level clause template, changes can be made to templates at any of these three levels.

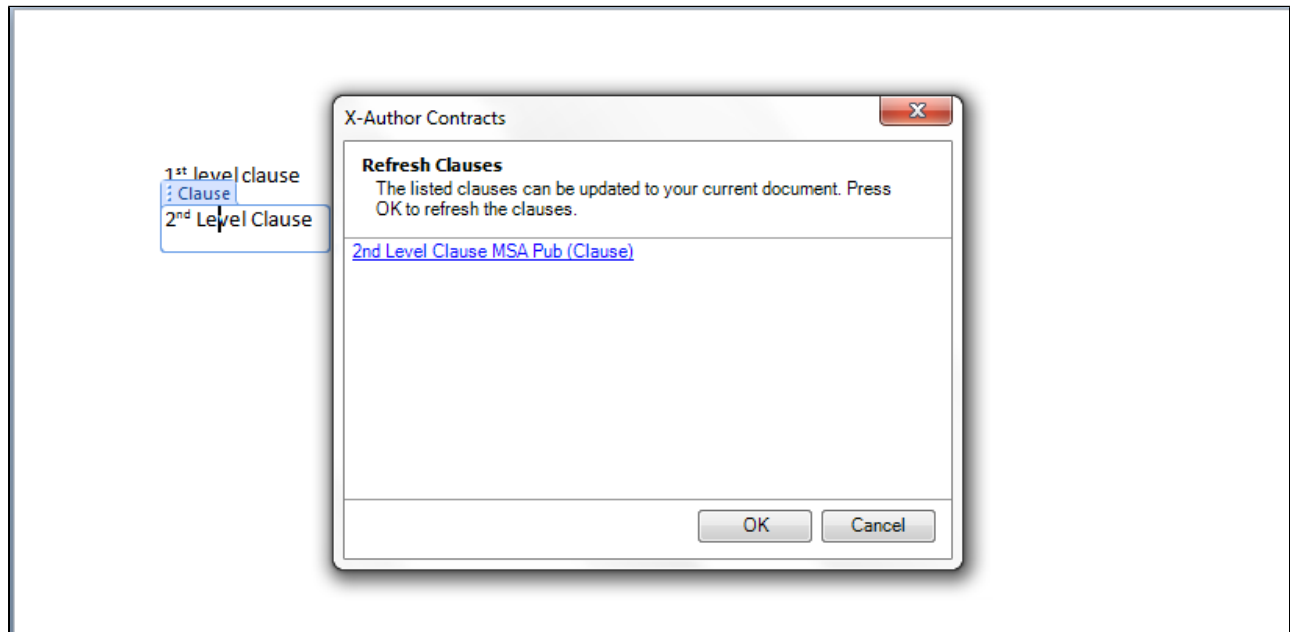
- A change to the 2nd level template will have an impact on both the 1st level clause template and the main agreement template.
- If the user then has the 1st level clause template checked out, and then checks it back in, the system now allows the user to **refresh** this 1st level clause template's contents by updating the 2nd level clause template's change contents directly into the 1st level clause template before check-in.
- Then the system also allows the user to view the affected parent clause or main agreement template records in Salesforce, or just go directly to engage the CM Auto Publishing for the main agreement template. So for the 1st level clause template at check-in, the user can use the Auto Publishing feature to publish all of the main agreement templates which are affected by the changes to the 1st level clause template.



The Auto Publishing feature will update all higher level parent clause templates as well as the main agreement template affected by the changes in a 2nd or lower level child template. The net effect of using both the Refresh and Auto Publishing features is that document generation uses the current template contents and produces much faster generation speeds, as the publishing task is already done prior to generation.

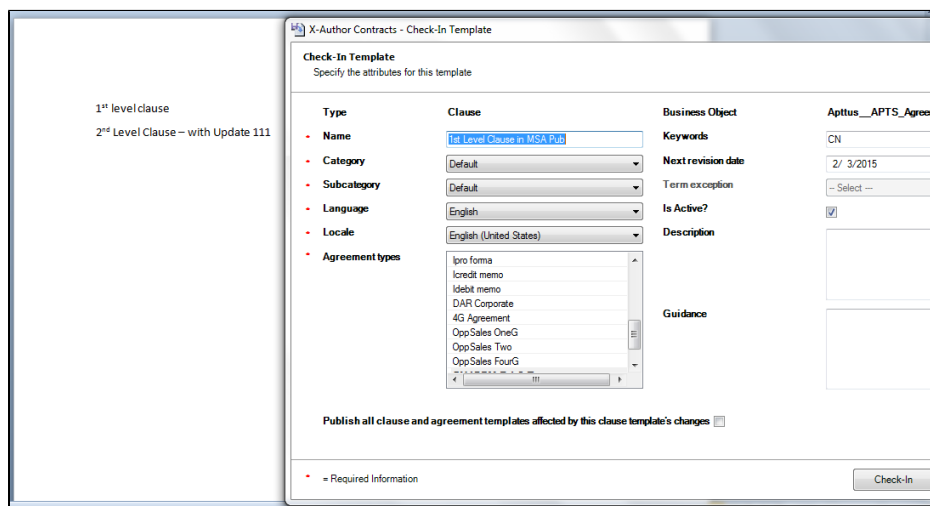
Procedure Overview

The user has previously changed a 2nd level clause template. Here they are checking in the 1st level clause template which contains that changed 2nd level clause template. When they click the check-in button, the following pop-up is displayed to the user:



The dialogue indicates that the user can bring in the changed content of the 2nd level clause template into this 1st level clause template, to refresh it and make it fully current regarding changed contents. The user can click the URL of that 2nd level clause template to be taken to the record in Salesforce within the Apttus Contract Management (CM) application.

When the user clicks **OK** on the Refresh pop-up dialogue, the 1st level clause template content associated with the 2nd level clause's changed content is refreshed or updated, and the check-in page dialogue is updated as well, because this changed 1st level clause template is used in one or more main agreement templates which should now be published to contain the changed clause templates' contents.



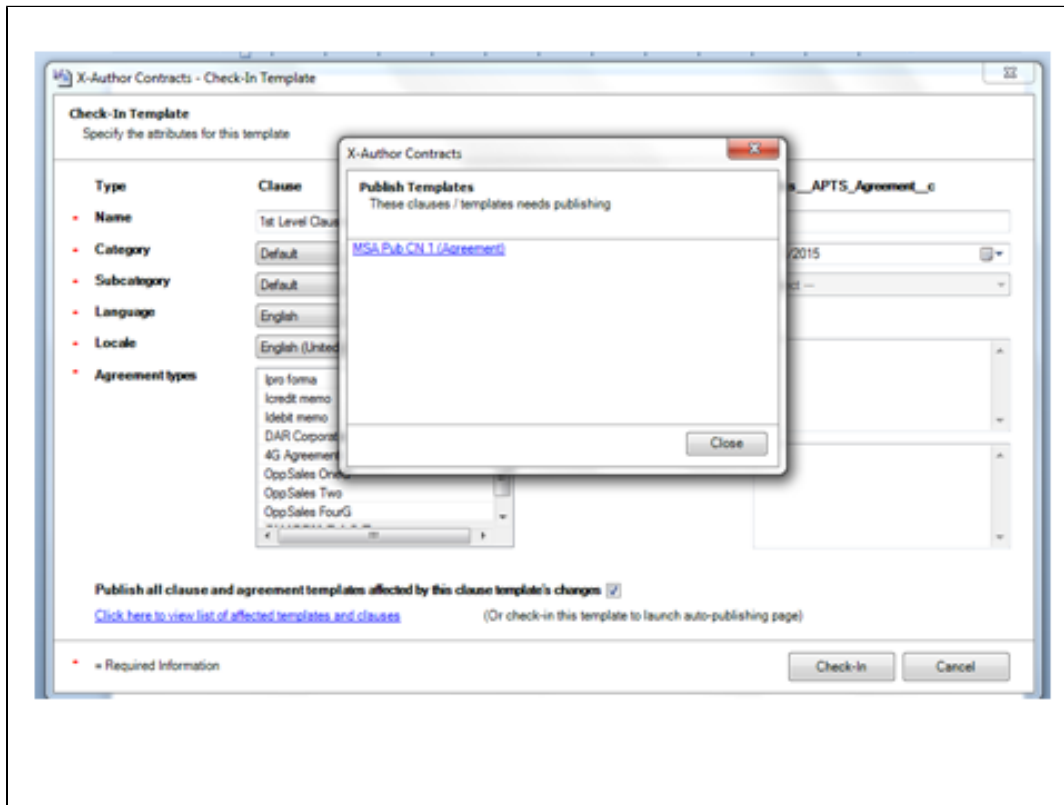
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The user can check the 1st level clause template in without publishing its parent or main agreement templates by leaving the box at the bottom unchecked or FALSE. But if they check the box, the system now presents the additional opportunities' related text and link.

The screenshot shows a 'Check-In Template' dialog box with the following fields and options:

- Type:** Name (1st Level Clause in MSA Pub), Category (Default), Subcategory (Default), Language (English), Locale (English (United States)), Agreement types (list: lpro forma, lcredit memo, ldebit memo, DAR Corporate, 4G Agreement, OppSales OneG, OppSales Two, OppSales FourG).
- Business Object:** Keywords (CN), Next revision date (2/ 3/2015), Term exception (-- Select --), Is Active? (checked).
- Description:** (empty text area).
- Guidance:** (empty text area).
- Publish all clause and agreement templates affected by this clause template's changes:** (checked).
- Link:** [Click here to view list of affected templates and clauses](#) (Or check-in this template to launch auto-publishing page).
- Buttons:** Check-In, Cancel.

If the user clicks on the check-in URL, a list of the affected parent and/or main agreement templates is rendered to the user.



Clicking on any template link in the list will take the user to the related CM template record in Salesforce. In this case, the only affected parent template to this 1st level clause template is the one main agreement template.

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Clause References New Template Clause Reference Clause References Help ?				
Action	Reference Number	Clause	Clause Reference Id	Last Modified By
Edit Del	REF-000002877	1st Level Clause in MSA Pub	0bee73e8-f29c-4fc9-9df0-df6e36b1a2d6	Preston Mann , 2/3/2015 10:18 AM
Edit Del	REF-000002878	MSA CN Definitions	ae83adad-3b8d-4b3b-a6e8-71e224f68f22	Preston Mann , 2/3/2015 10:16 AM
Edit Del	REF-000002879	Seasonality	75694d1f-bbf9-4ea6-a7ad-7041fb2d89fd	Preston Mann , 2/3/2015 10:16 AM

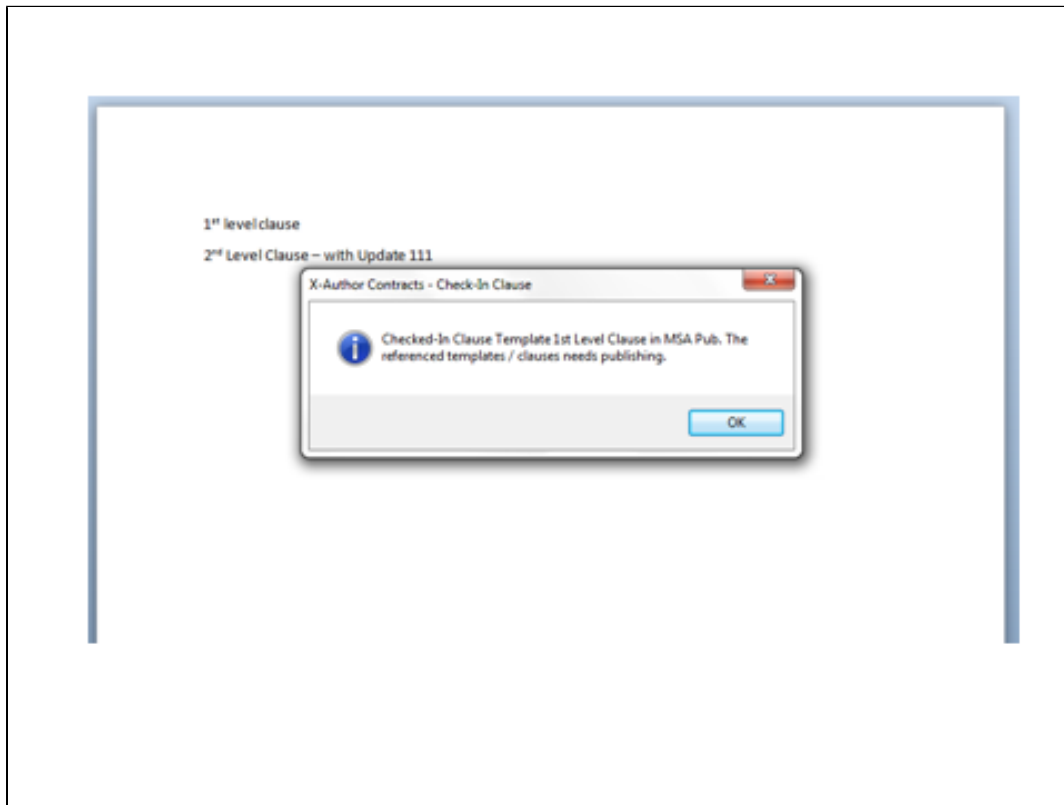
Template References New Template Clause Reference Template References Help ?				
No records to display				

Temp Objects New Temp Object (Comply) Temp Objects Help ?				
No records to display				

Open Activities New Task New Event Open Activities Help ?				
No records to display				

Activity History Log a Call Mail Merge Send an Email View All Activity History Help ?						
Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Updated Template		✓	2/3/2015	Preston Mann	2/3/2015 10:16 AM
Edit Del	Inserted clause '1st Level Clause in MSA Pub'		✓	2/3/2015	Preston Mann	2/3/2015 10:16 AM
Edit Del	Updated Template		✓	2/3/2015	Preston Mann	2/3/2015 10:11 AM
Edit Del	Replaced text with clause 'MSA CN Definitions'		✓	2/3/2015	Preston Mann	2/3/2015 10:11 AM
Edit Del	Created Template		✓	2/3/2015	Preston Mann	2/3/2015 10:09 AM

When the user clicks the **Check-In** button with the Publish action checked or set to *TRUE*, the user receives this message from the system that the 1st level clause template has been successfully checked in, but that the related parent or higher level templates should be published to bring them up to fully current status for use in document generation.



When the user clicks **OK**, the system takes the user to the Auto Publishing page in a frame. Here the user can see all of the parent or main agreement templates which are currently in an unpublished state, and require publishing. They can select 1 or more of these templates for publishing.

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Publish Templates [Publish] [Abort Pending] [Clear Pending] [Refresh]

Publisher

Publisher User Name:

Publisher User Credentials:

Enable Auto Publish: ☒

The template publisher uses an API to publish the template in an unattended batch process. To retrieve the template and store the published template via the API, the publisher user name and credentials must be provided. If a security token is required, it must be appended to the user credentials.

MANUAL PUBLISHING

For manual publishing, please follow steps below:

- 1) Enter the Publisher User Name and Credentials
- 2) Select one or more templates from the list and click Publish.

AUTO PUBLISHING

For auto publishing please follow steps below:

- 1) Enter the Publisher User Name and Credentials
- 2) Check the Enable Auto Publish check box. Enabling Auto Publish will store the Publisher User Name and Credentials in Salesforce.
- 3) Please follow the instructions provided to setup the Publish Template Job Scheduler. The Job Scheduler will monitor templates and queue them for publishing when necessary.

Page #: 1 out of 1

Templates

<input type="checkbox"/>	Name	Type	Description	Language	Locale	Number Of Clauses	Needs Publishing	Publish Status	Published Date
<input type="checkbox"/>	AP Test CN 2	Agreement		English	English (United States)	0	✓		
<input type="checkbox"/>	MB Clause Filled Agreement	Agreement		English	English (United States)	2	✓		
<input type="checkbox"/>	MB MSA Test 2	Agreement		English	English (United States)	1	✓		
<input type="checkbox"/>	MSA CN 1 Agreement V8	Agreement		English	English (United States)	15	✓		
<input checked="" type="checkbox"/>	MSA Pub CN 1	Agreement		English	English (United States)	3	✓		
<input type="checkbox"/>	Text Only AP CN	Agreement		English	English (United States)	0	✓		

When the user clicks the **Publish** action button, the page reflects that the batch has been submitted and a progress bar at the bottom of the frame provides status changes.

Finally, when the batch has been successfully published, the progress and status is updated with the related batch completion data. This means that all main agreement templates which have been affected by one or more changes to their contained 1st level or even nested 2nd level or lower clause templates, are now fully published and current in content for use in agreement document generation. And when they are used in generation, their time-to- generation performance will be substantially improved when compared to generated agreement documents containing linked clause references.

credentials must be provided. If a security token is required, it must be appended to the user credentials.

MANUAL PUBLISHING
For manual publishing, please follow steps below:
1) Enter the Publisher User Name and Credentials
2) Select one or more templates from the list and click Publish.

AUTO PUBLISHING
For auto publishing please follow steps below:
1) Enter the Publisher User Name and Credentials
2) Check the Enable Auto Publish check box. Enabling Auto Publish will store the Publisher User Name and Credentials in Salesforce.
3) Please follow the instructions provided to setup the Publish Template Job Scheduler. The Job Scheduler will monitor templates and queue them for publishing when necessary.

Publish Job 767L000000SweclAD has been submitted for processing.

Page #: 1 out of 1

Templates

<input type="checkbox"/>	Name	Type	Description	Language	Locale	Number Of Clauses	Needs Publishing	Publish Status	Published Date
<input type="checkbox"/>	AP_Test_CN_2	Agreement		English	English (United States)	0	✓		
<input type="checkbox"/>	MB Clause Filled Agreement	Agreement		English	English (United States)	2	✓		
<input type="checkbox"/>	MB MSA_Test_2	Agreement		English	English (United States)	1	✓		
<input type="checkbox"/>	MSA_CN_1 Agreement V8	Agreement		English	English (United States)	15	✓		
<input type="checkbox"/>	MSA Pub_CN_1	Agreement		English	English (United States)	3	✓	Submitted	
<input type="checkbox"/>	Text Only AP_CN	Agreement		English	English (United States)	0	✓		

Batch Jobs

Job Name	Created By	Created Date	Status	Status Detail	Completion Date	Total Batches	Batches
TemplatePublishJob	Prashant Mann	2/3/2015 10:42 AM	Completed	100% Finished	2/3/2015 10:43 AM	2	2

Adding Smart Property to a Clause in a Template

With X-Author Contracts, a clause may be provided a smartness property. This can be done through either the properties in the Control Panel or using a right click on clause in the Control Panel.

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 will get redlined and negotiated. Apttus Smart Clauses can capture the differences between contracts. In the November 2016 release of X-Author Contracts, you can add smartness property to a clause in an agreement template, which after generation will make those clauses **Smart**.

Access to the properties of a clause can be seen and manipulated from the Control Panel. **Mark as Smart** is the property within the X-Author Template Control Panel that can eventually make clauses **Smart**. When the property is *True*, the clause will be Smart at generation, and if the property is *False* the clause will be text at generation.

Nesting Clauses in X-Author Templates

A nested clause for the purpose of X-Author Templates, is when you have inserted a clause into another clause, which then you insert into an agreement template. For example, if a clause named *Governing Law-CA* is inserted into a *Definitions* clause which is inserted into a MSA Template. In this context, *Governing Law-CA* is a nested clause within the *Definitions* clause. For the purpose of X-Author Templates, *Definitions* clause is denoted as a 1st level clause.

When a 1st level clause is inserted into an agreement template, there are a few things to consider.

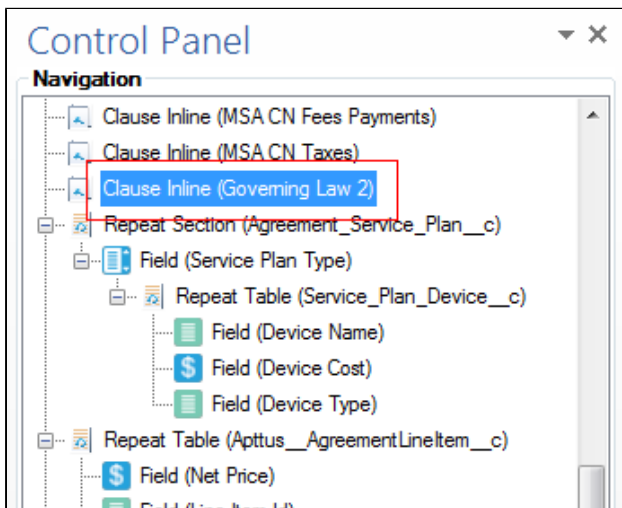
- Only the 1st level clause can gain the smartness property within the Control Panel. This means that when the clause has Mark as Smart attribute as *True*, only *Definitions* clause will have Smartness property.
- Conditionals of clauses not in the 1st level, when inserted into a template, will be Read-Only.
- Nested clauses, like other clauses, will only be considered **Smart** in the context of a generated document.

Note

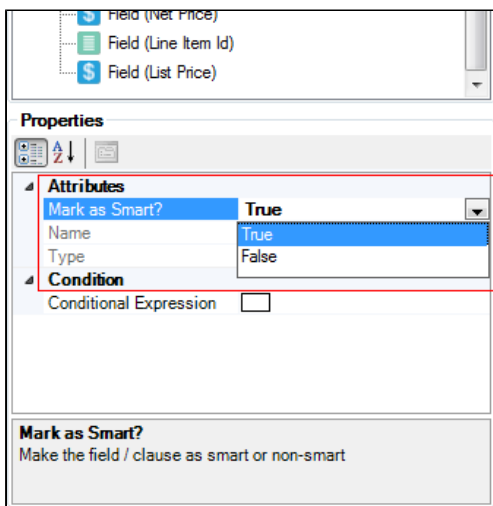
If your clause record contains only a table, ensure that you add a paragraph before and after the table to avoid any errors.

To mark a clause as smart in a template

1. Insert a clause into the agreement template using the Playbook of the X-Author Templates ribbon.
2. Click the **Control Panel** button on the X-Author Contracts Templates ribbon tab to open the Control Panel.
3. In the Control Panel, select the clause that you inserted into your FX2 Template.



- Go to the Properties section at the bottom of the Control Panel and for the **Mark as smart?** attribute, change the value to the desired value (**False** or **True**).



You have added or removed smartness from a clause in an agreement template.

Note

Clauses that contain images or Apttus repeating elements (e.g., repeat tables) cannot be marked as smart.

Refreshing Clauses in an Agreement Template

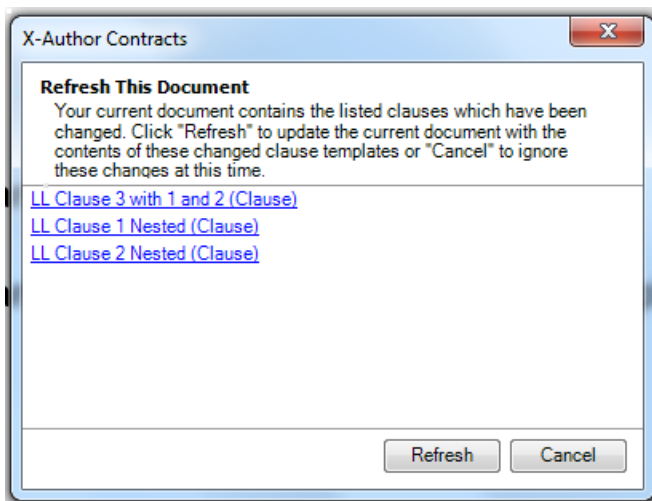
Refresh Clauses functionality allows to keep your agreement template up to date. If the agreement contains clauses, and one clause has been changed but not published, this functionality can update the clause in the agreement template in context.

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.
3. Click **OK** when you receive the confirmation dialog box stating *All clauses are refreshed successfully*.

Mark Clause Menu in X-Author Templates

A block of text or fields can use the **Mark Clause** menu to gain a clause boundary and Smartness properties. Upon generating the document, only the clauses marked as Smart will 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 smartness property. The **Mark Clause** menu allows the user to add properties into inline text in the agreement template. After utilizing the Mark Clause functionality, the new clause will be added to the Control Panel corresponding to its location in the document. Any clause formed from the **Mark Clause** functionality will have, **Marked as Smart** as *True* by default. Unless changed, it will be a smart clause in the context of a contract document.

Simply by highlighting the desired text within a checked out Template, selecting the Mark Clause menu from the X-Author Templates ribbon tab, and then filling in the appropriate clause details, you can mark a text as smart.

Note

- It is recommended 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.
- A template containing Sections, Tables, Images or Reference Merge Fields cannot be marked as smart. Only text based clauses and clauses containing the Microsoft Word Tables can be marked as a clause.
- After you mark the selected content as a clause, you cannot mark any other part of the same content within the boundary of the Marked clause as a different clause record.

There might be instances you may use the **Mark Clause** menu functionality on the wrong section of text, or you may not have captured all of the text that you wanted. X-Author allows you to **Unmark** a clause using the same procedure of the **Mark Clause** menu. A clause can also be Unmarked by right clicking the clause in the Control Panel and choosing Unmark. This undo action can only be done in the same session the clause had used the **Mark Clause** menu functionality, prior to check-in of the template.

To mark a clause in a template

1. Open up a Template and highlight the desired clause.

This Master Service Agreement is entered into and effective as of ("Effective Date") by and between ACME, Inc., a Delaware corporation, having its principal place of business at Two Market St, San Francisco, California 94105 ("ACME") and LLDocs-Acct, a CA corporation ("Customer").

For good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties agree as follows:

"Affiliate" means any entity which directly or indirectly controls, is controlled by, or is under common control with the subject entity. "Control," for purposes of this definition, means direct or indirect ownership or control of more than 50% of the voting interests of the subject entity.

2. After you highlight the clause, click on **Mark Clause** from the X-Author Templates ribbon tab.
3. In the Mark Clause dialog box, fill in the appropriate information.

Mark Clause
Specify the details for marking a clause

• **Clause Name**

• **Category**

• **Sub Category**

Exception

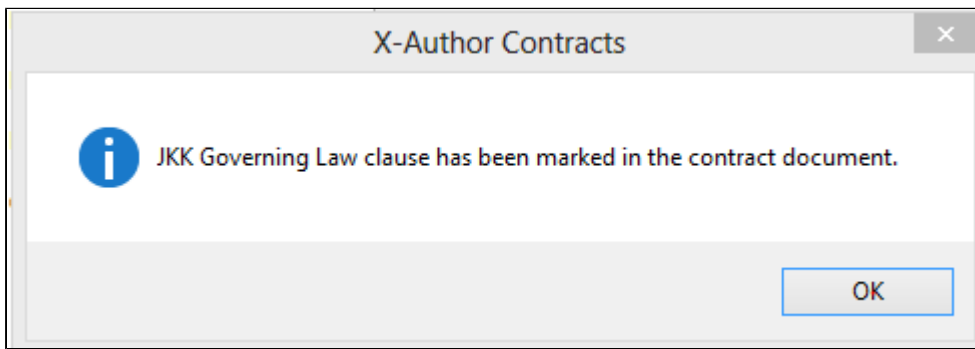
Risk Rating

Materially Significant ☐

Clause Text (Selected)
"Affiliate" means any entity which directly or indirectly controls, is controlled by, or is under common control with the subject entity. "Control," for purposes of this definition, means direct or indirect ownership or control of more than 50% of the voting interests of the subject entity

* = Required Information

4. Click **Save**.
5. A dialog box with the name of the marked clause appears to confirm that you have marked a clause.



The successfully marked clause will be indicated with surrounding border. You can also verify if the clause was marked properly by opening the Control Panel and viewing the marked clause details there.

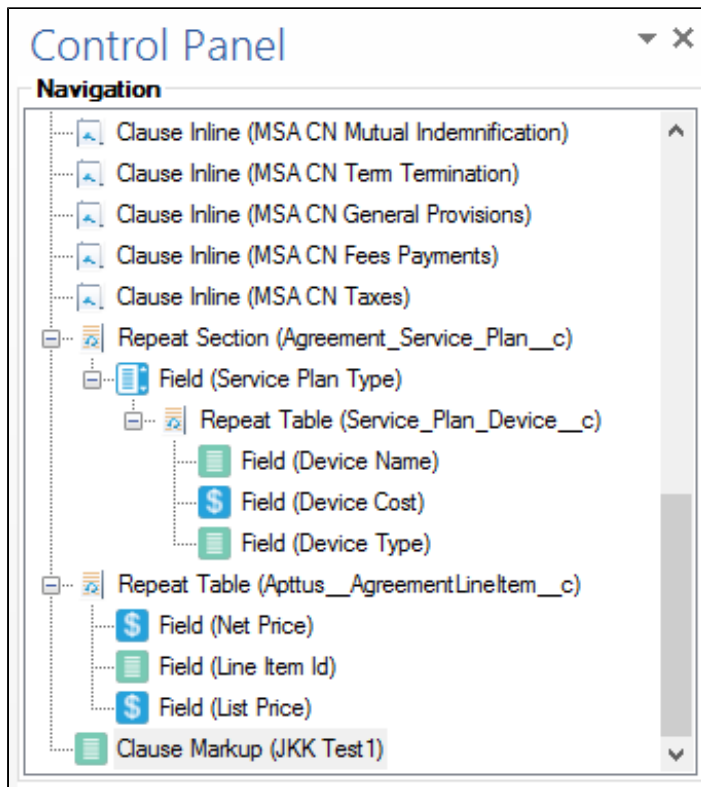
By default, the marked clauses are set as Smart.

To unmark a clause in a template

You must have a clause marked in the same session as you want to unmark a clause.

1. From the X-Author Templates Ribbon, click **Control Panel** to open it.

2. Click the marked clause from the Navigation Panel.



3. Do any one of the following to unmark the selected clause:
 - Right click on the selected clause and click **Edit markup properties**. You will see the message with the clause properties. Click **Unmark**.
 - Place your cursor within any part of the marked clause and click **Mark Clause** from the X-Author Templates ribbon tab. You will see the message with the clause properties. Click **Unmark**.

4. Click **Yes** to confirm unmarking of the clause.
5. You will receive a confirmation message with the clause name.
6. Click **OK** to finish unmarking the clause.

Working with Rich Text Area Fields

FX2 formatted templates can take advantage of Rich Text Area (RTA) fields by rendering them as HTML. You can use RTA fields in your template documents to include pre-formatted text, tables and images when documents are generated. You take care of this in X-Author Contracts when you insert Rich Text fields and choose how they should be rendered.



In pre-existing format, RTA fields are only supported by rendering them as an image. It is recommended for FX2 documents to use HTML content for your images as well, as long as they are accompanied by other items. It is still recommended to "Render As Image" RTA fields when you are inserting a field containing images and no other content. For instructions on inserting image references into templates for rendering as image, refer to [Image References in Templates \(FX2\)](#).

Configuring Rich Text Area Fields

Before you can use Rich Text Area fields in agreement templates, you must first create the fields on the Agreement object. For proposal templates, use the same process for the Quote/Proposal object.

To create an RTA field

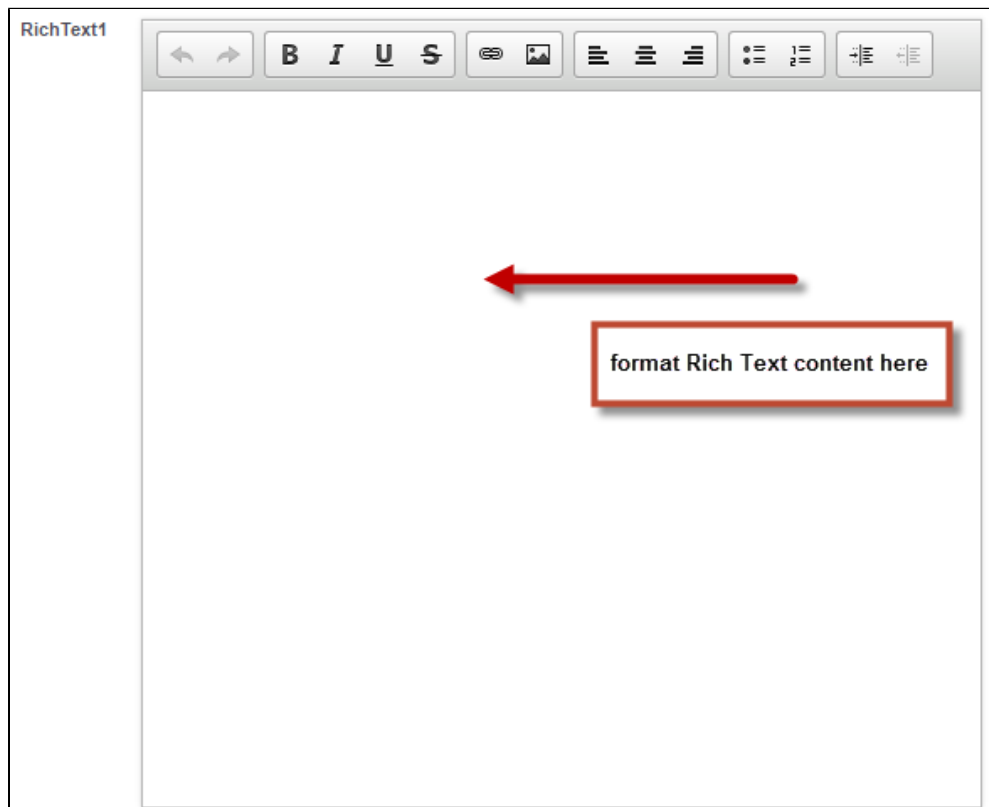
1. Go to **Setup > Create > Objects > Agreement**.
2. Under **Custom Fields & Relationships**, click **New**.
3. Select **Text Area (Rich)** and click **Next**.
4. Enter a **Field Label** and **Field Name**, such as *RTF Content 1*, and click **Next**.
5. Set field-level access and click **Next**.
6. Click **Save**. The Rich Text Area is now available from the *Fields* list when you edit a page layout. Create additional RTA fields to hold other pre-formatted content.

To add RTA fields to the Agreement layout

1. Go to **Setup > Create > Objects > Agreement > Page Layouts** and select the layout that will contain your RTA fields.
2. From the **Fields** list, select the RTA fields you want to use and add them to the **Information** section or add them to a new or existing section.
3. Click **Save**. Repeat steps 1 – 3 for any other required Agreement object page layouts. You can use this same process for the Quote/Proposal object.

How to Prepare Rich Text Content for Templates

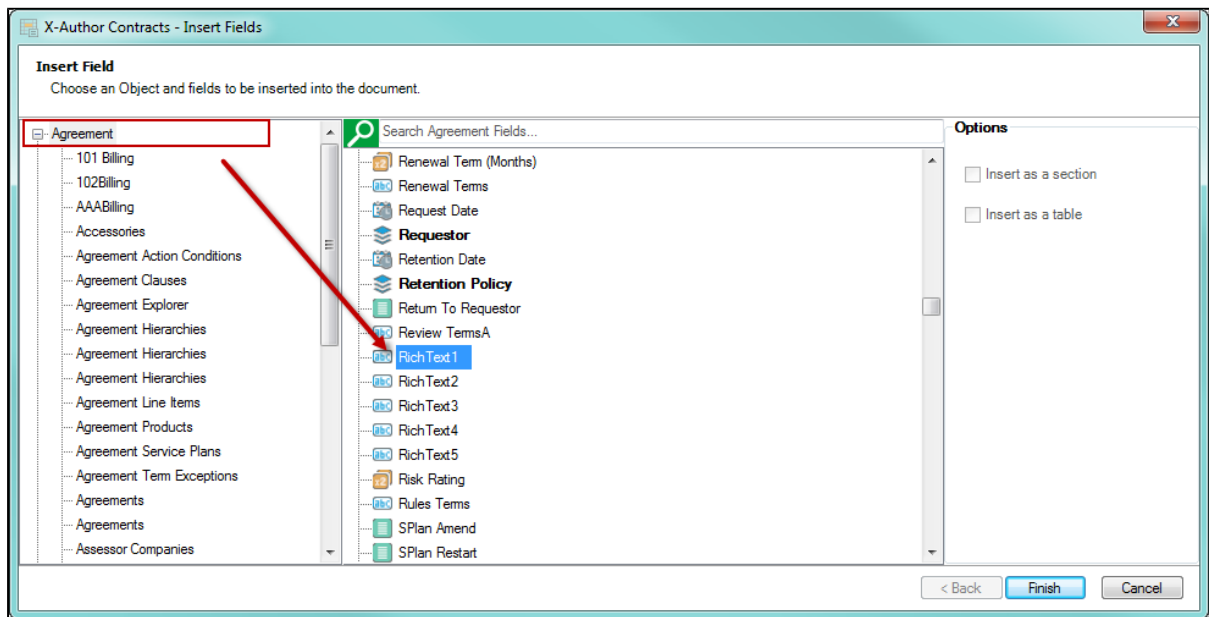
X-Author templates only support Rich Text content developed using the Rich Text editor in Salesforce. RTA fields inside templates generate field content exactly as shown on the agreement record. Before generating an agreement based on a template containing RTA fields, edit the agreement record directly to format your Rich Text content.



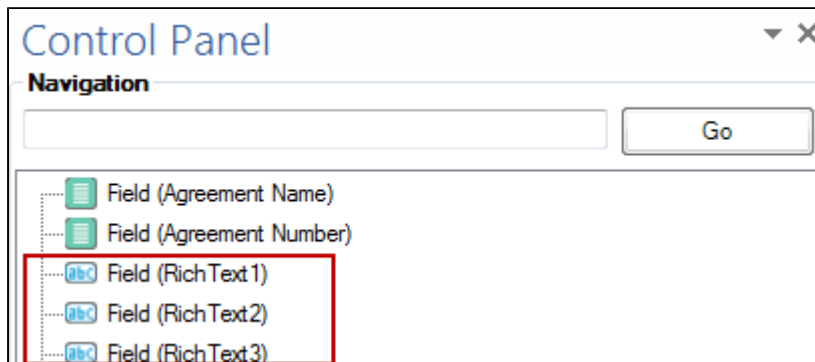
Be aware that copy-paste or data loading of Rich Text content that includes formatting not available using the editor (e.g., tables) may or may not appear correctly in generated documents. Refer to Salesforce documentation for HTML limitations if attempting to include RTF content in this way.

To insert RTA fields into a template

1. Open Microsoft Word and [connect to X-Author Contracts](#).
2. From the X-Author Templates tab, create a new template or check-out an existing template.
3. Click **Insert Fields**. The Insert Field dialog is displayed.
4. Select the Agreement object and the Rich Text field you want to insert. Hold **Ctrl** and select any additional fields to insert them in the order selected.



5. Click **Finish** to insert the field into your template. The Rich Text field is inserted and displayed in the Control Panel with the appropriate icon.



6. Highlight the Rich Text field in the Control Panel. The **Properties** pane below the Control Panel displays attributes for the field.
7. Next to "Render As" click the drop-down and choose **HTML**, if it is not already selected.

Properties

Attributes

Name	Apttus__APTS_Agreement__c/aps_agreer
Type	Field (TEXTAREA)

Display Attributes

Render As: **HTML** (dropdown menu showing IMAGE and HTML options)

Render As
Displays how the field will be rendered in the document

8. Continue to insert fields or check-in your document.

You cannot insert RTA fields into the header/footer of a template.

Tip: Controlling HTML Content Width

If your RTF field contains large HTML content, and you want to control the width of the output in the generated document, follow these steps:

1. Prior to inserting your RTF field that contains large content, insert a table with only one cell.
2. Right-click the table and select **Auto Fit/Fixed Column Width** and adjust the table to your desired width.
3. Insert the RTF field into the one-cell table. The generated document content will use the selected width and grow downward.

Image References in Templates (FX2)



It is strongly recommended to insert RTF fields into your templates as HTML when your content contains images and other content, as described in the previous section [Working with Rich Text Area Fields](#). The following represents a valid process for inserting RTF fields as images and can still be used, but should only be used when your RTF content contains only images and no other content.

X-Author can display images in agreement documents by including them in RTF fields and referencing them in agreement templates.

For images to be displayed in an agreement document, there must be a reference to the image available in Salesforce for the merge server to use, so it can place the image in the generated agreement document. Apttus provides this ability through the *Upload Image* option in the header of an object. This provides the option to upload an image to an RTF field associated with a page layout, which can then be referenced via a merge field in the template used for the agreement document.

In order for the Apttus Merge Server to render your image properly, you must specify a height and width after inserting the field. Failure to do so will result in no image being generated in the target document.

You can use images up to 1MB in size and .gif, .jpg, and .png file types. To ensure the images will be presented in the document as expected you should work on a draft document in Microsoft Word first, edit the images as required in an image editor application, and then upload them to an RTF field.



In case your system has not been configured to use image references, please have your System Administrator complete the required configuration in Salesforce, before you try to add and reference images.

To add images and upload them to an object

The object must be using a page layout that has the required fields added to it.

1. In Salesforce, go to the **Agreements** tab and select the one you want to upload images to.

2. Click **Upload Images** and select which RTF field to use and click **Next**.
Be sure to select the correct field for the page layout, as currently all RTF fields in the system are included in the drop-down list.
3. Click **Browse** and select the required file from the *Images* folder.
4. Click **Click Upload** and then click **Finish**.

The image is now displayed in the RTF field in the object's header section.

The image can now be added to templates.

To reference an image in a template

1. Login to X-Author and from the **X-Author Templates** tab click **Check-Out**.
2. Search for the required template and click **Open**.
3. Place the cursor in the template where you want to insert an image and click **Insert Field**.
4. If this is an agreement template, select the **Agreement Fields** object
- or -
If this is a proposal template, select the **Quote/Proposal Fields** object.
5. Select the RTF field you want to insert and click **Finish**.

The merge field is inserted into the document template in the following format, with default width and height measurements.

You can change the default width and height as required. Measurements are in inches.

Properties

<div> <div> <div></div> <div></div> <div></div> </div> <div> <div></div> <div></div> <div></div> </div> </div>	
<div> <div> <div></div> <div></div> </div> <div> <div>Attributes</div> </div> </div>	
Name	Apttus__APTS_Agreement__c/apts_agreem
Type	Field (TEXTAREA)
<div> <div> <div></div> <div></div> </div> <div> <div>Display Attributes</div> </div> </div>	
Height	5
Render As	IMAGE
Width	5
<div> <div> <div></div> <div></div> </div> <div> <div>Dynamic Section</div> </div> </div>	
Condition	

Name

Name of the field / clause as in Salesforce

When you preview or generate an agreement or proposal document using the template, images are included in the generated document.

To configure Upload Image action

This task assumes you want to configure an agreement object, other objects can also be configured in a similar manner.

1. Go to **Build > Create > Objects > Agreement**.
2. In the **Custom Fields & Relationships** section, click **New**.
3. Select **Formula** and click **Next**.
4. Enter a **Field Label** and **Field Name**, such as *Upload Image*, select **Text** from the **Formula Return Type** list and click **Next**.
5. Enter the formula below, ensuring it is all on the same line in the formula field, like the screen shot, and click **Next**.
The code should be: `HYPERLINK("/apex/Apttus__ImageUpload?id=" & Id, IMAGE("/resource/Apttus__Button_UploadImage", "Upload Image"), "_self")`

Upload Image (Text) =

`HYPERLINK("/apex/Apttus__ImageUpload?id=" & Id, IMAGE("/resource/Apttus__Button_UploadImage", "Upload Image"), "_self")`

6. Set the field-level access and click **Next**.

7. Click **Save**.

You can select page layouts here, but as you will likely want to edit the page layouts to reposition the Upload Image button, it is not required at this point.

Upload Image is now available from the Fields list when you edit a page layout.



You could add image support to Quote/Proposals by repeating this task for that object. You should also create RTF fields for the images, if they do not already exist.

To create a Rich Text Area

This task assumes you want to configure an agreement object, other objects can also be configured in a similar manner.

1. Go to **Build > Create > Objects > Agreement**.
2. In the **Custom Fields & Relationships** section, click **New**.
3. Select **Text Area (Rich)** and click **Next**.
4. Enter a **Field Label** and **Field Name**, such as *RTF Image*, and click **Next**.
5. Set the field-level access and click **Next**.
6. Click **Save**.

You can select page layouts here, but as you will likely want to edit the page layouts to reposition the RTF area, it is not required at this point.

The rich text area is now available from the Fields list when you edit a page layout. You can create more rich text areas if you want to have more images available for your documents.

To configure Image Reference fields

You must have created an Upload Image field and RTF fields to be used with a page layout.

1. Go to **Build > Create > Objects > Agreement > Page Layouts** and select the one you want to add Image Reference functionality to.
2. From the **Fields** list select the RTF fields you want to use for images and add them to the **Information** section.

3. Then select **Upload Image** from the **Fields** list and add it to the **Information** section.
4. Click **Save**.
5. Repeat steps 1 to 4 for any other required Agreement object or Proposal object page layouts.

The fields will now be displayed on objects using those page layouts. When you go to the object, there will be an Upload Image button, along with the RTF fields in the object's header section.

Working with Pre-FX2 Formatted Templates

A language template contains the boilerplate legal language, terms and conditions associated with a contract. Examples of language templates that could be associated with an NDA agreement type are Unilateral NDA – Inbound, Unilateral NDA – Outbound, and Mutual Nondisclosure Agreement.

Other examples may be language templates that are regional variations or client specific versions of contracts. Since language templates can have embedded merge fields contained within them that get automatically populated during agreement creation time, please ensure that you markup the clauses using the Author to identify the merge fields. An example of a template marked up with merge fields inserted from the author is shown below:

This MUTUAL NONDISCLOSURE AGREEMENT (the "Agreement") is made this day of {MERGEFIELD APTS_AGREEMENT_CONTRACT_START_DATE * MERGEFORMAT }, by and between Apttus Inc. ("Internal Party"), a California corporation, on behalf of itself and its subsidiaries, with its principal place of business at 101 Main St., San Jose, CA and {MERGEFIELD APTS_AGREEMENT_ACCOUNT * MERGEFORMAT }, ("The Company"), a corporation, with its principal place of business at {MERGEFIELD ACCOUNT_BILLINGSTREET * MERGEFORMAT }, {MERGEFIELD ACCOUNT_BILLINGCITY * MERGEFORMAT }, {MERGEFIELD ACCOUNT_BILLINGSTATE * MERGEFORMAT } {MERGEFIELD ACCOUNT_BILLINGPOSTALCODE * MERGEFORMAT } {MERGEFIELD ACCOUNT_BILLINGCOUNTRY * MERGEFORMAT }.

X-Author can be used to manage contract templates and clauses in the Apttus Contract Lifecycle Management Suite. You can use the tool to create or maintain agreement templates or clauses, and manage them within the Apttus system from the Contract Template and Clause Libraries.



- Only Microsoft Word documents in .doc and .docx format are supported for creating or maintaining Templates.

- The following special characters not allowed by the local file system and are not supported in the template name, agreement name, agreement version name| : " < > ? \ /

Creating New Agreement Templates (Pre-FX2 Format)

X-Author Contracts allows the new FX2 format to be used for all types of fields. X-Author Contracts also continues to provide the ability to create a *New* Template using the pre-FX2 Template format.

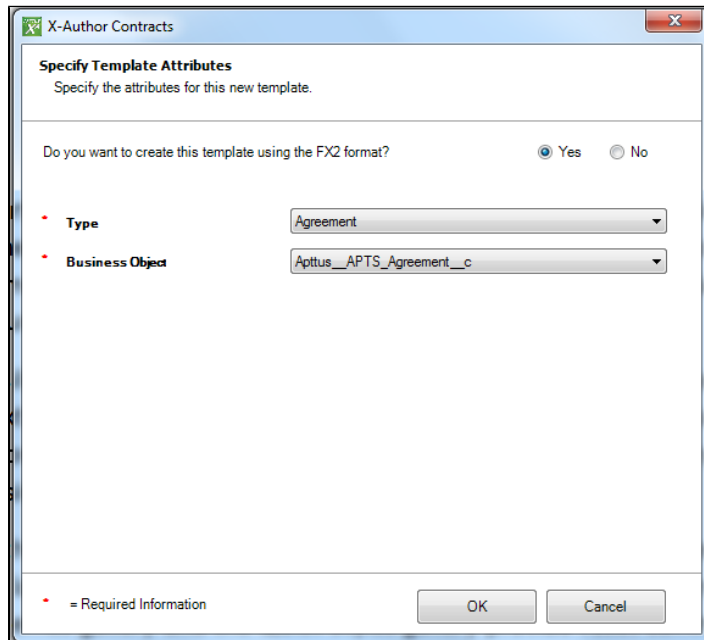


This process applies to both Agreement and Clause Templates.

To create a new Template, click *New* in the X-Author Templates ribbon tab after connecting to your Salesforce org. You will be presented with the following selection requirements.

- Do you want to create this template using the FX2 format? - *Yes/No*
- Type - Picklist of values: *Clause, Agreement, Proposal, Section, Supporting Document, etc.*
- Business Object - Picklist of Values: *Apttus_APTS_Agreement__c* and other business objects that are made available to you by your Salesforce system administrator. This picklist is dependent on the value selected in the *Type* picklist. Your Salesforce system administrator must configure this dependent list prior to you creating new FX2 Templates.

Selecting the **Yes** check box to answer the question, "Do you want to create this template using the FX2 format?", will automatically display two picklists: *Type* and *Business Object*.




Selecting the **No** check box to answer the question, "Do you want to create this template using the FX2 format?", will automatically hide the additional *Type* and *Business Object* options.

Checking Out a Template

A pre-existing template in Salesforce can be checked out for editing by clicking Check-Out. Once the Check-Out button is clicked, the user is presented with a browser-based form which loads the browsing of templates Visual Force page. The user can search on various parameters and choose a template open in Microsoft Word.

This process is the same for the pre-existing Template format and the FX2 Template format.

To check out a Template

1. Select the **X-Author Templates** ribbon tab and click **Check-Out**.
2. In the Checkout window, select the template **Type** you want to work on and enter any other search criteria and click .

The **Templates** list displays templates matching the criteria.

3. Click **Open** for the required template.

The template is opened in Microsoft Word. X-Author Contracts automatically detects the document type, Template format - pre-existing or FX2 - and enables corresponding X-Author Templates ribbon tab.

You can now work with the template, such as inserting merge fields, smart fields, and making content conditional. You can also use this pre-existing template as the basis for a new template by cloning it.

Checking In a Pre-Existing Template

After creating a new Template or updating an pre-existing Template, the *Check-in* action has been updated with a new *Check-in Template* dialog box.

The *Check-in Template* dialog box has been formatted in order to improve the user experience.

Check-In Template
Specify the attributes for this template

Type	Clause	Business Object	Apttus__APTS_Agreement__c
<ul style="list-style-type: none"> Name Category Subcategory Language Locale Agreement types 	<ul style="list-style-type: none"> Corporate Other Procurement Sales NDA Proposal Custom Proposal1 Custom Proposal2 	<ul style="list-style-type: none"> Keywords Next revision date Term exception Is Active? Description Guidance 	<ul style="list-style-type: none"> Keywords Next revision date Term exception Is Active? Description Guidance

* = Required Information

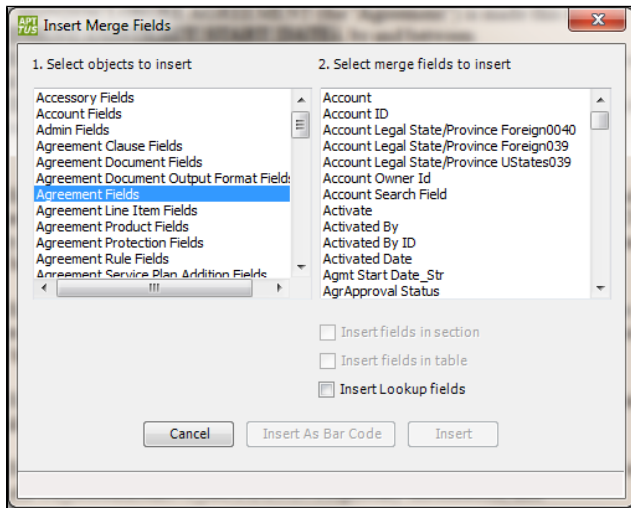
Check-In Cancel

Using X-Author to Insert Merge Fields

Place a cursor into the appropriate section of the document where a merge field is going to be inserted and select **Insert Merge Fields** from the X-Author Templates ribbon tab.

The Insert Merge Fields dialog lists the objects and associated merge fields.

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Select *Agreement Fields* in the left column and click on appropriate merge field(s) to insert into the contract template. To deselect a merge field hold the Ctrl key down when clicking it. If you have selected *Agreement Start Date* merge field as below and clicked Insert, then in the template document it will be inserted as follows:

```
{ MERGEFIELD apts_agreement_contract_start_date \* MERGEFORMAT }
```

To see merge field codes in a template, press ALT+F9 once or twice. These keystrokes toggle field codes on and off in Word. If codes are turned on you will see merge fields similar to the following for the Agreement Name:

```
{ MERGEFIELD apts_agreement_name \* MERGEFORMAT }
```

If codes are turned off, the same merge field will appear with double brackets before and after the mergefield, as in «*apts_agreement_name*».

NOTE: Special Case for Merge Fields using Agreement Record Types

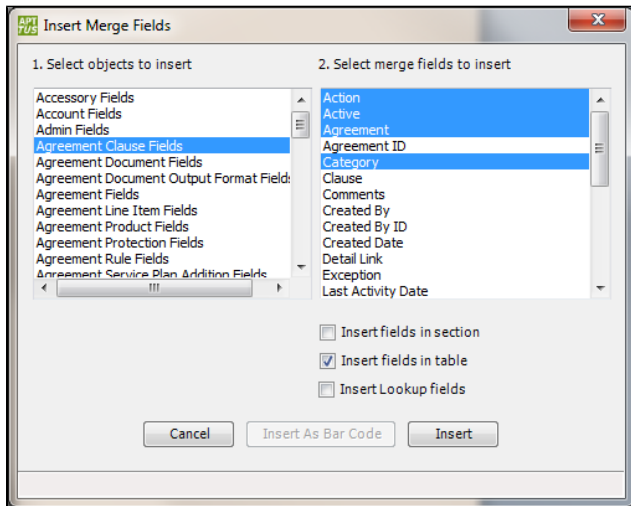
When inserting merge fields for agreement *RecordType* or *RecordTypeId* into a document, you must include both merge fields for recordtype and recordtypeid, otherwise when the template gets saved to salesforce, the merge field for *RecordType* will not be saved to Salesforce and will not get resolved correctly by the Apttus Merge Server. Make sure you include both:

```
{ MERGEFIELD apts_agreement_recordtype \* MERGEFORMAT }
```

```
{ MERGEFIELD apts_agreement_recordtype_id \* MERGEFORMAT }
```


Using X-Author to Insert Line Item Merge Fields

You can also insert merge fields for line item object that have a master/detail or lookup relationship with the agreement by selecting the line item relationship object, such as agreement clause. When you do this, the Insert fields in table option automatically becomes available since Author knows that this object has a master/detail relationship with the agreement.



To insert the fields in a table, select the fields you want in the Insert Merge Fields dialog and click **Insert**. For the selection above the following table gets inserted:

Action	Active	Agreement	Category
<pre>{ MERGEFIELD Apttus__Agreemen t_Clause_start } { MERGEFIELD agreement_clause _action * MERGEFORMAT }</pre>	<pre>{ MERGEFIELD agreement_clause _active * MERGEFORMAT }</pre>	<pre>{ MERGEFIELD agreement_clause _agreement * MERGEFORMAT }</pre>	<pre>{ MERGEFIELD agreement_clause _category * MERGEFORMAT }{ MERGEFIELD Apttus__Agreemen t_Clause_end</pre>

Insertion of the merge fields in a table can also be maintained manually by the template designer, but it is preferable to do this using Apttus Author. After the merge fields are resolved by the Apttus Merge Server when you generate the agreement from within Salesforce, the final table might look as follows:

Action	Active	Agreement	Category
Modified	true	Agreement Test1	Confidentiality
Inserted	true	Agreement Test2	Definitions



Line item conditions inside tables are not supported.

Using X-Author to Insert Smart Merge Fields

The X-Author Word add-in has support for inserting smart merge fields into an agreement or clause template. Smart merge fields are specialized merge fields that can retain the Apttus field definition even after the Merge Server generates the Agreement document. This feature helps for reconciling the document which is explained in detail in the [Reconciliation](#) section.



A normal merge field or a qualified merge field can be inserted as a smart merge field. You cannot insert lookup fields as smart merge fields.

Smart fields should be used for small chunks of text, such as dates, categories, and numeric values. Essentially for the parts of an agreement that would be negotiated. Smart fields are not intended to hold large amounts of text and should not be used as such. Text Area data type fields and Multi-Select Picklists are not supported.

Reconciliation functionality is supported for the fields inserted 'in section' and/or 'in table'. Qualified merge fields as smart fields for the 2 and 3 level objects - are not supported.

To insert smart merge fields, click on the **Insert Smart Field** in the X-Author Templates Ribbon menu. Make sure that field codes are turned on in Word. You can do this by selecting the "Field Codes" from the View menu in Word options, or you can type Alt-F9 to toggle field codes on and off.

Select the object and field for insertion. Once chosen, the **Insert as Smart Field** button gets enabled and you can click it to insert a smart merge field.

The general syntax for a smart merge field is:

```
{ MERGEFIELD apts_agreement_contract_start_date \INTELLIGENT
name=apts_agreement_contract_start_date;label=Agreement Start Date;
calculated=False; \* MERGEFORMAT }
```

The keyword *INTELLIGENT* tells the Merge Server to preserve this field when the Agreement document gets generated.



The keyword and the attributes viz. name, label, calculated are Author related information which should not be manually altered at any point of time.

When does the Insert as Smart Field button gets disabled?

- If the chosen field is a formula field which contains more than one Apttus field.

```
CASE(MONTH( First_Specification_Meeting_Date__c ), 1, "January",2,"February",3,"March",4,"
April", 5, "May",6, "June", 7, "July",8, "August", 9, "September", 10, "October", 11, "November",
12, "December", "") & " " & TEXT(DAY( First_Specification_Meeting_Date__c )) & ", " & TEXT
(YEAR( First_Specification_Meeting_Date__c ))
```

First_Payment__c - Amount_Received_First_Payment__c

- If the chosen field is a reference field - Lookup data type field.

Using Multiple Smart Fields for the same field of an Object

You can include multiple instances of the same smart field in a template.

When you are creating your templates you can enter the same header level smart field into the template multiple times. For instance, with the standard Apttus Agreement and Proposal objects, you could insert multiple instances of smart fields for *Agreement Fields* in your templates, but not for other objects.

After you generate a document from the template and subsequently change the value of one or more of those smart fields in that document, they must be reconciled before you can check-in that document. This is required because a single value must be selected for all instances of the smart field, which then enables the object record in Salesforce to be updated with that value.



Only header level fields can be inserted multiple times. Related list fields and repeating data sets cannot be used.

Support for Nested Child Level Merge Fields

X-Author and Merge Server can support resolving merge fields for nested child level items at the child and grandchild levels of an agreement or proposal.

With X-Author you can insert merge fields for child relationship objects that have a master/detail child relationship with the agreement and merge fields for a third level, the grandchild level objects with a lookup relationship to the original object that is a child object of the agreement.

X-Author supports either master/detail or lookup relationships at the child level, as well as lookup relationships from a grandchild that is related to the original agreement by its relationship to the child agreement. Only lookups at the grandchild or third level are possible.

X-Author supports inserting qualified merge fields for objects at both the child and grandchild levels. To summarize, X-Author has:

- The ability to pick standard merge fields for object child and grandchild levels
- The ability to pick lookup (qualified) merge fields for object child and grandchild levels
- The ability to distinguish between lookups at parent, child, and grandchild levels
- The ability to insert section tags to denote nested child/grandchild levels
- The ability to insert lookup fields in tables and sections
- The ability to insert conditions in tables and sections
- Backwards compatibility with pre-existing templates

What this means is you can have Related Lists for Service Plan level information for an agreement, and then easily insert merge fields for this information into your templates. You can then define another object, say Service Plan Devices, which is related to a Service Plan by a lookup relationship, and then define merge fields for the agreement service plan devices that can be repeated for each agreement service plan.

The mechanism to support the features described above involves adding section tags to support defining an area to the merge server so it can interpret line item merge fields within a section as being grandchildren of the object whose scope enclosed the original section tags.

As before, qualified merge fields have the following object field syntax to qualify the lookup fields:

```
{ QMERGEFIELD apttus__account__c.account__accountnumber \* MERGEFORMAT }
```

Section Tags

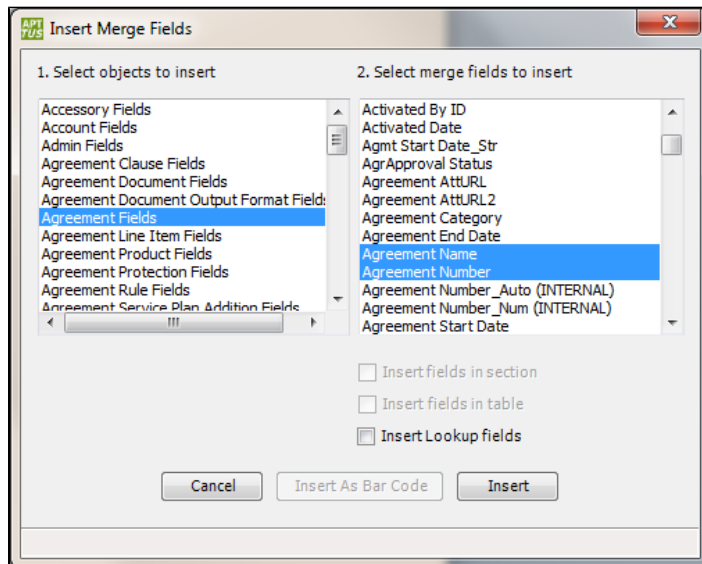
Author contains the ability to define a section, using start and end tags to denote where the section begins and ends, respectively. Within a section, there can be nested line items as well. Normal agreement level2 (master/child relationship to agreement) items can be defined inside a table, but can also be defined as a section as follows:

```
{ objectname_section_start }...{ objectname_section_end }
```

Template designers who want to create templates that display nested child line items (down a max of two levels from the agreement level object or three levels overall), will use the section feature of Author to define the outer level child item.

To demonstrate this feature, we show an example of creating a template for an agreement object that has two nested level of child relationships, including agreement service plan line item details (level 2) and agreement service plan devices (level 3). In this example, an agreement can have one or more agreement service plans (level2), and an agreement service plan can in turn have one or more agreement service plan devices (level3).

The following screen shows how the Insert Merge Fields dialog of the Author looks to select agreement (Level 1) mergefields:



The merge fields that are inserted look like the following:

```
{ MERGEFIELD apts_agreement_name \* MERGEFORMAT }{ MERGEFIELD  
apts_agreement_ff_agreement_number \* MERGEFORMAT }
```

As before, we can also insert level 1 lookup fields for agreement level fields, such as the requestor user's email address, which results in the following QMERGEFIELD getting inserted:

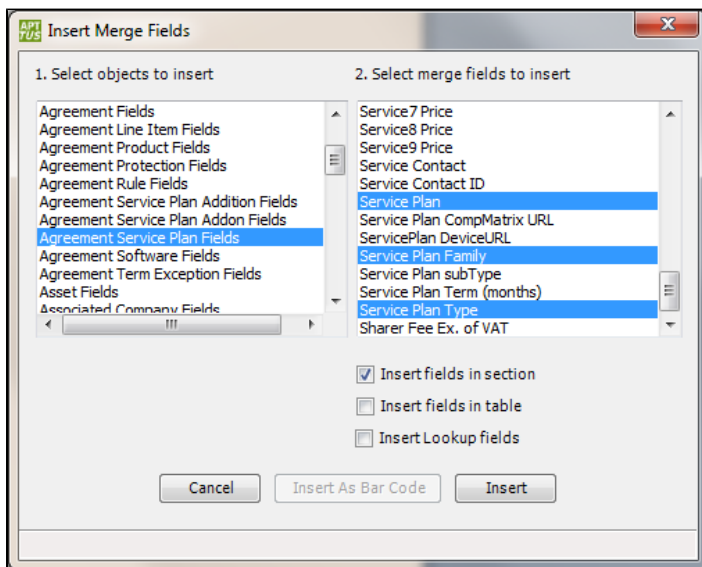
```
{ QMERGEFIELD apttus__requestor__c.user_email \* MERGEFORMAT }
```

For level 1 items, check boxes Insert fields in section and Insert fields in table are disabled. The insertion above corresponds to the following data source:

Agreement (Level 1)

- Agreement Name
- Agreement Number
- Agreement requestor - User (level1 lookup)
 - Email

Agreement children with master-detail or lookup relationships back to the agreement object (such as agreement service plans, agreement clauses, etc) can be added as before by selecting the child relationship object in the left-side pane and the desired fields in the right-side pane.



The selection above gives the user the ability to specify merge fields at Level 2 inside a section:

Agreement Service Plan (Child of agreement) (Level 2)

- Service plan name
- Service plan family
- Service plan type

The merge fields that get inserted look like this:

```
{ MERGEFIELD agreement_service_plan_section_start }
```

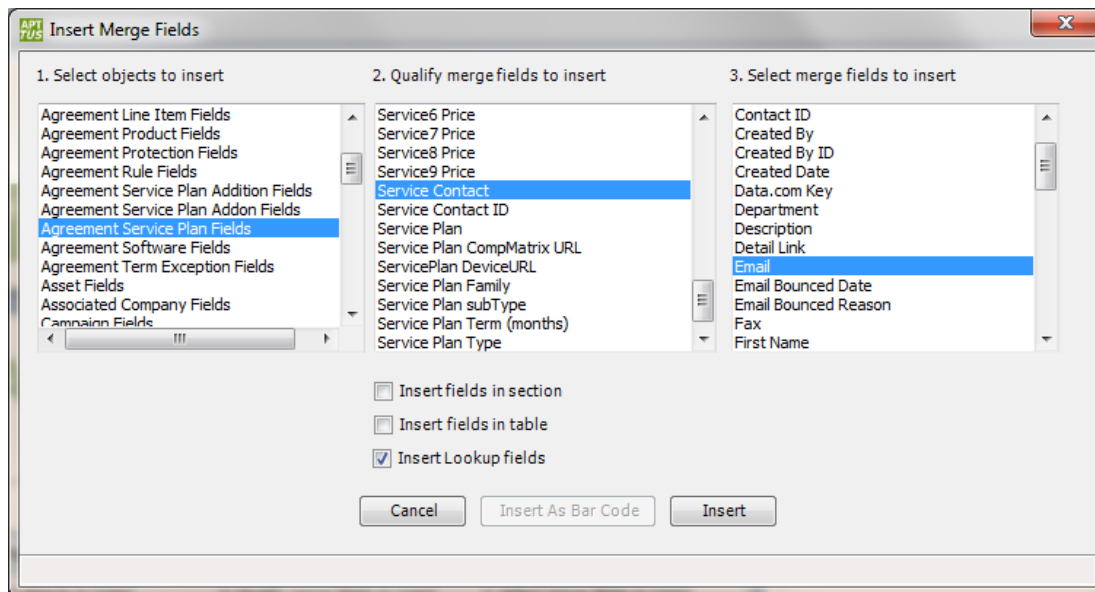
```
{ MERGEFIELD agreement_service_plan_name \* MERGEFORMAT }
```

```
{ MERGEFIELD agreement_service_plan_service_plan_family \* MERGEFORMAT }
```

```
{ MERGEFIELD agreement_service_plan_service_plan_type \* MERGEFORMAT }
```

```
{ MERGEFIELD agreement_service_plan_section_end }
```

If you need to insert lookup fields to resolve within this master detail relationship you can place a cursor within section tags, invoke Insert Merge Fields dialog and expand the right-side pane to select lookup fields by checking the Insert lookup field check box.



The selection above gives the user the ability to specify lookup fields at Level 2 and corresponds to the following data source:

Agreement (Level 1)

- Agreement Name
- Agreement Number
- Agreement requestor - User (level1 lookup)
 - Email

Agreement Service Plan (Child of agreement) (Level 2)

- Service plan name
- Service plan family
- Service plan type
- Service contact - Contact (level2 lookup)
 - Email

The Level 2 qualified merge field that is inserted within section tags looks like the following:

```
{ QMERGEFIELD service_contact__c.contact_email \* MERGEFORMAT }
```

You can also insert the level1 lookup field for the agreement inside the section tags. So if we insert this Level 2 qualified merge field for the Service contact email address and another – Level 1 qualified merge field for the Agreement requestor email address - inside the section (with the insertion point and selection inside the section start and end tags), it will look like as follows:

```
{ MERGEFIELD agreement_service_plan_section_start }
```

```
{ MERGEFIELD agreement_service_plan_name \* MERGEFORMAT }
```

```
{ MERGEFIELD agreement_service_plan_service_plan_family \* MERGEFORMAT }
```

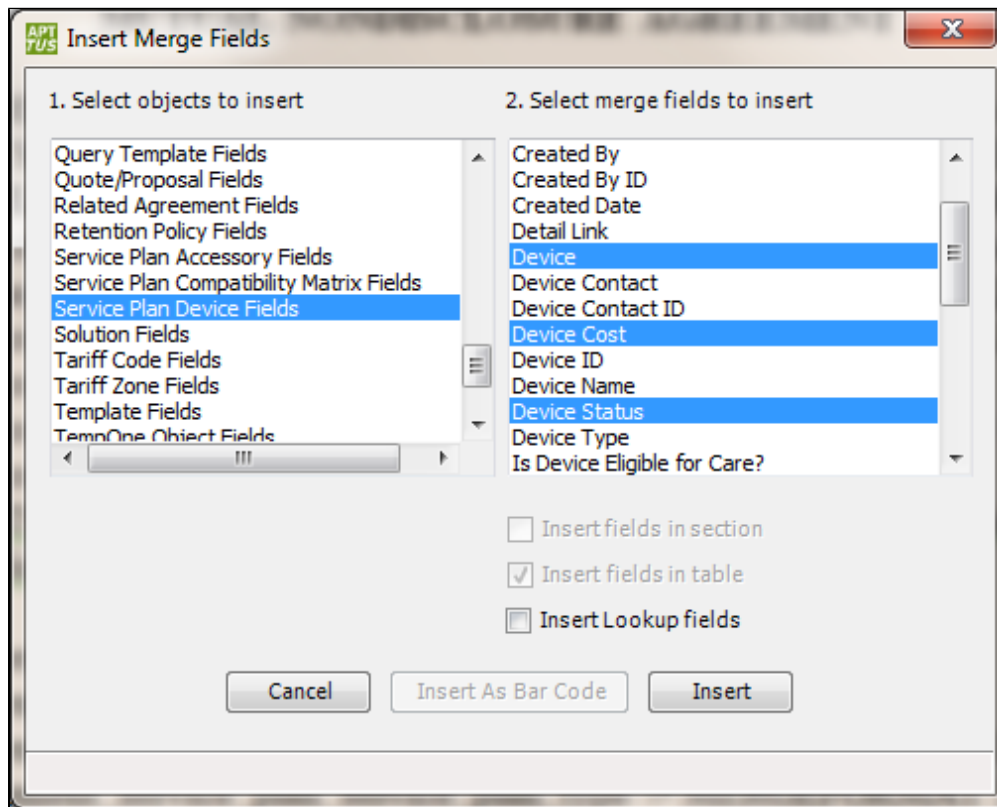
```
{ MERGEFIELD agreement_service_plan_service_plan_type \* MERGEFORMAT }
```

```
{ QMERGEFIELD service_contact__c.contact_email \* MERGEFORMAT }
```

```
{ QMERGEFIELD apttus__requestor__c.user_email \* MERGEFORMAT }
```

```
{ MERGEFIELD agreement_service_plan_section_end }
```

If you want to insert merge fields from a deeper level, such as Level 3 described above (for agreement service plan devices), you simply select *Agreement Service Plan Devices* from the left-side pane as the object and the desired fields in the right-side pane. Since you will be inserting these grandchild objects placing a cursor inside the section, they will be inserted in a table; notice that the check box Insert fields in table has become checked and grayed out automatically:



The selection above gives the user the ability to specify merge fields at Level 3 and corresponds to the following structure:

Agreement (Level 1)

- Agreement Name
- Agreement Number
- Agreement requestor - User (level1 lookup)
 - Email

Agreement Service Plan (Child of agreement) (Level 2)

- Service plan name
- Service plan family
- Service plan type
- Service contact - Contact (level2 lookup)
 - Email

Agreement Service Plan Device (Grandchild of agreement) (Level 3)

- Service plan device
- Service plan device cost
- Service plan device status
- Service plan device list price

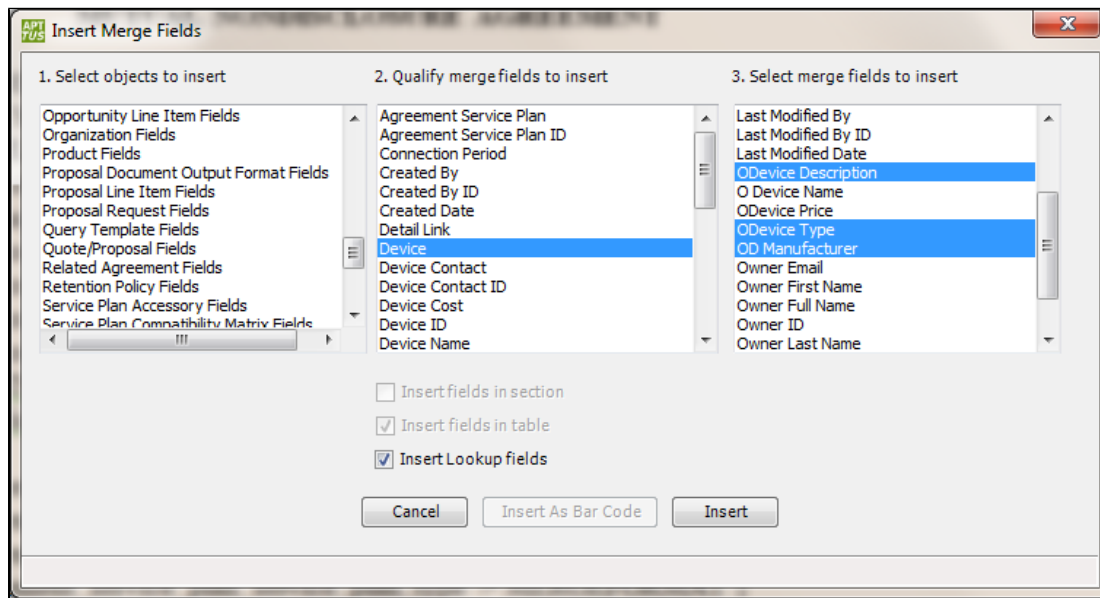
Once these merge fields are added, the part of the template document with section tags should look like the following:

```
{ MERGEFIELD agreement_service_plan_section_start }
{ MERGEFIELD agreement_service_plan_name \* MERGEFORMAT }
{ MERGEFIELD agreement_service_plan_service_plan_family \* MERGEFORMAT }
{ MERGEFIELD agreement_service_plan_service_plan_type \* MERGEFORMAT }
{ QMERGEFIELD service_contact__c.contact_email \* MERGEFORMAT }
{ QMERGEFIELD apttus__requestor__c.user_email \* MERGEFORMAT }
```

Device	Device Cost	Device Status	List Price
<pre>{ MERGEFIELD Service_Plan_Device_start } { MERGEFIELD service_plan_device_device * MERGEFORMAT }</pre>	<pre>{ MERGEFIELD service_plan_device _device_cost * MERGEFORMAT }</pre>	<pre>{ MERGEFIELD service_plan_device _device_status * MERGEFORMAT }</pre>	<pre>{ se _l ME ME Se _I</pre>

```
{ MERGEFIELD agreement_service_plan_section_end }
```

With Level 1 and Level 2 lookup fields, you can also insert Level 3 object lookup fields. Place a cursor within section tags, invoke Insert Merge Fields dialog, check the **Insert lookup field** checkbox to select several Level 3 lookup fields for the agreement service plan device line items:



The selection above gives the user the ability to specify lookup fields at Level 3:

Agreement Service Plan Device (Grandchild of agreement) (Level 3)

- Device – ODevice (level3 lookup)
- ODevice description
- ODevice type
- OD manufacturer

The inserted merge fields look like the following:

ODevice Description	ODevice Type	ODevice Manufacturer
<pre>{ MERGEFIELD Service_Plan_Device_start } { QMERGEFIELD device__c. o_device _odevice_description * MERGEFORMAT }</pre>	<pre>{ QMERGEFIELD device__c. o_devic e_odevice_type * MERGEFORMAT }</pre>	<pre>{ QMERGEFIELD device__c. o_device_od_manufacturer * MERGEFORMAT }{ MERGEFIELD Service_Plan_Device_end }</pre>

As with Level 1 and Level 2 objects, we can also insert Level 1 and Level 2 lookup fields inside of the line item table for a Level 3 object; although it doesn't really make sense to always do this since these values will get repeated for every Level 3 field that is retrieved. Identify the place inside the table to insert these qualified merge field, place the cursor, invoke Insert Merge Fields dialog and proceed with the insertion of the merge fields:

- Service contact - Contact (level2 lookup)
 - Email
- Agreement requestor - User (level1 lookup)
 - Email

Here is how the table for Level 3 object with all merge fields and qualified merge fields might look like:

Device	Service Contact Email address	Agr. Requestor Email Address	ODevice Description	ODevice Type	OD Me
{ MERGE FIELD Service_Plan _Device_start } { MERGE FIELD service_plan _device _device * MERGE FORMAT }	{ QMERGE FIELD service _contact __c. contact _email * MERGE FORMAT }	{ QMERGE FIELD apttus_ _requestor __c.user _email * MERGE FORMAT }	{ QMERGE FIELD device__c.o _device _odevice _description * MERGE FORMAT }	{ QMERGE FIELD device__c.o _device _odevice_type * MERGE FORMAT }	{ QME FIELD devic _devi _manu * ME FORMA

Combining all of these steps together, we can now show the complete structure including Levels 1 through 3:

Agreement (Level 1)

- Agreement Name
- Agreement Number
- Agreement requestor - User (level1 lookup)

- Email

Agreement Service Plan (Child of agreement) (Level 2)

- Service plan name
- Service plan family
- Service plan type
- Service contact – Contact (level2 lookup)
 - Email
- Agreement requestor - User (level1 lookup)
 - Email

Agreement Service Plan Device (Grandchild of agreement) (Level 3)

- Service plan device
- Service plan device cost
- Service plan device status
- Service plan device list price
- Device – ODevice (level3 lookup)
- ODevice description
- ODevice type
- OD manufacturer
 - Service contact – Contact (level2 lookup)
 - Email
- Agreement requestor - User (level1 lookup)
 - Email

The template with all inserted merge fields might look like the below example (the comments in italic describe the types of merge fields and qualified merge fields that are inserted inside sections and tables for the objects of level1 through level3):

```
{ MERGEFIELD apts_agreement_name \* MERGEFORMAT } { MERGEFIELD  
apts_agreement_ff_agreement_number \* MERGEFORMAT }
```

level1 qualified merge fields outside section:

```
{ QMERGEFIELD apttus__requestor__c.user_email \* MERGEFORMAT }
```

```
{ MERGEFIELD agreement_service_plan_section_start }
```

level2 merge fields inside section:

```
{ MERGEFIELD agreement_service_plan_name \* MERGEFORMAT }
```

```
{ MERGEFIELD agreement_service_plan_service_plan_family \* MERGEFORMAT }
```

```
{ MERGEFIELD agreement_service_plan_service_plan_type \* MERGEFORMAT }
```

level2 qualified merge fields inside section:

```
{ QMERGEFIELD service_contact__c.contact_email \* MERGEFORMAT }
```

level1 qualified merge fields inside section:

```
{ QMERGEFIELD apttus__requestor__c.user_email \* MERGEFORMAT }
```

level3 merge fields within line item tags inside section:

Device	Service Contact Email address level2 qualified merge field	Agr. Requestor Email Address level1 qualified merge field	ODevice Description level3 qualified merge fields	ODevice Type level3 qualified merge fields	OD Manufactur level3 qualified merge fields
{ MERGE FIELD Service_ Plan_Device _start }{ MERGE FIELD service_ plan_ device_device * MERGE FORMAT }	{ QMERGE FIELD service_ _contact __c. contact_ _email * MERGE FORMAT }	{ QMERGE FIELD apttus__ requestor __c.user_ _email * MERGE FORMAT }	{ QMERGE FIELD device_ _c. o_device_ _odescription * MERGE FORMAT }	{ QMERGE FIELD device_ _c. o_device_ _odescription _type * MERGE FORMAT }	{ QMERGE FIELD device_ _c.o_device_ _od _manufactur * MERGE FORMAT }

```
{ MERGEFIELD agreement_service_plan_section_end }
```

X-Author and Merge Server components are able to resolve these nested grandchild relationships using the section start and end tags. If a start section tag is present, any child level items after the section start tag and before the end section tag (i.e. agreement service plan items in the example above) are assumed to be normal child level items, and within the section tags - any merge fields in tables with the start and end tags for line item levels (such as agreement service plan devices in the example above) denote grandchildren items at the agreement or parent object level. These items are also child items via a lookup relationship to the true children at the parent level.

Section blocks can also be maintained manually by the template designer as well as line item start and end tags can, but it is preferable to do this using X-Author.



- The repeating section design discussed above is based on Word fields. Word allows Word fields to be inserted almost anywhere in a document; however, the start field should be inserted before the beginning of a paragraph and the end field should be inserted after a paragraph is ended, otherwise you will get errors generating the agreement.
- This design supports conditionally marked text inside of sections without any changes. Also qualified merge fields inside a table being inserted inside section tags are supported (lookups for 3-level objects); but line item conditions inside tables are not supported.
- You cannot have sections nested inside of one another and you cannot have grandchild level objects defined within a section unless they are defined within a table.

Working with Clauses in Pre-FX2 Format

Even though you will have standard clauses that you wish to use in every contract, through negotiations, your trading partners will not always agree with them – as you know. We provide the concept of template libraries - alternative clauses or sometimes known as fallback provisions. This simply allows you to select alternative language with differing degrees of risk and acceptability, so that you can replace your current clause with it.

As with contract language templates, clauses also can have embedded merge fields contained within them that get auto populated during agreement creation time. Please ensure that you markup the clause template documents using Microsoft Word to identify the merge fields similar to the language templates.

Creating Clauses

Clauses or clause templates are created and maintained the same way as agreement templates. The difference is that clauses are smaller sections of text that can be manually added during the negotiation process or automatically added to an agreement using conditional logic, whereas agreement templates are comprehensive terms and conditions and can be used by the Apttus Merge Server to generate an actual agreement. Open your clause document in Word or create a new one by pasting a pre-existing clause from the clause library into a new blank document.

As mentioned before, you can keep the clause the way it was or you can add merge fields or FX2 fields, conditional text, or change it any way you like. Once you're sure the clause is the way you want it, select either **Check-In** or **Clone** menu to save the clause to Apttus.

Enter appropriate properties for the clause. You can select multiple agreement types this clause applies to or deselect types by clicking while holding the Ctrl key down. When finished, click **Save** or **Clone**. A message should appear saying the clause template was created.

Updating Clauses

Open a pre-existing clause using **Check-Out**. Note that you should select **Show Filter** and choose **Clause** from the **Type** list before you run your search.

X-Author Contracts - Checkout Cancel

Type a Name, Description or Keyword and click the Search icon.

Sample 🔍

[Hide Filter](#)

Type: Clause

Category: --None--

Subcategory: --None--

Locale: --None--

Language: --None--

Page #: 1 out of 1

Action	Name	Category	Subcategory	Description	Guidance
Open	Sample Clause	Category	Subcategory		
Open	sample clause 23-01	Category 1	Category 1 Subcategory 1		
Open	SC_Sample Clause 12-03	Confidentiality	Default		

Make required changes to the clause and click **Check-In**.

Apttus Author - Check-In Template ✕

Template Type: Clause

Template Name *: Sample Clause

Description:

Guidance:

Agreement Types Supported *: BombardierV
Corporate
Custom Proposal 1

Next Revision Date (mm/dd/yyyy): 12:00:00 AM

Category *: Category

Subcategory *: Subcategory

Language *: English

Locale: English (United States)

Keywords: Supporting Clause

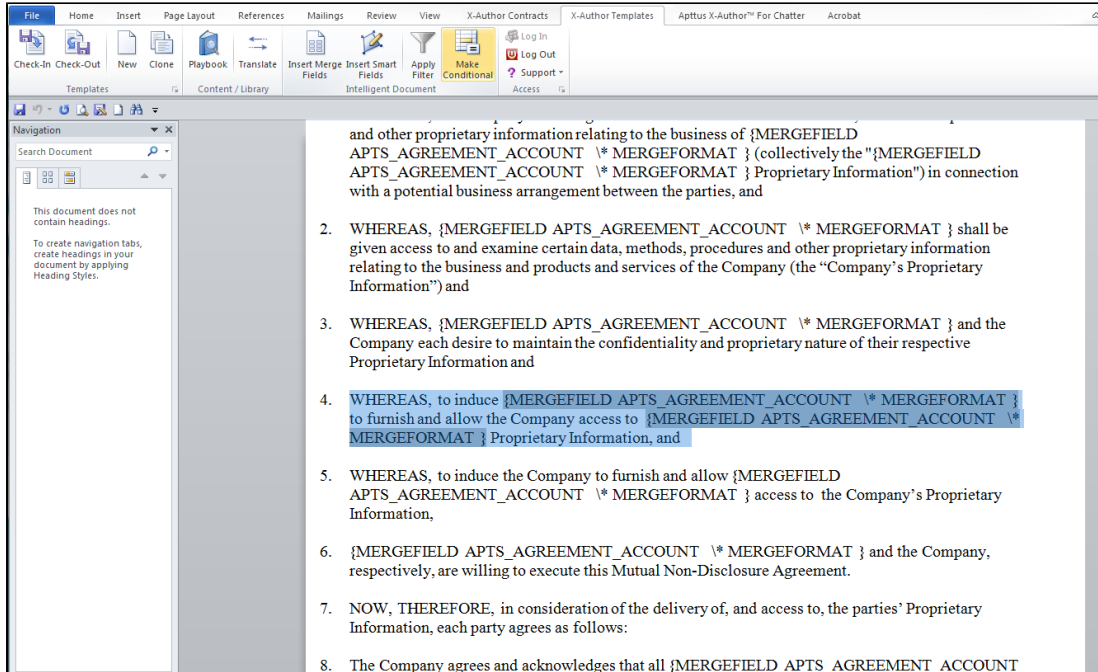
☒ Is Active

Check-In Cancel

* Denotes Required Fields

Using X-Author to Make Selected Text Conditional

You can select a region of text in the template and make it conditional based on an expression containing one or more merge fields. Select desired text in the template and click **Make Conditional**.



For conditional text you need to have field codes turned on or the text will appear to be missing. Make sure that field codes are turned on in Word: by selecting **Field Codes** from the **View** menu in Word options, or by typing Alt-F9 (toggles field codes on and off).

Specify a conditional expression by selecting an Entity, Field, Operator, and Value. In the example below, we have created an expression that says “If the total agreement value is greater than \$1,000,000 then include the text shown in the ‘Selected Text to Make Conditional’ box.

Make Conditional

Entity: Agreement Fields

Field: Total Agreement Value

Operator: Greater Than

Value: 100000

Select Text to Make Conditional:

WHEREAS, to induce ☐MERGEFIELD APTS_AGREEMENT_ACCOUNT \[* MERGEFORMAT ☐ to furnish and allow the Company access to ☐MERGEFIELD APTS_AGREEMENT_ACCOUNT \[* MERGEFORMAT ☐ Proprietary Information, and

Make Conditional **Cancel**

Once you have created the condition, click **Make Conditional**.

2. WHEREAS, {MERGEFIELD APTS_AGREEMENT_ACCOUNT \[* MERGEFORMAT } shall be given access to and examine certain data, methods, procedures and other proprietary information relating to the business and products and services of the Company (the "Company's Proprietary Information") and
3. WHEREAS, {MERGEFIELD APTS_AGREEMENT_ACCOUNT \[* MERGEFORMAT } and the Company each desire to maintain the confidentiality and proprietary nature of their respective Proprietary Information and
- { IF { MERGEFIELD apts_agreement_total_contract_value } > 100000 " WHEREAS, to induce {MERGEFIELD APTS_AGREEMENT_ACCOUNT \[* MERGEFORMAT } to furnish and allow the Company access to {MERGEFIELD APTS_AGREEMENT_ACCOUNT \[* MERGEFORMAT } Proprietary Information, and |
" "" }
4. WHEREAS, to induce the Company to furnish and allow {MERGEFIELD APTS_AGREEMENT_ACCOUNT \[* MERGEFORMAT } access to the Company's Proprietary Information,
5. {MERGEFIELD APTS_AGREEMENT_ACCOUNT \[* MERGEFORMAT } and the Company, respectively, are willing to execute this Mutual Non-Disclosure Agreement.

Notice the text that was originally selected has now been enclosed by additional symbols and words. These symbols and words form a conditional expression that tells the Apttus Merge Server to include this text if the condition is satisfied. Of course this is a simple expression involving a single merge field (the contract value). You can also enter conditional expressions directly into the template by creating IF fields with Ctrl F9 { } which you'll have to do if you want to create more complex expressions. Repeat this process until you are finished creating conditional text in your template.

When finished click **Check-In** to display the Check-In Template dialog. Enter the required properties for the template and check it in.



Ensure that you have accepted or deleted all outstanding modifications that were part of tracked changes and that the template is unprotected. Active Word features, such as these, can impact the ability for merge server to successfully generate an agreement document.

After the template is saved to Apttus you will receive a confirmation message.

You can specify multiple agreement types this template supports by clicking on each type desired. Click on an item with the Ctrl key held down to deselect an item. Make sure you save the template using the *Category* and *Subcategory* that you want, but you can always change it later. To change the default *Category* and *Subcategory* pick list values, contact your Salesforce administrator.

The Check-In action from the previous step saves the agreement template to the Apttus web application and creates Activity History log entries, either *Created Template* or *Updated Template*. The new template becomes accessible from the **Templates** tab and can now be used for agreement creation by the Apttus Merge Server when creating draft or final versions of an agreement.

Using Conditional Clauses and Text

One of the key advantages of using the Apttus Contract Management Suite is the ability to use conditional clauses and text within contract templates. The Apttus Merge Server resolves these conditions at run time when the draft document or final agreement document is generated, but X-Author is where you create and maintain these conditional clauses.

Conditional clauses makes use of the built-in features of Word's conditional text processing. X-Author extends the built-in features of Word to provide support for conditional clauses within Word template documents.



You must have field codes enabled in Word when using conditional text processing. Select Alt-F9 to toggle field codes on and off.

General Structure

The structure of a conditional expression uses the IF syntax of Word and is as follows: { IF Expression1 Operator Expression2 TrueResult [FalseResult] }

The field brackets ({ }) are used to delimit conditional expressions from normal text. These field delimiters cannot be typed in but are entered using Ctrl+F9. Square brackets ([]) denote optional arguments.

Expression1 and Expression2 are values you want to compare. These expressions can be names, text strings, numbers, nested fields that return a value, or mathematical formulas. If an expression contains spaces, enclose the expression in quotation marks.

Operator is the comparison operator with a space before and after it. It can be one of the following types:

Operator	Description
=	Equal to
<>	Not equal to
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to

TrueResult and FalseResult can be either text or a nested IF field that result whenever the comparison is true (TrueResult) or false (FalseResult). If FalseResult isn't specified and the comparison evaluates to false, the IFfield has no result and returns nothing. Each string containing multiple words must be enclosed in quotation marks.

If the operator is '=' or '< >' Expression2 can contain a question mark (?) to represent any single character or an asterisk (*) to represent any string of characters. Expression2 must be enclosed in quotation marks so that it's compared as a character string. If you use an asterisk in Expression2, the portion of Expression1 that corresponds to the asterisk and any remaining characters in Expression2 cannot exceed 128 characters.

Special Operators

Due to restrictions with the built-in conditional text processing capabilities of Word, there is no native support for a “contains” operator.

This is of particular importance when entering conditional expressions to test Salesforce multi-picklist data types that can contain multiple values for the presence of a particular value. For instance, the conditional expression

```
{ IF { MERGEFIELD City } CONTAINS "Fran" "contains Fran." "does not contain Fran." }
```

where we wanted to see if the merge field City contained the characters Fran is not possible. If for example the city could be San Diego, San Francisco, or San Jose we would not be able to test successfully for San Francisco.

In addition, it is NOT possible to reword this conditional expression as

```
{ IF { MERGEFIELD City } = "**Fran*" "contains Fran." "Does not contain Fran." }
```

using before and after wildcard characters since they are not supported together. Using a wildcard character after text, as in “Starts With”, or before text, as in “Ends With” is possible, but not both. Thus we can have “testval*” (for Starts With ‘testval’) or “*testval” (for Ends With ‘testval’) in an expression, but not “*testval*”.

To get the functionality of a CONTAINS operator, you MUST use the make conditional command and select CONTAINS as the operator. This adds some special tags to the conditional expression so it can be evaluated correctly at runtime.

Conditional Clauses

X-Author provides support for two basic types of conditional text: inline conditional text and conditional references. Conditional inline text contains the condition with the actual text to be inserted if the condition is true. A conditional reference contains the same condition but contains a reference to the text (which can itself contain additional conditional text).

The advantage of using a conditional reference is that the text that gets inserted for a true condition at runtime comes from the clause reference in Salesforce which can be changed independently of the contract template. Inline conditions, on the other hand, are a permanent part of the contract template and cannot be changed independent of the template itself.

Rather than hard coding the text, using a conditional clause reference allows you to include the text at run-time instead of when the template is created. This offers significant advantages since using a clause reference will allow you to dynamically include the latest version instead of an older one.

In order to use clause reference expressions you should always use the **Make Conditional** option. It automatically inserts the correct command and clause ID that allows the clause to be inserted at runtime. Constructing conditional references manually should be avoided. The differences between using inline clauses and clause references are as follows:

Using a Clause Reference:

```
{ IF { MERGEFIELD A } = "True" { CLAU SEREF id=00P50000001hqyEEAQ
name=SampleClauseA" "" }
```

Using an Inline Clause:

```
{ IF { MERGEFIELD B } = "True" "Hard coded clause text to be inserted" "" }
```

There are two ways to specify conditions. You can enter conditional expressions using the Make Conditional option or by typing it manually into the document enclosed by field brackets using Ctrl+F9 characters or via the Insert Field menu using a MergeField.

For marking a simple block of text as conditional, the Make Conditional command is easier to use. However, it is currently limited in the complexity of the expression it can create due to ambiguities in the expression that can be present.

For complex expressions, it is recommended you enter the basic expression first, using the Make Conditional option, and then refine it by directly editing the text within the conditional field brackets. One other current drawback Author is that once a condition is created using the Make Conditional command, it cannot be selected and edited again via the Make Conditional option. All future edits must be made manually.

Conditional Text Examples

The IF field (field: A set of codes that instructs Microsoft Word to insert text, graphics, page numbers, and other material into a document automatically. For example, the DATE field inserts the current date.) performs one of two alternative actions, depending on the condition you specify.

For example, the statement "If the weather is sunny, we'll go to the park; if not, we'll go to the movies" specifies a condition that must be met (sunny weather) for a certain action to take place (going to the park). If the condition is not met, an alternative action occurs (going to the movies).

The following IF field is a similar type of statement. If the current data record contains "San Francisco" in the City field, Word prints the first text in quotation marks in the merged document that results from that data record. Otherwise, Word prints the second set of text. This example uses the IF and MERGEFIELD fields together.

```
{ IF { MERGEFIELD City } = "San Francisco" "Please call our local office." "Please return the enclosed form in the provided envelope." }
```

You can modify the IF field codes by using them in conjunction with other field codes, such as comparing a data field with another data field or bookmark: This IF field compares the number in the Ratedata field with the number in the Discountdata field. If the numbers are equal, the specified text is printed. If they are not equal, no text is printed.

```
{ IF { MERGEFIELD Rate } = { MERGEFIELD Discount } "We will offer you a larger discount. " " " }
```

Performing Boolean AND/OR Operations

The IF field does not directly support Boolean AND and OR operations in a template. However, the logical AND and OR operators are actually just abbreviations of nested IF statements; therefore, you can construct the equivalent of Boolean AND and OR operations.

Starting with the basic IF statement

```
{IF test1 "TrueResult" "FalseResult" }
```

You can nest another IF statement to create a logical OR or AND statement as in the following:

To create an OR statement (Position the second test inside the second set of quotation marks):{IF test1 "TrueResult" "{IF test2 "TrueResult" "FalseResult" }" }

To create an "AND" statement (Position the second test inside the first set of quotation marks):{IF test1 "{IF test2 "TrueResult" "FalseResult" }" "FalseResult" }

Constructing a Boolean AND Statement

The AND statement

```
IF (field <> "A") AND (field <> "B") THEN "TrueResult"
```

```
ELSE "FalseResult"
```

```
END IF
```


can be translated to an IF statement for use in a template as follows:

```
{IF field <> "A" "{IF field <> "B" "TrueResult" "FalseResult" }" "FalseResult" }
```

Constructing a Boolean OR Statement

The OR statement

```
IF (field = "A") OR (field = "B") THEN "TrueResult"
```

```
ELSE "FalseResult"
```

```
END IF
```

can be translated to an IF statement for use in a template as follows:

```
{IF field = "A" "result" "{IF field = "B" "TrueResult" "FalseResult" }" }
```

You can specify multiple conditions by nesting a COMPARE field inside an IF field.



To type field braces ({ }) in a Word document, press Ctrl+F9. To turn field codes on or off, press Alt+F9.

Complex Conditional Expressions

Here are several examples of creating more complex conditional expressions illustrating what we've seen so far. These examples show how simple expressions can be combined together to form much more complex expressions. Although parentheses are not directly support in the conditional language, we also show how you can simulate them. The expressions below are real and contain real fields so you can copy and paste them from this document into a real template if you wish (you'll have to change the merge field names of course). An understanding of Boolean logic is assumed.

Multiple OR Conditional Expressions

Here is an example of a complex conditional expression combining multiple OR operators. For this expression to evaluate to true, AT LEAST ONE of the component expressions must be true. To simplify these expressions for illustration purposes, a clause reference is used instead of inline text.

A or B or C or D

Alternative 1

```
{ IF {(  
  
  { IF { MERGEFIELD A } = "True" 1 0 } +  
  { IF { MERGEFIELD B } = "True" 1 0 } +  
  { IF { MERGEFIELD C } = "True" 1 0 } +  
  { IF { MERGEFIELD D } = "True" 1 0 }  
  ) } >= 1  
"{ CLAUSEREF id=00P50000001hqyJEAQ name=SampleClause }" "" }
```

Multiple AND Conditional Expressions

Here is an example of a complex conditional expression combining multiple AND operators. For this expression to evaluate to true, ALL of the component expressions must be true. To simplify these expressions for illustration purposes, a clause reference is used instead of inline text.

A and B and C and D

```
{ IF {(  
  
  { IF { MERGEFIELD A } = "True" 1 0 } *  
  { IF { MERGEFIELD B } = "True" 1 0 } *  
  { IF { MERGEFIELD C } = "True" 1 0 } *  
  { IF { MERGEFIELD D } = "True" 1 0 }  
  ) } >= 1  
"{ CLAUSEREF id=00P50000001hqyJEAQ name=SampleClause }" "" }
```

Multiple Complex Conditional Expressions

Multiple AND and OR expressions are fairly simply to setup and use since the order of evaluation at execution time does not matter. In other words, the expression “A and B and C and D” evaluates to the same thing as “A and C and B and D”. This is also true for complex OR an expression since only one is required to be true for the result to be true. There are two ways you can construct conditional expressions: implicitly or explicitly. This is important because of the way the conditional expression evaluator evaluates all expressions at runtime.

Implicit Evaluation

Here is an example of a complex expression with implicit evaluation order (in other words without explicitly defining the order of evaluation). If you use implicit evaluation, you must be careful to make sure the expression evaluates to what you think it should since the expression will be evaluated from left to right. This complex expression is basically the same the multiple AND and OR samples except that we use the "+" arithmetic addition operator for a logical OR operation and the "*" multiplication arithmetic operator for logical AND operations. Alternating + and * we then get the expression:2

((A or B) and C) or D)

Alternative 1 – Uses Implicit Evaluation from Left to Right

```
{ IF {(
{ IF { MERGEFIELD A } = "True" 1 0 } +
{ IF { MERGEFIELD B } = "True" 1 0 } *
{ IF { MERGEFIELD C } = "True" 1 0 } +
{ IF { MERGEFIELD D } = "True" 1 0 }
)} >= 1
"{ CLAUSEREF id=00P50000001hgyJEAQ name=SampleClause }" "" }
```

Explicit Evaluation

Here is a better example of the way you should construct complex expressions with explicit evaluation order since there is no way the expression can be misinterpreted. Using this method is a little trick, but it ensures the expression evaluations to exactly what you think it should.

(A or B) and (C or D)

Alternative 2 – Uses Explicit Evaluation

When constructing complex Boolean expressions containing multiple AND and OR operators, you can only compare two arguments at a time, thus the following example DOES NOT work:

```
{ IF {(
{{ IF { MERGEFIELD A } = "True" 1 0 } +
{ IF { MERGEFIELD B } = "True" 1 0 } } *
{ IF { MERGEFIELD C } = "True" 1 0 } +
{ IF { MERGEFIELD D } = "True" 1 0 } }
)} >= 1
"{ CLAUSEREF id=00P50000001hgyJEAQ name=SampleClause }" "" }
```

If we modify the expression to include steps that force the comparison of the two arguments '(A or B)' and '(C or D)' followed by a final comparison of the two results using the "*" operator (AND) then we get the correct expression that DOES work:

```
{ IF {(  
{ =({ IF { MERGEFIELD A } = "True" 1 0 } +  
{ IF { MERGEFIELD B } = "True" 1 0 }) >= 1 } *  
{ =({ IF { MERGEFIELD C } = "True" 1 0 } +  
{ IF { MERGEFIELD D } = "True" 1 0 }) >= 1 }  
)} >= 1  
"{ CLAUSEREF id=00P50000001hgyJEAQ name=SampleClause }" "" }
```

If you study the two different expressions above carefully, you will see that the subtle nuance in how you construct the expression makes all the difference in how the expression gets evaluation at runtime by the conditional expression engine. The point here is that you should use explicit order of evaluation when possible and constrain your comparisons to two or more sub expressions at a time.

Summary of Word field related commands

The following Word shortcut keys can be used to toggle features.

Field Commands	Keystrokes
Insert field brackets { }	[Ctrl] [F9]
Toggle field codes	[Alt] [F9]
Force a field update	[F9]
Lock a field	[Ctrl] [F11]
Unlock a field	[Shift] [Ctrl] [F11]
Field to plain text	[Shift] [Ctrl] [F9]

Customizable Expressions

The following conditional expressions consist of actual Microsoft Word fields and can be copied from this document and pasted into contract or clause templates for further customization. Note that the clause reference IDs will need to be changed or the reference field can be deleted and simple text can be used. To see these fields, toggle ALT-F9 in the Word document version of this guide to make the merge field codes appear or disappear.

Multiple OR Conditional Expressions

A or B or C or D

Multiple AND Conditional Expressions

A and B and C and D

Multiple Complex Conditional Expressions(A or B) and (C or D)

Referencing Term Exceptions in Pre-Existing Templates

The Check-In dialog box includes the ability to associate a term exception with a template when it is checked in.

This adds the term exception to the **Term Exception** field on the Template record and also adds an entry in the **Sections/Clauses** related list on the Term Exception for the template.



You must be using Contract Management and X-Author Contracts 7.0 and higher.

To reference a term exception while checking in

1. From the **X-Author Templates** tab, click **New** to display an empty Word doc.
2. Add content to the template and then click **Check-in**.
3. In the Check-In Template dialog box, as you enter details for the template note that the Term Exception list remains empty, as long as no Agreement Types have been selected.

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Check-In Template
Specify the attributes for this template

Type	Agreement	Business Object	Apttus__APTS_Agreement__c
Name	Agreement NA 001	Keywords	
Category	-- Select --	Next revision date	2/15/2015
Subcategory	-- Select --	Term exception	-- Select --
Language	-- Select --	Is Active?	<input type="checkbox"/>
Locale	-- Select --	Description	
Agreement types	Default Corporate Other Procurement Sales NDA Proposal Custom Proposal 1	Guidance	

* = Required Information

Check-In Cancel

4. Select one or more **Agreement Types** and the **Term Exception** list will be populated with term exceptions that have the same agreement type.

Check-In Template
Specify the attributes for this template

Type	Agreement	Business Object	Apttus__APTS_Agreement__c
Name	Agreement NA 001	Keywords	
Type	Agreement	Next revision date	2/17/2015
Category	Default	Term exception	-- Select --
Subcategory	Default	Is Active?	<input type="checkbox"/>
Language	English	Description	
Locale	English (United States)	Guidance	
Agreement types	Car Dealership MSA Customer Paragon NDA DELL		

* = Required Information

Check-In Cancel

5. Select a term exception and click **Check-In**.

The template record now has the term exception associated with it.

If you edit the template in X-Author later and change the term exception associated with it, the Template record and the old and new Term Exception records will be updated accordingly.

Image References in Templates

X-Author can display images in agreement documents by including them in RTF fields and referencing them in agreement templates.

For images to be displayed in an agreement document, there must be a reference to the image available in Salesforce for the merge server to use, so it can place the image in the generated agreement document. Apttus provides this ability through the *Upload Image* option in the header of an object. This provides the option to upload an image to an RTF field associated with a page layout, which can then be referenced via a merge field in the template used for the agreement document.



If you insert an image into an RTF field in Salesforce without using this feature, it will not be displayed in the agreement document.

The Apttus merge server can use the image's aspect ratio to determine its size on the page. If you set one of either width or height to some value and leave the other at zero, merge server will use the aspect ratio of the image to change the zero value to one which matches the aspect ratio. If you put values in for both width and height; that will be used. If no values are entered, the image will be placed in the document with its original measurements.

For example, you have a table cell that is 2x2 inches and an image which has a resolution of 800x600 pixels. If you put the image into the cell, you could set the image width to *2.0* and height to *0.0*. When the document is generated, merge server would set the image height to *1.5*, as the aspect ratio of an 800x600 pixel image is 1.33. If you remove the width and height attributes and values, the image will default to 5x7. You can change the default size by clicking Manage from the X-Author login dialog and then selecting the Templates tab.

You can use images up to 1MB in size and .gif, .jpg, and .png file types. To ensure the images will be presented in the document as expected you should work on a draft document in Word first, edit the images as required in an image editor application, and then upload them to an RTF field.



In case your system has not been configured to use image references, please have your System Administrator complete the required configuration in Salesforce, before you try to add and reference images.

To add images and upload them to an object

The object must be using a page layout that has the required fields added to it.

1. In Salesforce, go to the **Agreements** tab and select the one you want to upload images to.

2. Click **Upload Images** and select which RTF field to use and click **Next**.
Be sure to select the correct field for the page layout, as currently all RTF fields in the system are included in the drop-down list.
3. Click **Browse** and select the required file from the *Images* folder.
4. Click **Click Upload** and then click **Finish**.

The image is now displayed in the RTF field in the object's header section.

The image can now be added to templates.

To reference an image in a template

1. Login to X-Author and from the **X-Author Templates** tab click **Check-Out**.
2. Search for the required template and click **Open**.
3. Place the cursor in the template where you want to insert an image and click **Insert Merge Field**.
4. If this is an agreement template, select the **Agreement Fields** object
- or -
If this is a proposal template, select the **Quote/Proposal Fields** object.
5. Select the RTF field you want to insert as a merge field and click **Insert Field**.

The merge field is inserted into the document template in the following format, with default width and height measurements: {MERGEFIELD RTFFieldName\META renderAS=IMAGE;width=7;height=5;*MERGEFORMAT}. You can change the default width and height as required. Measurements are in inches.

When you preview or generate an agreement or proposal document using the template, images are included in the generated document.

To configure Upload Image action

This task assumes you want to configure an agreement object, other objects can also be configured in a similar manner.

1. Go to **Build > Create > Objects > Agreement**.
2. In the **Custom Fields & Relationships** section, click **New**.
3. Select **Formula** and click **Next**.

4. Enter a **Field Label** and **Field Name**, such as *Upload Image*, select **Text** from the **Formula Return Type** list and click **Next**.
 5. Enter the formula below, ensuring it is all on the same line in the formula field, like the screen shot, and click **Next**.
The code should be: `HYPERLINK("/apex/Apttus__ImageUpload?id=" & Id, IMAGE("/resource/Apttus__Button_UploadImage", "Upload Image"), "_self")`
- Upload Image (Text) =
HYPERLINK("/apex/Apttus__ImageUpload?id=" & Id, IMAGE("/resource/Apttus__Button_UploadImage", "Upload Image"), "_self")
6. Set the field-level access and click **Next**.
 7. Click **Save**.
You can select page layouts here, but as you will likely want to edit the page layouts to reposition the Upload Image button, it is not required at this point.

Upload Image is now available from the *Fields* list when you edit a page layout.



You could add image support to Quote/Proposals by repeating this task for that object. You should also create RTF fields for the images, if they do not already exist.

To create a Rich Text Area

This task assumes you want to configure an agreement object, other objects can also be configured in a similar manner.

1. Go to **Build > Create > Objects > Agreement**.
2. In the **Custom Fields & Relationships** section, click **New**.
3. Select **Text Area (Rich)** and click **Next**.
4. Enter a **Field Label** and **Field Name**, such as *RTF Image*, and click **Next**.
5. Set the field-level access and click **Next**.
6. Click **Save**.
You can select page layouts here, but as you will likely want to edit the page layouts to reposition the RTF area, it is not required at this point.

The rich text area is now available from the *Fields* list when you edit a page layout. You can create more rich text areas if you want to have more images available for your documents.

To configure Image Reference fields

You must have created an Upload Image field and RTF fields to be used with a page layout.

1. Go to **Build > Create > Objects > Agreement > Page Layouts** and select the one you want to add Image Reference functionality to.
2. From the **Fields** list select the RTF fields you want to use for images and add them to the **Information** section.
3. Then select **Upload Image** from the **Fields** list and add it to the **Information** section.
4. Click **Save**.
5. Repeat steps 1 to 4 for any other required Agreement object or Proposal object page layouts.

The fields will now be displayed on objects using those page layouts. When you go to the object, there will be an **Upload Image** button, along with the RTF fields in the object's header section.

X-Author Migration Manager Behavior

Migration and Dynamic Document Assembly

Migration Manager cannot be used to migrate document assembly objects (*Rulesets*, *Rules*, and *Components*). You will have to manually upload those objects or use Salesforce Dataloader.

Also if you have templates that have Dynamic Document Section related list line items, you should migrate your templates as follows, in this order:

- Upload *Document Assembly Rulesets* and *Document Assembly Rules* into the target org and de-activate each of them
- Run Migration Manager
- Upload *Document Assembly Component* records into the target org and activate the rulesets and rules

Migration, Referenced Clauses, and Merge Fields

In instances where new merge fields are added to a clause template, that is referenced by a parent agreement or proposal template, Migration Manager will not handle the update of the *Mergefields (Apttus__Mergefields2__c)* field on that parent template record with the merge fields from the clause.

To ensure that field is updated on the parent template record, you must open the template in X-Author and check it in. That action will update *Mergefields (Apttus__Mergefields2__c)*.

Template Versioning

Template Versioning provides a solution framework of document versioning at the Template level to track template versions against generated documents. Your organization's policies, requirements, legal and business practices may change over time, requiring templates to be updated. Rather than manually keeping track of template iterations, you can use template versioning to track and manage every version of your template throughout its lifecycle. Template versioning maintains those different versions as the template changes, giving template admins the ability to activate specific template versions based on their needs, and to observe how the template looked at every stage in the authoring process. Template versioning applies to both agreement and clause templates in your library.

In short, template versioning allows template admins to:

- Survey older contracts by viewing their associate template version to understand what was in the template at generation.
- Revert to previous template versions.
- Clone template versions to begin a new template lifecycle.
- Publish updated clauses and nested clauses across specific template versions.
- Understand the growth and evolution of a given template.

The following sections in this guide provide step-by-step instructions for managing templates in X-Author Contracts for orgs with Template Versioning enabled:

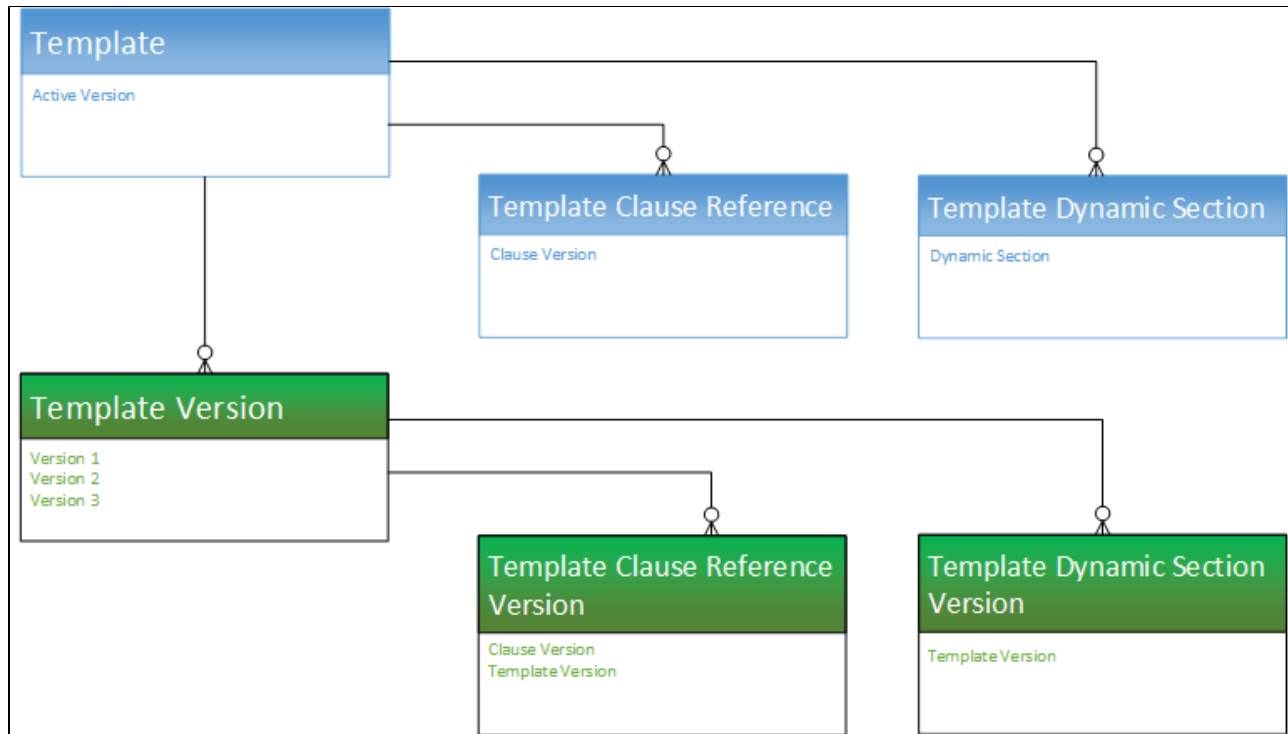
Behavior for versioned templates is different where described. All other X-Author Contracts functionality remains unchanged. Consult other chapters in this guide for information specific to your document format (FX2 or Pre-FX2).

To use Template Versioning it must be enabled for your org. Refer to Template Versioning in the *Contract Management Administrator Guide*.

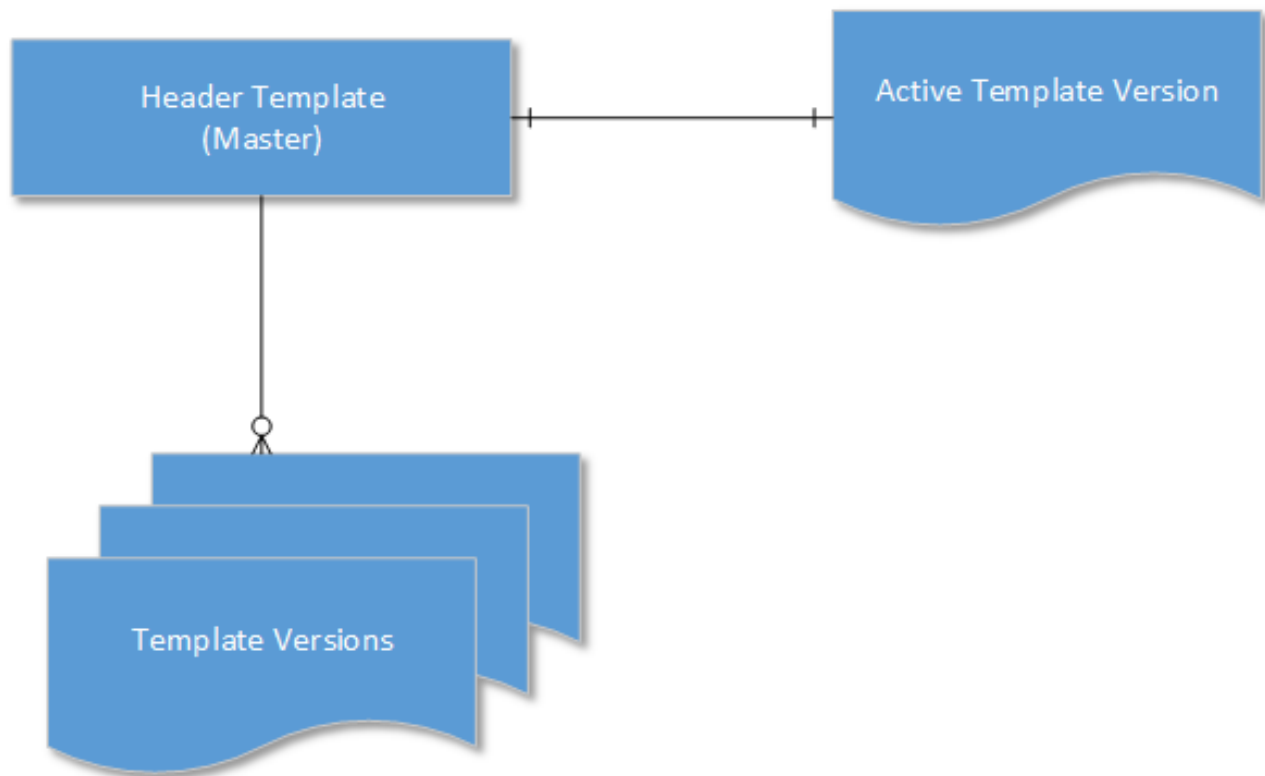
How Template Versioning Works

Each agreement or clause template in your org (with or without template versioning enabled) always consists of one template, and multiple child references to clauses and sections contained in that template. For every instance of that template, there is always only one template which can be considered active (the version selected by the user to generate the contract or the version of the clause inserted into an agreement template).

More specifically, whenever a new template is created by any means, one instance of the template is created, stored in the Template object in Salesforce, and any clauses or dynamic sections nested in the template are stored in the Template Clause Reference and Template Dynamic Section objects respectively. The Template object has a master-detail relationship to both child objects, as shown in the following figure.



Template Versioning preserves the same template, called the "**Header Template**," which has a one-to-one relationship with the Active Version of the template and its child objects, and a one-to-many relationship with other versions of the template, which also have versioned clause and section references, but are considered inactive.



Template Versioning introduces three new objects:

- **Template Version** – a detail object of the master Template object
- **Template Clause Reference Version** – a child object of Template Version that stores nested clause references
- **Template Dynamic Section Version** – a child object of Template Version that stores dynamic section references

When a user creates a new version of a template, the version information is incremented (e.g. from "1.0" to 2.0") but stored in the **Template Version** object and its child objects, NOT the **Template** object, creating a separate record of that template version. After creation, when and if a template version becomes the *active* version, data from the **Template Version** objects are copied to the **Header Template** objects and that template version becomes the new active version of the Header Template.

Creating New Template Versions

i This page contains instructions for creating new agreement or clause templates when Template Versioning is enabled. For instructions on creating templates without versioning, see [Creating New Agreement Templates \(Pre-FX2 Format\)](#) in this guide.

To create a new agreement or clause template:

1. Open Microsoft Word and [connect to X-Author Contracts](#).
2. From the X-Author Templates tab, click **New**. The Create New Template dialog is displayed.

3. Enter values in the fields provided as described in the following table (fields marked in **red** are required):

Field	Description
Name	Give the template a meaningful name according to its agreement type.
	Choose the format of your template (FX2 or Pre-FX2)

Field	Description
Framework Format	
Business Object	Choose the valid business context (for contracts, "Agreement")
Type	Choose the type of template to create (e.g. "Clause" or "Agreement").
Category	Choose the administrator-defined category.
Subcategory	Choose the administrator-defined subcategory based on the chosen category.
Language	Choose the default template language.
Locale	Choose the default template locale.
Next Revision Date	Identify a date for the next revision of the template.
Term Exception	Use the lookup to search for an choose a Term Exception to apply to the template.
Keywords	Enter comma-separated keywords to associate with the template. Can be used as tags with Document Finder.
Description	Enter a description for the template.
Guidance	Enter guidance to help users determine the purpose of the template.
Agreement Types	Choose which Agreement Types are valid for this template. Use the arrow buttons to determine available agreement types.

4. Click **Create New**. The template is created in the system and flagged as transient. Note: Only the header information is captured. You must [check in](#) the template to create a version.

Checking In Template Versions

i This page contains instructions for checking in templates when Template Versioning is enabled. For instructions on checking in templates without versioning, see [Checking In a Pre-Existing Template](#) in this guide.

After you create a new template or make changes to an existing template, you can check-in the template to update its contents in Salesforce and create a new version. Depending on the version of the template, when you check it in it may or may not become the active version of the template.

To check in a template version

1. From the X-Author Templates ribbon, click **Check-In**. The Checkin Template dialog is displayed.

The screenshot shows the 'Check-In' dialog box for X-Author Contracts. The dialog is titled 'X-Author Contracts' and has 'Check-In' and 'Cancel' buttons at the top. The main content area is titled 'Check-In' and contains the following fields and sections:

- Name:** CC FX2 SOW
- Business Object:** Apttus_APTS_Agreement__c
- Framework Format:**
- Type:** Agreement
- Category:** Default
- Subcategory:** Default
- Language:** English
- Locale:** English (United States)
- Next Revision Date:** 1/25/2016 [5/4/2016]
- Term Exception:** --None--
- Keywords:**
- Description:**
- Guidance:**
- Agreement Types:**
 - Available:** Default, NDA, SLA
 - Chosen:** SOW
- Comments:**
- Update Current Version:** ☐
- Activate:** ☐

At the bottom of the dialog, there are 'Check-In' and 'Cancel' buttons.

2. Enter values into the fields provided as described in the following table (fields marked in red are required):



Note: Any changes made to fields during Check-In update template information for the master template record. When you check out a previous or new version after updating this information, the template properties will reflect these changes.

Field	Description
Name	Enter a new name for the template.
Category	Choose an option from the list to update the template category.
Subcategory	Choose an option from the list to update the template subcategory.
Language	Choose an option from the list to change the default language for the template.
Locale	Choose an option from the list to change the default locale for the template.
Next Revision Date	Identify a new date for the next revision of the template.
Term Exception	Choose an option from the list to change the term exception applied to this template.
Keywords	Enter comma-separated keywords to associate with the template. Can be used as tags with Document Finder.
Description	Enter a new description or modify the existing description for the template.
Guidance	Enter new guidance or modify existing guidance to help users determine the purpose of the template.
Comments	Enter comments that apply to this version of the template. Comments are displayed to template administrators during check out and are stored in the Template Version object record.

Field	Description
Agreement Types	Add or remove Agreement Types to associate with this template.
Activate	Check this box to activate the new version of this template when check-in is complete. If disabled, the new version will still be checked in but the currently active version will remain the same. You can activate this version at a later time.
Update Current Version	Check this box to update the current version you have checked out. This template will replace the current version and will not create a new version of the template.

3. Click **Check-In**. This template version is checked in and the version number is incremented by 1 (unless Update Current Version is checked–see above). For example, if you have checked out Template v2.0, when you check in the new version, it will be checked in as Template v3.0. Template version information is updated and added to the Template details in Salesforce. The name of the template and the document itself will contain no version information.

Checking Out Template Versions



This page contains instructions for checking out templates when Template Versioning is enabled. For instructions on creating templates without versioning, see [Checking Out an FX2 Template](#) or [Checking Out a Template](#) in this guide.


To work with any template version, you must check it out directly from X-Author Contracts. When you check out a template version, you are only working with the specific version of the agreement or clause. As with contracts, when you check out a template a lock is put on the document, preventing other users from editing it while you are working on it. After you release the lock or check in the template, the lock is released. Note that the lock only prevents other users from checking out the *version* you are working on, not every version of the template.

To check out a template version

1. Open Microsoft Word and connect to X-Author Contracts.
2. From the X-Author Templates tab, click on **Check-Out**. The Checkout dialog is displayed.



If your template document is already open because you have checked it in or released the document lock, you can instead click the arrow below the Check-Out icon and choose **Check-Out Currently Opened Document** to quickly check out the current document.

3. Enter a name, description or keyword in to the search box. Use the filters below the box to restrict your search to a specific template type (e.g., Agreement or Clause) and further refine your search.
4. Click the **Search** icon  to display a list of Templates that match your criteria. Any guidance saved in the template record is displayed in the far-right column.

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Checkout

SOW

Type: Agreement Category: --None-- Subcategory: --None--

Locale: --None-- Language: --None--

Templates

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Action	Name	Guidance
Select	SOW ABC	
Select	SOW Alt	
Select	CC FX2 SOW	
Select	CC FX2 SOW Alt	

- Click **Select** to choose a template to check out. The Template Versions dialog is displayed. Comments saved in the version record for each template version are displayed in the far-right column.

Checkout

SOW

Version: Modified By: User

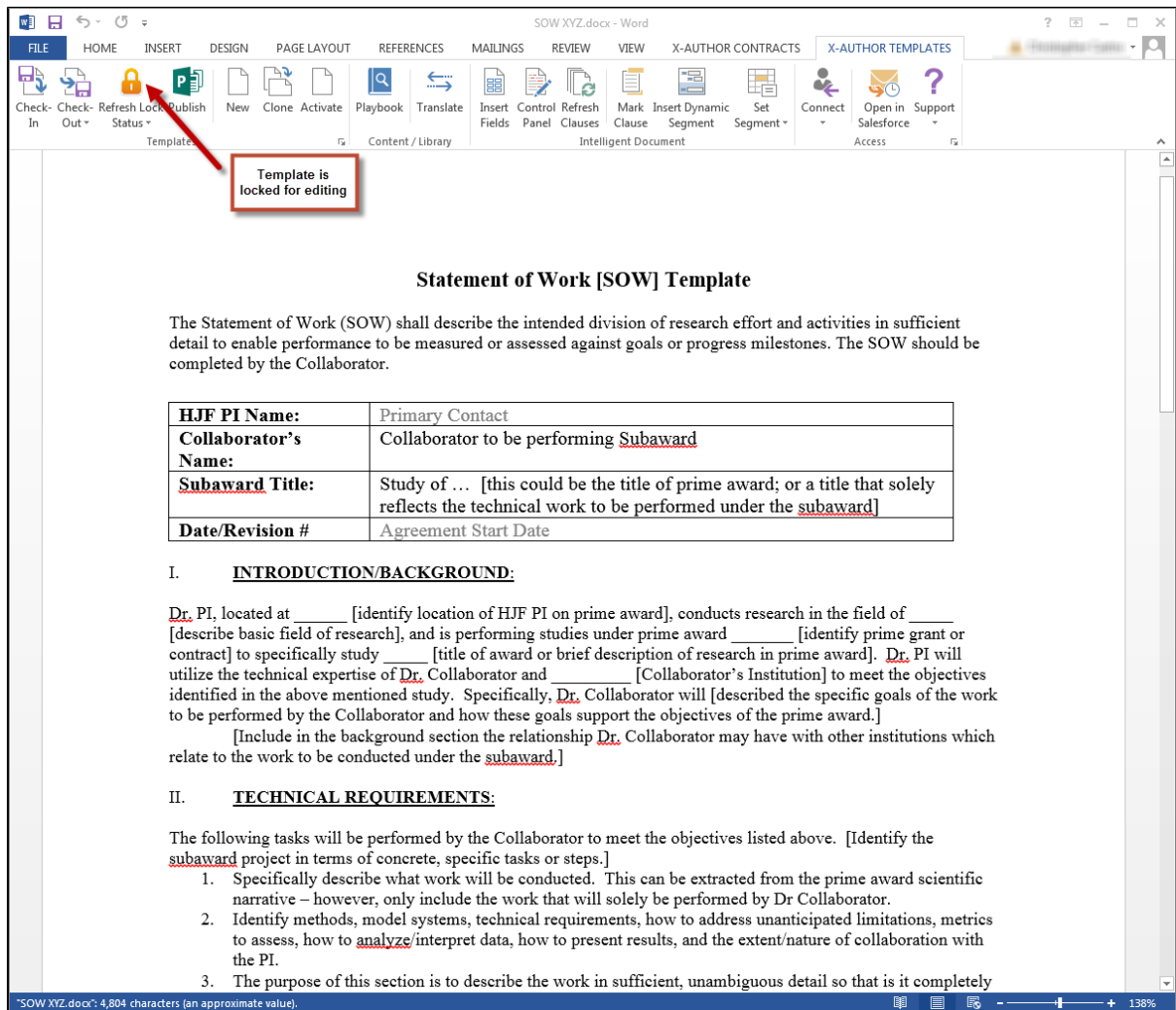
Last Modified After: [4/29/2016] Last Modified Before: [4/29/2016]

Template Versions

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Action	Name	Version Name	Version Number	Comments
Open	SOW XYZ	v2.00	2.00	
Open	SOW XYZ	v1.00	1.00	This version is auto generated from the original templat
Open	SOW XYZ	v4.00	4.00	Here are some comments.
Open	SOW XYZ	v6.00	6.00	

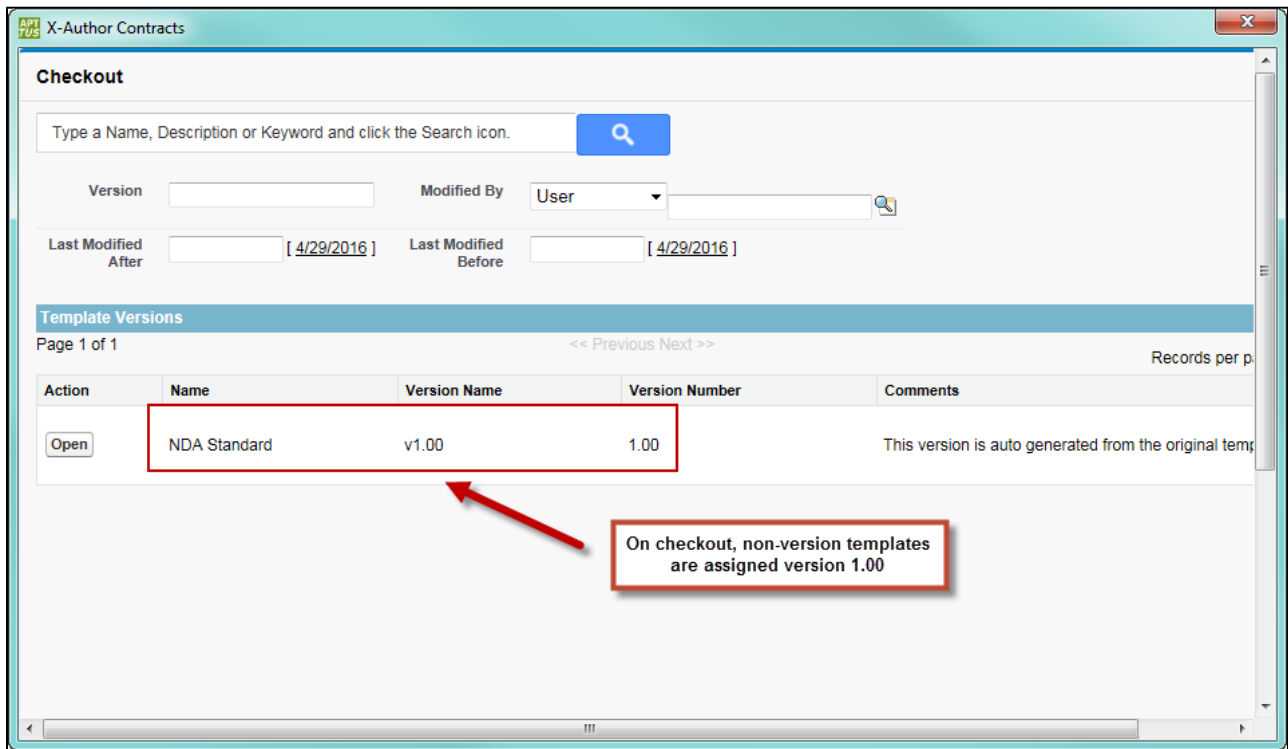
6. Click **Open** next to the version you want to check out. The template document is checked out of the system and locked for editing. X-Author Contracts automatically detects whether the document is FX2 or Pre-FX2 format.



You are now ready to work with the template. Refer to the appropriate section in this guide for instructions on working with fields, clauses and other elements for FX-2 or Pre-FX2 templates.

Checking Out a Template with No Versions

You will likely have many templates in your org that were created before enabling Template Versioning. In this case, these templates will not have a template version. After Template Versioning is enabled, the first time you check out a non-versioned template, the system will automatically assign it as the version 1.00.



The version number is added to the Template record as Template Version. The next time you [check-in the template](#), the version will increment as normal.

Cloning Template Versions

i This page contains instructions for cloning templates when Template Versioning is enabled. For instructions on creating templates without versioning, see [Cloning a Template](#) in this guide.

You can clone a template when the need arises to have a template with similar language or elements. When you clone a template version, a new template record is created as version 1.0. Remember the following when cloning a template version:

- You can only clone the *active version* of a template.
- You cannot use the clone button if any version other than the active version is open in X-Author.
- Cloning a template record is just like creating a new one except a copy of the document you are cloning is attached to the new record as the first version.

To clone a template version

1. Open Microsoft Word and [connect to X-Author Contracts](#).
2. [Check out](#) the template version you want to clone.
3. From the X-Author Template tab, click **Clone**. The Clone Template dialog is displayed.



The Clone button will not be available unless the template you are cloning is the active version.

4. Make changes to the template header information as necessary. By default, the template Name appends the word "Copy" to the original name. For information on fields in the Clone Template dialog, refer to [Creating New Template Versions](#).
5. Click **Clone**. After the cloning is successful:
 - X-Author creates a copy of the template as a new template record with the new name and header information.
 - The template version information is saved to the record as version 1.0.

- A copy of the template document is saved to the Notes & Attachments Related List of the template record.
- The currently opened document is renamed to *TemplateName.docx* and remains checked out. When you check in the template the version will be incremented as usual.

To View Parent Template Version

You can clone a template from another template version and can track the version of the parent template from which the current template was cloned. To view the parent version of the current template:

1. Login to Salesforce.
2. Go to **Templates** tab to view the template record.
3. Go to **Versions** related list.
4. In the versions related list you can see the parent version of the current template in the **Parent Version** column. You can also see the active version from the **Active Version** field in the Publish Templates related list. The parent version of the new template created is blank because it does not have a parent template.

Template Detail

▼ Publish Templates

Published Doc ID: [] Needs Publishing: ☐

Publish: [Publish] Published Date: []

Unpublish: [] Publish Status: []

Name: CLM-1891 Test A1 Number Of Clauses: 0

Description: [] Record Type: []

Agreement Types: Default, Corporate; Other Reference: 378963f8-9ecd-a454-70bb-b61079353464

Business Object: Apttus_APTS_Agreement__c Owner: []

Type: Agreement Keywords: []

Category: Category Guidance: []

Subcategory: Subcategory Language: English

IsActive: ☒ Locale: English (United States)

Framework Format: Pre FX2 Next Revision Date: []

Activate Version: [Activate Version] Created By: []

Active Version: v3.00 Last Modified By: []

Term Exception: []

► Test Fields

► Content & Mergefields

Versions

New Template Version

Action	Version Name	Is Active	Parent Version
Edit Del	v1.00	<input type="checkbox"/>	
Edit Del	v2.00	<input type="checkbox"/>	v1.00
Edit Del	v3.00	<input checked="" type="checkbox"/>	v2.00
Edit Del	v4.00	<input type="checkbox"/>	v1.00



To view parent version, make sure to add the Parent Version column to the Versions related list using Edit Layout option from Salesforce.

Activating Template Versions

You can use X-Author to activate a template version to make it the current active version. When a contract is generated, the active version of the template will always be used. When a template is created, the first version becomes the active version. Every subsequent version of a template requires the administrator to activate it either on check-in or manually from X-Author or Salesforce. For information on activating template versions from Salesforce, refer to [Activating Template Versions](#) in the Contract Management Administrator guide.

In X-Author, there are several ways to activate a template version, depending on your objective. You can:

- Activate a template version at check-in.
- Activate a template version that is currently checked out.

- Activate any version of a template without checking it out.

To activate a template version at check-in

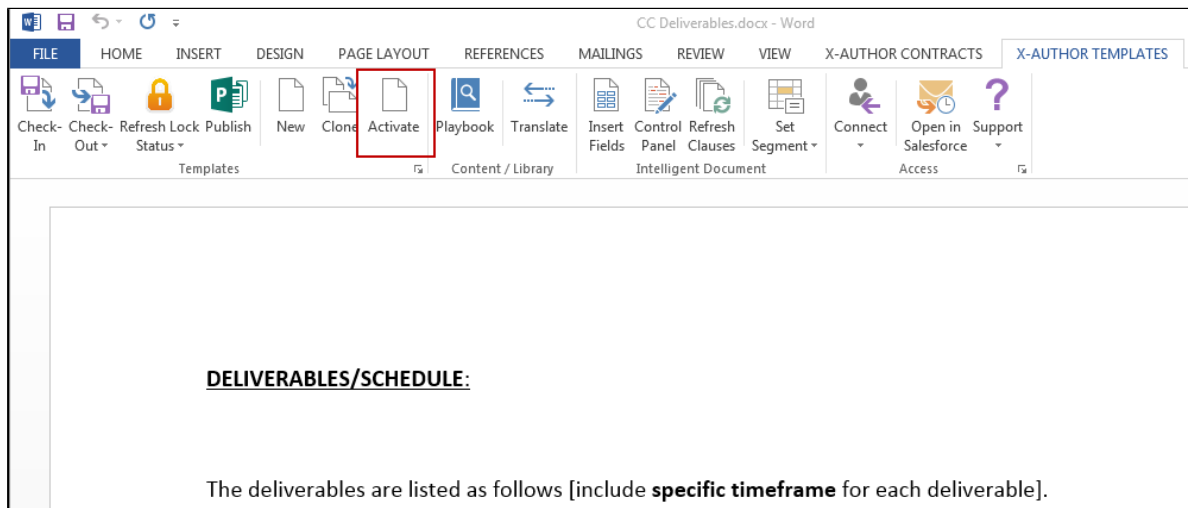
1. Complete all steps required for checking in your template as described in [Checking In Template Versions](#) before clicking **Check-In**.
2. Click the **Activate** check box to activate this version at check-in. *If you do not enable this check box, the current active version will remain the active version.*

The screenshot shows the 'Checkin Template' dialog box in the X-Author Contracts application. The dialog contains various fields for template metadata and a red box highlighting the 'Activate' checkbox, which is checked. The 'Check-In' button is visible at the bottom.

3. Click **Check-In**. Your template is checked in and increments to a new version number. This version of the template is now active.


To activate a currently checked out template

1. From the X-Author Templates tab, [check out](#) the contract you want to activate.
2. From the X-Author Templates tab, click the **Activate** button. You can only activate checked out templates that are not the active version.



3. When the template is successfully activated, the Activation dialog displays the message "Template Activated."

To activate any template version

1. Open Microsoft Word and connect to X-Author Contracts.
2. From the X-Author Templates tab, click **Activate**. The Activation dialog is displayed.
3. Enter a name, keyword or description associated with your template in the search dialog, choose any filters from the provided fields, and click the **Search** icon . A list of templates matching your search is displayed.
4. Click **Select** next to the template record that contains the version you want to activate. A list of versions is displayed, along with any comments entered when the version was last checked in.

Activation

Type a Name, Description or Keyword and click the Search icon.

Version Modified By

Last Modified After Last Modified Before

Template Versions

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Action	Name	Version Name	Version Number	Comments
<input type="button" value="Activate"/>	CC FX2 SOW	v3.00	3.00	This version is auto generated from the original ten
<input type="button" value="Activate"/>	CC FX2 SOW	v4.00	4.00	
<input type="button" value="Activate"/>	CC FX2 SOW	v2.00	2.00	This version is auto generated from the original ten
<input type="button" value="Activate"/>	CC FX2 SOW	v1.00	1.00	This version is auto generated from the original ten

5. Click on **Activate** next to the version you want to activate.

Publishing Template Versions

Publishing templates improves document generation performance by taking referenced clauses in a template and "publishing" them before the template is used to generate a document. In Pre-FX2, this takes the content of the clause and enters it into the template body as static text, as if it was another part of the main template. In FX-2 format, updated clauses are inserted into the template.

Template Versioning allows you to be more selective when publishing templates. You can choose which versions to publish, updating nested clauses in some versions while preserving older versions of your clauses in other templates. In template versioning, publishing adopts a "bottom-up" approach. You publish the main template with nested clauses, but the process actually travels up from the updated clause to the main template itself. For example, consider a template with a nested clause which contains an updated clause. First the clause is updated, next its parent clause is updated, and finally the main template is updated. For every update, each template version is incremented by 1.

The process for both manually and automatically publishing templates in X-Author Contracts is unchanged. Refer to [Publishing](#) for step-by-step instructions for publishing your templates.

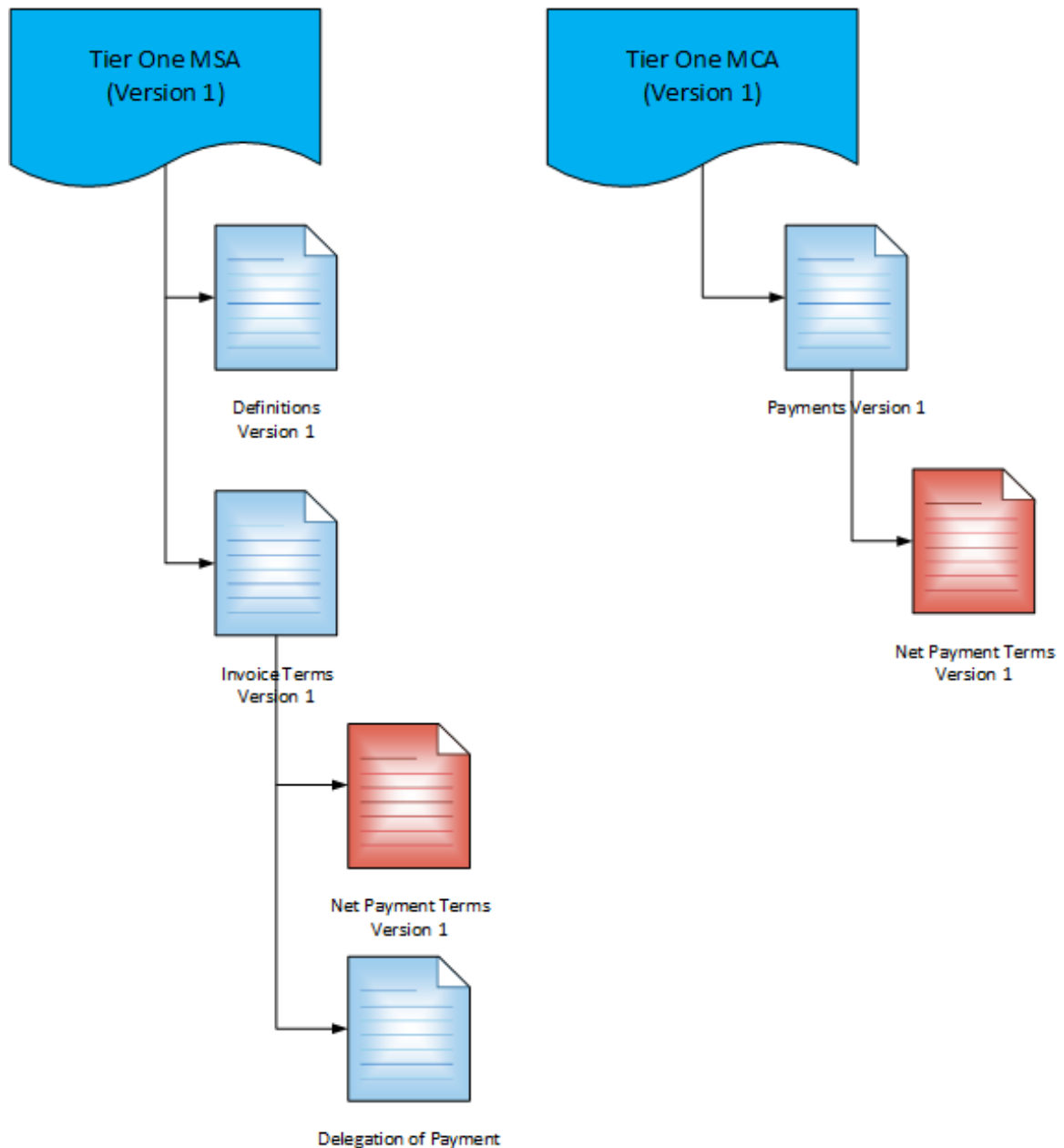


If a template has not yet been versioned and is published, the template is published with two versions: a pre-published version and the published version.

Consider the following scenario for publishing templates when a clause has been updated:

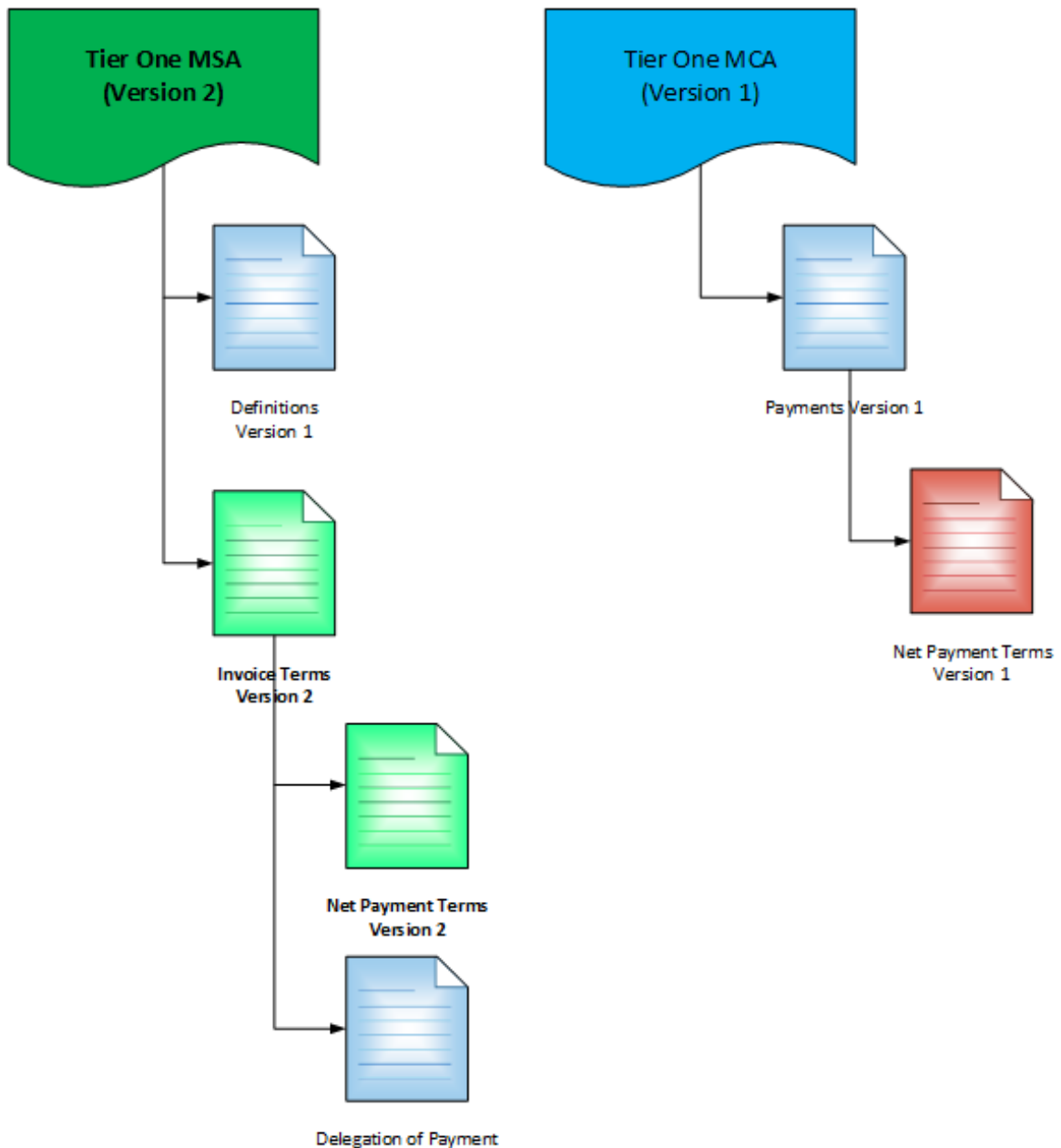
① Use Case: MSA Payment Terms Publish Scenario

Sam Sales works for Tier One Systems, and is managing two different master templates, and MSA and MCA. Both templates contain the same Net Payment Terms clause (version 1.0). The figure below represents the template and clause hierarchy for both templates. Note the Net Payment Terms clause is nested under both.



Sam is given instructions to update the Net Payment Terms clause to a Net 45 from Net 30 for MSA contracts only. Sam updates the clause to version 2.0 and activates it. This flags both parent clauses and master templates as "needs publishing." Because only the MSA contracts need to reflect the updated Net Payment Terms clause, Sam elects to publish just the MSA master template to a new version.

When the template is published, the Net Payment Terms nested in the MSA template, the Net Payment Terms clause, the MSA Payment Terms clause above it and the MSA master template are all updated to version 2.0. MSA template 2.0 is now the active template version. The MCA template is not published and still contains version 1.0 of the Net Payment Terms clause.



All MSA contracts using this template will now use the updated clause version.

Migrating Template Versions

X-Author Migration Manager allows you to perform numerous functions, including migration of templates from one Salesforce org to another. When you migrate non-versioned templates, all template records are essentially copied to the new org with no changes.

With Template Versioning, migration of agreement and clause templates to a new org resets version numbers. All migrated templates are reset to version 1.0 when transported. In addition, if a template has been migrated to another org, and is migrated again into the same org, the newer version will replace any versions that are present.

To understand this more easily, it is important to remember that a template's active version is always copied to the Template record's header details. So, during any migration, the *active* version of any templates migrated becomes the new version 1.0, regardless of how many versions of that template may exist as nested clause templates. Therefore, any templates that remain unpublished and contained older versions of clauses will still contain those clauses, but there will only be version information in the template record for the active version of the clause template.



Please note that during template migration, bookmarks created with the older versions of X-Author Contracts, that is versions before 9.0810, are not migrated by the Migration Manager. To overcome this limitation, remove the instances of such bookmarks from the template and re-insert them with the latest version of X-Author Contracts plugin (9.08010 or later).

Cloning a Template

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

Pre-requisites:

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

To clone a template from an existing template:

1. Click Clone on the X-Author Templates ribbon in Microsoft Word.

2. 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 cloned template will be *Clause Agreement Template **Copy***.
3. Click Clone to save the cloned template to Salesforce.

Clone Template
Specify the attributes for this template

Type	Agreement	Business Object	Apttus__APTS_Agreement__c
<ul style="list-style-type: none"> Name (Required): Pub Software License Template Copy Agreement types (Required): Default, NDA Unilateral, License, MSA Category (Required): Default Subcategory (Required): Default Language (Required): English Locale (Required): English (United States) Enable Formatting (Required): <input checked="" type="checkbox"/> Date Format (Required): M/dd/yyyy Currency Format (Required): None Number Precision (Required): 0 Currency Precision (Required): 2 	<ul style="list-style-type: none"> Keywords (Required): Next revision date (Required): 10-01-2017 Term exception (Required): -- Select -- Is Active? (Required): <input checked="" type="checkbox"/> Description (Required): Software license template for TPub 	<ul style="list-style-type: none"> Guidance (Required): 	
Cloned from (Required): TPub Software License Template			



* = Required Information

Clone Cancel

NOTE

You have the option to change Locale settings for your template when you clone it. To know how to define locale options when cloning, refer to [Defining Locale Options when Cloning](#).

Using the Playbook

Playbook helps you to search for a template, clause, section or supporting documents that can be inserted into the template as inline text or smart content controlled text. By default the Playbook pane is displayed on the right, within the main Word window, but it can be re-positioned, by clicking  and choosing **Move**. It can be closed by clicking Playbook again or clicking .

While searching for clauses in the Playbook pane, within Microsoft Word, you can select **Show Filter** to add search criteria. Filters let you narrow down your search by specifying search criteria like Type, Category, Sub-Category, Locale and Language etc.

Playbook for Pre-FX2 Templates

Let's replace one of the clauses in our agreement template with an pre-existing clause from the Playbook. To replace an existing clause:

1. Open a pre-existing template using **Check-Out**. The template document opens in Word. Select a pre-existing paragraph or place the cursor in appropriate place to replace or insert a clause.
2. Click **Playbook** and search for the required clause you want to insert. Only clauses that have an agreement type that matches the agreement type of the template can be displayed in the search results.
3. To insert the clause as inline text, click **Insert** in the Playbook dialog. If the text is highlighted and the clause is inserted from the playbook, then the highlighted text is completely replaced with the inserted text.

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The screenshot shows the X-Author Contracts interface. The main document area displays a contract with several clauses. Clause 5, titled "Site Evaluation", is highlighted with a red box. The Playbook sidebar on the right shows a search bar and a list of templates. The "Non FX2 Training Clause AS" is highlighted in the list.

Contract Document Content:

C. Ten Percent (10%) of the Purchase Price within thirty (30) days after Buyer's Acceptance of the Equipment.

In the event that Buyer does not accept the Equipment, Company shall refund all prior payments within fifteen (15) days of receipt of notification from Buyer that it does not accept the Equipment.

All invoices submitted to Buyer by Company shall list the items of Equipment purchased thereunder in the same sequence used in Buyer's Purchase Order for such Equipment. Buyer's Purchase Order Number shall appear on all invoices submitted to Buyer hereunder.

4. **Taxes.** Buyer represents that it is a tax-exempt corporation under Section 501(c)(3) of the Internal Revenue Code of the United States, as amended, and under applicable laws of the State of Maryland. The State of Maryland tax-exempt number for Buyer is _____. Company shall take all action required to cause the purchase of the Equipment hereunder to be treated as a tax-exempt transaction, and in no event shall Buyer be responsible for any sales, use, property, gross receipts, or similar taxes levied against any party to this Agreement.

5. **Site Evaluation.** At no cost or expense to Buyer, Company shall furnish Buyer with site preparation studies, which shall include, but not be limited to, power, air conditioning, and operational considerations with respect to the Equipment. Company's personnel shall coordinate their activities with and avoid interference with Buyer's employees and construction contractors working to prepare the Installation Site (as hereinafter defined) for receipt of the Equipment. A pre-installation instruction manual will be provided to Buyer by Company upon request.

6. **Site Preparation.** Buyer shall be responsible for preparing a site suitable for the installation and operation of the Equipment (hereinafter "Installation Site").

7.

Playbook Sidebar:

Type a Name, Description or Keyword and click the Search icon.

Training

Hide Filter

Type: Clause

Category: --None--

Subcategory: --None--

Locale: --None--

Language: --None--

Page #: 1 out of 1

Templates:

Action	Name	Guidance
Insert	Non FX2 Training Clause AS	
Insert Reference		

- After you have inserted the clause, click **Check-In**.
- To replace the recently inserted clause, select the inserted clause in the template. Open **Playbook**, select another clause and click **Insert**.

The screenshot shows the X-Author Contracts interface. The main document area displays a contract with several clauses. Clause 5, titled "Training", is highlighted with a red box. The Playbook sidebar on the right shows a search bar and a list of templates. The "Non FX2 Delivery Clause AS" is highlighted in the list.

Contract Document Content:

4. **Taxes.** Buyer represents that it is a tax-exempt corporation under Section 501(c)(3) of the Internal Revenue Code of the United States, as amended, and under applicable laws of the State of Maryland. The State of Maryland tax-exempt number for Buyer is _____. Company shall take all action required to cause the purchase of the Equipment hereunder to be treated as a tax-exempt transaction, and in no event shall Buyer be responsible for any sales, use, property, gross receipts, or similar taxes levied against any party to this Agreement.

5. **Training.** Prior to Acceptance of the Equipment or at such other time as the parties may mutually agree, Company shall provide, at no cost or expense to Buyer, training in operation of the Equipment for employees designated by Buyer.

6. **Site Preparation.** Buyer shall be responsible for preparing a site suitable for the installation and operation of the Equipment (hereinafter "Installation Site").

7. **Confidential Information**

1.1 To the extent authorized by the law, the parties may wish, from time to time, in connection with work contemplated under this Agreement, to disclose confidential information to each other ("Confidential Information"). Each party will use reasonable efforts to prevent the disclosure of any of the other party's Confidential Information to third parties for a period of three (3) years after the termination of this Agreement, provided that the recipient party's obligation shall not apply to information that:

a. is not disclosed in writing or reduced to writing and so marked with an appropriate confidentiality legend within thirty (30) days of disclosure;

b. is already in the recipient party's possession at the time of disclosure thereof;

c. is or later becomes part of the public domain through no fault of the recipient party;

Playbook Sidebar:

Type a Name, Description or Keyword and click the Search icon.

Show Filter

Page #: 1 out of 1

Templates:

Action	Name	Guidance
Insert	Non FX2 Confidentiality Clause AS	
Insert Reference		
Insert	Non FX2 Delivery Clause AS	
Insert Reference		
Insert	Non FX2 Training Clause AS	
Insert Reference		

Page #: 1 out of 1

- You will see that the clause inserted in the previous steps is now replaced with the new clause.

Note that there are two additional activity log entries since the last update of the template.

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First one – Replaced text with section 'Non FX2 Training Clause AS' - was added when we replaced the template text with a pre-existing clause from the Library. The second log is- Replaced text with section 'Non FX2 Delivery Clause AS' when you replaced the training clause with the new clause.

The screenshot displays the Salesforce X-Author Contracts interface for a template named 'Purchase and Sale FX1 AS'. The interface is divided into several sections:

- Template Detail:** Shows metadata for the template, including Name, Type, Reference, Description, Agreement Types, Category, Subcategory, Output Page, IsActive, Owner, Cloned From, Term Exception, Keywords, Guidance, Language, Locale, Framework Format, Next Revision Date, Created By, and Last Modified By.
- Content & Mergefields:** Displays the Text Content and Mergefields for the template.
- Activity History:** A table showing the history of updates to the template.

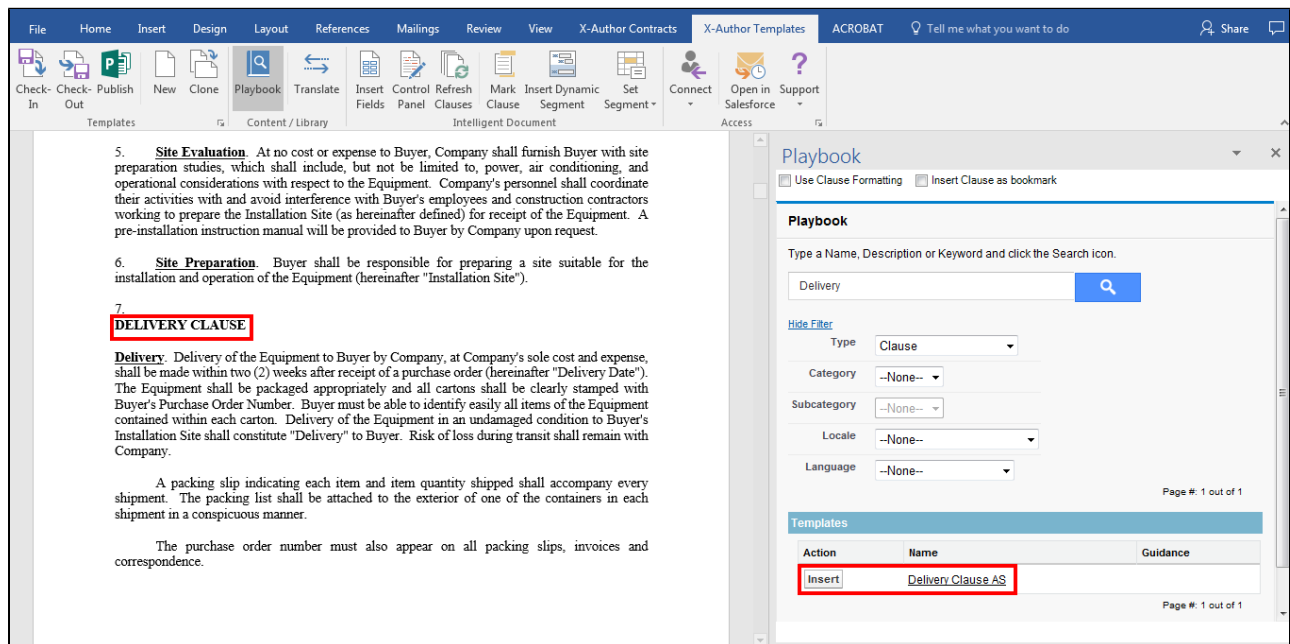
The Activity History table has the following columns: Action, Subject, Name, Task, Due Date, Assigned To, and Last Modified DateTime. The table contains four rows of activity, with the last two rows highlighted in red:

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified DateTime
Edit Del	Updated Template		✓	3/7/2017	Anubha Singh	3/7/2017 1:34 AM
Edit Del	Replaced text with section 'Non FX2 Delivery Clause AS'		✓	3/7/2017	Anubha Singh	3/7/2017 1:33 AM
Edit Del	Updated Template		✓	3/7/2017	Anubha Singh	3/7/2017 1:28 AM
Edit Del	Replaced text with section 'Non FX2 Training Clause AS'		✓	3/7/2017	Anubha Singh	3/7/2017 1:28 AM
Edit Del	Updated Template		✓	3/3/2017	Anubha Singh	3/3/2017 2:52 AM

Playbook for FX2 Templates

Playbook for FX2 templates allows you to search for a template, clause, section or supporting documents that can be inserted into the template as inline text or smart content controlled text. For inserting a clause from the Playbook in an FX2 formatted template:

1. Login to X-Author Templates in word and open a pre-existing template using **Check-Out**.
2. The template document opens in Word. Select a pre-existing paragraph or place the cursor in appropriate place to replace or insert a clause.
3. Click on **Playbook** on X-Author Templates ribbon and search for the required clause you want to insert.
4. Click **Insert**.
5. After you have inserted the clause, click **Check-In**.



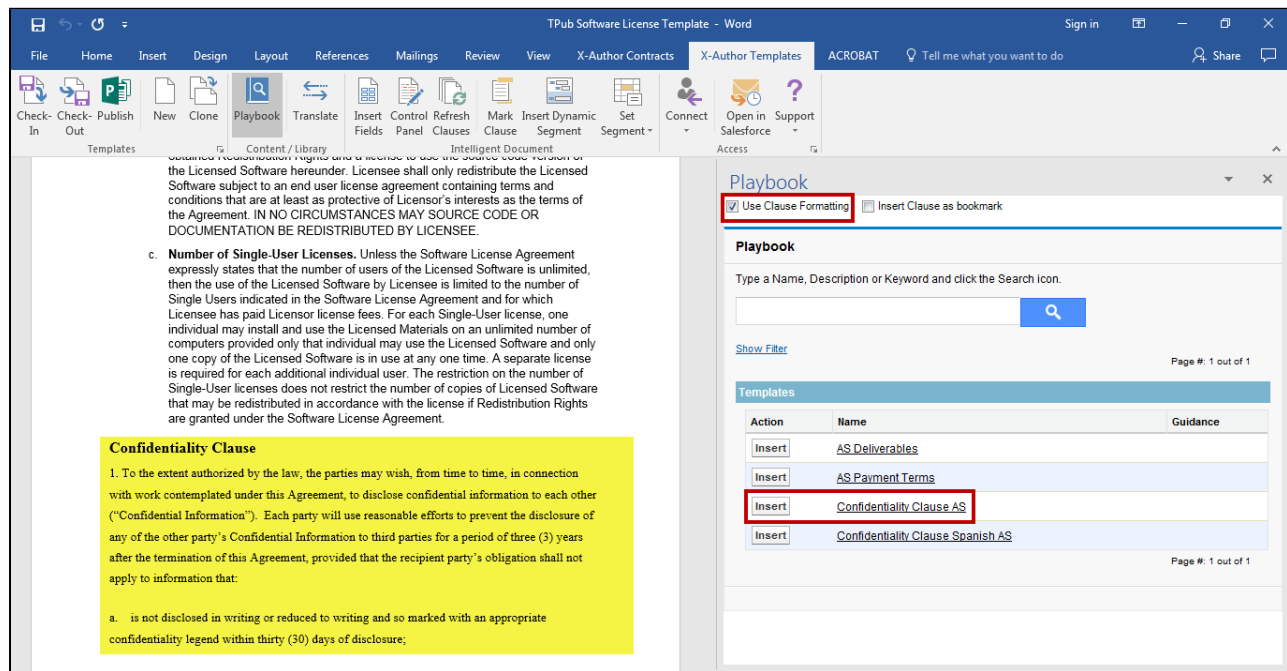
In FX2 Templates, you can no longer insert a clause reference. You can only enter the clause as an inline text. You can still insert clause references into a pre-existing format Template.

Clause Formatting on Insert Clause in FX2 Formatted Templates

For FX2 formatted templates, X-Author for Contracts has a feature that allows you to choose whether to adopt template formatting or retain clause formatting when a clause is inserted into a template. To use this:

1. Login to X-Author Templates in word and open a pre-existing template using **Check-Out**.
2. The template document opens in Word. Select a pre-existing paragraph or place the cursor in appropriate place to replace or insert a clause.
3. Click on **Playbook** on X-Author Templates ribbon and search for the required clause you want to insert.
4. On the top of Playbook Pane, select **Use Clause Formatting** checkbox.
5. Click **Insert**.
6. After you have inserted the clause, click **Check-In**.

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Note that the inserted clause (highlighted in yellow above) retains the formatting of the clause.



You cannot apply Use Clause Formatting for Document Assembly Ruleset clauses, since the same settings do not apply to inserted nested clauses within Document Assembly Rulesets component clause.

Inserting Clauses as Bookmarks (FX2)

When managing a contract, there is often legal language that may be required to exist in the agreement document in multiple locations. Using the standard workflow when designing an agreement template, the Template Administrator inserts clauses directly into the template, which are rendered in the agreement document when it is generated. Contract managers and negotiators then open the generated document and insert, modify or delete clauses as needed. The limitation with the standard workflow is that when numerous occurrences of the same clause are needed in a contract, each must be manually added to the template by either the Template Admin or the Contract Manager.

This feature provides Template Administrators with the ability to instead insert bookmarks into the Agreement Template. Each bookmark contains a reference to a single clause in the template library. When the agreement document is generated, clauses inserted as bookmarks are not populated in the agreement document. Instead, when a Contract Manager works with the

document, they have the option to automatically insert the content of a clause at *every location in the document with the same bookmark using a single click*. This provides greater flexibility and less work when multiple occurrences of the same clause are required in a document.

The Clause Bookmark feature requires **X-Author Contracts for Word version 8.5.0713 or later** and a connected org with **Apttus Contract Management package version 8.5.0346 or later** installed. Clause bookmarks only work with FX2 format templates and documents.

Configuring Clause Bookmark Functionality

Adding Clause Bookmark functionality to X-Author Contracts requires configuration of the Admin properties described in the following table.

Admin Property	Description	Possible Values
APTS_AllowBookmarkInsertion	Enables the "Insert Clause as Bookmark" check box in Playbook for X-Author Templates.	True/False
APTS_HighlightClauseOnBookmarkInsertion	Automatically highlights all clauses immediately after being inserted from bookmark locations in X-Author Contracts.	True/False
APTS_BookmarkHighlightColor	Defines the color to use when highlighted clauses are	Recommended values (specify one): wdBlack, wdBlue, wdBrightGreen, wdDarkBlue, wdDarkRed, wdGreen (default) , wdGray25,

Admin Property	Description	Possible Values
	inserted as bookmarks after generating the agreement.	wdGray50, wdPink, wdRed, wdTeal, wdTurquoise, wdViolet, wdWhite, wdYellow.

To configure Admin Properties

1. Log in to the connected Salesforce org.
2. Go to the **Admin** tab in Apttus Contract Management.
3. Click **New** to add a new Admin property.
4. Enter the Admin Property name into the **Name** field (e.g., "APTS_AllowBookmarkInsertion").
5. Enter the property's value into the **Value** field.
6. Click **Save**.
7. Repeat steps 3 – 6 for each property you want to configure.

APTS_BookmarkHighlightColor	wdGreen
APTS_HighlightClauseOnBookmarkInsertion	True
APTS_AllowBookmarkInsertion	True



Only **APTS_AllowBookmarkInsertion** is required to enable this feature.

Inserting Clauses as Bookmarks in Agreement Templates

Before Contract Managers can take advantage of the Clause Bookmark feature, Template Administrators must insert clause references as bookmarks in the agreement template.

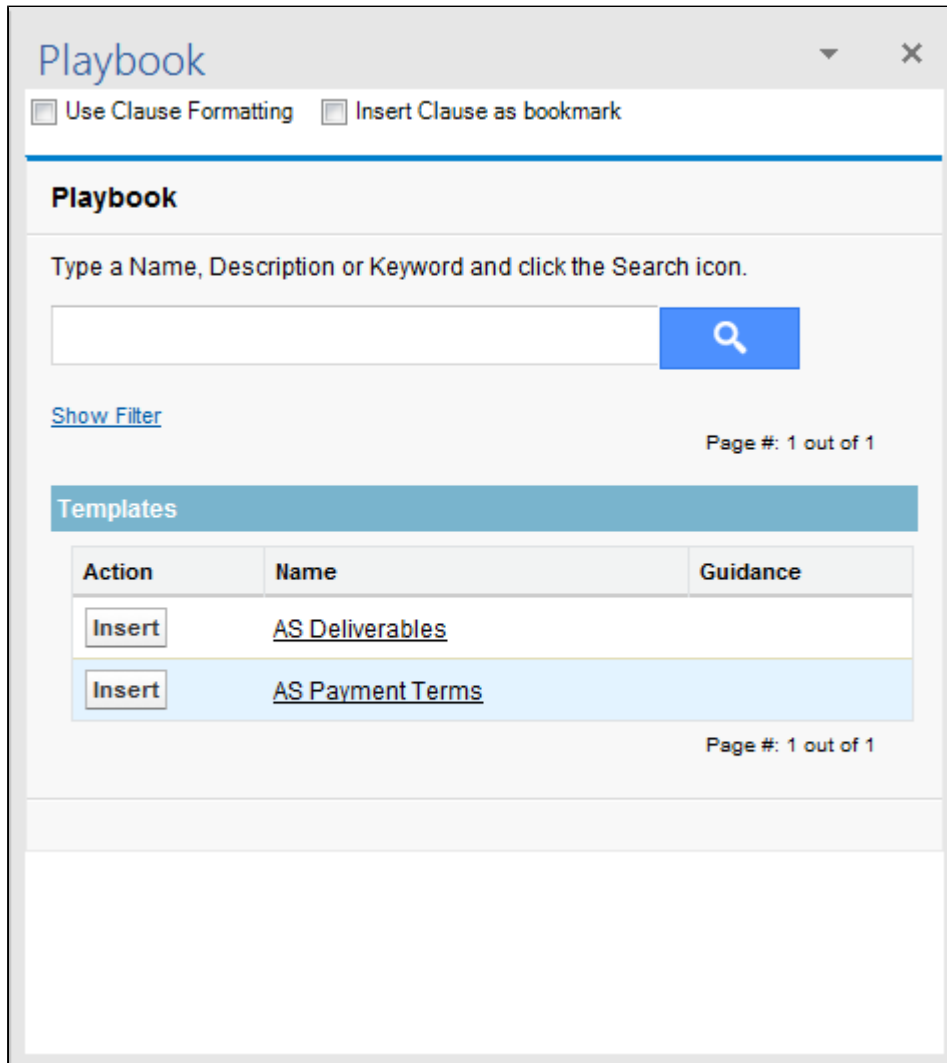


Please note at this time the following limitations for clause bookmarks:

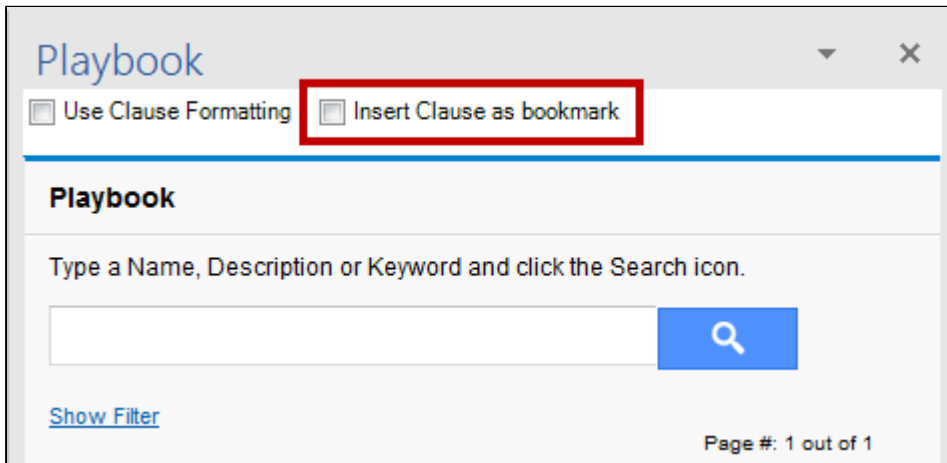
- although you can insert clauses as bookmarks in any template, there is no support for bookmarked nested clauses.
- clause bookmarks inserted in repeat tables will only appear once in the generated document, appended to the end of the table content.

To insert a clause as a bookmark

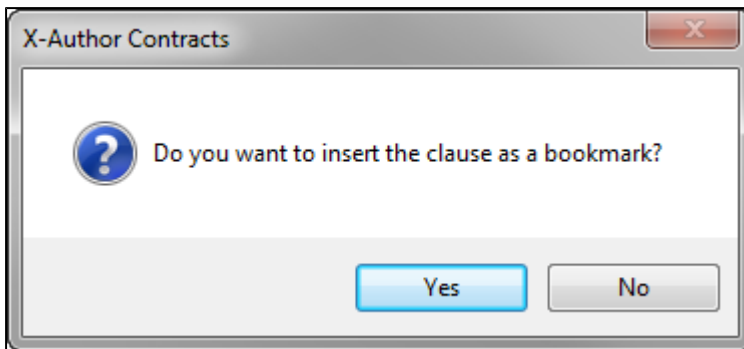
1. Open Microsoft Word and [log in to X-Author Contracts](#).
2. From the X-Author Templates ribbon, select **Playbook**. The Playbook pane is displayed to the right of the document.



3. Use the Playbook search dialog to search for one or more clauses you want to insert.
4. At the top of the Playbook pane, select the check box to **Insert Clause as bookmark**.
5. Place your cursor where you want to insert the bookmark into your agreement template.



6. Click **Insert** next to the clause you want to insert. The following confirmation dialog is displayed.



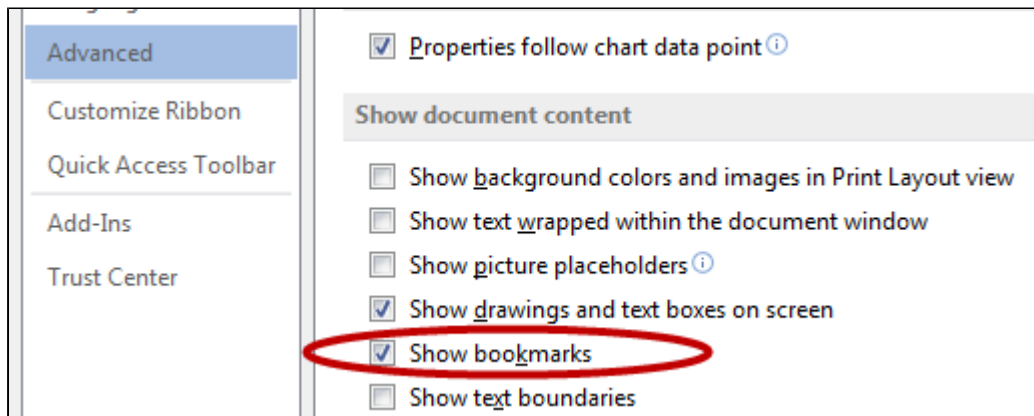
7. Repeat Steps 5 – 7 to insert the same clause as a bookmark in other locations or to insert other clauses as bookmarks.
8. **Check-In** your agreement template to update the template in Salesforce with the bookmarked clause references.

A Note on Publishing and Bookmarks. When a clause is inserted into a template as bookmark, it is inserting a reference to that clause into the corresponding template. Therefore, if the clause associated with the bookmark is changed, the corresponding template will *not* need publishing. When working with an agreement document, the most recent version of the clause is always inserted.

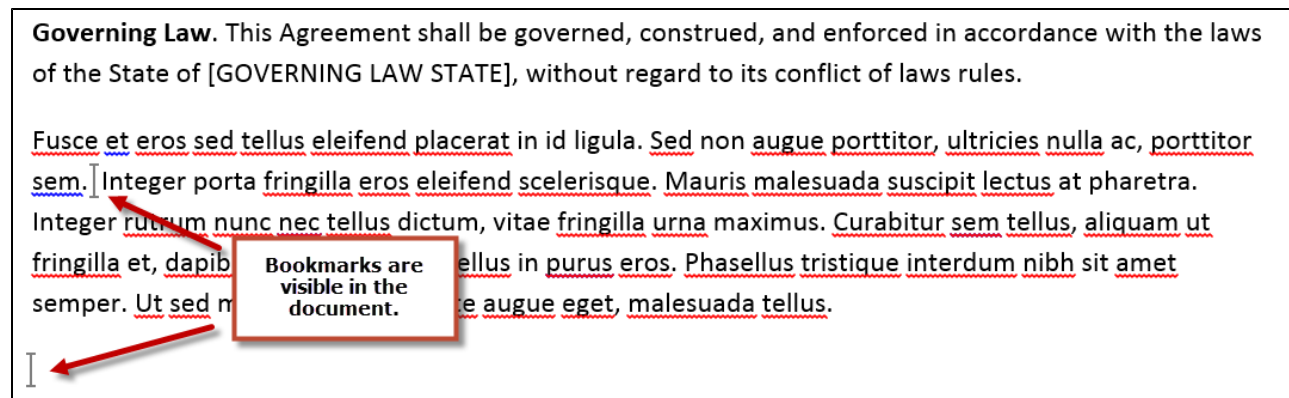
Making Bookmarks Visible in the Template Document

After inserting clauses as bookmarks, you may find it easier to confirm insertion of bookmarks by making them visible in the Word document. To make bookmarks visible:

1. Go to **File > Options > Advanced**.
2. Scroll down to the **Show Document Content** section.
3. Select the "Show bookmarks" check box.



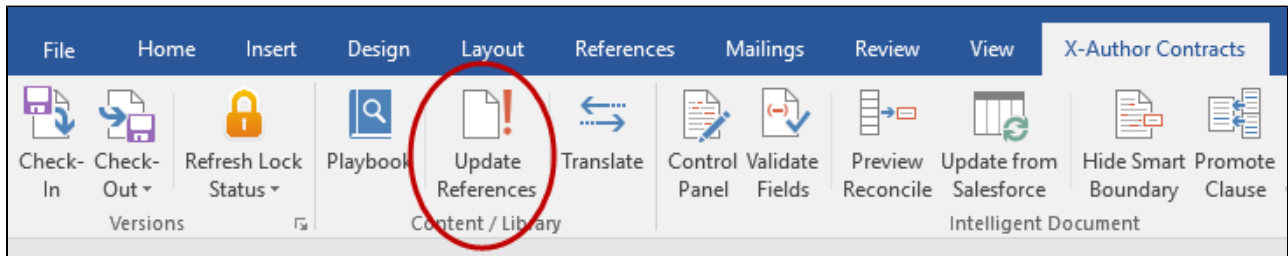
4. Return to your document and confirm that bookmarks are present.



Updating References

The **Update References** button lets you update the clause references, table of contents, headers and footers, cross-references, bookmarks, and formulas in tables. To update references in your document:

1. Go to X-Author Contracts tab in Microsoft Word ribbon.
2. Click **Update References**.



Inserting Dynamic Segments



Hint: Click on an image to enlarge the view.

As a template administrator, you can use **Dynamic Segments** in your X-Author Contracts templates to dynamically populate agreement documents with the content of clause templates and/or attachments based on **Document Assembly Rulesets (DAR)** defined in the connected Org.

Dynamic segments are not to be confused with conditional segments in agreement templates—conditionality is handled by values in the Document Assembly Rulesets themselves, and in the context of line item objects, filtered further using conditional expressions when you insert the segment. Document Assembly components (the actual clause templates or line item attachments defined in the ruleset and its rules) are included or excluded at document generation based on these Rulesets and filters. For more information on configuring dynamic Document Assembly Rulesets, refer to Dynamic Document Assembly in the *Contract Management Administrator Guide*.

Dynamic segments can be inserted wherever you would typically insert a clause template or line item content (depending on your individual use case).



Support for the *Proposal* object and for both the *Agreement* and *Proposal* objects at the *line item level* is only enabled for users of **Apttus Contract Management and X-Author Contracts November 2016 release** or later (versions **8.335 (CM)** and **8.508 (XAC)** respectively). Prior versions only support the Agreement object header level and clauses as dynamic components (not attachments).

Note

Ensure dynamic component content matches the audience and requirement, such as whether it is going to be generic content reused in multiple rules or specific content aimed at a specific requirement such as a geographical area or business unit.

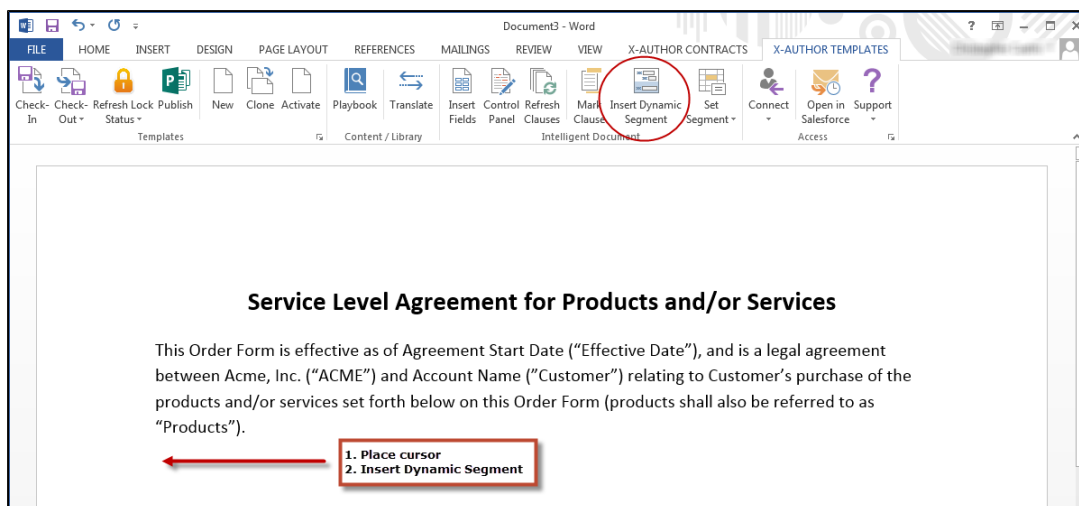
Prerequisites

Before inserting dynamic segments into your template, your template must meet the following prerequisites:

- Your template must be of the type *Agreement* or *Proposal* and can be in Pre-FX2 or FX2 format. You cannot insert dynamic segments into a *Clause* template.
- You must have at least one dynamic Document Assembly Ruleset created in the target Org.

To insert Dynamic Segments

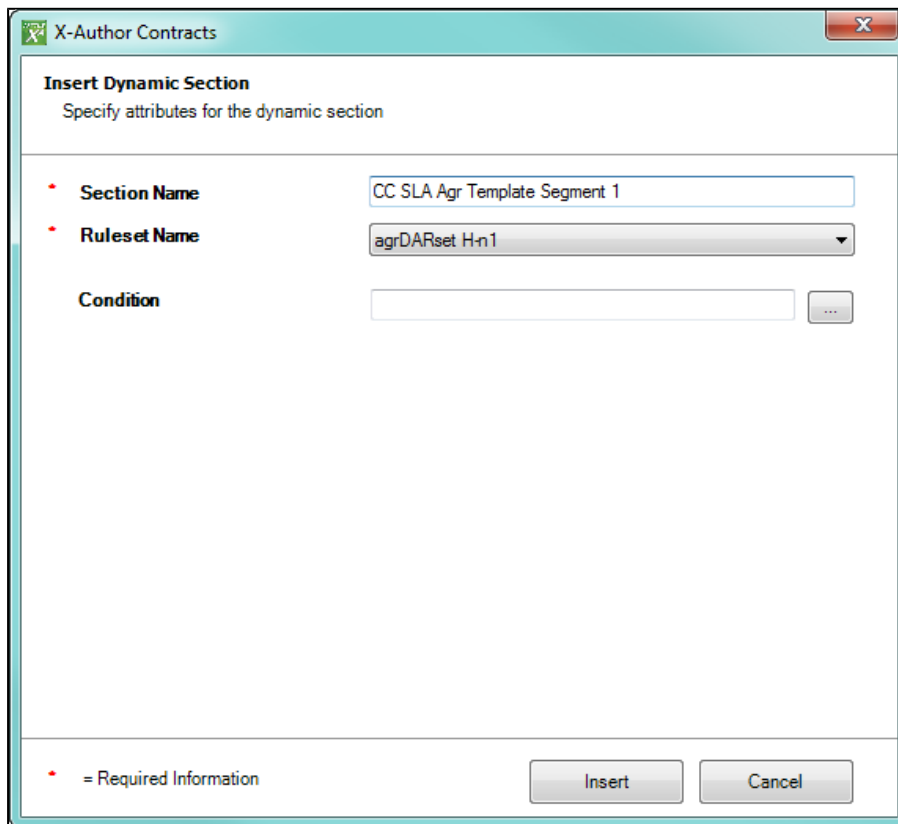
1. From the **X-Author Templates** ribbon tab, create a new template or check out an existing template.
2. Place your cursor at the point in the Template you want to insert a dynamic segment.
3. From the Intelligent Document section of the X-Author Templates tab, click **Insert Dynamic Segment**.



The **Insert Dynamic Section** dialog is displayed.

The image shows a dialog box titled "X-Author Contracts" with a close button in the top right corner. The main heading is "Insert Dynamic Section" with a subtitle "Specify attributes for the dynamic section". Below this, there are three fields: "Section Name" (a text input field), "Ruleset Name" (a dropdown menu showing "agrDARset H-n1"), and "Condition" (a text input field with a small button to its right). At the bottom left, there is a legend: a red asterisk followed by "= Required Information". At the bottom right, there are two buttons: "Insert" and "Cancel".

4. In the dialog box, enter a **Section Name** that describes the dynamic segment you inserting. The name must be unique to the document.
5. Choose a **Ruleset Name** from the drop-down list to define the active Document Assembly Ruleset that will be used for this segment. Only Rulesets matching the agreement type (record type) of the template are displayed in the list.



The image shows a dialog box titled "X-Author Contracts" with a close button in the top right corner. The main heading is "Insert Dynamic Section" with a subtitle "Specify attributes for the dynamic section". There are three required fields, each marked with a red asterisk: "Section Name" with the text "CC SLA Agr Template Segment 1", "Ruleset Name" with a dropdown menu showing "agrDARset H-n1", and "Condition" with an empty text box and a small button with three dots. At the bottom left, a legend indicates that a red asterisk means "= Required Information". At the bottom right, there are "Insert" and "Cancel" buttons.

X-Author Contracts

Insert Dynamic Section
Specify attributes for the dynamic section

* **Section Name** CC SLA Agr Template Segment 1

* **Ruleset Name** agrDARset H-n1

Condition

* = Required Information

Insert Cancel

6. For Rulesets using a *Header-level*/context (no line item components, only clause components), skip to the next step. For Rulesets with *Line Item-level*/context (e.g., components are attachments on Agreement Line Items or Agreement Products), you can define condition expressions to filter dynamic content by line item or lookup-related field values.

X-Author Contracts

Insert Dynamic Section
Specify attributes for the dynamic section

* **Section Name** CC SLA Agr Template Segment 1

* **Ruleset Name** aRSet Birds ALItem

Condition (Apttus__ListPrice__c > 50.00)

* = Required Information

Insert Cancel

7. Click **Insert** to insert the dynamic segment into your template.
8. After you have completed adding dynamic segments to the template, check it in.
When you **Check-In** a template with dynamic sections, you will not be able to change the agreement type of the template.

For each dynamic segment you inserted, a record is added to the Template Dynamic Segments related list on the Template record.

When you generate an agreement document in Salesforce and use this template, the content that is included in the Agreement document will depend on the parameters set out in the Doc Assembly Rulesets referenced by the Dynamic Segments configuration.

i Document Assembly Rulesets do not make a distinction between Pre-FX2 and FX2 content. Be certain when authoring templates that include dynamic segments to use the Rulesets with the appropriate content format.

Cloned Clause Template UUID Identification

The cloning of Dynamic Assembly Rules includes the cloning of the Component Types and the associated Clause Templates assigned to the Contract Types.

Separately, within X-Author Contracts, this template cloning identifies the new template created from the original template using two fields, which are always updated on the original template, and containing the ID's of the new template. In this way, if a clause template has been cloned using X-Author Contracts, it is also an assigned template for a cloned component type within a cloned rule, the customer can determine if and which new template is to be used in the new rule's component type.

Auto Select Options When Finalizing Documents

You can choose to have PDF generation and reconciliation be automatically selected, when you select Check-In for an agreement document and choose to save it as the *Final* document.

By default X-Author will give you the option to *Reconcile Document* and *Create PDF Attachment* when you check-in a final document; however, you can select system properties which make those options automatically selected and not editable. There are also additional system properties which allow you to override those automatic selections.



You must be using X-Author Contracts 7.0 or higher and Contract Management 7.0.228 or higher.

Configuring Auto Select Options

Four Comply System Properties control this functionality. By default they are not selected.

From Setup, go to **Develop > Custom Settings > Comply System Properties** and click **Manage** and then **Edit**. The two settings for auto enabling are:

- **Auto Enable PDF For Final Docs** - Select this and the *Create PDF Attachment* option is always selected when you choose to save as *Final - to be signed* from the check-in dialog.
- **Auto Enable Reconciliation** - Select this and the *Reconcile Document* option is always selected when you go to check-in an agreement document.

These two settings enable you to override the auto-enabled options when you go to check-in an agreement document:

- **Allow PDF Select Override** - This is only applicable when *Auto Enable PDF For Final Docs* is selected.
- **Allow Reconcile Selection Override** - This is only applicable when *Auto Enable Reconciliation* is selected.

When you select the system properties as indicated below the check-in dialog will work as follows:

- **Auto Enable PDF For Final Docs**
- **Auto Enable Reconciliation**

X-Author Contracts - Check-In

Options

* Save: Final - to be signed

Version Details

* Suggested Name: Corporate_v1_Final

☐ Watermark will not be included...

☒ Reconcile Document

☒ Create PDF attachment

* = Required Information

Save Cancel

- **Auto Enable PDF For Final Docs**
- **Auto Enable Reconciliation**
- **Allow PDF Select Override**
- **Allow Reconcile Selection Override**

X-Author Contracts - Check-In

Options

* Save: Final - to be signed

Version Details

* Suggested Name: Corporate_v1_Final

☐ Watermark will not be included...

☒ Reconcile Document

☒ Create PDF attachment

* = Required Information

Save Cancel

Opening Agreement or Template Record in Salesforce From X-Author

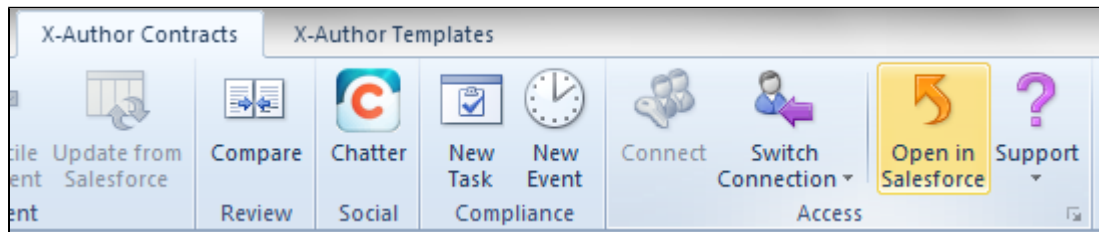
You can open the Salesforce record of an active Template or Agreement document from within X-Author Contracts.



Add-in features that are associated with *Update From Salesforce*, *Playbook Access* from the X-Author Contracts Tab, and *Import Offline Documents* are not available for custom objects at this time.

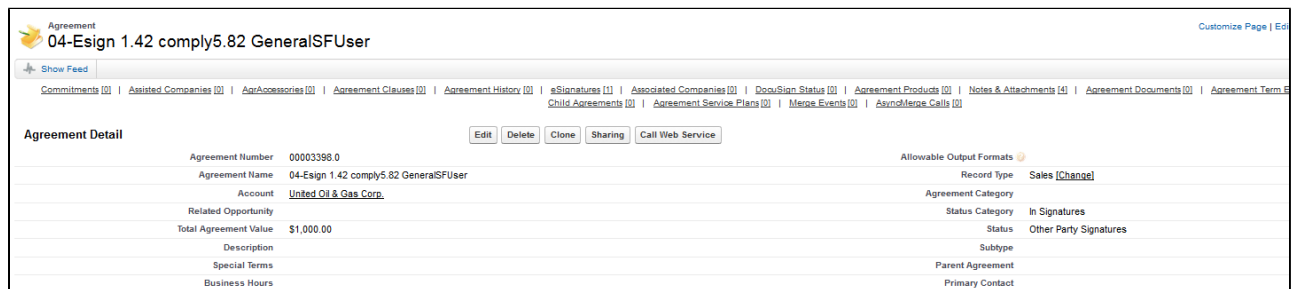
Open in Salesforce Button

When you have an Agreement document or Template open in X-Author Contracts, a new button is now displayed called, *Open in Salesforce*. The *Open in Salesforce* button enables you to view the corresponding Agreement document or Template in your Salesforce org.



Corresponding Record Opened in Salesforce

After clicking *Open in Salesforce* button, when you have either an Agreement document or Template open in X-Author Contracts, the corresponding record will open your default web browser and is displayed.





- You must upgrade to X-Author Contracts 7.2.1104 in order to utilize this feature. You must be using X-Author Contracts 7.2.1104 or higher in order to use this feature.
- You must be logged into Salesforce with an active session from X-Author Contracts.

Removing Track Changes in Microsoft Word

After checking in a template using the *Check-in* button in the X-Author Templates ribbon tab and then generating an Agreement document using that template, Track Changes will appear in Microsoft Word. To hide the Track Changes from a generated document, you must perform two tasks.

To deselect Microsoft Formatting

You must have checked out a Template into X-Author Templates.

1. In the Microsoft Ribbon, select **Review**.
2. Click **Show Markup** and deselect **Formatting**. Verify that the check mark is no longer next to **Formatting**.
3. Click **Check-in** under the X-Author Templates ribbon.

You have removed the automatic formatting for Microsoft Track Changes for the checked out Template.

You must also configure one Microsoft Office option setting.

To configure the Microsoft Office Option Setting for Markup

You must have checked out a Template into X-Author Templates.

1. Please refer to this Microsoft Office Knowledge Base Article for [Markup text may reappear when you open or when you save a document of Word](#).
2. Click **Check-in** under the X-Author Templates ribbon.

You have successfully removed default behavior for how formatting affects opened documents.

Defining Template Locale

- [Pre-requisites](#)
- [Limitations](#)
- [Locale Settings for Templates](#)
 - [Defining Locale settings for a new template](#)
 - [Defining Locale settings at Check-in](#)
 - [Defining Locale settings when Cloning](#)

Template localization is a feature introduced in the February 2017 X-Author Contracts release that allows Template Administrators to define the locale of their templates . Template Administrators have the ability to:

- Specify the **Locale** when creating a new template or cloning a template, or change the locale of a template at check-in. At template creation, admins can [enable locale settings](#) and choose the Currency Format, Date Format, and configure Number, Currency and Percent precision for the whole template.
- Define the format for **Number**, **Currency**, **Date** and **Percent** fields using the Control Panel. This preserves the locale for fields in inserted clauses at the template level, while making specific changes to other field formats as needed. Generated documents conform to template locale except where specified at the field level.

Combining the above features allows Template Administrators to use multiple locale formats in templates, while maintaining a default locale and format for subsequent document generation.

To learn how to change field format by locale, refer to [Changing Field Format by Locale](#) .

Pre-requisites

- Template type must be FX2.
- *Enable Formatting* must be checked when creating, checking in or cloning a template to enable field level locale configuration.
- To use template localization feature, minimum X-Author Contracts version required is **9.0.0306** .

Limitations

- Template localization features are not supported for orgs with Template Versioning enabled.

- Locale formatting for templates is only supported in the FX2 format.
- Changing locale at check-in is supported only in X-Author Contracts version **9.0.0306** and higher.
- Locale settings at the field level cannot be specified for marked fields or fields in marked clauses.
- Inserted clauses will inherit locale from the main template and generate using the same locale formatting, unless the clause template already has a defined locale.
- If you have a template configured for a specific locale (e.g., German) that includes inline clauses that are not configured for localization, then on generate action the clause will inherit the locale settings from the template. So, any Currency, Date, Number/Percent and Precision settings in the main template will also apply to the clause when it is generated.

Locale Settings for Templates


Defining Locale settings for a new template



To create a new template with locale options, refer to [Creating New Agreement Templates \(FX2 Format\)](#).

To define locale settings for a new template enter values in the fields provided as described in the following table. Fields marked with an asterisk (*) are required.

Field Name	Description
Type*	Choose the template type from the picklist (Agreement, Proposal, Clause, etc.).
Business Object*	Choose the business object for your template (e.g., <i>Apttus__APTS_Agreement__c</i> for Agreement). This picklist is dependent on the value selected for Type.
Locale*	Choose an option from the list to change the default locale for the template.
Enable Formatting	Check this box to enable locale formatting at the template and field level for this template. This allows you to define locale settings for Currency, Number, Percent and Date formats.

Field Name	Description
Optional: Specify the following fields when "Enable Formatting" is selected.	
Date Format	Select a format from the picklist for Date fields in the template.
Currency Precision	Enter a number to define the precision for Currency field values in the template (e.g., "2" if the Currency field should display two digits following the decimal point.)
Currency Format	<p>Select the appropriate radio button to choose the symbol format for Currency fields in the template (ISO or Currency Symbol). Select "None" if you do not want to specify a Currency format. All other Currency options are hidden.</p> <div>  <p>If "Currency Symbol" is selected, Currency fields will be generated with no space between the symbol and field value. If "ISO" is selected, Currency fields will be generated with a space between the ISO code and field value.</p> </div>
Number Precision	Enter a number to define the precision for Number/Percent field values in the template (e.g., "2" if the Number/Percent field should display two digits following the decimal point.)

Defining Locale settings at Check-in



After you create a new template or make changes to an existing template, you can check-in the template to create a new version. To check in a template, refer to [Checking in an FX2 Template](#).

If you want to define or change the template locale when you check it in, specify values for the following fields:


Field	Description
Locale	Choose an option from the list to change the default locale for the template. If you do not change this option, the template locale will remain the same.
Enable Formatting	Check this box to enable locale formatting at the template and field level for this template. This allows you to define locale settings for Currency, Number, Percent and Date formats.
Optional: Specify the following fields when "Enable Formatting" is selected to modify locale formatting.	
Date Format	Select an option from the drop-down to choose the default format for all Date fields in the template.
Currency Format	Select an option from the drop-down to choose the format for all Currency fields in the template. Choose "None" to only display Currency field values in generated documents.
Number Precision	Enter a number to define the precision for Number/Percent field values in the template (e.g., "2" if the Number/Percent field should display two digits following the decimal point.)
Currency Precision	Enter a number to define the precision for Currency field values in the template (e.g., "2" if the Currency field should display two digits following the decimal point.)

Note the following behavior:


- All existing configured fields and clauses will conform to the locale of the template prior to check-in, and will persist on checkout unless [explicitly changed](#).
- Any clauses inserted after checkout will adhere to the clause template locale, if one has been defined. If not, any inserted clauses will adhere to the new locale.

For a list of locales supported by Apttus, see [List of Apttus Supported Locales and Associated Formatting](#).

Defining Locale settings when Cloning

 To clone a template, refer to [Cloning a Template](#).

You have the option to change Locale settings for your template when you clone it. You can specify the following fields:

Field	Description
Locale	Choose an option from the list to change the default locale for the template.
Enable Formatting	Check this box to enable locale formatting at the template and field level for this template. This allows you to define locale settings for Currency, Number, Percent and Date formats.
Optional: Specify the following fields when "Enable Formatting" is selected to modify locale formatting.	
Date Format	Select an option from the drop-down to choose the default format for all date fields in the template.
Currency Format	Select an option from the drop-down to choose the format for all Currency fields in the template. Choose "None" to only display Currency field values in generated documents. <div>  If "Currency Symbol" is selected, Currency fields will be generated with no space between the symbol and field value. If "ISO" is selected, Currency fields will be generated with a space between the ISO code and field value. </div>
Number Precision	Enter a number to define the precision for Number/Percent field values in the template (e.g., "2" if the Number/Percent field should display two digits following the decimal point.)

Field	Description
Currency Precision	Enter a number to define the precision for Currency field values in the template (e.g., "2" if the Currency field should display two digits following the decimal point.)

- Selecting a Locale for the template defaults all Date, Number/Percent and Currency values in the template to pre-defined formats. To see the list of locales and their corresponding formats, refer to [List of Apttus Supported Locales and Associated Formatting](#) in the Appendix.
- You can define formats for the selected locale by specifying the optional Date, Number /Percent and Currency formats described in the table above. Field format can also be defined from the Control Panel when you are working with the template (see [Changing Field Format by Locale](#))

✔ Use-Case

Template with Multiple Locale

Scenario: Template locale is Spanish and field locale is not defined

Consider an organization which needs to create a Memorandum of Understanding (MoU) type of agreement for Spanish Locale. To create a template:

1. Open Microsoft Word and connect to X-Author Contracts.
2. In the X-Author Templates click New, to create a new template.
3. To check the localization feature, enter following fields in the template:
 - a. Agreement Start Date
 - b. Agreement End Date
 - c. Agreement End Date
 - d. Total Agreement Value
4. Check in the template with Locale set as Spanish and Enable Formatting selected.

Check-In FX2 Template
Specify the attributes for this template

Type	Agreement	Business Object	Apttus__APTS_Agreement__c
* Name	AS Spanish MoU	Keywords	
* Agreement types	NDA Unilateral License MSA MoU	Next revision date	07-02-2017
* Category	Default	Term exception	-- Select --
* Subcategory	Default	Is Active?	<input checked="" type="checkbox"/>
* Language	English	Description	Memorandum of Understanding in Spanish locale
* Locale	Spanish	Guidance	
Enable Formatting	<input checked="" type="checkbox"/>		
Date Format	dd/MM/yyyy		
Currency Format	None		
Number Precision	0		
Currency Precision	2		

* = Required Information

Check-In Cancel

5. Generate an agreement using the above template. The date fields shall reflect the format corresponding to the template locale. This is shown in the following screenshot:

Term of MOU. This MOU is effective upon the day and date **01/02/2017** last signed and executed by the duly authorized representatives of the parties to this MOU and the governing bodies of the parties' respective counties or municipalities and shall remain in full force and effect for not longer than **31/01/2018**.

This MOU may be terminated, without cause, by either party upon the completion of the term of Term (Months) months.

Duration. This MOU is at-will and may be modified by mutual consent of authorized officials from (list partners). This MOU shall become effective upon signature by the authorized officials from the party one and will remain in effect until modified or terminated by any one of the partners by mutual consent. In the absence of mutual agreement by the authorized officials from Apttus Inc. this MOU shall end on **31/01/2018**.

Contact Information

Account Name- TPub Inc

City- Chicago

Country- United States

Total Agreement Value- **6.666.666,00**

*field values highlighted with yellow are the locale dependent fields

The generated agreement has all four fields with formats conforming to the template locale, which is Spanish.



For a list of locales supported by Apttus, along with default formats for the above fields, refer to [List of Apttus Supported Locales and Associated Formatting](#)

Changing Field Format by Locale

Note

Localization of templates and template elements is not supported in orgs with Template Versioning enabled.

When you create a new template or clone an existing one, you are required to specify a **Locale** for your template.

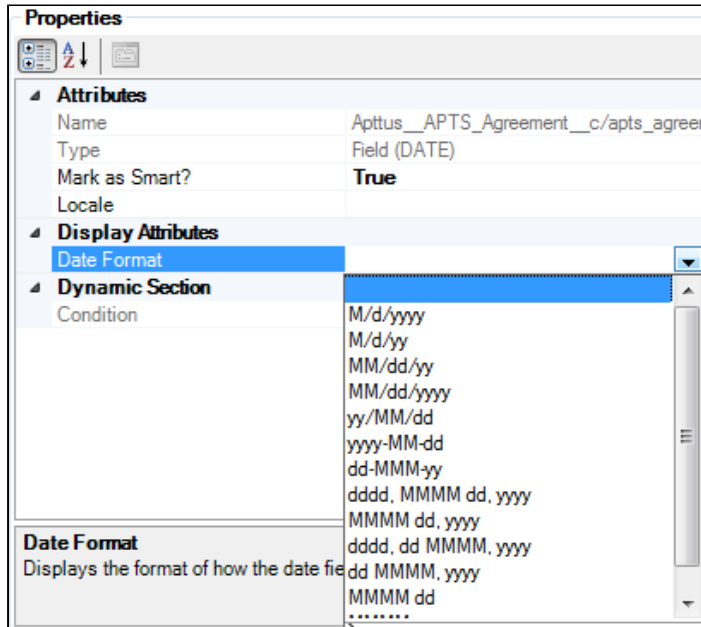
Because there may be some cases that require you to override formats at the field level, X-Author Templates provides template administrators with the ability to define the format for **Number**, **Percent**, **Currency**, and **Date** fields using the Control Panel. This allows you to preserve locale for fields in inserted clauses at the template level, while making specific changes to other field formats as needed. Generated documents conform to template locale except where specified at the field level.

Prerequisites

- This feature is only supported in X-Author for Contracts version **9.0.0306** and higher.
- Only template documents in FX2 format are supported.
- *Enable Formatting* must be selected when the template is created, cloned or checked in.

To change format for Date fields

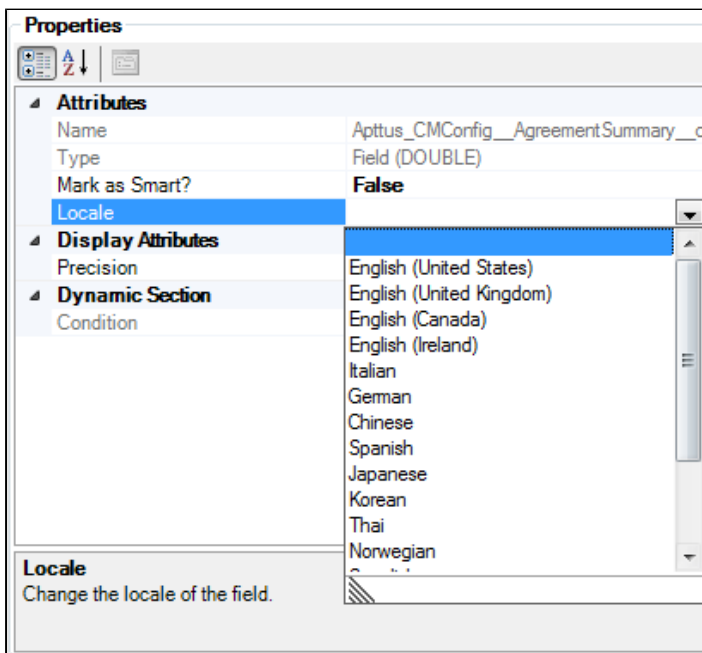
1. From the X-Author Templates ribbon, select the **Control Panel**.
2. Select the field in the document or in the Control Panel.
3. In the Properties pane, select the **Date Format** drop-down and choose the new format.



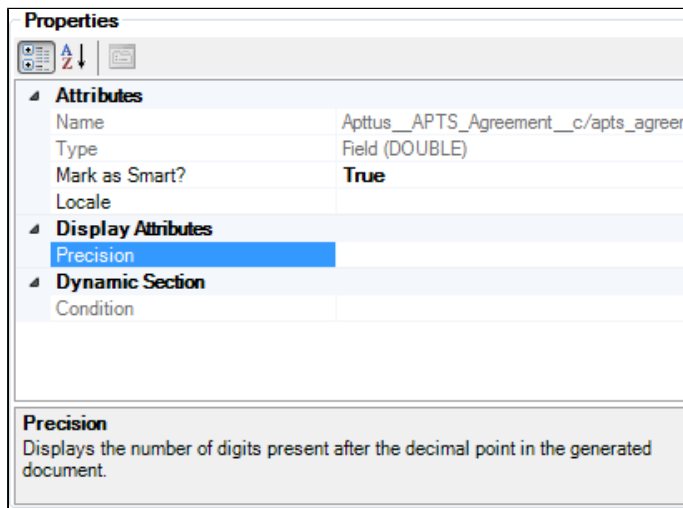
- If you have not selected Locale value at the field level for the date field in the localized template, then its Date Format will be inherited from the template level settings.
- If you select the Locale value for a date field from its Field Properties pane, then the Date Format attribute will display the list of values corresponding to Locale selected at the field level, and you can select the desired format.

To change decimal precision for Number/Percent fields

1. From the X-Author Templates ribbon, select the **Control Panel**.
2. Select the field in the document or the Control Panel.
3. In the Properties pane, select the **Locale** drop-down and choose a Locale for the field.



4. In the Properties pane, enter a number to represent decimal precision for the field (e.g., "2" if the Number/Percent field should display two digits following the decimal point.)



Properties									
<div> </div>									
<div> <div>Attributes</div> <table> <tr> <td>Name</td> <td>Apttus_APTS_Agreement_c/apts_agreer</td> </tr> <tr> <td>Type</td> <td>Field (DOUBLE)</td> </tr> <tr> <td>Mark as Smart?</td> <td>True</td> </tr> <tr> <td>Locale</td> <td></td> </tr> </table> </div>		Name	Apttus_APTS_Agreement_c/apts_agreer	Type	Field (DOUBLE)	Mark as Smart?	True	Locale	
Name	Apttus_APTS_Agreement_c/apts_agreer								
Type	Field (DOUBLE)								
Mark as Smart?	True								
Locale									
<div> <div>Display Attributes</div> <table> <tr> <td>Precision</td> <td>2</td> </tr> </table> </div>		Precision	2						
Precision	2								
<div> <div>Dynamic Section</div> <table> <tr> <td>Condition</td> <td></td> </tr> </table> </div>		Condition							
Condition									

Precision
 Displays the number of digits present after the decimal point in the generated document.

To change locale, precision and format for Currency fields

1. From the X-Author Templates ribbon, select the **Control Panel**.
2. Select the field in the document or the Control Panel.
3. In the Properties pane, select the **Locale** drop-down and choose a Locale for the field.
4. In the Properties pane, make any of the following changes as needed:
 - Enter a number to represent decimal precision for the field (e.g., "2" if the Currency field should display two digits following the decimal point.)
 - Select a Currency format from the drop-down list: ISO Code, Symbol or None. If "None" is chosen, only the Currency field values will be displayed in generated documents.

Properties

Attributes

Name	Apttus__APTS_Agreement__c/aps_agreement_total_contract_v
Type	Field (CURRENCY)
Mark as Smart?	False
Locale	

Display Attributes

Precision	
Currency Format	

Dynamic Section

Condition	None ISO Code Symbol
-----------	----------------------------

Currency Format
Displays the format of how the currency field will be rendered in the document



- For a list of locales supported by Apttus, along with default formats for the above fields, refer to [List of Apttus Supported Locales and Associated Formatting](#)
- If you have a template configured for a specific locale (e.g., German) that includes inline clauses that are not configured for localization, then on generate action the clause will inherit the locale settings from the template. So, any Currency, Date, Number/Percent and Precision settings in the main template will also apply to the clause when it is generated.



Use-Case

Template with Multiple Locale

Scenario: Template locale is Spanish and field locales are updated with different locale

After multiple iterations of the above agreement, the organization gets a request where they have to update the Agreement Start Date and the Agreement End Date to reflect the German locale. To achieve this:

1. Open Microsoft Word and connect to X-Author Contracts.
2. In the X-Author Templates ribbon click Check-Out. Select the template generated in the previous scenario to checkout.

3. Click Control Panel from the X-Author Templates ribbon.
4. Select the following date fields from the Control Panel, to make locale changes from the properties pane:
 - a. Agreement Start Date: Change the locale to German. In the properties pane select German as locale from the drop-down menu.
 - b. Agreement End Date: Change the locale to German. In the properties pane select German as locale from the drop-down menu.
 - c. Agreement End Date: Keep it as it is.
 - d. Total Agreement Value: Keep it as it is.

Properties

Attributes

Name	Apttus__APTS_Agreement__c/aps_agreer
Type	Field (DATE)
Mark as Smart?	True
Locale	German

Display Attributes

Date Format	
-------------	--

Dynamic Section

Condition	
-----------	--

Name
Name of the field / clause as in Salesforce

5. Check-in the template with the same locale settings.
6. Regenerate the agreement with the updated template. The regenerated agreement shows updated format for the date field values whose locale was updated.

Term of MOU. This MOU is effective upon the day and date **01.02.2017** last signed and executed by the duly authorized representatives of the parties to this MOU and the governing bodies of the parties' respective counties or municipalities and shall remain in full force and effect for not longer than **31.01.2018**.

This MOU may be terminated, without cause, by either party upon the completion of the term of Term (Months) months.

Duration. This MOU is at-will and may be modified by mutual consent of authorized officials from (list partners). This MOU shall become effective upon signature by the authorized officials from the party one and will remain in effect until modified or terminated by any one of the partners by mutual consent. In the absence of mutual agreement by the authorized officials from Apttus Inc. this MOU shall end on **31/01/2018**.

Contact Information

Account Name- TPub Inc

City- Chicago

Country- United States

Total Agreement Value- **6.666.666,00**

*field values highlighted with blue show the updated locale format. The blue highlighted date field now reflect the format corresponding to the German locale.

Thus, with localization feature you can create templates with a specific locale to reflect locale specific precision, number or date formats.

To learn more about localization, refer to [Defining Template Locale](#).

Managing Versions

Note

Use a *.doc* format if you are generating agreements in the pre-FX2 format and a *.docx* format for generating agreements in the FX2 format.

Note

Ensure that the contract administrator is assigned the profile where the field level security for all the fields of **Agreement Clause** object is set as Visible.

In This Section

- [Checking Out Versions](#)
- [Working with Agreements in FX2 format](#)
- [Working with Agreements in Pre-FX2 format](#)
- [Importing Offline Agreement Documents](#)
- [Locking Documents](#)
- [Using the Playbook for Agreement Documents](#)
- [Comparing and Merging Versions](#)
- [Associating Term Exceptions](#)

Checking Out Versions

To work with any version of an agreement document associated with an agreement record in Salesforce, you must open it directly in X-Author For Contracts. When you open the document, you are "checking out" the document. As the metaphor implies, it is like checking a book out from a library. After you have checked it out, no one else can work with the document until your return it, or "check in" the document.


Because of this, checking out an agreement document also put a lock on the document, stopping other users from editing it while you are working on it. This applies when you initially check-out a document, as well as if you select **Check-Out > Currently Opened Document** after releasing the lock on a document. For more information on how document locking works, see [Locking Documents](#).



The Comply System Properties setting — **Enable Version Control** — also used for locking agreement documents, is required for this feature. If the feature does not seem to be working, check that this setting is enabled.

If your Salesforce org has upgraded to the February 2016 release of Contract Management and has Document Finder enabled, skip ahead to [Document Finder Checkout](#). Otherwise, continue with Classic Checkout.

Classic Checkout

1. From the **X-Author Contracts** tab in Word, click **Check-Out**.
2. Enter an agreement name or number for a search term and click .
3. Click **Select** for an agreement and then click **Open** to open the desired document.

If the document is currently locked by you or someone else, a message will display who has locked the file and at what time. You can use **Refresh Lock Status** to release a lock you had previously put on the document and begin editing the document. You cannot release someone else's lock.

If you refresh the lock, you can select **Check-Out > Currently Opened Document**, to re-apply the lock and enable your checked out document to be checked in.

Document Finder Checkout

With the introduction of the February 2016 release of Apttus Contract Management, the Checkout screens in X-Author were changed to reflect implementation of the **Document Finder** feature. Locating agreement records and agreement documents attached to those records is easier with Document Finder as the number of available filters is greatly expanded.



Note: The functionality of document checkout differs slightly depending on whether you are checking out *version aware* or *non-version aware* documents.

1. From the X-Author Contracts tab in Word, click **Check-Out**.

Checkout

Use any filter below to search for an agreement containing your document(s)

Enter Agreement Name or Number Agreement Owner Agreement Primary Contact




Enter Agreement Name or Number User Agreement Owner Agreement Primary Contact

Page 1 of 3 << Previous Next >> Records per page 25

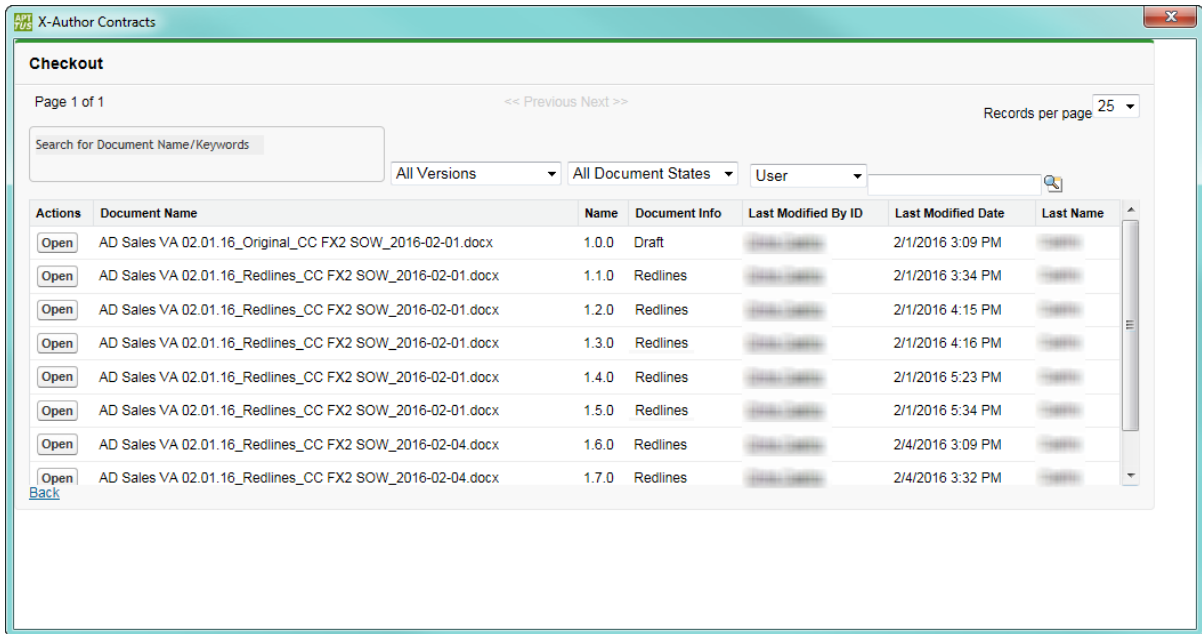
Action	Account Name	Agreement Name	Agreement Number	AgreementType_String	Description	Version Aware
Select	ABC Company	YB Corporate Test -003	00007188.0	Corporate		✓
Select	ABC Company	YB Corporate Test -001	00007106.0	Corporate		✓
Select	Acc001	Corporate	00007200.0	Corporate		✓
Select	Acc001	Offline-from XAC	00007195.0	Corporate		✓
Select	Acc001	Dynamix Sales Agreement	00007223.0	Sales		✓
Select	Acc001	Corporate	00007074.0	Corporate		✓
Select	Acc001	NDA	00007071.0	NDA		
Select	Acc001	Frame/Master – HW, SW & Support	00007069.0	Corporate		
Select	Acc001	Corporate	00007112.0	Corporate		✓
Select	Acc001	TPubs Sales Agreement	00007137.0	Sales		
Select	Acc001	Corporate_regenerate-v8.370-Import Offline Copy	00007142.0	Corporate		✓
Select	Acc001	NDA--Store Executed Agreement	00007165.0	NDA		
Select	Acc001	Procurement--OfflineAgreement8.371	00007161.0	Procurement		

Note

Minor user interface (UI) enhancements have been made to the checkout screen to make the check-out process smoother for all users. Labels have been added to all the search boxes to remove ambiguity about the function of the search box.

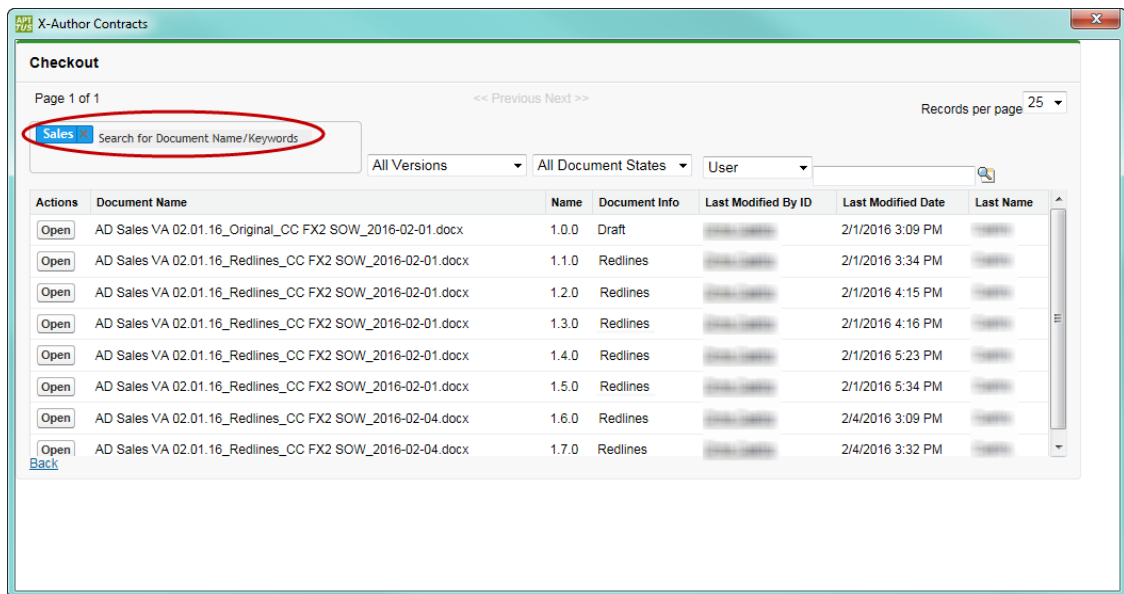
2. To find the agreement record associated with the agreement record you want to check out, narrow the list of agreements on the page using **one or more** of the provided filters:
 - a. Enter an **Agreement name** or **Agreement number** and click .
 - b. Use the drop-down to choose a **User** type and click the  lookup button to search and choose from a list of users.
 - c. Click the  lookup button to choose from a list of **Primary Contacts** associated with the record you are looking for
3. Click **Select** to display a list of agreement documents associated with the chosen agreement record.

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4. (Version Aware) Search for an agreement document to check out by Keywords/Tags.

- Enter a name or keyword into the Document Finder search box. (Note: If there are predefined tags set by the Default Document Tags property, or from previous check-ins of other agreement documents, they will be displayed in a drop-down).



- Press **Enter** or type a comma (,) at the end of each name or tag you enter. You can enter any number of values. The list of documents updates as you enter each tag.

- c. After you enter a name or a tag, click the 'X' in the tag () to remove it from your search. This updates the document list to reflect only the current keywords/tags.
5. **(Non-Version Aware)** Search for a document by Document Name or Number. Enter a name or number and click  .
6. If necessary, refine your document search by applying one of more filters. Consult the following table for a list of these filters and how to define them. Some filters are only available for *Version Aware* records.

Document Filter	Version Aware Required	Description
Version	Yes	Choose from All Versions to list all versions of all agreement documents which match the current search configuration, or Most Recent Version to constrain the current list to only the most recent versions.
Document State	Yes	Choose the Document State to list only document versions matching the selected Document State for the current configuration: All Document States, Final, Clean, Draft, or Redlines.
Document Owner (User)	No	Choose a User type from the drop-down menu and use the lookup to search for and choose a user to constrain the list of documents to only documents owned by the chosen user. You can also directly type the name of the user and click outside the provided field.

7. Click **Open** to check out your document.

If the document is currently locked by you or someone else, a message will display who has locked the file and at what time. You can use **Refresh Lock Status** to release a lock you had previously put on the document and begin editing the document. You cannot release someone else's lock.

If you refresh the lock, you can select **Check-Out > Currently Opened Document**, to re-apply the lock and enable your checked out document to be checked in.

Working with Agreements in FX2 format

Checking In Versions in FX2 format

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 *.doc* and *.docx* format are supported for maintaining versions and checking in and checking out Agreements.

An Agreement document has been checked out before clicking **Check-In**. The various options available on **Check-In** are:

1. Check-in an Agreement document with redlines.
2. Check-in an Agreement document without redlines.
3. Reconcile an Agreement Document when checking in an Agreement document.

X-Author Contracts - Check-In Document

Check-In Document
Define the attributes to be applied in checking this document into Salesforce

Options

* Save: ☐ Update Current Version
☒ With Redlines
☐ Without Redlines
☐ Final - to be signed

Version Details

* Suggested Name: AD Sales VA 02.01.16_Redlines_CC FX2 SOW_2016-02-0

☐ Include Watermark
☐ Reconcile Document
☐ Create PDF attachment
☐ Make this document private

Keywords / Tags: Sales, Legal Q3

< Back Finish Cancel



Small UI enhancements have been made in order to make the check-in process smoother for all users. By eliminating picklists for options and replacing the options with radio buttons, all of the available options increase visibility.

To check-in agreement document versions

1. Select an agreement in Salesforce and open an agreement document from the **Notes & Attachments** (non-version aware record) or **Document Versions** (version aware record) related list.
2. From the **X-Author Contracts** ribbon in Microsoft Word, use **Connect** to connect to your Salesforce org.
3. Make changes as required to the document and then select **Check-in** to display the Check-In dialog and select one of the three options from the **Save** list.

Option	Description (Non-Version Aware)	Description (Version Aware)
With Redlines	This saves a draft version of the agreement document with all markups and <i>Redlines</i> is used as the action in your org's configured default document naming convention.	This saves a draft version of the agreement document with all markups and <i>Redlines</i> is used as the action in your org's configured default document naming convention. Selecting this option creates a Minor version under the Document Version Details related list in your Agreement record.
Without Redlines	This saves a draft version of the document without markups and is typically done before sending an agreement to a third party for review. Track changes /redlines are automatically removed from the Word file and <i>_Clean</i> is used as the action in the configured default document naming convention.	This saves a draft version of the document without markups and is typically done before sending an agreement to a third party for review. Track changes/redlines are automatically removed from the Word file and <i>_Clean</i> is used as the action in the configured default document naming convention. Selecting this option creates a Major version under the Document Version Details related list in your Agreement record.
Final - to be signed	This saves a version of the document without markups and also enables a PDF version of the document to be created. If	This 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, both a Word and PDF file

Option	Description (Non-Version Aware)	Description (Version Aware)
	this option is selected, both a Word and PDF file will be saved to the agreement's Notes and Attachments related list. By default, <i>_Final</i> is used as the action in the configured default document naming convention.	will be saved to the agreement's Notes and Attachments related list. By default, <i>_Final</i> is used as the action in the configured default document naming convention. Selecting this option creates a Major version under the Document Version Details related list in your Agreement record.

4. Select **Update Current Version** if you only want to update the current copy of the document you are working on in Salesforce. All other options will be disabled. If you do not select this option a new document will be saved in Salesforce.



Note: this option will not be visible if you are checking in a generated version for the first time (the draft must have been checked in at least once). Also, any document lock created when the document was first checked out will remain. *An admin must release the lock or assign the lock to another user for anyone else to work with the document.*

In the **Suggested Name** field, enter the required name for the document or leave it as the name suggested by X-Author. The default name depends on your version of Contract Management and the default document naming convention defined for your org. You do not need to specify a file extension in the **Suggested Name** field, as author automatically saves it in .docx format.


Note


If you want to use personalized document name by editing the document name in the **Suggested Name** field, the default name of the document specified in the Document Naming Convention property will be overridden.

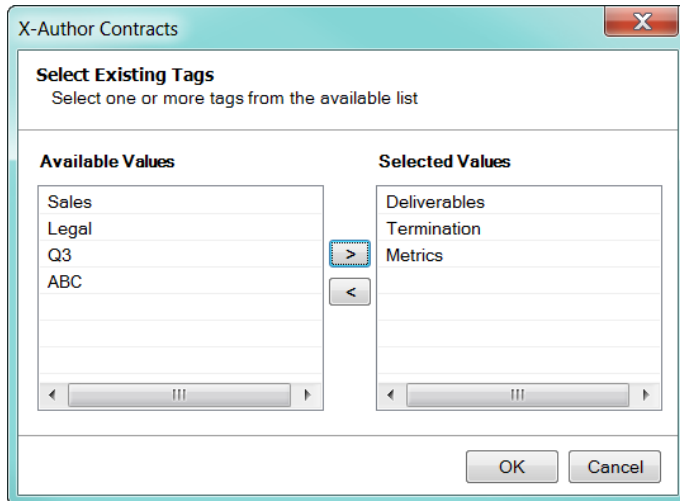
Also, please note that the **Suggested Name** field shows the file name with %version% attribute, which gets resolved into the document version number in the file name, after checking in the document.

For more details on the Document Naming Convention property, refer to **Comply System Properties** topic in the Appendix of *Contract Management Administrator Guide*.

5. Select the required watermark option. Select **Reconcile Document** to synchronize the Salesforce Agreement object fields with those that were updated in the document. See [Reconciliation](#) for more details.
 - 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**.
6. Select **Create PDF attachment** to have both a Word and PDF file saved to the agreement's Notes and Attachments related list.
7. Select **Make this document private** if you want the agreement document accessible to only the document owner and the system administrator. See [Marking Agreement Document as Private](#) for further details.
8. Enter any comma-separated **Keywords/Tags** you want to associate with the document upon check-in. X-Author users can filter *version-aware* agreement documents at [checkout](#) based on these keywords/tags. Contract Management users can also make use of these tags when using Document Finder on the agreement record.

 Keywords/tags functionality is only enabled in orgs updated with **Apttus Contract Management 8.4.0321 or higher** with Document Finder enabled. For more information on enabling Document Finder, refer to [Configuring Document Finder](#) in the *Contract Management Administrator Guide*. Keywords/tags can only be used with *version aware* records.

9. Click the  button to the right of Keywords/Tags to choose from a list of existing tags to apply to the new version of the document you are checking in. Click **OK** to add them to the list of keywords/tags on the previous screen.



10. Click **Save** and then click **OK** in the confirmation message box. The checked in document is stored on the agreement record based on the record's version aware status:
- Version Aware – The updated document is stored in the **Document Versions** related list for the agreement if you choose to check-in **With Redlines** or **Without Redlines**. See below for information on Contract Document Versioning . If you have chosen to check in the agreement document as **Final - to be signed** , it will be stored in the **Notes and Attachments** related list.
 - Non-Version Aware – The updated document (Redlines, Clean or Final) is stored in the **Notes & Attachments** related list.

To update the current document version

A situation may arise when you are working with a document and realize you would like to make more changes to the document but have already checked in the new version. To avoid having to check in another redlined version, you now can instead choose to “Update Current Version” from the Check-In Document screen.



Note: this option will not be visible if you are checking in a generated version for the first time (the draft must have been checked in at least once).

1. Follow steps 1 - 2 from the previous section.
2. Select the check box **Update Current Version**. All other options in the window are disabled.
3. Click Save. The current copy of the agreement document is updated in Salesforce.

Check-In Document
Define the attributes to be applied in checking this document into Salesforce

Options

• Save: ☒ Update Current Version
☐ With Redlines
☐ Without Redlines
☐ Final - to be signed

Version Details

• Suggested Name: Sales SOW 09.21.15.2_Redlines_Sales SOW_2015-09-21
☐ Include Watermark
☐ Reconcile Document
☐ Create PDF attachment
☐ Make this document private

Track Recipients
Check which recipients reviewed the document(s):
☒ Recipient unknown, check-in as Negotiator

Comments:

< Back Finish Cancel

Updating Current Version and Document Locks

When you update the current version of the document you are working on, any document lock created when the document was first checked out will remain. In most cases, you will be choosing to update the current document version with the ultimate goal of checking it in—when you are finished with your updates to the document you can release the lock by performing a full check-in. However, in the event that you do not wish to create a new document version by checking it in, the document lock can be released in the following ways:

- Release the Document lock from X-Author Contracts (must have proper Agreement Lock permissions).
- Assign the lock to another user from the Salesforce record (**Admin only**).

For more details on agreement document versioning, refer to Contract Document Versioning, in *Contract Management Administrator Guide*.

Creating Offline Agreements in FX2 format

Offline Agreements can be created directly in X-Author Contracts, by taking a pre-existing Microsoft Word document that was created outside of Salesforce and has not previously been associated with an Agreement, and checking it in.

When a document is open in X-Author Contracts and has not previously been kept in Salesforce, the Check-In option can be used for creating an Offline Agreement. There are some mandatory fields that must be completed before a new Agreement can be generated, otherwise the fields that can be displayed can be configured. The results are the same as creating an Offline Agreement from the Agreements tab in Salesforce.

When you click *Check-in*, the dialog box will prompt you to select an answer to the question, "Do you want to import this agreement document using the FX2 format?" The available answers are "Yes" or "No". After selecting one of the options, clicking **OK** will initiate the *New Offline Agreement* VisualForce page where you can then enter in details for the desired Agreement record.

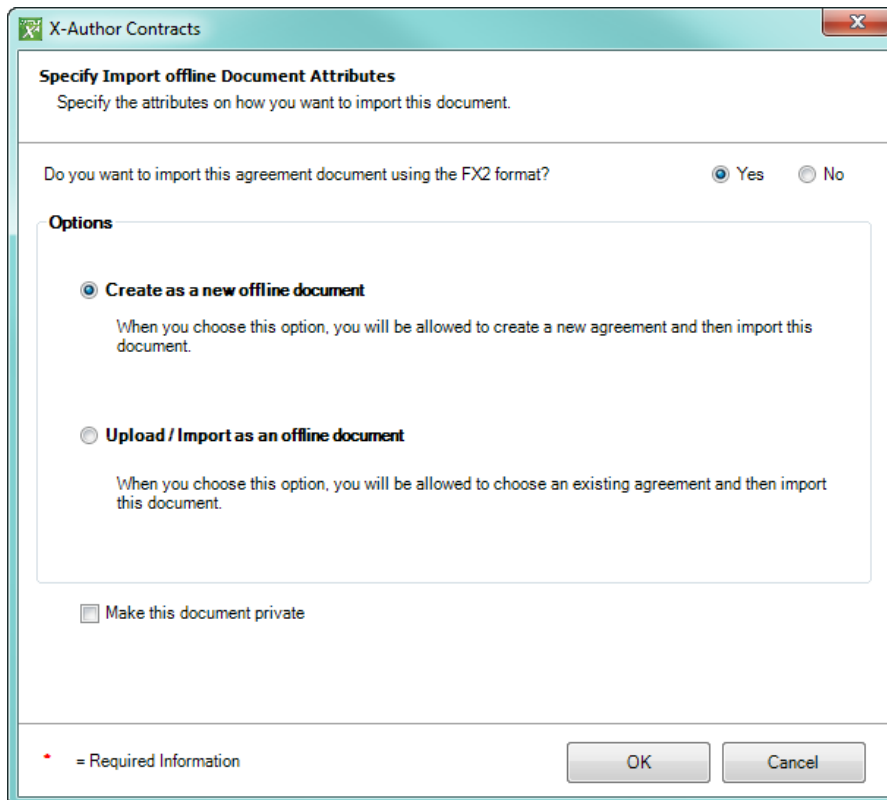
The screenshot shows a dialog box titled "X-Author Contracts" with a close button (X) in the top right corner. The main heading is "Specify Import offline Document Attributes" with a subtitle "Specify the attributes on how you want to import this document." Below this, there is a question: "Do you want to import this agreement document using the FX2 format?" with two radio button options: "Yes" (selected) and "No". Underneath is a section titled "Options" containing two radio button options: "Create as a new offline document" (selected) and "Upload / Import as an offline document". Each option has a descriptive text block. At the bottom left, there is a checkbox labeled "Make this document private". At the bottom right, there are "OK" and "Cancel" buttons. A legend at the bottom left indicates that a red asterisk (*) denotes "Required Information".



You must be using Contract Management 6.3 or higher, as well as X-Author Contracts 6.3 or higher to create offline agreements.

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

1. With the document open, connect to the Salesforce org where you want to create the offline document.
2. Go to the **X-Author Contracts** tab and click **Check-In**. The Check-In dialog is displayed.

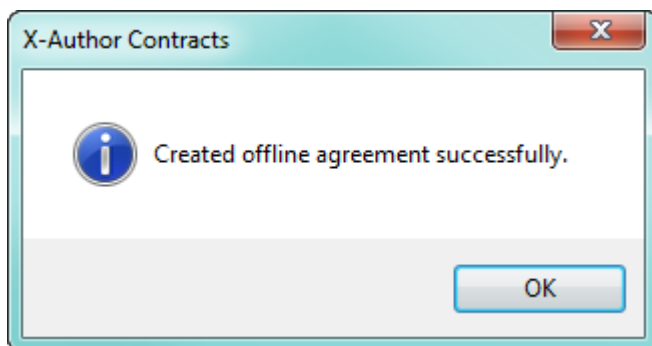


The image shows a dialog box titled "X-Author Contracts" with a close button in the top right corner. The main heading is "Specify Import offline Document Attributes" with a subtext "Specify the attributes on how you want to import this document." Below this is a question: "Do you want to import this agreement document using the FX2 format?" with two radio buttons: "Yes" (selected) and "No". Underneath is a section titled "Options" containing two radio button options: "Create as a new offline document" (selected) and "Upload / Import as an offline document". Each option has a descriptive text block. Below the options is a checkbox labeled "Make this document private". At the bottom left, there is a red asterisk icon followed by the text "= Required Information". At the bottom right are two buttons: "OK" and "Cancel".

3. Select **Create as a new offline document** and click **OK**. Optionally, you can choose to make the offline document private. For more information on what this means, see [Marking Agreement Documents as Private](#).
4. In the New Offline Agreement window, enter an Agreement Name for your document, select an existing Account, and complete any remaining fields. Click **Save**.

The screenshot shows a window titled "X-Author Contracts" with a sub-header "New Offline Agreement". Below the sub-header are "Save" and "Cancel" buttons. The main section is titled "Information" and contains several fields: "RecordType" (a dropdown menu showing "SOW"), "Agreement Name" (a text field with "0216_Agreement"), "Account" (a text field with "ABC Company" and a magnifying glass icon), "Primary Contact" (a text field with "Joshua Johnson" and a magnifying glass icon), "Related Opportunity" (a text field with a magnifying glass icon), "Agreement Start Date" (a date field with "2/4/2016" and a calendar icon), "Term (Months)" (a text field), and "Agreement End Date" (a date field with "2/4/2018" and a calendar icon). A legend on the right indicates that a red vertical bar next to a field name means "Required Information". At the bottom of the form are "Save" and "Cancel" buttons.

5. Wait for the confirmation dialog to be displayed. Your offline agreement has been completed successfully.



The agreement record is created in Salesforce and the document is attached to the **Notes & Attachments** related list or **Document Versions** if Contract Document Versioning is enabled.

Mark Clause Menu Actions and Promote Clauses

Using the **Mark Clause** menu, you can drag and drop a block of text onto Library node in the Mark Clause menu or drag it onto the playbook clause (with the option to replace the agreement text with the playbook text). A marked clause can then be promoted to the Playbook for using it in future.

Marking a Clause in an Agreement

During the process of negotiation, a user may find a section of text that they would like to make smart or replace with a clause from the Playbook library.

Mark Clause is available for Agreement documents generated from FX2 Templates. This is similar to the **Insert Section** feature in the pre-existing format framework.

A user can mark a clause in a contract document through one of two ways:

- Drag and drop the selected content onto the library node to mark a one-off clause.
- Drag and drop the selected content onto a clause in the clause list.

This has implications for imported document, 3rd party paper and document during negotiation cycles.

With each action such as insert, modify or delete you make to the smart clause, the Agreement Clause related list in your agreement record reflects these changes effectively. For more details, refer to [Tracking Clauses in your Agreement](#).

To mark a clause in an agreement

There are two ways to mark a clause in an agreement document:

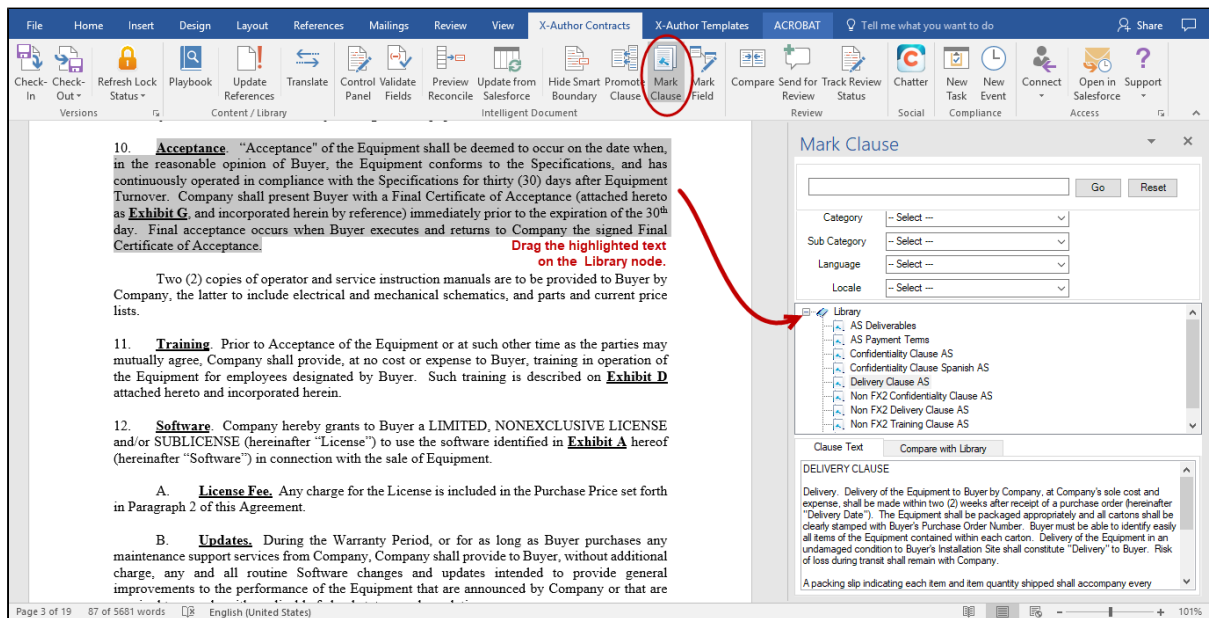
- drag-and-drop document content onto the library node of the Mark Clause panel, to mark it as a "1-off" instance of a clause.
- drag-and-drop document content onto a clause from the clause list, to assign clause properties to the content or replace it with the content of the clause from the Playbook.

To mark a "1-off" Clause


1. From the X-Author Contracts ribbon, select **Mark Clause**. The Mark Clause panel is displayed.
2. Highlight the content in the contract to be marked as a clause.

X-Author Contracts on Salesforce Spring 2018 User Guide

3. Drag and drop the highlighted content onto **Library** node in the Mark Clause panel:



The Mark Clause form is displayed.

 X-Author Contracts

Mark Clause
 Specify the details for marking / creating a clause

*

Action

Inserted

*

Clause Name

*

Category

-- Select --

*

Sub Category

-- Select --

Exception

-- Select --

Risk Rating

-- Select --

Materially Significant

☐

Clause Text (Selected)

All invoices submitted to Buyer by Company shall list the items of Equipment purchased thereunder in the same sequence used in Buyer's Purchase Order for such Equipment. Buyer's Purchase Order Number shall appear on all invoices submitted to Buyer hereunder.

*

= Required Information

Save

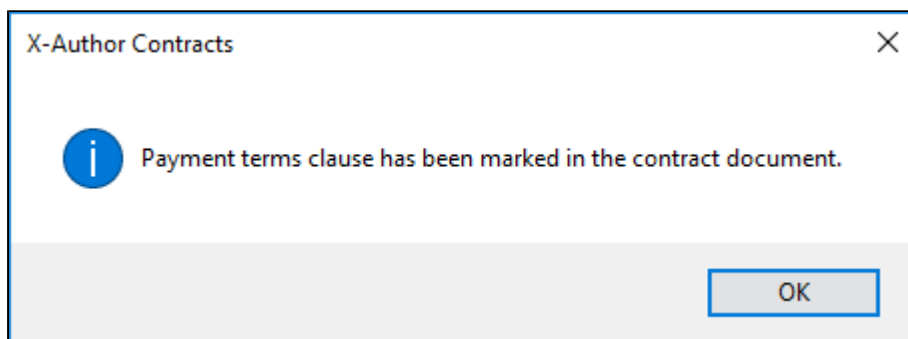
Cancel

4. Fill in the following fields in the form (fields marked with an asterisk (*) are required):

Field	Description
Action	This drop-down list shows various actions you can perform with the selected clause. By default, <i>Inserted</i> is chosen and is Read-Only.
Clause Name	Type a name for the 1-off clause.
Category	Select a Category for the 1-off clause.

Field	Description
Sub Category	Select a Sub Category for the 1-off clause. This drop-down list is dependent on the Category drop-down list.
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"> • Green • Red • Yellow
Materially Significant	Select this check box if you want to make your clause materially significant.
Clause Text (Selected)	This text area shows the selected text which you want to mark as a clause.

- Click **Save** to mark document content as a 1-off clause. The clause is marked as smart in the document and a confirmation dialog is displayed.



Any smart fields in the original content will be preserved in the newly-marked clause. The clause is displayed in the **Control Panel** when you have the document checked out.

Control Panel		
<input type="checkbox"/> Fields <input type="checkbox"/> Clauses		
<input type="checkbox"/> Show changed clauses only <input type="checkbox"/> Show clause library for marking		
Clause Name	Changed?	Marked for Deletion?
CC Deliverables	<input type="checkbox"/>	<input type="checkbox"/>
CC Technical Requirements	<input type="checkbox"/>	<input type="checkbox"/>
CC Termination	<input type="checkbox"/>	<input type="checkbox"/>
Payments SOW 5.16	<input type="checkbox"/>	<input type="checkbox"/>

6. **Check-In** and/or **Reconcile** your document when you are finished.

To mark document content as an existing clause

1. From the X-Author Contracts ribbon, select **Mark Clause**. The Mark Clause panel is displayed.
2. Highlight the content in the contract to be marked as a clause.
3. Drag and drop the highlighted content onto the desired clause in the Mark Clause panel:

The screenshot shows the X-Author Contracts ribbon with the 'Mark Clause' button circled in red. The Mark Clause panel is open on the right, displaying a list of clauses in the library. A red arrow points from the highlighted text in the document to the 'Delivery Clause AS' entry in the library.

Document Content:

10. **Acceptance** "Acceptance" of the Equipment shall be deemed to occur on the date when, in the reasonable opinion of Buyer, the Equipment conforms to the Specifications, and has continuously operated in compliance with the Specifications for thirty (30) days after Equipment Turnover. Company shall present Buyer with a Final Certificate of Acceptance (attached hereto as **Exhibit G**, and incorporated herein by reference) immediately prior to the expiration of the 30th day. Final acceptance occurs when Buyer executes and returns to Company the signed Final Certificate of Acceptance.

Two (2) copies of operator and service instruction manuals are to be provided to Buyer by Company, the latter to include electrical and mechanical schematics, and parts and current price lists.

11. **Training** Prior to Acceptance of the Equipment or at such other time as the parties may mutually agree, Company shall provide, at no cost or expense to Buyer, training in operation of the Equipment for employees designated by Buyer. Such training is described on **Exhibit D** attached hereto and incorporated herein.

12. **Software** Company hereby grants to Buyer a LIMITED, NONEXCLUSIVE LICENSE and/or SUBLICENSE (hereinafter "License") to use the software identified in **Exhibit A** hereof (hereinafter "Software") in connection with the sale of Equipment.

A. **License Fee**. Any charge for the License is included in the Purchase Price set forth in Paragraph 2 of this Agreement.

B. **Updates**. During the Warranty Period, or for as long as Buyer purchases any maintenance support services from Company, Company shall provide to Buyer, without additional charge, any and all routine Software changes and updates intended to provide general improvements to the performance of the Equipment that are announced by Company or that are

Mark Clause Panel:

Category: -- Select --
 Sub Category: -- Select --
 Language: -- Select --
 Locale: -- Select --

Library:

- AS Deliverables
- AS Payment Terms
- Confidentiality Clause AS
- Confidentiality Clause Spanish AS
- Delivery Clause AS
- Non FX2 Confidentiality Clause AS
- Non FX2 Delivery Clause AS
- Non FX2 Training Clause AS

Clause Text Compare with Library

DELIVERY CLAUSE

Delivery. Delivery of the Equipment to Buyer by Company, at Company's sole cost and expense, shall be made within two (2) weeks after receipt of a purchase order (hereinafter "Delivery Date"). The Equipment shall be packaged appropriately and all cartons shall be clearly stamped with Buyer's Purchase Order Number. Buyer must be able to identify easily all items of the Equipment contained within each carton. Delivery of the Equipment in an undamaged condition to Buyer's Installation Site shall constitute "Delivery" to Buyer. Risk of loss during transit shall remain with Company.

A packing slip indicating each item and item quantity shipped shall accompany every

The Mark Clause menu user interface is enhanced to now show a flat list of clauses under Library node. Earlier the Mark Clause menu showed clauses in a hierarchy tree according to the Category or Sub-category.

The Mark Clause form is displayed.

Mark Clause
Specify the details for marking / creating a clause

* **Action** Inserted

* **Clause Name** Delivery Clause AS

* **Category** Confidentiality

* **Sub Category** -- Select --

Exception -- Select --

Risk Rating -- Select --

Materially Significant ☐

Clause Text (Selected)
Acceptance. "Acceptance" of the Equipment shall be deemed to occur on the date when, in the reasonable opinion of Buyer, the Equipment conforms to the Specifications, and has continuously operated in compliance with the Specifications for thirty (30) days after Equipment Turnover. Company shall present Buyer with a Final Certificate of Acceptance (attached hereto as Exhibit G, and incorporated herein by reference) immediately prior to the expiration of the 30th day. Final acceptance occurs when Buyer executes and returns to Company the signed Final Certificate of Acceptance.



☐ Replace the current clause selection with the one from the library?

* = Required Information


Save Cancel

4. Fill in the following fields in the form (fields marked with an asterisk (*) are required):

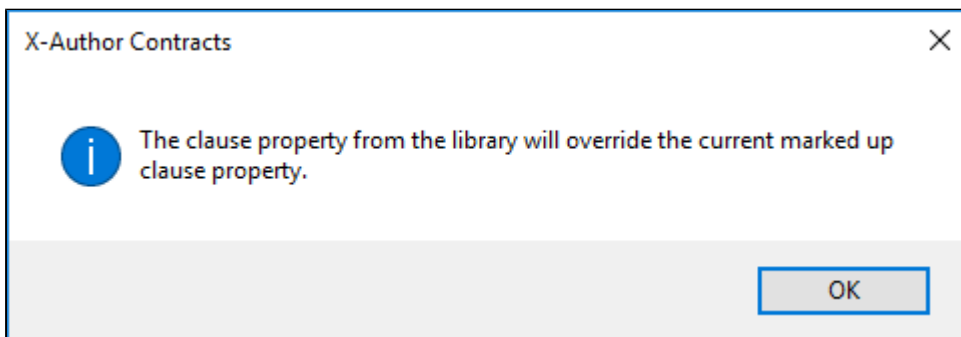
Field	Description
Action	This drop-down list shows various actions you can perform with the selected clause. By default, <i>Inserted</i> is chosen and is Read-Only.

Field	Description
Clause Name	Enter a name for the clause. This field is pre-populated with the name from the clause library. If you change the name, the clause will adopt the properties of the one in the library, but be displayed with this clause name in the document Control Panel.
Category	<p>Select a Category for the clause.</p> <div>  If the content to be marked was dropped onto a clause and the Category picklists in the Template and Agreement Clause objects in your org are the same, this field will be automatically populated. </div>
Sub Category	<p>Select a Sub Category for the clause. This drop-down list is dependent on the Category drop-down list.</p> <div>  If the content to be marked was dropped onto a clause and the Sub Category picklists in the Template and Agreement Clause objects in your org are the same, this field will be automatically populated. </div>
Exception	Select a term exception record from the drop-down list to associate with your clause.
Risk Rating	<p>Select an appropriate risk rating for your clause. Valid values are:</p> <ul style="list-style-type: none"> • Green • Red • Yellow
Materially Significant	Select this check box if you want to make your clause materially significant.
	This text area shows the selected text which you want to mark as a clause.

Field	Description
Clause Text (Selected)	

 Clause properties defined in this form will override any properties inherited from the associated clause, unless you choose to replace the selection with a clause from the library (see below).

5. **(Optional)** Select **Replace the current clause selection with the one from the library?** to replace the clause content with content from the clause in Playbook. If you choose this option, the following dialog is displayed.



When click **Save** to mark a clause that replaces content with a clause from the library, if your marked content contains any smart fields, you will be prompted with the message, "The current selection contains Apttus fields which will be deleted and replaced with the contents of the clause. Do you wish to proceed?"

Click **Yes** to confirm replacement or **No** to cancel.

6. Click **Save** to mark the clause clause in your document. The clause is marked as smart and a confirmation dialog is displayed.
7. **Check-In** and/or **Reconcile** your document when you are finished.

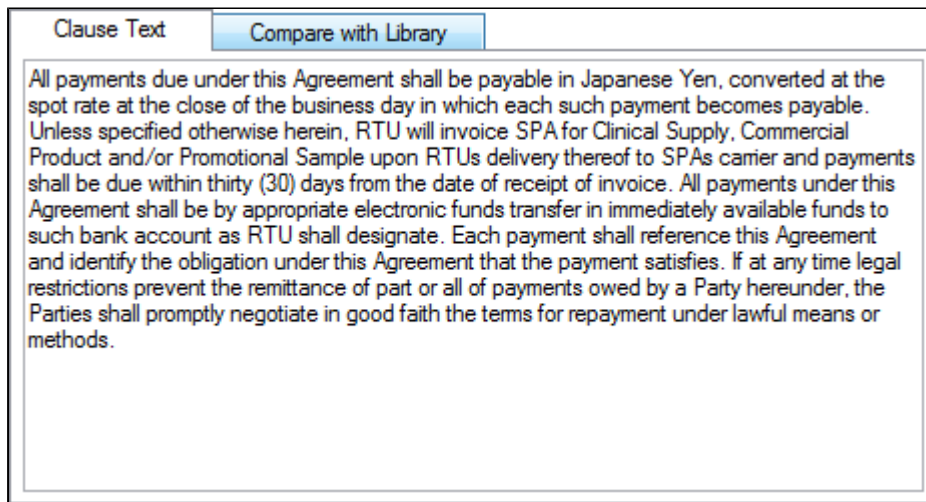
Recording Marked Clause Activity on the Agreement Record

With each action on the smart clause, such as insert, modify or delete, the Agreement Clause related list in your agreement record reflects these changes effectively. For more details, refer to [Tracking Clauses in your Agreement](#) .

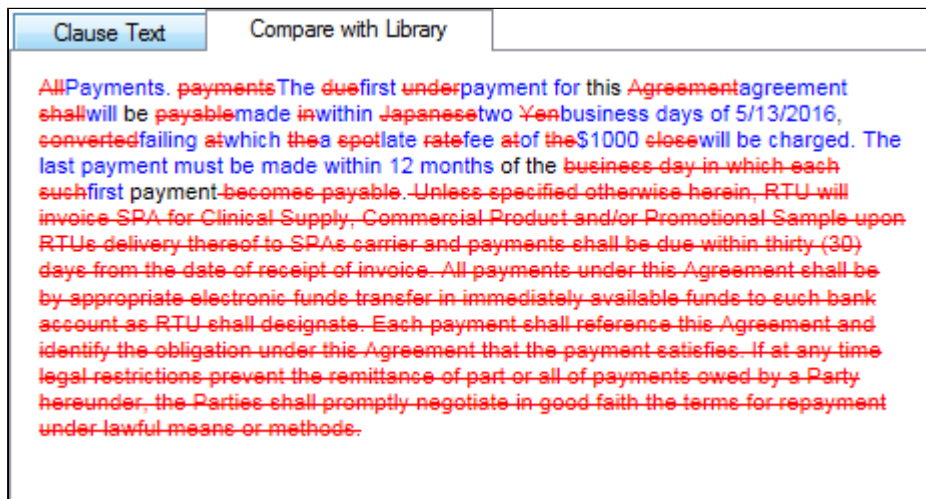
Comparing Marked Content with the Clause Library

Prior to, or after you mark a clause in your document, you can compare the text of the marked clause with the content of the associated clause in Playbook. To compare content:

1. Highlight the marked text (or text to be marked) and click on the associated clause in the Mark Clause panel.
2. By default, the **Clause Text** is displayed in a tab below the Mark Clause panel.



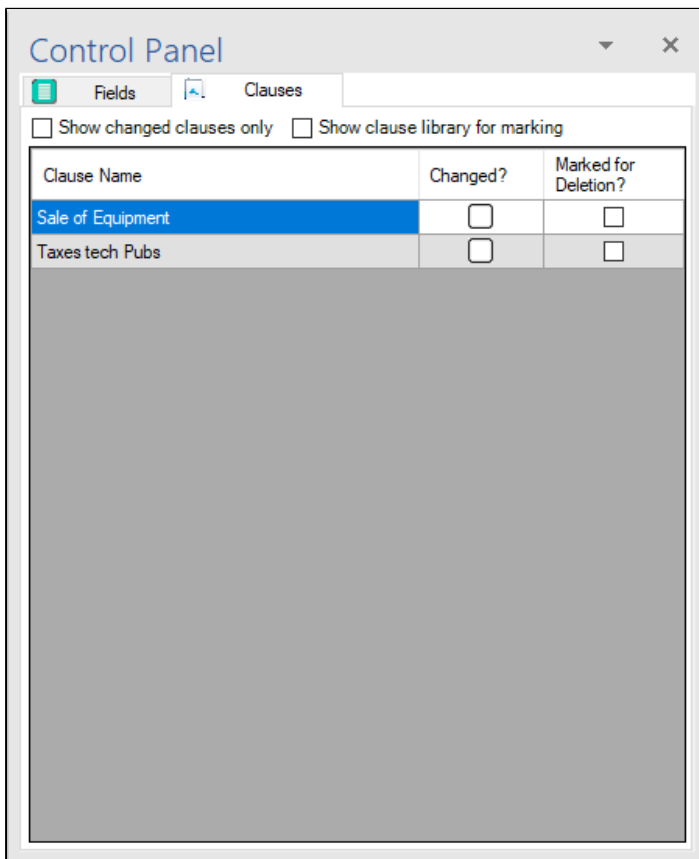
3. Click **Compare with Library** to show diff text between the marked content and the clause from the Library.



Limitation on indented content: if the content you are marking has an indent (tab) at the beginning of the first paragraph and you mark the content as a clause, when you choose to **Show Changes** from the Control Panel, the text will no longer be indented. To correct this, prior to marking the clause, remove the indent from your text and use Tab to indent the text. From the auto-correct menu which appears, select "Change Back to Tab." You may then mark the clause as normal and the indent will be visible when you choose to Show Changes.

To unmark a clause in an agreement

- Ensure that you have marked a clause in an agreement document opened in X-Author Contracts ribbon.
 - You can unmark a clause in the same session as you marked it.
1. From the X-Author Contracts Ribbon, click **Control Panel** to open it.
Make sure you deselect both, **Show changed clauses only** and **Show clause library for marking** check boxes to view all the clauses.



2. Right click on the marked clause in the Control Panel and do any one of the following:

- Click **UnMark Clause**.
- Click **Edit Marked Clause Properties**. You will see the message with the clause properties. Click **Unmark**.

3. Click **Yes** to confirm unmarking of the clause.

4. You will receive a confirmation message with the clause name. Click **OK** to finish unmarking the clause.

You have unmarked a clause in the same session as you marked a clause.

With each action on the smart clause, such as insert, modify or delete, the **Agreement Clause** related list in your agreement record reflects these changes effectively. For more details, refer to [Tracking Clauses in your Agreement](#).

Searching Clauses in Mark Clause Menu

Using the Mark Clause menu, you can drag and a drop a block of text onto either clause Library node (root node) or drag it onto the playbook clause (with the option to replace the agreement text with the playbook text). A marked clause can be then be promoted to the Playbook for future use. The Mark Clause menu displays the list of clauses in an alphabetized ascending sequence from A to Z. Mark Clause menu has following features to help you in searching the desired clause faster:

- The Mark Clause menu lists only those clauses which have the Record Type same as the Record Type of the agreement document currently opened in the X-Author Contracts.
- The clauses listed in the Mark Clause menu, under Library are sorted in ascending alphabetical order, from A to Z.
- The Mark Clause menu has search feature with a search box which searches per the search string entered by you. The search feature searches in the Clause Name, Keywords and clause Description fields.
- The search string is not case sensitive.
- The search feature also has an advanced filter which filters the clauses based on Category, Sub-category, Locale and Language.

Using the Search Box

To search clauses in the Mark Clause menu:

1. Go to X-Author Contracts tab and click **Mark Clause**. This opens the Mark Clause menu in the right hand side of your Microsoft Word Document window.

The screenshot shows the 'Mark Clause' window. At the top is a search bar with 'Go' and 'Reset' buttons. Below are four dropdown menus for 'Category', 'Sub Category', 'Language', and 'Locale', each with a '-- Select --' option. A 'Library' section follows, containing a list of clause names: 'AS Deliverables', 'AS Payment Terms', 'Confidentiality Clause AS', 'Confidentiality Clause Spanish AS', 'Delivery Clause AS', 'Non FX2 Confidentiality Clause AS', 'Non FX2 Delivery Clause AS', and 'Non FX2 Training Clause AS'. At the bottom, there is a 'Clause Text' label and a 'Compare with Library' button, with a large empty text area below.

2. To search with a search string, type the search string in the search box on the top of the menu and click **Go**.

- The search box shows result according to full or partial search string entered.
- The search box does not accept special characters including *, |, :, ", <, >, ?, \, /.
- You can also perform search with wild character %.

✔ Use Case

If you want to search a clause or list of clauses which have the words Non and Clause in their name, you can use the wild character "%", in your search string.

- Go to Mark Clause menu.
- In the search box, type "Non%Clause" and click **Go**.
- The search result will show all the clauses with the words "Non" and "Clause" in their name

The screenshot shows a 'Mark Clause' dialog box with a search bar containing 'Non%Clause' and 'Go'/'Reset' buttons. Below are filters for Category, Sub Category, Language, and Locale, all set to '-- Select --'. A 'Library' section lists four clauses: 'Non FX2 Confidentiality Clause AS', 'Non FX2 Delivery Clause AS', 'Non FX2 Training Clause AS', and 'Non-Reliance Clause AS'. At the bottom, there is a 'Clause Text' field and a 'Compare with Library' button.

Using Clause Filters

The search feature of mark Clause menu has some pre-built filters to further refine your clause search. These filters are under the search box.

- Advanced filters can refine the search based on following four type of pre-built filters:
 - Category,
 - Subcategory,
 - Language, and
 - Locale
- The four advanced filter are all picklist fields and you can select the picklist values from the drop-down.
- The search results are shown after logical *AND* operation of the search string in the search box and the values selected in the above four advanced filters.

Use Case

If you want to perform a complex search for a clause you can leverage the search box and the advanced filter to get a more accurate search result. if you want to search a clause in Spanish language, from Procurement category and having the word "Sales" in its title you can do it in the following manner:

- In the search box type "Sales"
- In the advanced filter Category field, select Procurement from the picklist and in the Language field, select Spanish from the picklist.
- Click **Go**
- The clause or clauses, fulfilling all the three conditions outlined above will be shown in search results.

Resetting Search

Reset clears out all the filter and search parameter including the search string and the advanced filter selection.

- To reset all the search parameters click **Reset** in the Mark Clause menu.

Earlier, you could promote the clauses to Playbook only through the X-Author Templates ribbon. Now, as a system administrator, you can select any content in the agreement document, mark the content as clause and then promote it to the clause library.

If your clause contains Smart fields, Playbook takes these Smart fields as text only.

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

1. On the X-Author Contracts tab, click **Promote Clause** ribbon.
2. From the list of marked clauses, select the clauses you want to promote to the clause library.

[illegible]

3. Do one of the following:
 - Click **Next** to move to the Check-In Clause dialog.
 - Click **Cancel** to cancel promoting the clause to Playbook.

4. In the Check-In Clause to Playbook dialog, enter a mandatory Name, Category, Subcategory, and Language for the selected clause. This is similar to checking in a clause from X-Author Templates ribbon.

Check-In Clause to Playbook
Please select the clause properties which shall be checked in as library of clause

Name	LL Clause 2 Nested	Type	Clause
Category	-- Select --	Business Object	Apttus__APTS_Agreement_c
Subcategory	-- Select --	Agreement Type	4G Agreement
Language	-- Select --	Term Exception	
Locale	-- Select --		
Description			
Guidance			
Keywords			

< Back Finish Cancel

5. Do one of the following:
 - Click **Back** to move back to step 2.
 - Click **Finish** to complete promoting the selected clause to the Playbook.
 - Click **Cancel** to cancel the clause promotion.

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

X-Author Contracts Control Panel

The **Control Panel** can be accessed from the X-Author Contracts ribbon tab. The Control Panel enables you to view all of the fields, sections, and tables in an Agreement document that uses the new FX2 format. To access the Control Panel, click **Control Panel** in the X-Author Contracts ribbon tab. The Control Panel opens in a side panel in Microsoft Word.

Note

From November 2015 release onwards, ensure that you have at least one smart field or smart clause in your agreement document to access the Control Panel ribbon tab in X-Author Contracts. Accordingly, you can view the Fields or Clauses tab within the Control Panel.

Within the **Control Panel**, you can view the fields and clauses that have been tagged within an Agreement document. The **Control Panel** lists all smart fields and clauses in the order they appear in the document.

- Fields - You can view the *Field Name* and the previous value and the current value of that field.
- Clauses - You can view the *Clause Name*, check if the content in the clause is changed or not and also mark the clause for deletion.

You can also use the *Filters* section above the field columns to filter the results in the **Control Panel** by selecting the following options for fields and clauses.

- For fields, use **Show changed fields only** to list only those fields whose values have been changed and use **Show fields for marking** to list the fields with its field types which can be used for tagging.

Control Panel (Left Screenshot):

Fields | Clauses

☒ Show changed fields only ☐ Show fields for marking

Field Name	Previous Value	Current Value
Agreement Start Date	8/4/2015	8/13/2015

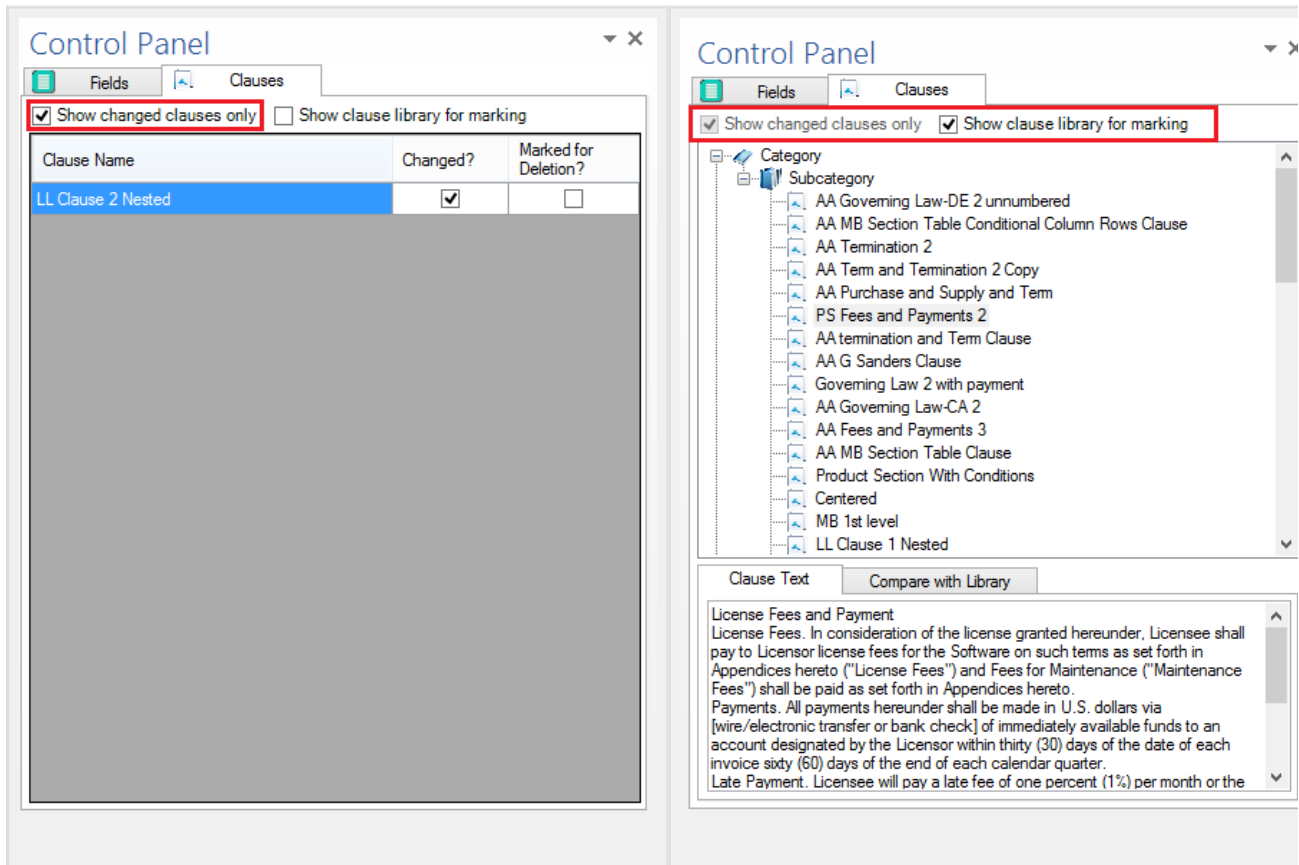
Control Panel (Right Screenshot):

Fields | Clauses

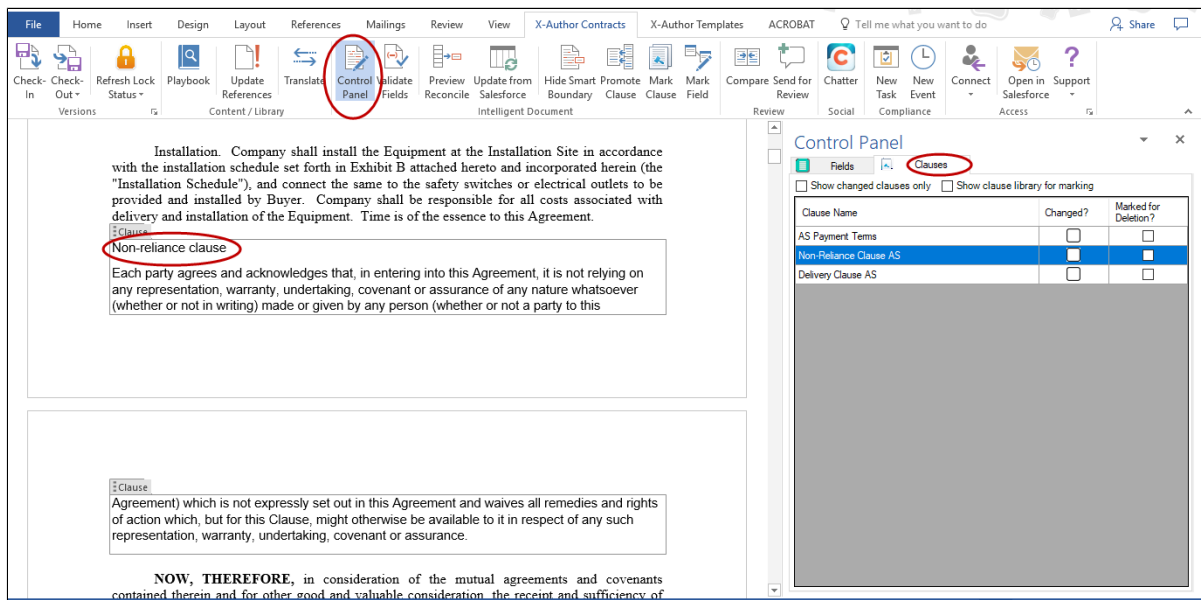
☒ Show changed fields only ☒ Show fields for marking

Field Label	Field Type
DocuSign	
Cycle Status	PICKLIST
Deal Type	PICKLIST
Information	
Account Search Field	STRING
AgrApproval Status	PICKLIST
Agreement AttURL	URL
Agreement AttURL2	URL
Agreement Category	PICKLIST
Agreement Name	STRING
Agreement Number_Num (INTERNAL)	STRING
AgreementStartDate_forUK Format	DATE
Allowable Output Formats	MULTIPICKLIST
ChangeClause	BOOLEAN
DeleteClause	BOOLEAN
InsertClause	BOOLEAN
Is Locked	BOOLEAN
Is Transient	BOOLEAN
Latest Doc ID	STRING
MarkClause	BOOLEAN
Service Plan	PICKLIST
Service Variations Allowed	BOOLEAN
Status	PICKLIST

- For clauses, use **Show changed clauses only** to list only those clauses whose content has been changed and use **Show clause library for marking** to display the clause library to further mark a clause in the agreement document. You can also view the difference between the selected text and the text from the clause library. The red strike-through shows the deleted content and the content in blue shows the new content.



- X-Author Contracts Control Panel is enhanced to show highlighted clause name in the **Clauses** tab of the Control Panel when you select any text of the corresponding clause in the body of the agreement document. This ensures that while deleting clauses from a document you don't accidentally delete a wrong clause.



Changing the position and the width of the Control Panel

When the *Control Panel* is opened up, you can move it to other locations within Microsoft Word. By clicking and holding on the title bar, you can move the *Control Panel* to the top, left, right, or bottom of Microsoft Word.

You can also change the width of the Control Panel by using the left column of the Control Panel for Fields and Clauses tabs.

When you expand the Control Panel, the leftmost column also moves with the cursor. In cases where you decrease the size of the Control Panel to a greater extent, use the scroll bar to view the various columns. Even tooltips for each record in the fields tab help you view the previous and current value of each record.

Clause Control Panel Actions

The Control Panel under X-Author Contracts enables you to perform the following actions:

- [Reject Clause Changes to an Agreement Document](#)
- [Mark Clauses for Deletion](#)
- [Remove Clauses Inserted in the same session](#)

Rejecting Clause Changes in an Agreement

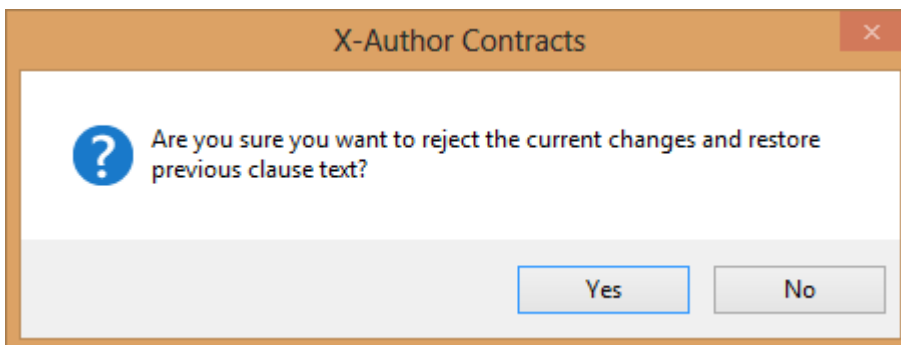
X-Author Contracts also enables you to accept or reject the changes you make to the clause content in a generated document.

When viewing a redlined agreement, you will need to reconcile changes in the clauses. Clause changes and clause reconciliation with X-Author Contracts is absolute, either you accept the entire change (default) or reject all changes. Unlike Fields and Tables, clauses during any reconciliation are Read Only. You can reject a change in a clause from the Control Panel. Select a changed clause from the Control Panel and in the bottom pane, you will see the differences in current clause to the previous clause.

To reject clause changes in an agreement

Ensure that you have made some changes made to the marked clauses in a generated document open in X-Author Contracts ribbon.

1. From the X-Author Contracts Ribbon, click **Control Panel** to open it. By default, **Show changed clauses only** is selected to view only the changed clause records. You can adjust the column width in the Control Panel by drag and drop functionality.
2. Right click on any clause which has **Changed** check box selected against it.
3. Click any one of the following:
 - Click **Reject Changes** if you do not wish to keep the changes in the clause.
 - Click **Show Changes** if you want to view the changes made to the clause. The newly added content is visible in blue and the deleted content in red.
4. If you chose to reject the changes, the following confirmation message appears.



5. Click **Yes** to remove the changes from the clause or click **No** to retain the changes in the clause.

You have either accepted or rejected the changes made to the marked clause in the generated document.

You can now **Check-In** the document.

Deleting Clauses from an Agreement

There will be times in the negotiation when the other party will want to delete a clause. In X-Author Contracts, only the Apttus user can delete smart clauses. During the negotiation of a contract the other party may highlight and attempt to delete a clause, but to the Apttus user, they will see a clause with a boundary that has been wholly redlined.

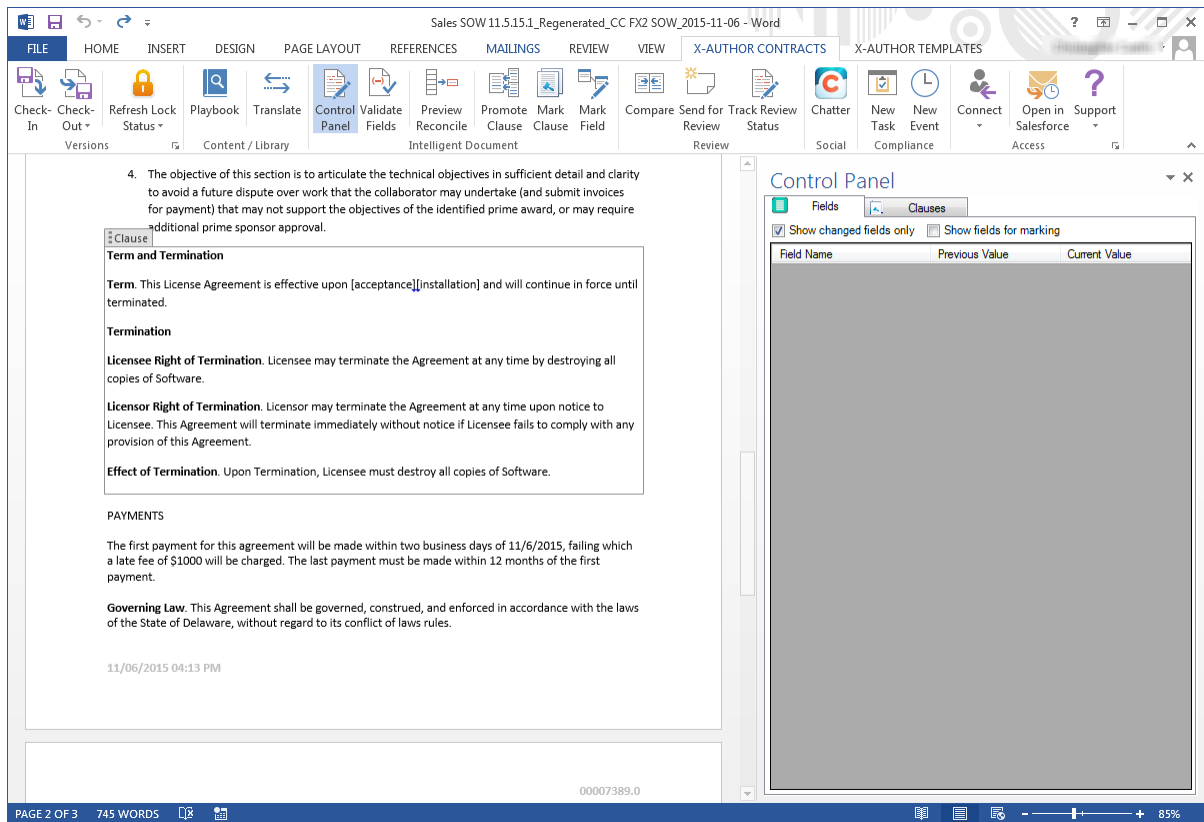
X-Author Contracts allows you to mark a clause for deletion and deletes the clause content from the document after you reconcile the document back to Salesforce.

Following reconciliation, the changes in the deleted clause are visible on the **Agreement Clause** related list on the Agreement record. For more details, refer to [Tracking Clauses in your Agreement](#).

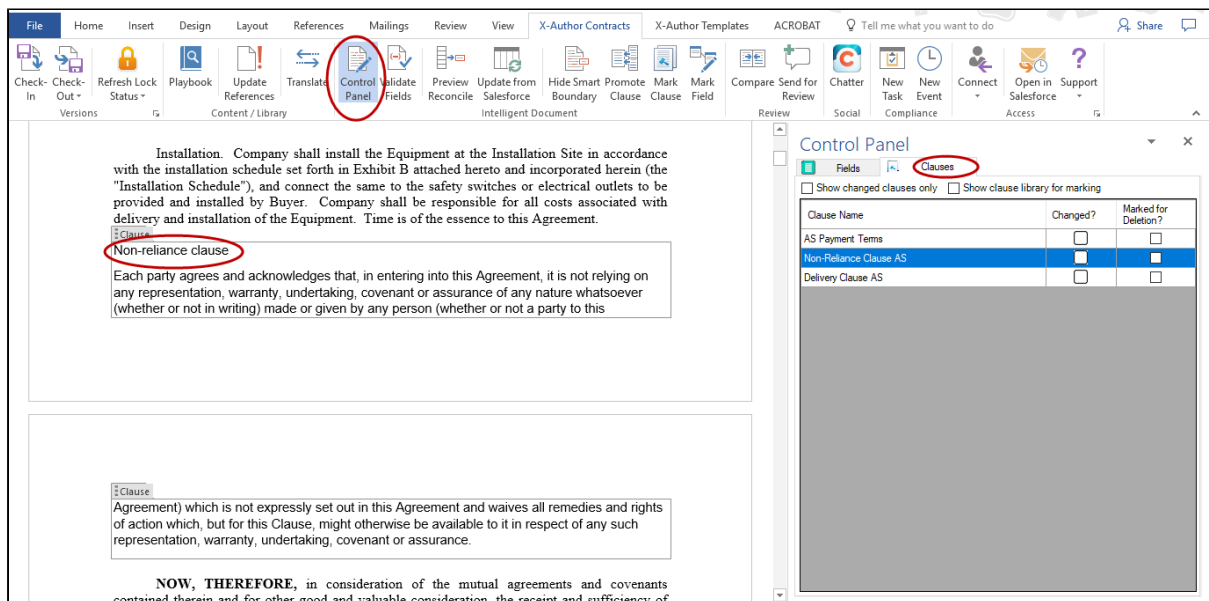
To delete a clause from the Control Panel

1. Open the **Control Panel** from the X-Author Contracts ribbon.

X-Author Contracts on Salesforce Spring 2018 User Guide

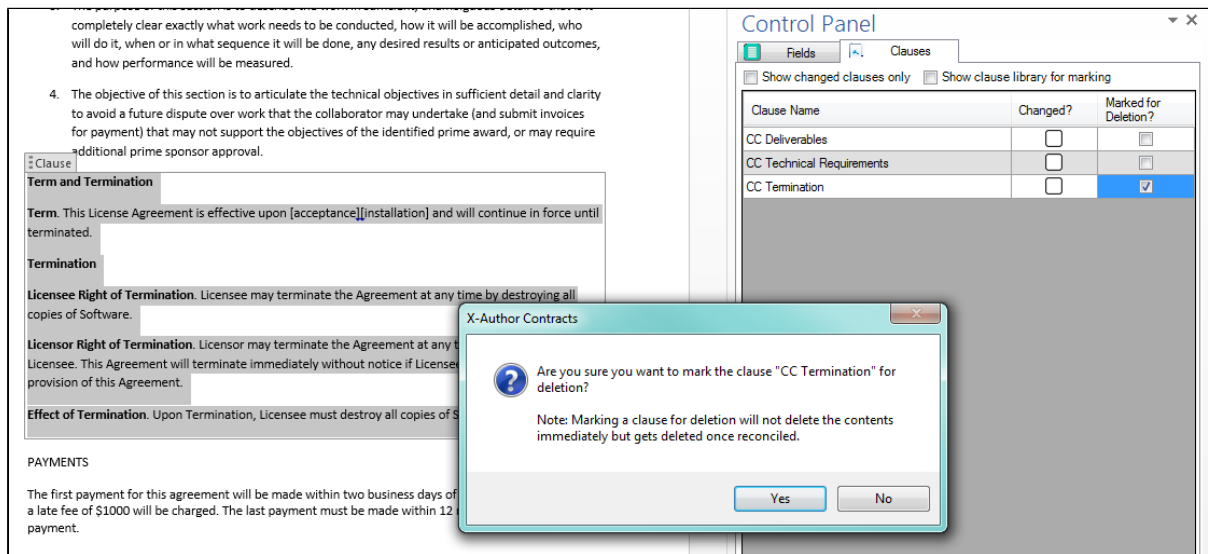


2. Click on the **Clauses** tab in the Control Panel and deselect **Show changed clauses only** to display a list of clauses in the document.



 X-Author Contracts Control Panel is now enhanced to highlight the name of the clause in the Control Panel when you click the clause body text in the agreement document. Use **X-Author Contracts version 9.0.1201** or later for accessing this feature.

- Click the check box under the **Marked for Deletion?** column corresponding to the clause you want to delete. A confirmation dialog is displayed.

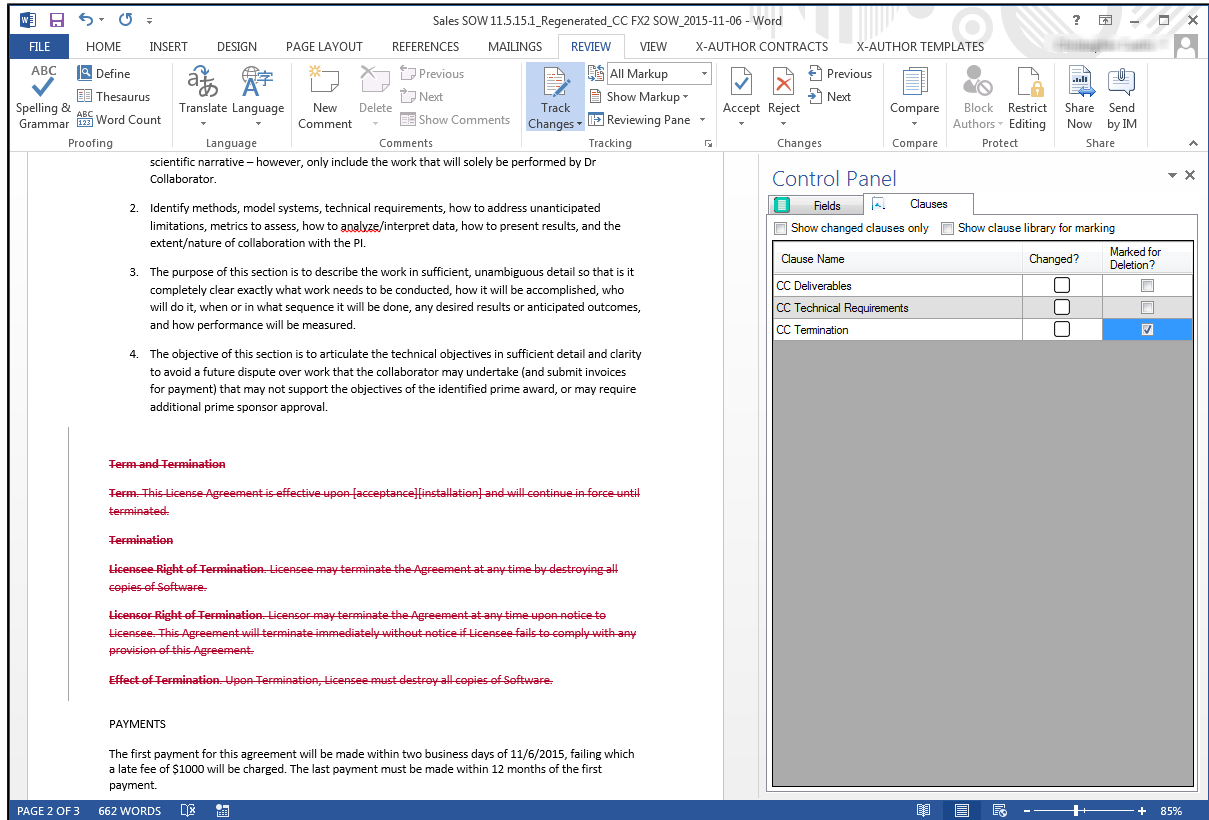


The screenshot displays the X-Author Contracts interface. On the left, a document snippet is visible with sections like "Term and Termination", "Licensee Right of Termination", "Licensor Right of Termination", and "Effect of Termination". On the right, the "Control Panel" is open, showing a table of clauses. The "CC Termination" clause is selected, and its "Marked for Deletion?" checkbox is checked. A confirmation dialog box titled "X-Author Contracts" is overlaid on the screen, asking "Are you sure you want to mark the clause 'CC Termination' for deletion?". The dialog includes a note: "Note: Marking a clause for deletion will not delete the contents immediately but gets deleted once reconciled." and "Yes" and "No" buttons.

Clause Name	Changed?	Marked for Deletion?
CC Deliverables	<input type="checkbox"/>	<input type="checkbox"/>
CC Technical Requirements	<input type="checkbox"/>	<input type="checkbox"/>
CC Termination	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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- Click **Yes** to mark the clause for deletion. The clause is now marked for deletion. If you have tracked changes enabled for the document, the content of the marked clause is redlined.



- Make any additional changes to the document, including marking other clauses for deletion. **Check-in** the document to complete deletion of the clause. The Check-in dialog displays all clauses marked for deletion.

Reconcile the Smart Clauses
View the changes to the smart clauses within the contract document. Clause changes can be rejected from the control panel.

Clause Name	Changed?	Marked for Deletion?
CC Termination	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Current Clause Text
Term and TerminationTerm. This License Agreement is effective upon [acceptance][installation] and will continue in force until terminated. TerminationLicensee Right of Termination. Licensee may terminate the Agreement at any time by destroying all copies of Software. Licensor Right of Termination. Licensor may terminate the Agreement at any time upon notice to Licensee. This Agreement will terminate immediately without notice if Licensee fails to comply with any provision of this Agreement. Effect of Termination. Upon Termination, Licensee must destroy all copies of Software.

Previous Clause Text
Term and TerminationTerm. This License Agreement is effective upon [acceptance][installation] and will continue in force until terminated. TerminationLicensee Right of Termination. Licensee may terminate the Agreement at any time by destroying all copies of Software. Licensor Right of Termination. Licensee may terminate the Agreement at any time upon notice to Licensee. This Agreement will terminate immediately without notice if Licensee fails to comply with any provision of this Agreement. Effect of Termination. Upon Termination, Licensee must destroy all copies of Software.

Comments

< Back Finish Cancel

To delete a clause inserted from Playbook in the same session

You can mark a clause for deletion which has been inserted in the same session to remove it from the agreement document prior to check-in. A session refers to the time between checking out an agreement document and checking it in.

1. Open the Control Panel > Clauses tab and deselect the **Show changed clauses only** check box to display a list of clauses in the document.
2. Click the check box under **Marked for Deletion?** corresponding to the clause you previously inserted. A confirmation dialog is displayed.

Control Panel

Fields Clauses

☐ Show changed clauses only ☐ Show clause library for marking

Clause Name	Changed?	Marked for Deletion?
CC Deliverables	<input type="checkbox"/>	<input type="checkbox"/>
CC Technical Requirements	<input type="checkbox"/>	<input type="checkbox"/>
CC Governing Law	<input type="checkbox"/>	<input type="checkbox"/>
CC Termination	<input type="checkbox"/>	<input type="checkbox"/>

X-Author Contracts

Are you sure you want to remove the clause entirely?
Note: Removing a clause will delete the contents of the clause.

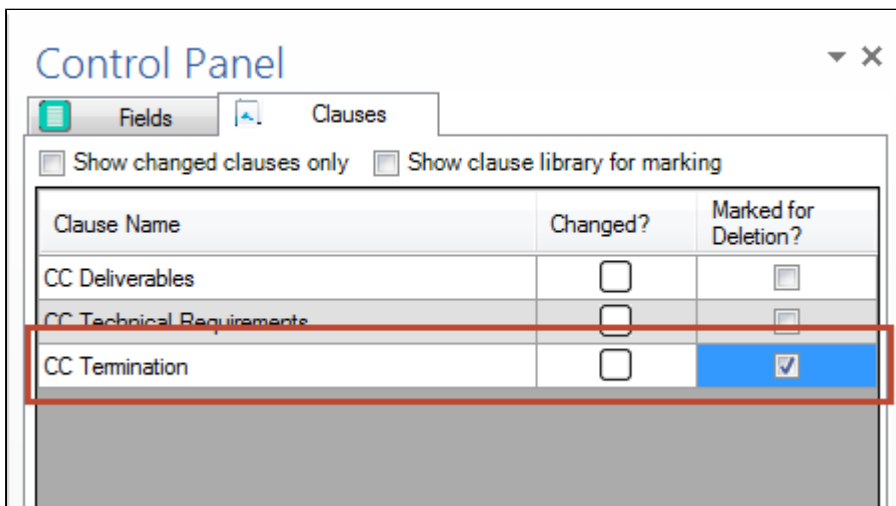
Yes No

3. Click **Yes** to remove the clause from the agreement document. The clause is removed from the document as well as the list of clauses displayed in the Control Panel.

To unmark a clause for deletion

You can unmark a clause which has been marked for deletion in the same session. A session refers to the time between checking out an agreement document and checking it in.

1. Open the Control Panel > Clauses tab and deselect the **Show changed clauses only** check box to display a list of clauses in the document. Note the clause which has been marked for deletion.



2. Click the check box corresponding to the clause which has been marked for deletion. A confirmation dialog is displayed.
3. Click **Yes** to unmark the clause for deletion. The check box is no longer enabled. Any redlines applied to the clause when it was marked for deletion are removed.

Clause Name	Changed?	Marked for Deletion?
CC Deliverables	<input type="checkbox"/>	<input type="checkbox"/>
CC Technical Requirements	<input type="checkbox"/>	<input type="checkbox"/>
CC Termination	<input type="checkbox"/>	<input type="checkbox"/>

Field Control Panel Actions

The Control Panel of X-Author Contracts allows you to reject the changes made to the smart fields in your agreement document with just a right click on the smart field. This is applicable when you want to negotiate only certain part of your agreement document without changing the rest of the content.

Also, if there are multiple occurrences of the same smart field in a single agreement document, but with different values, you can decide a single value for that smart field for all of the occurrences across your agreement document.

Rejecting the Field Changes in an Agreement

During the multiple rounds of negotiation, there can be changes made to the smart fields in your agreement document. As a contract administrator, you can decide to perform any one of the following 2 options in the Control Panel.

1. Accept the changes made by the negotiators: The changes are accepted implicitly by the system when you Check-In the document.
2. Reject the changes made by the negotiators: Use the Control Panel to navigate to your smart field and reject the changes made to it.

For example, your customer may want to start the agreement at a date later than originally proposed date. After your customer changes the Agreement Start Date, you can review the change and decide to either implicitly accept or explicitly reject the change.

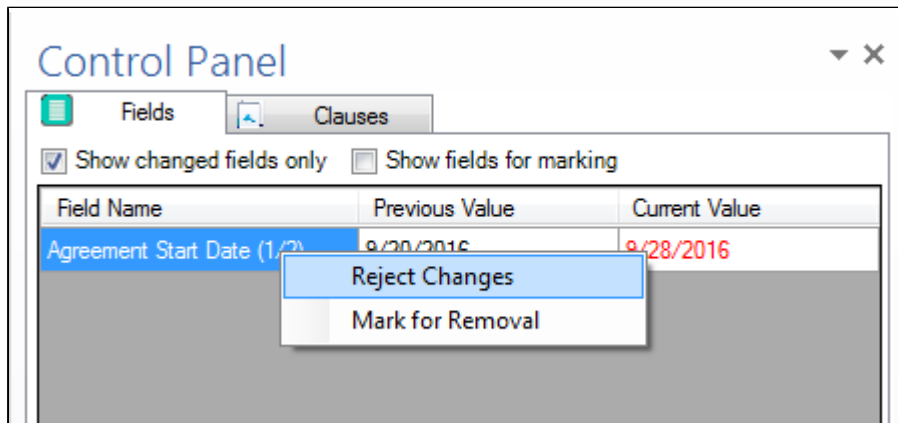
The Control Panel within the X-Author Contracts ribbon supports the above mentioned feature with the help of a right click. You can accept or reject the field changes before you check in the document to Salesforce.

To reject field changes in an agreement

You must have an agreement document containing changes in the field values open under the X-Author Contracts ribbon.

1. From the X-Author Contracts ribbon, click **Control Panel** to open it. By default, **Show changed fields only** checkbox is selected to view only the changed field records. You can adjust the column width in the Control Panel by dragging and dropping the left column of the Control Panel.

2. For each field containing a change in its value, you see its *Previous Value* and *Current Value* (marked in red). Right click on the field label.
3. Click the **Reject Changes** to reject the change made to the smart field.



4. Click **Yes** on the confirmation message to remove the changes from the agreement document.



The *Current Value* column reflects the earlier value of the smart field and is no more marked in red.

While you **Check-In** or **Preview Reconcile** the agreement document, the field values will be reflected at the Reconcile Smart Fields dialog box.

Viewing multiple occurrences of the Smart fields in an agreement document

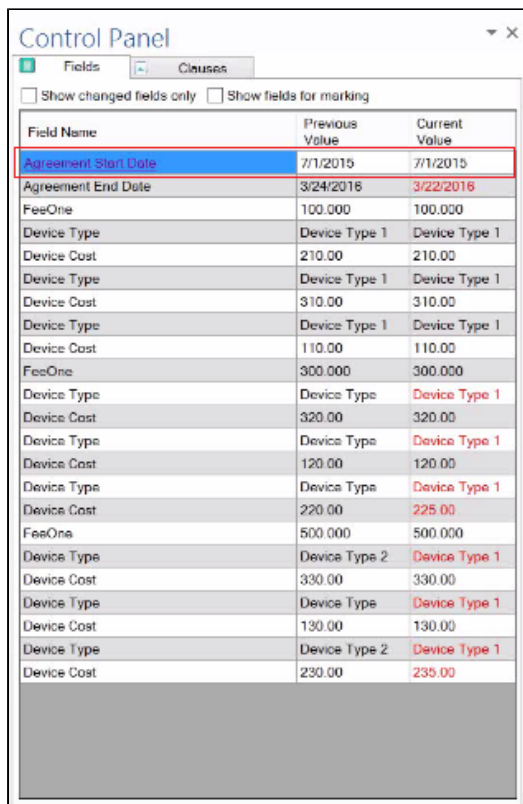
The Control Panel within the X-Author Contracts ribbon enables you to view the multiple occurrences of a smart field and choose a single value, thereby bringing uniformity of the field value across the agreement document. By default, the first occurrence of the smart field is shown in the Control Panel.

If the same smart field occurs more than once in your agreement document, you can now view the various values of the same smart field by clicking the link on the field label and choosing the value which you want to display across all of its instances in the agreement document.

To view multiple values of a Smart field in an agreement document

You must have made changes to the values of the smart field which appears more than once in your agreement document.

1. From the X-Author Contracts ribbon, click **Control Panel** to open it. By default, **Show changed fields only** checkbox is selected to view only the changed field records.

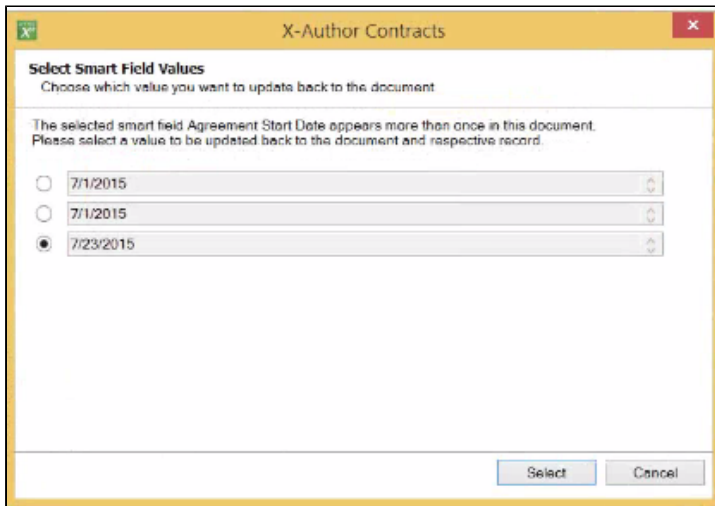


Field Name	Previous Value	Current Value
Agreement Start Date	7/1/2015	7/1/2015
Agreement End Date	3/24/2016	3/22/2016
FeeOne	100.000	100.000
Device Type	Device Type 1	Device Type 1
Device Cost	210.00	210.00
Device Type	Device Type 1	Device Type 1
Device Cost	310.00	310.00
Device Type	Device Type 1	Device Type 1
Device Cost	110.00	110.00
FeeOne	300.000	300.000
Device Type	Device Type	Device Type 1
Device Cost	320.00	320.00
Device Type	Device Type	Device Type 1
Device Cost	120.00	120.00
Device Type	Device Type	Device Type 1
Device Cost	220.00	225.00
FeeOne	500.000	500.000
Device Type	Device Type 2	Device Type 1
Device Cost	330.00	330.00
Device Type	Device Type	Device Type 1
Device Cost	130.00	130.00
Device Type	Device Type 2	Device Type 1
Device Cost	230.00	235.00

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You can adjust the column width in the Control Panel by dragging and dropping the left column of the Control Panel.

2. Click the link on the smart field to view the dialog box containing all the occurrences of that smart field. For example, if Agreement Start Date is occurring more than once in your agreement document, it has a link to view all of its values, like shown in the below dialog box.



3. You can select the radio button against the value which you want to keep for your smart field across your agreement document. In our example, if you want to keep 7/23/2015 as the Agreement Start Date, select the radio button next to it.
4. Click **Select**.

The smart field will now contain the final value under the current value column.

Removing Smart Fields from an Agreement

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](#).

❗ Note

Using this feature only removes the smartness of a field, not the content. Once the field is no longer smart, negotiating parties can make changes as required.

To remove a Field

- Open the **Control Panel** from the X-Author Contracts ribbon.

The screenshot shows the Microsoft Word interface with the X-Author Contracts ribbon active. The ribbon includes tabs for FILE, HOME, INSERT, DESIGN, PAGE LAYOUT, REFERENCES, MAILINGS, REVIEW, and X-AUTHOR CONTRACTS. The X-AUTHOR CONTRACTS ribbon contains various task groups: Versions (Check-In, Check-Out, Refresh Lock Status), Content / Library (Playbook, Translate), Intelligent Document (Control Panel, Validate Fields, Preview Reconcile, Promote Clause, Mark Clause, Mark Field), Review (Compare, Send for Review, Track Review Status), Social (Chatter), New Task (New Event), Connect, Open in Salesforce, and Support. The Control Panel task pane is open on the right, showing a table of contract details and a list of deliverables.

Statement of Work [SOW]

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

Customer Name:	ABC Company
Agreement Start Date:	2/1/2016
Agreement Term	12
Total Agreement Value	\$200,000.00
Owner Expiration Notice	90 Days

DELIVERABLES/SCHEDULE:

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

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

The Control Panel task pane on the right shows a table with columns: Field Name, Previous Value, and Current Value. The table is currently empty.

- Click on the **Fields** tab in the Control Panel and deselect **Show changed fields only** to display a list of fields in the document. Where there are multiple occurrences of the same field in the document, this will be noted in parentheses after the field name (e.g., if there are 3 occurrences of "Agreement Start Date," the first instance is displayed as "Agreement Start Date (1/3)").

Control Panel

Fields **Clauses**

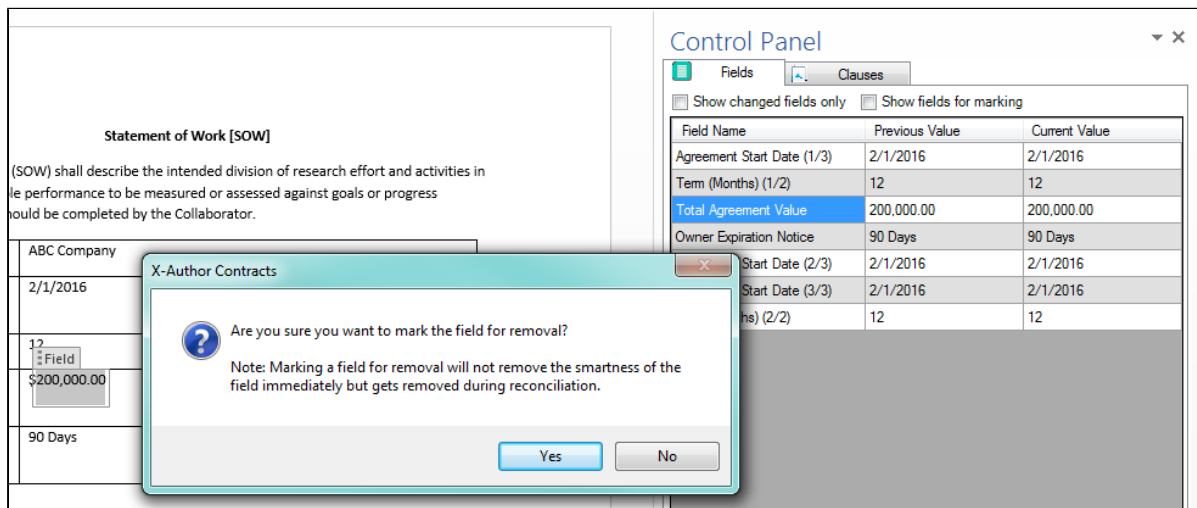
☐ Show changed fields only ☐ Show fields for marking

Field Name	Previous Value	Current Value
Agreement Start Date (1/3)	2/1/2016	2/1/2016
Term (Months) (1/2)	12	12
Total Agreement Value	200,000.00	200,000.00
Owner Expiration Notice	90 Days	90 Days
Agreement Start Date (2/3)	2/1/2016	2/1/2016
Agreement Start Date (3/3)	2/1/2016	2/1/2016
Term (Months) (2/2)	12	12

- Right-click on the field you want to remove and click **Mark for Removal**.

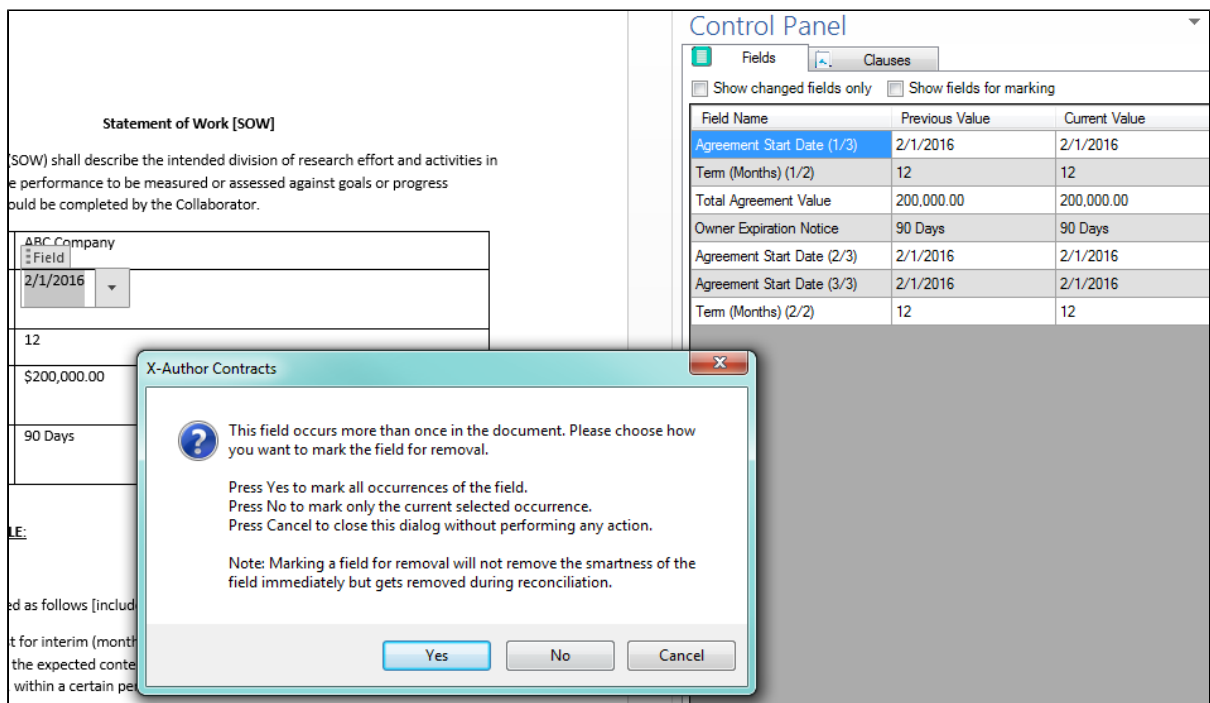
Field Name	Previous Value	Current Value
Agreement		2/1/2016
Term (Months) (1/2)	12	12
Total Agreement Value	200,000.00	200,000.00
Owner Expiration Notice	90 Days	90 Days
Agreement Start Date (2/3)	2/1/2016	2/1/2016
Agreement Start Date (3/3)	2/1/2016	2/1/2016
Term (Months) (2/2)	12	12

- (Single Occurrence of Field)** Click **Yes** to confirm marking of the smart field for removal or **No** to cancel.



5. **(Multiple Occurrences of Field)** Click on one of the following:

- Yes** to mark *all occurrences* in the document for removal.
- No** to mark *only the selected occurrence* for removal.
- Cancel** to return to the document without making any changes.



- Review fields in the Control Panel and document which are marked for removal. Note that any fields marked for removal will be stricken through in both the Control Panel and body of the document, in addition to any redlining in the Word document itself.

Statement of Work (SOW)

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

Customer Name:	AD Sales VA
Agreement Start Date:	2/1/2016
Agreement Term:	12
Total Agreement Value:	\$200000
Owner Expiration Notice:	90 Days

Control Panel

Field Name	Previous Value	Current Value
Agreement Start Date (1/3)	2/1/2016	2/1/2016
Term (Months) (1/2)	12	12
Total Agreement Value	200,000.00	200,000.00
Owner Expiration Notice	90 Days	90 Days
Agreement Start Date (2/3)	2/1/2016	2/1/2016
Agreement Start Date (3/3)	2/1/2016	2/1/2016
Term (Months) (2/2)	12	12

- Make any additional changes to the document, including marking other fields or clauses for deletion. Click **Check-in**.
- Choose **Reconcile Document** to permanently remove smartness from any fields.

Check-In Document
Define the attributes to be applied in checking this document into Salesforce

Options

Save: ☐ Update Current Version ☒ With Redlines ☐ Without Redlines ☐ Final - to be signed

Version Details

Suggested Name: AD Sales VA 02.01.16_Redlines_CC FX2 SOW_2016-02-01

☐ Include Watermark ☒ Reconcile Document ☐ Create PDF attachment ☐ Make this document private

Keywords / Tags:

< Back Next > Cancel

- Click **Next** to preview the smart fields marked for removal. All smart fields marked for removal are stricken through and each occurrence is listed separately.

Field Label	Previous Value	Current Value
Total Agreement Value	200,000.00	200,000.00
Term (Months)	12	12
Term (Months)	12	12
Owner Expiration Notice	90 Days	90 Days
Agreement Start Date	2/1/2016	2/1/2016
Agreement Start Date	2/1/2016	2/1/2016
Agreement Start Date	2/1/2016	2/1/2016

10. Click **Next** to reconcile any clauses as needed.
11. Click **Finish**. The document is checked in and smartness is removed from all marked fields. No values on the record are affected by smart field removal. All removed smart fields in the document are converted to static text.

Statement of Work [SOW]

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

Customer Name:	ABC Company
Agreement Start Date:	2/1/2016
Agreement Term	12

To unmark a field for removal

You can unmark a field which has been marked for removal in the same session. A session refers to the time between checking out an agreement document and checking it in.

1. Open the Control Panel > Fields tab and deselect the **Show changed fields only** check box to display a list of fields in the document. Note the field or fields which have been marked for removal.

Statement of Work [SOW]

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

Customer Name:	ABC Company
Agreement Start Date:	2/1/2016

Control Panel

Fields Clauses

☐ Show changed fields only ☐ Show fields for marking

Field Name	Previous Value	Current Value
Agreement Start Date (1/3)	2/1/2016	2/1/2016
Term (Months) (1/2)	12	12
Total Agreement Value	150,000.00	150,000.00
Owner Expiration Notice	90 Days	90 Days
Agreement Start Date (2/3)	2/1/2016	2/1/2016
Agreement Start Date (3/3)	2/1/2016	2/1/2016

2. Right-click on the field or fields marked for removal and choose **Unmark for removal**.

Control Panel

Fields Clauses

☐ Show changed fields only ☐ Show fields for marking

Field Name	Previous Value	Current Value
Agreement Start Date (1/3)	2/1/2016	2/1/2016
Term (Months) (1/2)	12	12
Total Agreement Value	150,000.00	150,000.00
Owner Expiration Notice	90 Days	90 Days
Agreement Start Date (2/3)	2/1/2016	2/1/2016
Agreement Start Date (3/3)	2/1/2016	2/1/2016
Term (Months) (2/2)	12	12

3. **(Single Occurrence of Field)** Click **Yes** to confirm unmarking the smart field for removal or **No** to cancel.

performance to be measured or assessed against goals or progress milestones. The SOW should be completed by the Collaborator.

ABC Company

2/1/2016

12

\$150,000.00

90 Days

X-Author Contracts

Are you sure you want to unmark the field for removal?

Yes No

Term (Months) (1/2)

Total Agreement Value

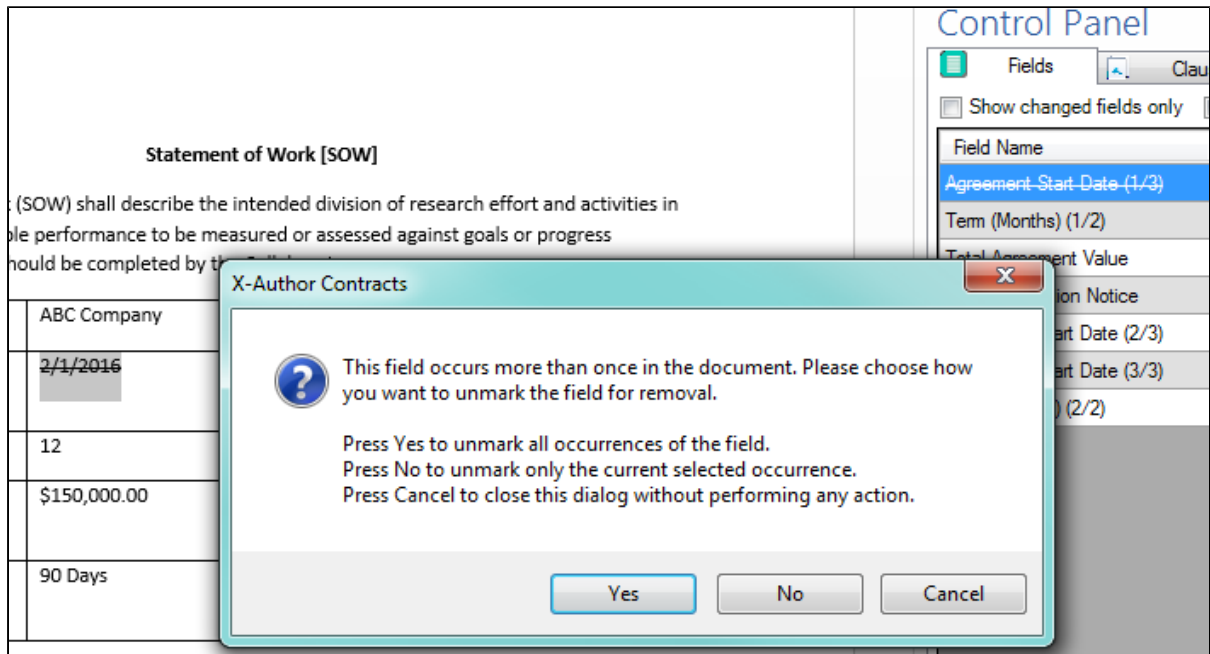
Owner Expiration Notice

Agreement Start Date (2/3)

Agreement Start Date (3/3)

Term (Months) (2/2)

4. **(Multiple Occurrences of Field)** Click on one of the following:
- Yes** to unmark *all occurrences* in the document for removal.
 - No** to unmark *only the selected occurrence* for removal.
 - Cancel** to return to the document without making any changes.



Tracking Clauses in your Agreement

Apttus Contract Management provides two solutions for tracking the clauses used in your agreement documents.

- **Tracking Agreement Clause Activity** – Track Agreement Clause activity using the Agreement Clause Related list. Whenever an agreement clause is inserted, modified or deleted during negotiation, agreement activity is recorded in the list at check-in and reconciliation. Use this data for reference or reporting purposes to track how non-standard language changes over the lifecycle of an agreement. *This is the default means for tracking clause activity in your agreement.*

- **Tracking Agreement Clause Versions** – Add the **Master Clause Listing** section to your agreement layouts to provide a comprehensive list of clauses referenced in the current/final agreement document, from first check-out to activation. Drill down into each clause listing to view a list of all Clause Iterations present in the document throughout the negotiation, as well as **Clause Iteration Details**. Generate reports on agreements that contain specific clauses or clause language.

Note

Tracking of Agreement Clause Versions is only available in Contract Management version **8.359** or higher when using X-Author for Contracts version **8.5.1010**. Only agreement documents using FX2 format are supported.

Tracking Agreement Clause Activity

The Agreement Clauses related list on the Agreement record is used to capture clause activity for associated agreement documents during contract negotiation. When an agreement is checked out by a negotiator using X-Author for Contracts, changes can be made to the document that insert, modify or delete clauses. When the agreement document is checked back in, new records are created in the Agreement Clauses related list that reflect these changes. You can use this data for reference or reporting purposes to track how non-standard language changes over the lifecycle of an agreement.

Below is an example of Agreement Clause data recorded in the related list after several sessions of negotiation (NDA agreement):

Agreement Clauses New Agreement Clause Submit For Clause Approval Agreement Clauses Help									
Action	Number	Action	Clause	Category	Text	Previous Text	Comments	Diff Text	
Edit Del	0000	Inserted	Confidentiality	Confidentiality	1. Definitions. "Confidential Information" is Acme, Inc.'s and Vendor's information that are marked as "Confidential" or "Proprietary" at the time of disclosure or, if disclosed orally or visually, that are treated as confidential or proprietary at the t...		Marked clause 'Confidentiality'		
Edit Del	0001	Inserted	Confidentiality	Confidentiality	1. Definitions. "Confidential Information" is Acme, Inc.'s and Vendor's information that are marked as "Confidential" or "Proprietary" at the time of disclosure or, if disclosed orally or visually, that are treated as confidential or proprietary at the t...		Marked clause 'Confidentiality'		
Edit Del	0002	Modified	Confidentiality	Confidentiality	1. Definitions. "Confidential Information" is Acme, Inc.'s and Vendor's information that are marked as "Confidential" or "Proprietary" at the time of disclosure or, if disclosed orally or visually, that are treated as confidential or proprietary at the t...	1. Definitions. "Confidential Information" is Acme, Inc.'s and Vendor's information that are marked as "Confidential" or "Proprietary" at the time of disclosure or, if disclosed orally or visually, that are treated as confidential or proprietary at the t...		1. Definitions. "Confidential Information" is Acme, Inc.'s and Vendor's information that are marked as "Confidential" or "Proprietary" at the time of disclosure or, if disclosed orally or visually, that are treated as confidential or proprietary at the t...	
Edit Del	0003	Deleted	Confidentiality	Confidentiality	1. Definitions. "Confidential Information" is Acme, Inc.'s and Vendor's information that are marked as "Confidential" or "Proprietary" at the time of disclosure or, if disclosed orally or visually, that are treated as confidential or proprietary at the t...	1. Definitions. "Confidential Information" is Acme, Inc.'s and Vendor's information that are marked as "Confidential" or "Proprietary" at the time of disclosure or, if disclosed orally or visually, that are treated as confidential or proprietary at the t...		No Changes Detected.	
Edit Del	0004	Inserted	Confidentiality	Confidentiality	The terms and conditions of this Agreement are confidential between the parties and shall not be disclosed to anyone else, except as may be necessary to effectuate its terms.		Inserted clause 'Confidentiality'		

Clause activity during negotiation and subsequent check-in captured in Agreement Clauses include:

- Inserting a clause into an agreement document using Playbook

- Marking a clause in the document and replacing its content with clause content from Playbook.
- Marking a clause in the document to adopt the properties of a clause from Playbook.
- Modifying a clause in the agreement document.
- Marking a clause for deletion.

Agreement Clause Records

Two factors determine how Agreement Clause activity is recorded in the related list during negotiation:

- The clause was inserted, modified or deleted in the initial session or a subsequent session. **A session can be defined as the time between Check-Out and Check-In of the same agreement document.**
- The clause was or was not **reconciled** to the agreement record.

Note

If you are using Contract Management **8.359** or higher with X-Author Contracts **8.5.1010** or higher: 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*.

The following tables describe how clause actions taken during a session affect Agreement Clause information on the Agreement record.

Initial Session (1st Check-Out)

Clause Actions before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
You insert a clause using the Playbook or Mark Clause, without making any changes to the clause content.	"Housing Rent Allowance" clause is inserted from the Playbook.	Creates a single record in Agreement Clause related list with Action as <i>Inserted</i> .	Creates a single record in Agreement Clause related list with Action as <i>Inserted</i> .

Clause Actions before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
After inserting a clause using Playbook or Mark Clause, you make changes to the clause content.	Contract negotiator changes a warranty period from 1 year to 2 years in the same session “Housing Rent Allowance” is inserted.	Creates a single record in Agreement Clause related list with Action as <i>Inserted</i> .	Creates 2 records in Agreement Clause related list: <ul style="list-style-type: none"> • One with Action as <i>Inserted</i>. • One with Action as <i>Modified</i>.
Once you insert a clause using the Playbook or Mark Clause, you decide to remove the entire clause or Unmark the clause from the Mark Clause Panel.	Contract negotiator decides that “Housing Rent Allowance” clause does not belong in the contract and chooses to remove it in the same session it has been inserted.	No record in the Agreement Clause related list.	No record in the Agreement Clause related list.

Subsequent Sessions

Actions taken on the Clause before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
You do not make any changes to the clause content.	"Housing Rent Allowance" clause is not modified in a session after it is inserted.	No update to the Agreement Clause related list.	No update to the Agreement Clause related list.
After checking out the same document, you make changes to the clause content.	"Housing Rent Allowance" is changed in a session after it has been inserted.	No update to the Agreement Clause related list.	Creates a single record in Agreement Clause related list with Action as <i>Modified</i> .
Once you Check-Out the same agreement document, you, as a Legal counsel, decide to permanently delete a clause from the document. You mark that clause for deletion from the Mark Clause Panel and Check-In the agreement document to Salesforce.	Contract negotiator decides that "Housing Rent Allowance" ought to be struck from the contract in a session after it had been inserted. Contract negotiator marks the clause for deletion.	No update to the Agreement Clause related list.	Creates a single record in the Agreement Clause related list with Action as <i>Deleted</i> .

Tracking Agreement Clause Versions

Agreement Clause Versioning enhances existing document control by introducing a solution framework of clause versioning at the Agreement record level. Using this feature, you can easily view a comprehensive list of clauses referenced in the current agreement document. Agreement Clause Versioning is intended to complement standard agreement clause tracking through the [Agreement Clause Related List](#). The primary purpose of Agreement Clause Versioning is to give users a means to track negotiation of clauses through the entire lifecycle of an agreement up to and including activation.

Using Agreement Clause Versioning you can:

- add a **Master Agreement Clauses** section to the Agreement record layout that provides a listing of all clauses referenced in the primary agreement document from initial check-out to activation.
- drill down into the list to view all **Clause Iterations** for a specific clause.
- drill down into each clause iteration to **Clause Iteration Details** to review changes to clause language.
- customize reports (using standard Salesforce functionality) to locate agreements by clause and/or clause language.

What is the difference between the Master Clause List and the Agreement Clause Related List?

While the two lists seem to be tracking the same information, both lists are unique and used for different purposes:

List	Description	Deleted Clauses?	Changes to a single clause
Master Agreement Clauses (Clause Versioning)	Provides a "bird's eye view" of what currently exists in the agreement document	No	Multiple changes to a single clause are stored in Clause Iterations .
Agreement Clause Related List (Default Clause Tracking)	Captures <i>every</i> change made to every clause that ever existed in the agreement document.	Yes	Multiple changes to a single clause are represented as separate entries.

Note

Tracking of Agreement Clause Versions is only available in Contract Management version **8.359** or higher when using X-Author for Contracts version **8.5.1010**. Only agreement documents using FX2 format are supported.

- [Adding Master Agreement Clauses to the Agreement Layout](#)

- [Viewing Master Agreement Clauses](#)
- [Viewing Clause Iterations](#)
 - [Clause Iteration Records](#)
 - [How Clause Iterations are Recorded](#)

Adding Master Agreement Clauses to the Agreement Layout

The Agreement Clauses Visualforce page is automatically enabled for all user profiles.

To make it visible on the agreement record, you must add it to the appropriate agreement layout.

1. Go to **Setup > Create > Objects > Agreement**
2. Under Page Layouts, click the **Edit** link next to the layout you want to modify.
3. Drag-and-drop the **Section** field onto the area below the Actions section of the Agreement layout.
4. Enter **Agreement Clauses** as the section name and choose a **1-Column** layout.
5. Click **OK**. The Agreement Clauses section is created.
6. From the Layout Designer menu, choose **Visualforce Pages**.
7. Drag-and-drop the **AgreementClauses** Visualforce page onto the section you just created.
8. In the upper-right hand corner of the AgreementClauses section, click the wrench icon to change the Visualforce Page Properties. Select the **Show scrollbars** option and click OK.
9. Click **Save** to save the Agreement page layout.
10. Repeat these steps for all Agreement layouts that will use Agreement Clause versioning.

Viewing Master Agreement Clauses

You can view a snapshot of each clause used in the agreement on the **Master Agreement Clauses** section on the Agreement record. You can drill down to view clause iterations from each master agreement clause record.

Master Agreement Clauses							
Name	Clause Text	Iteration Count	Action	Created By	Created On	Modified By	Modified Date
CC Deliverables	DELIVERABLES/SCHEDULE: The delivera...	1	Original	TPub Admin	10/03/16 21:47:53	TPub Admin	10/03/16 21:47:53
CC Technical Requirements	TECHNICAL REQUIREMENTS: The followi...	1	Original	TPub Admin	10/03/16 21:47:53	TPub Admin	10/03/16 21:47:53
CC Termination	Term and TerminationTerm. This License Ag...	1	Original	TPub Admin	10/03/16 21:47:54	TPub Admin	10/03/16 21:47:54
CC Governing Law	Governing Law. This Agreement shall be go...	1	Original	TPub Admin	10/03/16 21:47:58	TPub Admin	10/03/16 21:47:58

The important fields to note and what actions you can take are summarized in the following table.

Field Name	Description
Name	The name of the clause template OR The name, given to the clause by the user if it was marked. Click the link to view the Clause Iteration list for this clause.
Clause Text	A preview of the text of the Original clause (pre-activation) or Final clause (post-activation).
Iteration Count	The number of iterations the clause has undergone during negotiation.
Action	Original or Inserted (pre-activation); Final (post-activation).

Viewing Clause Iterations

You can drill down into each master clause from the previous list to view a list of iterations the clause has gone through during negotiation. Sorted by action, if the agreement is activated, clause iterations will be listed from the "Final" version descending to the "Original" version. The following example shows a Payment Terms clause that has gone through several iterations, ending with the Final version.

Click on any link under the **Number** column to view the **Clause Iteration Details** for a specific iteration. This allows you to review the full *Current Text* of the clause, the *Previous Text* and the *Diff Text* (redlined combination of current previous text).

Clause Iteration Records

First Check-out: Iterations of an agreement clause begin after the agreement document is generated and *checked out for the first time*. All clauses that exist in the document at this point are recorded as separate entries in the Master Clause Listing. The Action record in the Clause Iteration list is "Original" for these clauses. This helps you keep track of which clauses were present in the original version of the document.

During the course of negotiation, changes are made to the agreement document that inserts or modifies clauses. When any of these actions occur, they are recorded as in the **Master Agreement Clauses** list or **Clause Iterations**.

Clause activity during the negotiation and subsequent check-in includes:

- Inserting a clause into an agreement document using Playbook.
- Marking a clause in the document and replacing its content with clause content from Playbook.
- Marking a clause in the document to adopt the properties of a clause from Playbook.
- Modifying a clause in the agreement document.
- Checking in the document as "Final - to be signed."

Note

Deleted clauses are *never* recorded in the Master Agreement Clauses list or Clause Iterations because it is intended to represent the agreement document in its current state. All deleted clauses are tracked using the Agreement Clause Related List.

How Clause Iterations are Recorded

Two factors determine how clause activity is recorded during negotiation:

- The clause was inserted or modified in the initial session or a subsequent session. **A session can be defined as the time between Check-Out and Check-In of the same agreement document.**
- The clause was or was not **reconciled** to the agreement record.

The following tables describe how clause actions taken during a session affect Agreement Clause information on the Agreement record.

Initial Session (1st Check-Out)

Clause Actions before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
You insert a clause using the Playbook or Mark Clause, without making any changes to the clause content.	"Housing Rent Allowance" clause is inserted from the Playbook.	Creates a single record in Master Agreement Clauses & Clause Iterations with Action as <i>Inserted</i> .	Creates a single record in Master Agreement Clauses & Clause Iterations with Action as <i>Inserted</i> .
After inserting a clause using Playbook or Mark Clause, you make changes to the clause content.	Contract negotiator changes a warranty period from 1 year to 2 years in the same session "Housing Rent Allowance" is inserted.	Creates a single record in Master Agreement Clauses & Clause Iterations with Action as <i>Inserted</i> .	Creates a single record in Master Agreement Clauses with Action as <i>Inserted</i> . Creates 2 records in Clause Iterations: <ul style="list-style-type: none"> • One with Action as <i>Inserted</i>. • One with Action as <i>Modified</i>.
Once you insert a clause using the Playbook or Mark Clause, you decide to remove the entire clause or Unmark the clause from the Mark Clause Panel.	Contract negotiator decides that "Housing Rent Allowance" clause does not belong in the contract and chooses to remove it in the same session it has been inserted.	No record in Master Agreement Clauses.	No record in Master Agreement Clauses.

Subsequent Sessions

Actions taken on the Clause before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
You do not make any changes to the clause content.	"Housing Rent Allowance" clause is not modified in a session after it is inserted.	No update to Master Agreement Clauses.	No update to Master Agreement Clauses.
After checking out the same document, you make changes to the clause content.	"Housing Rent Allowance" is changed in a session after it has been inserted.	No update to Master Agreement Clauses.	Creates a single record in Clause Iterations with Action as <i>Modified</i> .
Once you Check-Out the same agreement document, you, as a Legal counsel, decide to permanently delete a clause from the document. You mark that clause for deletion from the Mark Clause Panel and Check-In the agreement document to Salesforce.	Contract negotiator decides that "Housing Rent Allowance" ought to be struck from the contract in a session after it had been inserted. Contract negotiator marks the clause for deletion.	No update to Clause Iterations.	Clause record is removed from Master Clause Listing ("Deleted" change recorded in Agreement Clause Related List)

Final clause version: After the agreement document is checked in as "Final - to be signed," a new clause iteration record with the action "Final" is created for each clause present in the final agreement document.

Use Case: Clause Versioning Scenario (SOW)

Sam Sales created a Statement of Work for his customer, Venture Industries.

The agreement contains all standard fields, and the SOW agreement contains standard language. He generates the SOW agreement.

Mary Manager, the contract manager for this agreement, logs in to X-Author and checks out the document.

The **Master Agreement Clauses** listing on the agreement record is updated to list all smart clauses in the document. Because they were present in the document as of the first check-out, all clauses are listed as *Original*.

Mary decides to mark text in the agreement document as a Payment Terms clause. She then checks the document in and reconciles it to the agreement record. The marked clause is added to Master Agreement Clauses with the action *Inserted*.

On a subsequent check-out, Mary Manager adds an Indemnification clause from Playbook and modifies the clause language in the same session. She checks the document back into Salesforce and reconciles it. Two entries are created in the **Clause Iterations** listing, one for the initial insertion of the clause, and another for the modification.

The agreement now goes to legal. During the process, the Governing Law clause is removed from the document. The clause is removed from Master Agreement Clauses, but the deletion is still tracked in the Agreement Clauses related list.


After negotiation concludes, Mary checks in the document as "Final - to be signed," and reconciles it. All clauses in the Master listing are updated with a "Final" iteration. The Payment Terms clause below demonstrates a complete tracking of versions, from initial insertion to Final check-in. Mary can drill down into the details for any iteration to view the Diff in clause text and other details.

Marking Agreement Documents as Private


X-Author Contracts allows you to mark documents as private whenever you take one of the following actions:

- Check-In an agreement document
- Create Offline Agreement
- Import Offline Agreement

When you mark a document as private it sets the */s Private* field for a specific record/action (Check In or Import Offline Agreement) of the **Merge Event** object to true. You can then use this flag to create custom triggers on the Agreement record for controlling permissions to your documents. You are encouraged to work with Apttus Professional Services to develop a solution for your private documents.

 In previous versions of X-Author Contracts, the default behavior for documents in your system was to set the default value for all draft documents to private (*/s Private = true*) and all final documents to public (*/s Private = false*).

To mark an agreement document as private at check-in

 Check-in dialogs may appear differently depending on whether your agreement uses Pre-FX2 or FX2 format.

1. Open Microsoft Word and log in to X-Author Contracts.
2. **Check-out** an agreement document from an existing agreement record.
3. Make any changes as required.
4. Click **Check-in** to open the Check-in Document dialog.

Check-In Document
Define the attributes to be applied in checking this document into Salesforce

Options

* Save: ☒ With Redlines
☐ Without Redlines
☐ Final - to be signed

Version Details

* Suggested Name: SOW 10.28.15.2_Redlines_SOW ABC_2015-10-29

☐ Include Watermark
☐ Reconcile Document
☐ Create PDF attachment
☐ Make this document private

< Back Finish Cancel

5. Select the check box under Version Details to **Make this document private**.

Check-In Document
Define the attributes to be applied in checking this document into Salesforce

Options

* Save: ☒ With Redlines
☐ Without Redlines
☐ Final - to be signed

Version Details

* Suggested Name: SOW 10.28.15.2_Redlines_SOW ABC_2015-10-29

☐ Include Watermark
☐ Reconcile Document
☐ Create PDF attachment
☒ Make this document private

< Back Finish Cancel

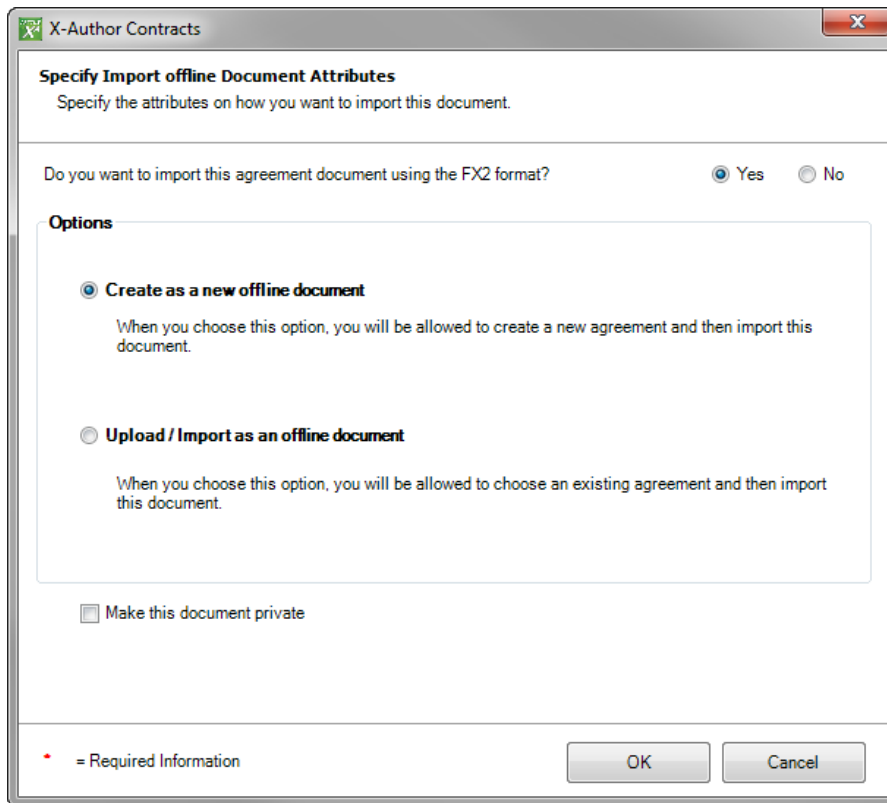
6. Click **Finish** to check-in your document.

In Apttus Contract Management, the **Merge Event Detail** page on the **Merge Event** related list shows the Check-in event flagged as *Is Private*.

Merge Event Detail		Edit	Delete	Clone
Event Name	Check In			
Action	Check In			
Status	Queued			
Result Document	00P61000000gkoxEAA			
Document Info	Redlines			
▼ Merge Parameters				
Agreement	SOW 10.28.15.2			
Custom Object				
Version Detail	1.3.0			
Template				
Document Format	DOCX			
Protection Level	Full access			
Is Draft	<input type="checkbox"/>			
Is Private	<input checked="" type="checkbox"/>			

To mark an offline agreement as private

1. Open an offline document in Microsoft Word.
2. Click **Check-in** to display the Import Offline dialog.



The image shows a dialog box titled "X-Author Contracts" with a close button in the top right corner. The main heading is "Specify Import offline Document Attributes" with a subtext "Specify the attributes on how you want to import this document." Below this is a question "Do you want to import this agreement document using the FX2 format?" with two radio buttons: "Yes" (selected) and "No". A section titled "Options" contains two radio button options: "Create as a new offline document" (selected) and "Upload / Import as an offline document". Each option has a descriptive text block. Below the "Options" section is a checkbox labeled "Make this document private". At the bottom left, there is a red asterisk icon followed by the text "= Required Information". At the bottom right are "OK" and "Cancel" buttons.

X-Author Contracts

Specify Import offline Document Attributes
Specify the attributes on how you want to import this document.

Do you want to import this agreement document using the FX2 format? ☒ Yes ☐ No

Options

☒ **Create as a new offline document**
When you choose this option, you will be allowed to create a new agreement and then import this document.

☐ **Upload / Import as an offline document**
When you choose this option, you will be allowed to choose an existing agreement and then import this document.

☐ Make this document private

* = Required Information

OK Cancel

3. Choose the document format and choose to either **Create** or **Import** an offline document.
4. Select the checkbox under Version Details to **Make this document private**.

X-Author Contracts

Specify Import offline Document Attributes
Specify the attributes on how you want to import this document.

Do you want to import this agreement document using the FX2 format? ☒ Yes ☐ No

Options

☒ **Create as a new offline document**
When you choose this option, you will be allowed to create a new agreement and then import this document.

☐ **Upload / Import as an offline document**
When you choose this option, you will be allowed to choose an existing agreement and then import this document.

☒ Make this document private

* = Required Information

OK Cancel

- Click **OK** and complete any additional steps required to create or import your offline document.

In Apttus Contract Management, the **Merge Event Details** page on the Merge Event related list shows the Create Offline Agreement event flagged as *Is Private*.

Merge Event Detail		Edit	Delete	Clone
Event Name	Create Offline Agreement			
Action	Create Offline Agreement			
Status	Queued			
Result Document	00P61000000pocNEAQ			
Document Info				
▼ Merge Parameters				
Agreement	CC Sales 10.29.15.1			
Custom Object				
Version Detail	1.0.0			
Template				
Document Format	DOCX			
Protection Level	Full access			
Is Draft	<input type="checkbox"/>			
Is Private	<input checked="" type="checkbox"/>			

Private Indicator Properties

There are two Comply System Properties that control the availability and behavior of the option to make documents private from X-Author:

- **Auto Enable Private Indicator**– When this property is enabled, the **Make this document private** checkbox is automatically selected and cannot be deselected.
- **Allow Private Selection Override** – When this property is enabled, the **Make this document private** checkbox option can be overridden when Auto Enable Private Indicator is set to true.

Depending on how the above properties are configured, when you check-in or create offline agreements, you may notice the **Make this document private** option is already enabled and can or cannot be changed. The following table describes how the combination of properties affects your ability to make documents private during one of these actions.

Auto Enable Private Indicator	Allow Private Selection Override	Available Action
FALSE	FALSE	Make this document private is not automatically enabled. You can enable this option during check-in or creation of an offline agreement.
TRUE	FALSE	Make this document private is automatically enabled. You cannot override the option for any document version.
TRUE	TRUE	Make this document private is automatically enabled. You can override the selected option for each document version.

Making Fields Updatable

Update fields are fields with content control border and their values can be updated after document generation using **Update from Salesforce**. 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 Update fields and later want to update the values of the field without generating or regenerating another document, you can click Update from Salesforce and the values of the Update fields will be updated from the CLM 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 cannot be marked as smart but need to be updated with the values from the new agreement record can be made Update fields.

Update fields have following characteristics:

- Any field can be made an Update field.
- Update fields cannot be made Smart.
- Update fields can only be defined in a template.
- The value of the Update fields cannot be edited in the generated agreement document and can only be updated.
- Update fields show a content control boundary in the generated agreement documents.

To mark a field as Update Field

1. Insert the field into your template by following the steps in Inserting Fields into a Template or Inserting Line Item Fields.
2. From the X-Author Templates ribbon, select Control Panel.
3. Search for and click the field in the Navigation Pane to highlight it in the document.
4. Right-click the field name in the Control Panel and select **Mark as Updatable**.

The value next to **Mark as Updatable?** in the Properties pane, under the Control Panel, is updated to "True" and simultaneously the value next to **Mark as Smart?** is updated to "False."



To Unmark an Update Field, right-click the field in the Control Panel and select **Unmark as Updatable**. You can also make this change by changing the value in the Properties pane from "True" to "False."

To delete an Update field

1. From the X-Author Templates ribbon, select Control Panel.
2. Search for and click on the field in the Navigation Pane to highlight it in the document.
3. Right-click on the field name in the Control Panel and select **Remove Field**.
4. Click Ok in the confirmation dialog box.

The Update field is deleted from the template.

Marking Fields

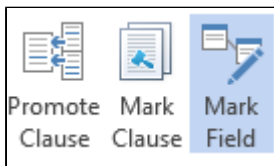
Using Playbook, you can mark small chunks of agreement document content as fields. When you mark content in an agreement document as a field, it becomes a smart field. Smart field values can be reconciled with data in the agreement record when the document is checked in, allowing changes made during negotiation to be accurately reflected and managed as data in Dynamics. 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. From the X-Author Contracts ribbon, select **Mark Field** to bring up the Mark Field window.



2. Highlight the field you want to mark, and drag-and-drop it onto the corresponding Field Label in the Mark Field window.

The screenshot shows a document editor with a contract template. A date field 'as of 09/30/2015' is highlighted in blue. A red arrow points from this field to the 'Mark Field' sidebar on the right. The sidebar lists various fields categorized into Information, Term & Renewals, and Key Dates.

Field Label | **Value in Salesforce**

Information

- Agreement (Demo) Type
- Agreement Category
- Agreement Name
- Agreement Subtype
- Payment Terms
- Region
- Status
- Status Category
- Support Exhibits
- Total Agreement Value

Term & Renewals

- Agreement End Date
- Agreement Start Date
- Amendment Effective Date
- Auto Renew
- Internal Renewal Notification Days
- Owner Expiration Notice
- Perpetual
- Renewal Consent
- Renewal Notice Days
- Renewal Term (Months)
- Term (Months)

Key Dates

- Activated Date
- Executed Copy Mailed Out Date
- Other Party Returned Date
- Other Party Sent Date
- Request Date
- Retention Date

Document Content:

PAYMENTS

The first payment for this agreement will be made within two business days of 11/22/2016, failing which a late fee of \$1000 will be charged. The last payment must be made within 12 months of the first payment.

All payments due under this Agreement shall be payable in Japanese Yen, converted at the spot rate at the close of the business day in which each such payment becomes payable. Unless specified otherwise herein, RTU will invoice SPA for Clinical Supply, Commercial Product and/or Promotional Sample upon RTUs delivery thereof to SPAs carrier and payments shall be due within thirty (30) days from the date of receipt of invoice. All payments under this Agreement shall be by appropriate electronic funds transfer in immediately available funds to such bank account as RTU shall designate. Each payment shall reference this Agreement and identify the obligation under this Agreement that the payment satisfies. If at any time legal restrictions prevent the remittance of part or all of payments owed by a Party hereunder, the Parties shall promptly negotiate in good faith the terms for repayment under lawful means or methods.

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

Third Party Claims. A Party entitled to indemnification for a claim shall give the indemnifying party reasonably prompt notice of a claim brought by a third party.

This contract has been requested as of 09/30/2015.

Reason for Termination: This contract does not fulfill all requirements set forth by all parties.

Product	Quantity	List Price	Net Price

- Click **Yes** to mark the highlighted text as a smart field.

X-Author Contracts

Are you sure you want to mark the current selection to the field Request Date and make it a smart field?

NOTE: You cannot undo this operation.

Yes **No**

The field is marked and highlighted in the document by a content control.

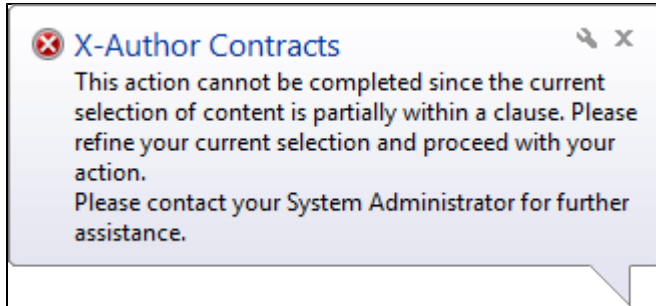
Field
as of 09/30/2015

Open the Control Panel to view changed fields. The marked field is listed, showing its current value.

- Click **Validate Fields** to ensure that the newly marked field is in a valid format for the data type of the field mapped.
- When you are finished marking other fields and working with your document, **Check-In** the agreement document and **Reconcile** fields to the agreement record in Dynamics.

Marking Fields with Hidden Boundaries

Because smart field boundaries [can be hidden](#) in agreement documents, text you attempt to mark as a smart field may already be a smart field in the document, just not visible. If you have the proper permissions to use the feature, make sure to show smart boundaries (**X-Author Contracts ribbon > Hide Smart Boundary**) before marking any fields. If the text you are marking is already a smart field, the following message will be displayed in Word.



Validating Fields

Validate Fields enables the user to ensure that inserted fields are legitimate.

The validation is for proper data type values in the field (date, number, etc.) and valid selected values from picklists, multi-picklists, etc. *Validate Fields* is only available for FX2 formatted Agreement documents.

Note

Ensure that you have at least one smart field in your agreement document to access **Validate Fields** ribbon tab in X-Author Contracts.

Prior to checking in an Agreement document, the user can click *Validate Fields*. If any field is invalid, a dialog box will appear, alerting the user about the invalid fields. If all fields are valid, the user will get a dialog box confirming that all fields are valid. If a field is invalid, the document cannot be reconciled.

Hiding Smart Boundaries



This feature is only available for users of Microsoft Office 2016 or later.

Smart fields and smart clauses in an agreement document are represented in Microsoft Word as a content control, with a bounding box that displays it as a smart element.

Statement of Work [SOW]	
The Statement of Work (SOW) shall describe the intended division of research effort and activities in sufficient detail to enable performance to be measured or assessed against goals or progress milestones. The SOW should be completed by the Collaborator. Bertrand Roberts	
Customer Name:	Partner Technologies
Agreement Start Date:	<div> <div>Field</div> <div>5/3/2016</div> <div>▼</div> </div>

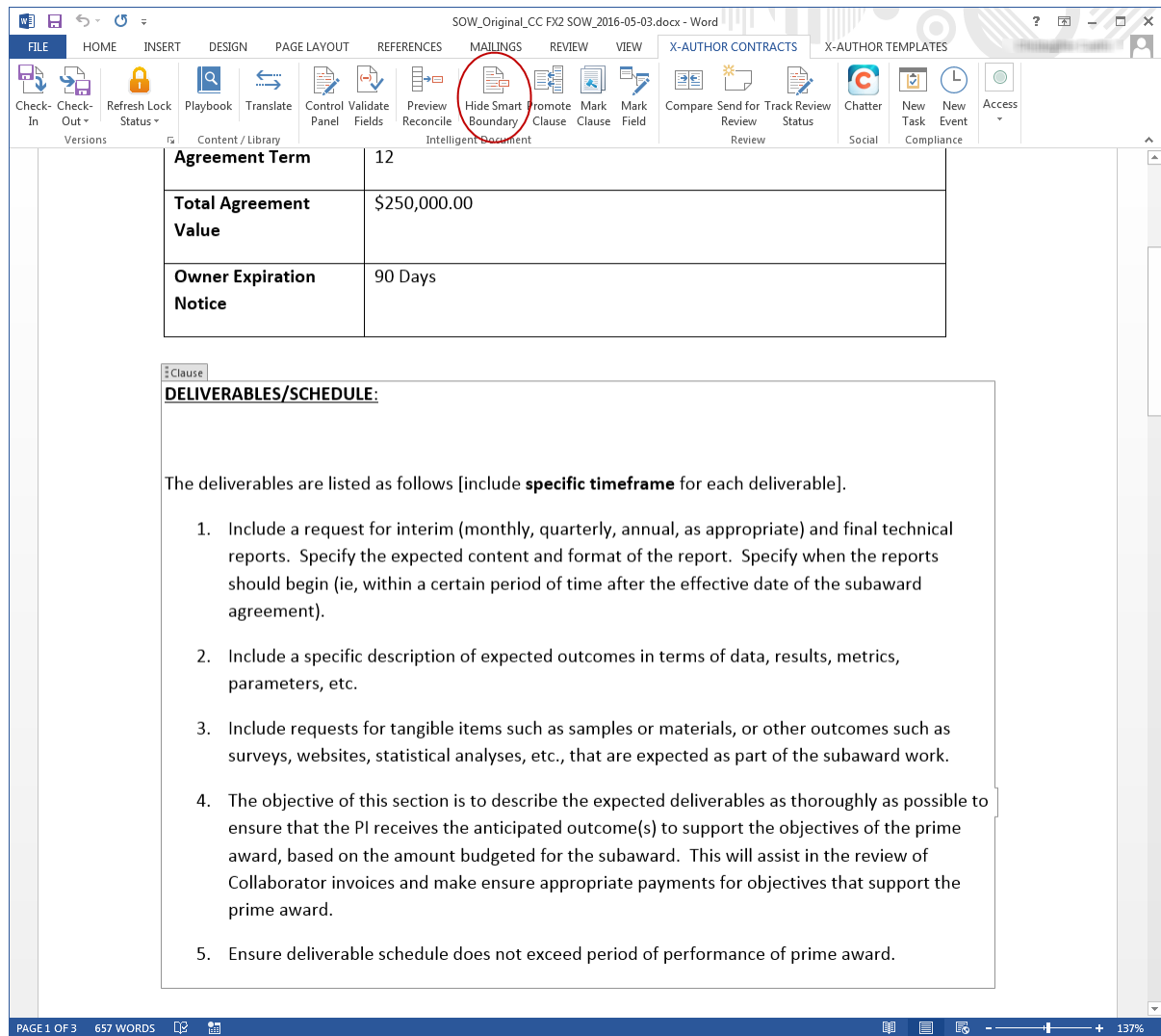
← smart element boundary

You can control the visibility of bounding boxes using the **Hide Smart Boundary** action in the X-Author Contracts tab.

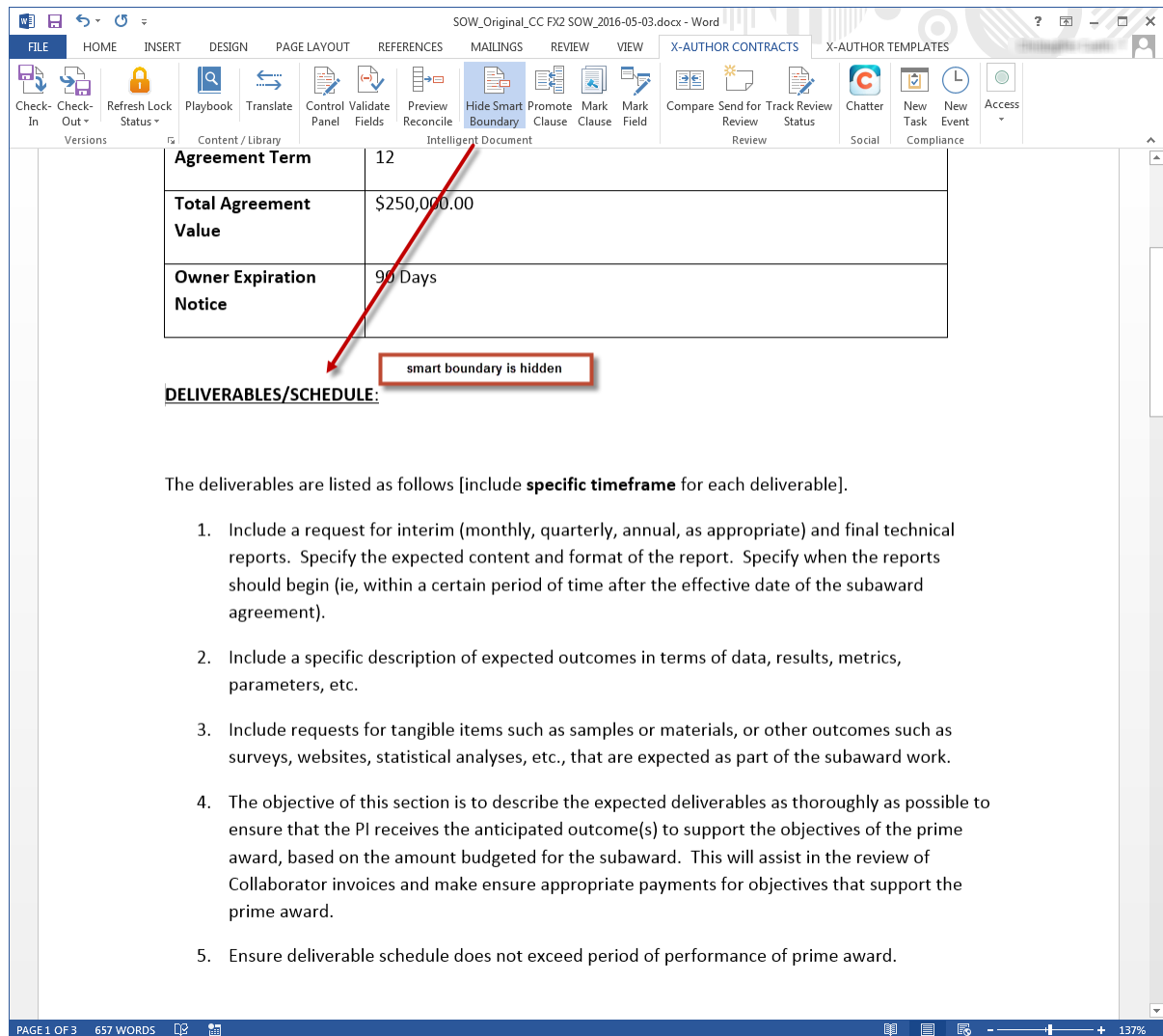
To hide smart boundaries in an agreement document

1. Open Microsoft Word and [connect to X-Author Contracts](#).
2. Open or check out a document that contains smart fields or clauses.

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3. From the X-Author Contracts tab, click **Hide Smart Boundary** to toggle smart boundaries off. The button is highlighted in the tab and bounding boxes are no longer shown around smart elements.



The screenshot shows the X-Author Contracts interface. At the top, there is a ribbon with tabs: FILE, HOME, INSERT, DESIGN, PAGE LAYOUT, REFERENCES, MAILINGS, REVIEW, VIEW, X-AUTHOR CONTRACTS, and X-AUTHOR TEMPLATES. The X-AUTHOR CONTRACTS tab is active, showing various icons for document management. Below the ribbon, there is a table with the following data:

Agreement Term	12
Total Agreement Value	\$250,000.00
Owner Expiration Notice	90 Days

A red arrow points from the 'Hide Smart Boundary' button in the ribbon to the table, with a callout box stating 'smart boundary is hidden'. Below the table, the section 'DELIVERABLES/SCHEDULE:' is highlighted. The text below reads: 'The deliverables are listed as follows [include **specific timeframe** for each deliverable].'

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

The status bar at the bottom indicates 'PAGE 1 OF 3', '657 WORDS', and a zoom level of '137%'.

4. Click the button again to toggle smart boundaries on.

During contract negotiation, it may be necessary to insert clauses or make changes to smart elements. When boundaries are hidden in a document, they are automatically displayed if:

- a field or clause is highlighted in the document body or Control Panel
- a clause is inserted into the agreement document
- a field or clause is marked in an agreement document



Smart elements remain automatically displayed in a generated document when a field /clause is marked. X-Author users still have the option to manually show/hide boundaries.

Highlighting Smart Fields (FX2)

If your org is properly configured, you can add a feature to the Control Panel that lets you highlight smart fields in your document. You can also configure X-Author Contracts to automatically highlight all smart fields in your document, while retaining the ability to toggle the highlighting on or off.

Configuring Smart Field Highlighting for FX2 Agreements

Enabling Smart Field highlighting requires proper permissions to create a new Admin entry in the connected Salesforce Org. The following Admin properties must be configured:

Admin Property	Description	Possible Values
APTS_HighlightFieldsUsingControlPanel	Adds a check box to the Control Panel in X-Author Contracts that allows users to toggle highlighting of smart fields in the document on/off.	True /False
APTS_DefaultHighlightFieldsControlPanel	Automatically enables the "Highlight fields" check box when you open a document in X-Author Contracts.	True /False

To configure Smart Field highlighting for FX2 format agreements

1. Log in to the connected Salesforce Org.
2. Go to the **Admin** tab in Apttus Contract Management.
3. Click **New** to add a new Admin property.
4. Enter "APTS_HighlightFieldsUsingControlPanel" into the **Name** field.
5. Enter "True" into the **Value** field.
6. Click **Save**.

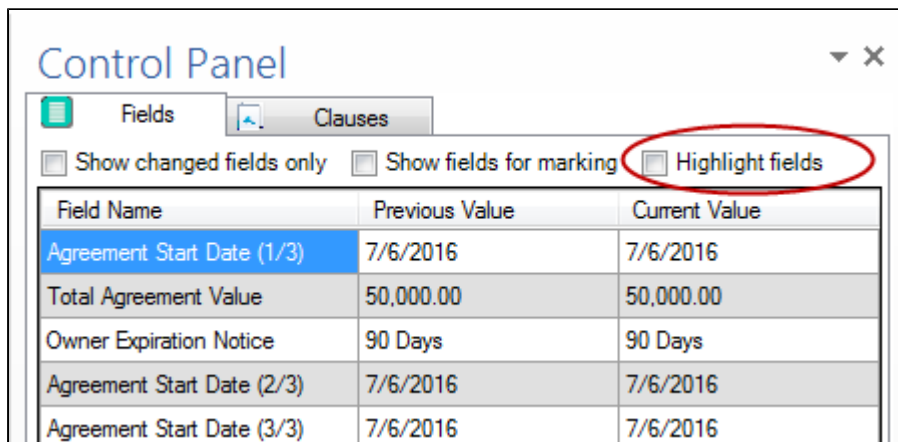
To configure X-Author to highlight Smart Fields by default for FX2 format agreements

1. From the Admin tab in Contract Management, click **New**.
2. Enter "APTS_DefaultHighlightFieldsControlPanel" into the **Name** field.
3. Enter "True" into the **Value** field.
4. Click **Save**.

Highlighting Smart Fields in an FX2 Agreement

After you configure Admin properties to enable highlighting, you can highlight smart fields in your agreement document. (Note: the following example assumes you do not have all smart fields highlighted by default)

1. Open Microsoft Word and [connect to X-Author Contracts](#).
2. [Check Out](#) the agreement document you want to work with.
3. From the X-Author Contracts ribbon, select **Control Panel**. By default, the **Fields** pane is displayed.



4. Select the **Highlight fields** checkbox (shown in the image above). All smart fields in the open document are highlighted.

Statement of Work [SOW]

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

Customer Name:	ABC Company
Agreement Start Date:	7/6/2016
Agreement Term	
Total Agreement Value	\$50,000.00
Owner Expiration Notice	90 Days

Control Panel

Fields Clauses

☐ Show changed fields only ☐ Show fields for marking ☒ Highlight fields

Field Name	Previous Value	Current Value
Agreement Start Date (1/3)	7/6/2016	7/6/2016
Total Agreement Value	50,000.00	50,000.00
Owner Expiration Notice	90 Days	90 Days
Agreement Start Date (2/3)	7/6/2016	7/6/2016
Agreement Start Date (3/3)	7/6/2016	7/6/2016

i Mark Field and Highlighting

If you have smart field highlighting already enabled and choose to mark text in your agreement as a smart field (by way of the "Mark Field" option), the new field is not automatically highlighted. Close and reopen the Control Panel to apply highlighting.

Updating Smart Fields from Salesforce (FX2)

Update from Salesforce is an action located in the X-Author Contracts ribbon you can use to update smart fields in your agreement document where fields have been updated in Salesforce since the document was generated.

Update from Salesforce 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 data sets. Adding a new line item in Salesforce and updating will create a new row in the table.
- Smart fields in generated clauses.

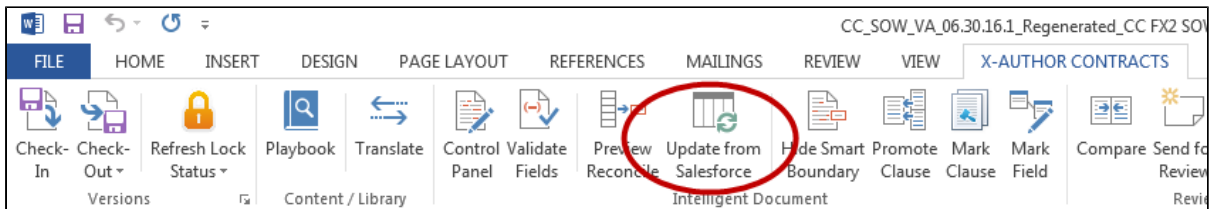


- If you choose to update fields from Salesforce, all changed smart field values will be updated. You cannot select only specific fields.
- Adding new line items to a Salesforce record and updating will only add a new row to the agreement document if a table exists containing those fields.

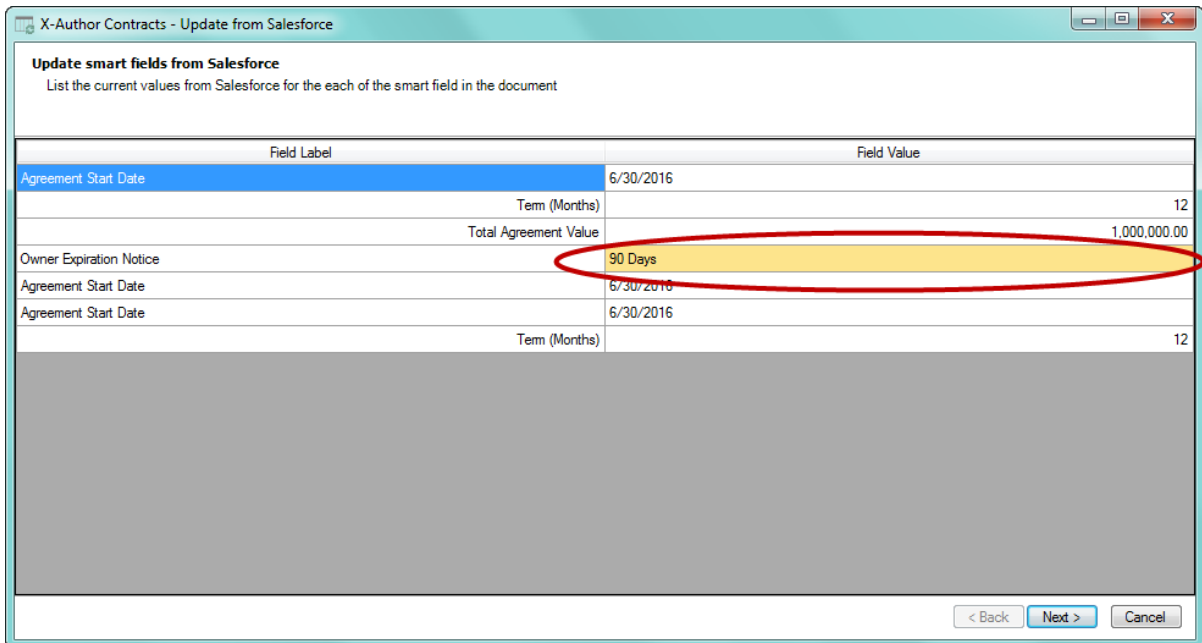
- Fields cannot be updated to or from an empty (null) value.

To update smart fields

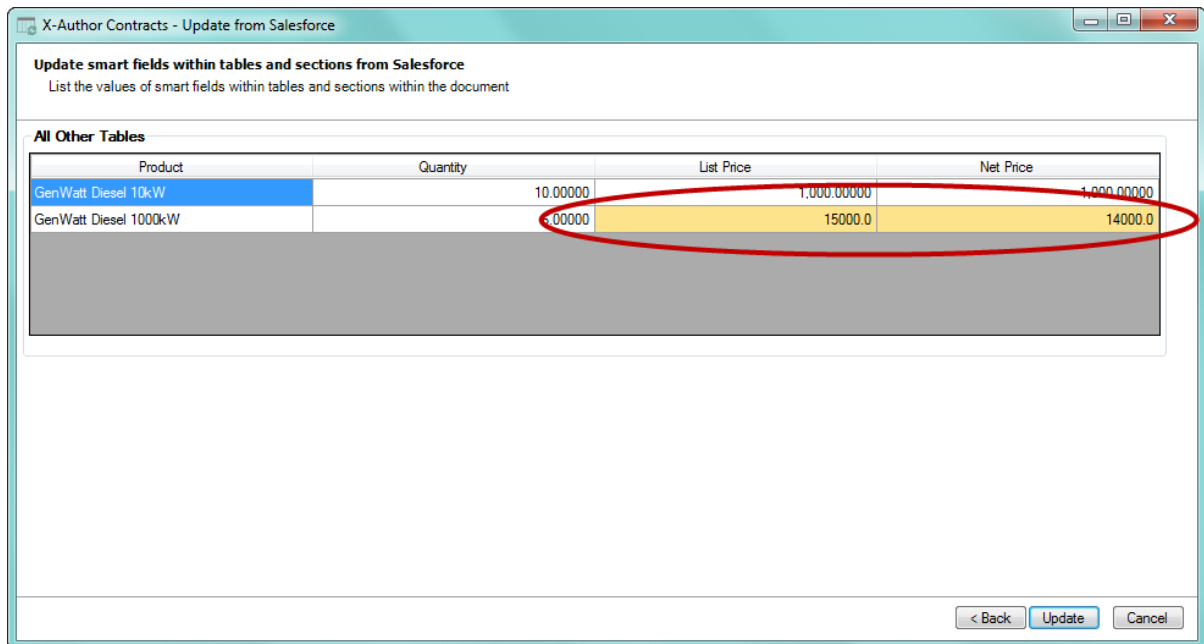
1. [Check out your agreement document](#). The **Update from Salesforce** button is enabled.



2. Click **Update from Salesforce** to display a dialog showing all header-level fields in the document. Field values that have been changed on the Salesforce record are highlighted in yellow.



3. Review the changed values and click **Next** to continue. The next page displays fields contained in sections and tables. Changed field values are highlighted in yellow.



4. Click **Update**. All highlighted field values are updated in the document to reflect changes made to the record in Salesforce.

Note

Fields updated from Salesforce will *not* be marked in the Control Panel as changed.

Working with Agreements in Pre-FX2 format

Checking In Versions

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

Only Microsoft Word documents in *.doc* and *.docx* format are supported for maintaining versions and checking in and checking out Agreements.

An Agreement document has been checked out before clicking **Check-In**. The various options available on **Check-In** are:

1. Check-in an Agreement document with redlines.
2. Check-in an Agreement document without redlines.

3. Reconcile an Agreement Document when checking in an Agreement document.

Check-In Document
Specify the attributes for checking this document

Options

* Save: With Redlines
☐ Update Current Version

Version Details

* Suggested Name: 6.1_Redlines_V7_Basic Sales Agreement_2016-02-05
☐ Include Watermark
☐ Reconcile Document
☐ Create PDF attachment
☐ Make this document private

Keywords / Tags: Sales, Legal, Q3

* = Required Information

Save Cancel



Small UI enhancements have been made in order to make the check-in process smoother for all users. By eliminating picklists for options and replacing the options with radio buttons, all of the available options increase visibility.

To check-in agreement document versions


1. Select an agreement in Salesforce and open an agreement document from **Notes and Attachments**.
2. From the **X-Author Contracts** ribbon in Microsoft Word, use **Connect** to connect to your Salesforce org.
3. Make changes as required to the document and then select **Check-in** to display the Check-In dialog and select one of the three options from the **Save** list.

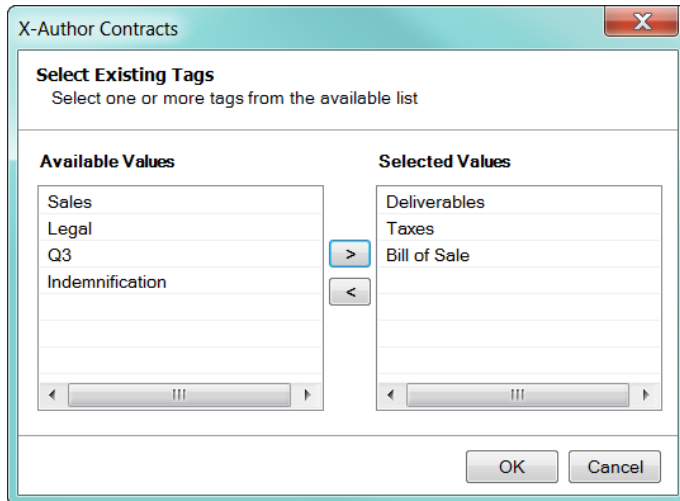
Option	Description (Non-Version Aware)	Description (Version Aware)
With Redlines	This saves a draft version of the agreement document with all markups and <i>Redlines</i> is used as the action in your org's configured default document naming convention.	This saves a draft version of the agreement document with all markups and <i>Redlines</i> is used as the action in your org's configured default document naming convention. Selecting this option creates a Minor version under the Document Version Details related list in your Agreement record.
Without Redlines	This saves a draft version of the document without markups and is typically done before sending an agreement to a third party for review. Track changes /redlines are automatically removed from the Word file and <i>_Clean</i> is used as the action in the configured default document naming convention.	This saves a draft version of the document without markups and is typically done before sending an agreement to a third party for review. Track changes/redlines are automatically removed from the Word file and <i>_Clean</i> is used as the action in the configured default document naming convention. Selecting this option creates a Major version under the Document Version Details related list in your Agreement record.
Final - to be signed	This saves a version of the document without markups and also enables a PDF version of the document to be created. If this option is selected, both a Word and PDF file will be saved to the agreement's Notes and Attachments related list. By default, <i>_Final</i> is used as the action in the configured default document naming convention.	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, both a Word and PDF file will be saved to the agreement's Notes and Attachments related list. By default, <i>_Final</i> is used as the action in the configured default document naming convention. Selecting this option creates a Major version under the Document Version Details related list in your Agreement record.

4. In the **Suggested Name** field, enter the required name for the document or leave it as the name suggested by X-Author. The default name includes the agreement name, revision number, and version type. You do not need to specify a file extension in the **Suggested Name** field, as author automatically saves it in .docx format.
5. 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.
 - Select **Remove Watermark**, if a non-final version has a watermark you do not want to include in the document.
 - **Watermark will not be included** is automatically selected (and greyed out) if you are saving the document as **Final - to be signed**.
6. Select **Reconcile Document** to synchronize the Salesforce Agreement object fields with those that were updated in the document. See [Reconciliation](#) for more details.
7. Select **Create PDF attachment** to have both a Word and PDF file saved to the agreement's Notes and Attachments related list.
8. Enter any comma-separated **Keywords/Tags** you want to associate with the document upon check-in. X-Author users can filter *version-aware* agreement documents at [checkout](#) based on these keywords/tags. Contract Management users can also make use of these tags when using Document Finder on the agreement record.



Keywords/tags functionality is only enabled in orgs updated with **Apttus Contract Management 8.4.0319 or higher** with Document Finder enabled. For more information on enabling Document Finder, refer to Configuring Document Finder in the *Contract Management Administrator Guide*. Keywords/tags can only be used with *version aware* records.

9. Click the  button to the right of Keywords/Tags to choose from a list of existing tags to apply to the new version of the document you are checking in. Click **OK** to add them to the list of keywords/tags on the previous screen.



10. Click **Save** and then click **OK** in the confirmation message box. The checked in document is stored on the agreement record based on the record's version aware status:
- Version Aware – The updated document is stored in the **Document Versions** related list for the agreement if you choose to check-in **With Redlines** or **Without Redlines**. If you have chosen to check in the agreement document as **Final - to be signed**, it will be stored in the **Notes and Attachments** related list.
 - Non-Version Aware – The updated document (Redlines, Clean or Final) is stored in the **Notes & Attachments** related list.

To update the current document version

A situation may arise when you are working with a document and realize you would like to make more changes to the document but have already checked in the new version. To avoid having to check in another redlined version, you now can instead choose to “Update Current Version” from the Check-In Document screen.



Note: this option will not be visible if you are checking in a generated version for the first time (the draft must have been checked in at least once).

1. Follow steps 1 - 2 from the previous section.
2. Select the check box **Update Current Version**. All other options in the window are disabled.
3. Click **Save**. The current copy of the agreement document is updated in Salesforce.

X-Author Contracts - Check-In

Check-In Document
Specify the attributes for checking this document

Options

* Save: With Redlines

☒ Update Current Version

Version Details

* Suggested Name: DW Pre-ex 1_Redlines_SOW Pre-Existing_2015-09-16

☐ Include Watermark

☐ Reconcile Document

☐ Create PDF attachment

☐ Make this document private

* = Required Information

Save Cancel

Updating Current Version and Document Locks

When you update the current version of the document you are working on, any document lock created when the document was first checked out will remain. In most cases, you will be choosing to update the current document version with the ultimate goal of checking it in—when you are finished with your updates to the document you can release the lock by performing a full check-in. However, in the event that you do not wish to create a new document version by checking it in, the document lock can be released in the following ways:

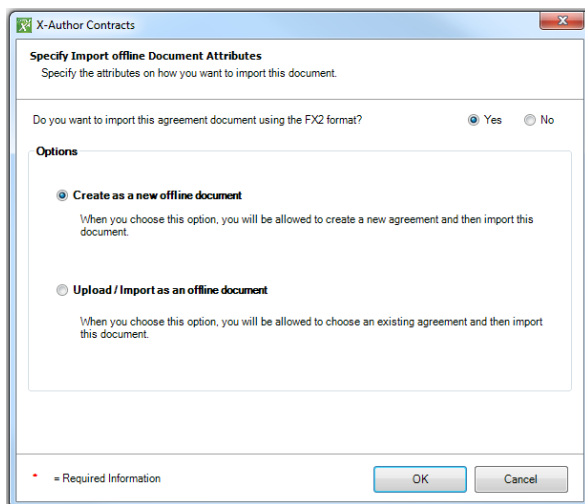
- [Release the Document lock](#) from X-Author Contracts (must have proper Agreement Lock permissions).
- Assign the lock to another user from the Salesforce record (**Admin only**).

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 Salesforce and has not previously been associated with an Agreement, and checking it in.

When a document is open in X-Author Contracts and has not previously been kept in Salesforce, the Check-In option can be used for creating an offline Agreement. There are some mandatory fields that must be completed before a new Agreement can be generated, otherwise the fields that can be displayed can be configured. The results are the same as creating an offline Agreement from the Agreements tab in Salesforce.

When you click on *Check-in*, the dialog box will prompt you to select an answer to the question, "Do you want to import this agreement document using the FX2 format?" The available answers are "Yes" or "No". After selecting one of the options, clicking on **OK** will initiate the *New Offline Agreement* VisualForce page where you can then enter in details for the desired Agreement record.

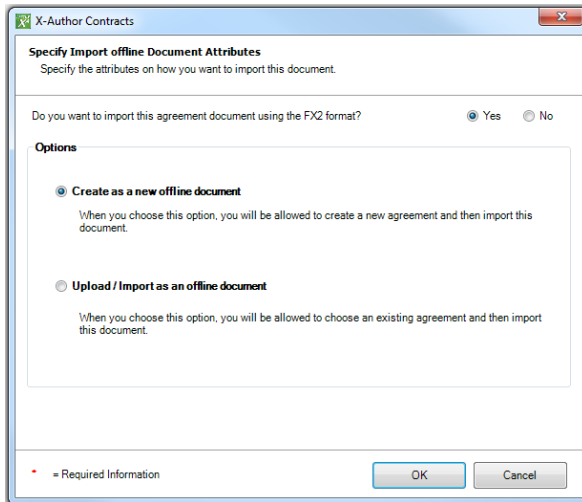


You must be using Contract Management 6.3 or higher, as well as X-Author Contracts 6.3 or higher to create offline agreements.

To create an offline agreement

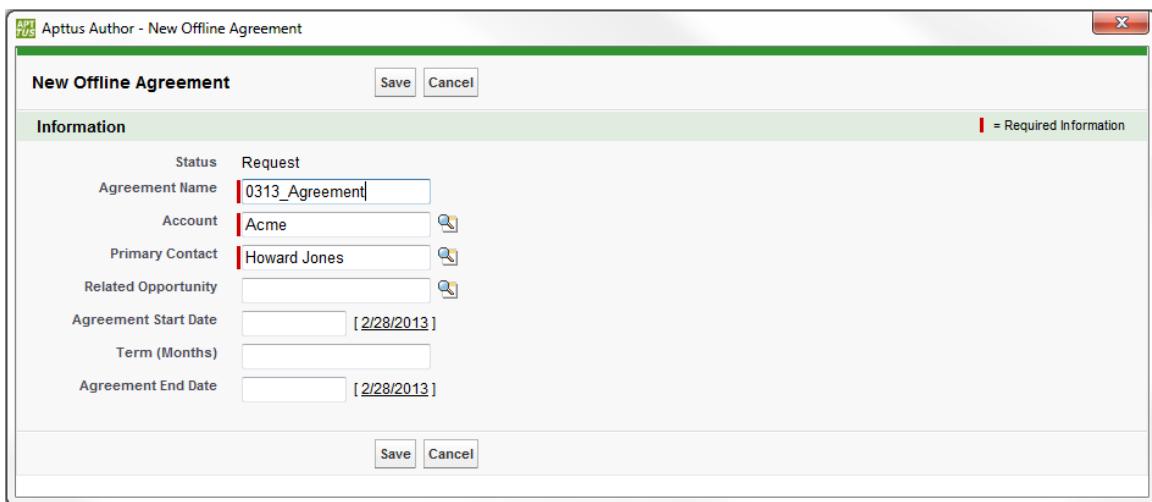
1. In Microsoft Word, select the **X-Author Contracts** ribbon tab and login.

2. Open the Agreement document to be used to create the offline Agreement, which is currently kept outside of Salesforce.
3. Click **Check-In** and the Specify Import Offline Document Attributes window is displayed.



The window is titled "X-Author Contracts" and "Specify Import offline Document Attributes". It asks "Do you want to import this agreement document using the FX2 format?" with "Yes" selected. Under "Options", "Create as a new offline document" is selected. A legend at the bottom indicates that a red asterisk means "Required Information".

4. Select **Yes** or **No** depending on if you want to import the opened Agreement document using the FX2 format.
5. Select **Create as a new offline document** and then click OK.
6. In the **New Offline Agreement** window, you must enter values for the mandatory fields, indicated in red.



The window is titled "Apttus Author - New Offline Agreement". It contains a form with the following fields: Status (Request), Agreement Name (0313_Agreement), Account (Acme), Primary Contact (Howard Jones), Related Opportunity, Agreement Start Date (2/28/2013), Term (Months), and Agreement End Date (2/28/2013). Red asterisks indicate required fields. The window has "Save" and "Cancel" buttons at the top and bottom.

7. Enter any remaining details for the agreement and click **Save**.

The agreement is added to the system, with the Word doc used to create the agreement available in the Notes & Attachments related list.

You can now see the full Agreement record, with all available actions and related lists, and enter additional details as required.

Creating Sections

X-Author Contracts can be used to create agreement sections from selected agreement document text.

These sections get inserted into the Agreement Clause related list associated with an agreement. Subsequently they can be selected from the Playbook and inserted into other agreement documents.

This feature provides the same functionality as if you were to manually create a new agreement clause object in Salesforce.

To create a section

You must have an agreement document open.

1. Highlight text in the agreement document and from the **X-Author Contracts** tab, select **Create > Section**.

2. In the Create Section dialog, select values for the following fields: **Action**, **Category**, **Exception**, **Risk Rating**, **Materially Significant**, and **Status**. These fields are used when searching for clauses in the Playbook.
3. Add comments if required and click **Save**.

The agreement clause is saved in Salesforce

Highlighting Smart Fields (Pre-FX2)

To highlight smart fields, select **X-Author Contracts > Intelligent Document > Smart Fields**. This is a toggle option, so click once to enable and again to disable highlighting.

When this menu is clicked, it will highlight the smart fields if they were not already highlighted. The highlight is created as a Word comment, tagged with initials as "Apttus", displaying the Apttus Label that one can see in an Agreement record.

X-Author Contracts on Salesforce Spring 2018 User Guide

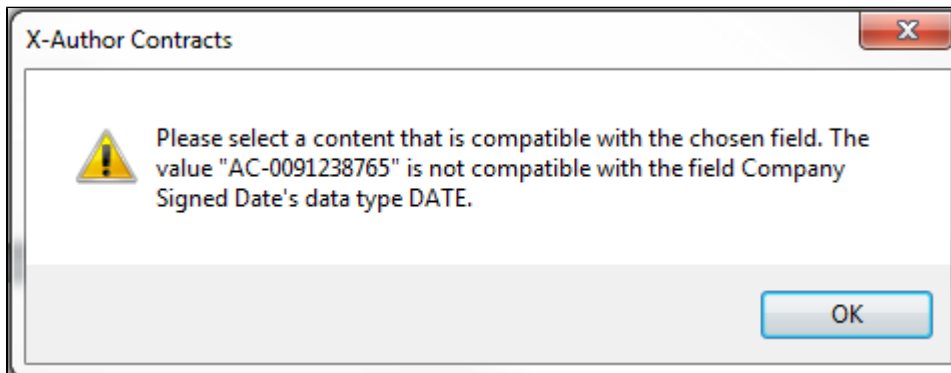
Customer Support Services Manual dated <u>October 30, 2011</u> , Revision 0 attached hereto as Schedule "A" and the Executive Summary dated September 26, 2011, attached hereto as Schedule "A-1". Schedules "A" and "A-1" together with any executed change orders (collectively, the "Specification") are made part of this Agreement by reference.	Comment [Aptus1]: Display Sch A Rev Date Deleted: September Deleted: 26
ARTICLE 2. PRICE, PAYMENT SCHEDULE AND DELIVERY	
2.1 In consideration of Seller's obligations to manufacture, sell and deliver the Aircraft to Buyer, Buyer shall pay to Seller the amount of \$ 100,000,000.00 USD as may be revised by change orders in accordance with Article 3 (together, the "Purchase Price") as follows:	
(i) 1 st payment due upon Buyer's execution of this Agreement:	\$25,000,000.00 USD Comment [Aptus2]: 1st Payment Deleted: 35
(ii) balance of Purchase Price due at Delivery Time (as hereinafter defined):	\$65,000,000.00 USD

Tagging Smart Fields

This enables you to *tag* text in an pre-existing agreement document, or in one used to create an offline agreement, indicating you want to use the text to provide the value for an Agreement record field.

The *Tag Smart Fields* option is available when you open an agreement document that was created using an X-Author template or immediately after creating an offline agreement. Selecting the option opens a window which displays only smart fields for the associated agreement. Then you can use *Reconcile Document* functionality to populate agreement record fields from the text in the Word document.

You must ensure that the text you tag matches the field type you associate it with. For instance, if you select a field that is not a date type and try to use it for the agreement signed date, you will be stopped from completing the drag and drop action. Fortunately, the *Type* attribute is displayed in the *Field Properties* window when you select a field or go to drag and drop a field.



Field Properties				
Label	API Name	Type	Calculated?	
Company Signed Date	Apttus__Company_Sign...	DATE	False	

Whether specifically tagging a single web URL or having it as part of a larger piece of content, you cannot tag document text that contains 'active' content, such as hyperlinks, bookmarks, or other Microsoft fields. If you do, the following system message is displayed: The current selection contains field which may be Apttus smart field or Microsoft field. It can't be marked as smart. Please modify your current selection.



Only Agreement Header Level fields are supported at this time.

To tag smart fields in an offline document

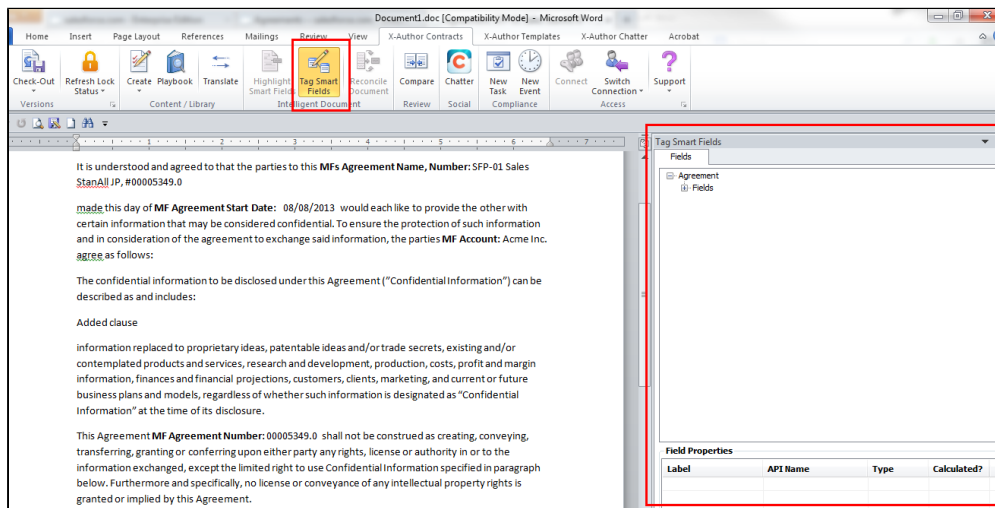
Complete To create an offline agreement

- or -

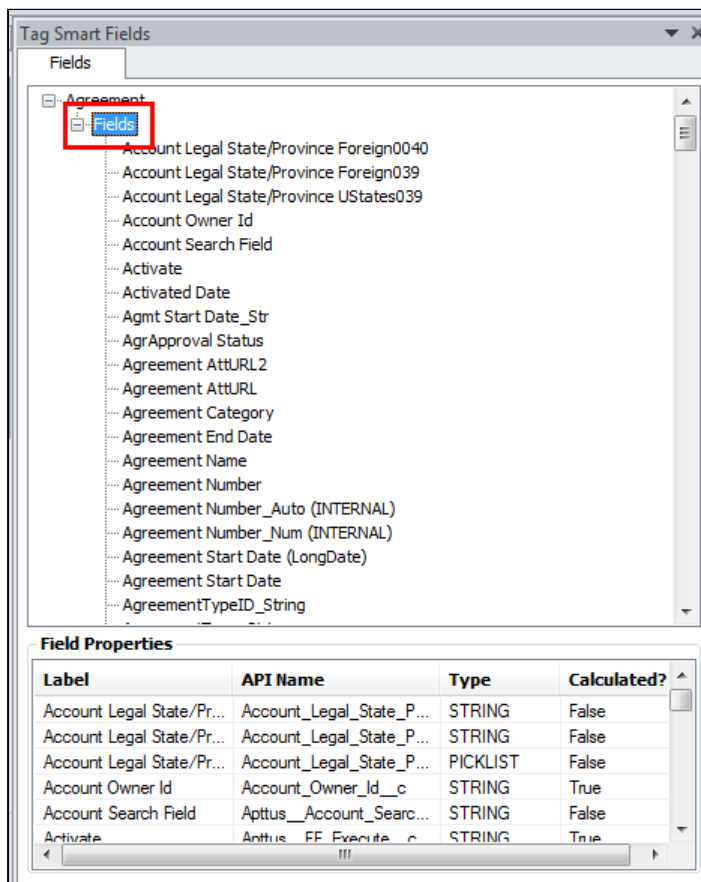
Open an pre-existing agreement document kept in Salesforce.

1. From the **X-Author Contracts** tab, select the **Tag Smart Fields** button to display the **Tag Smart Fields** window.

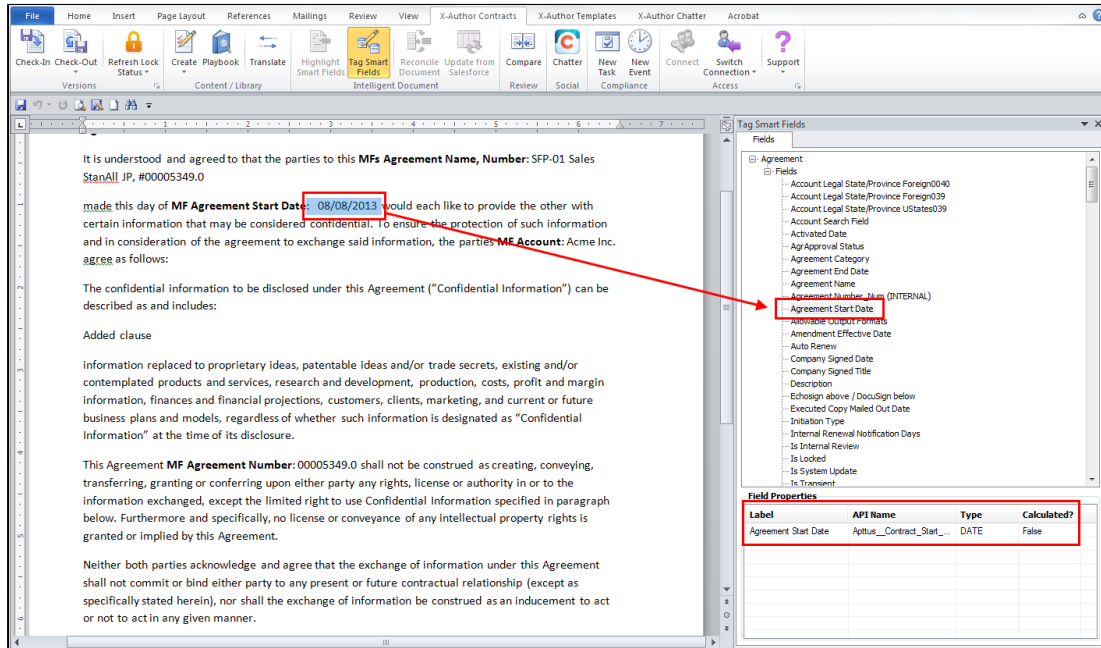
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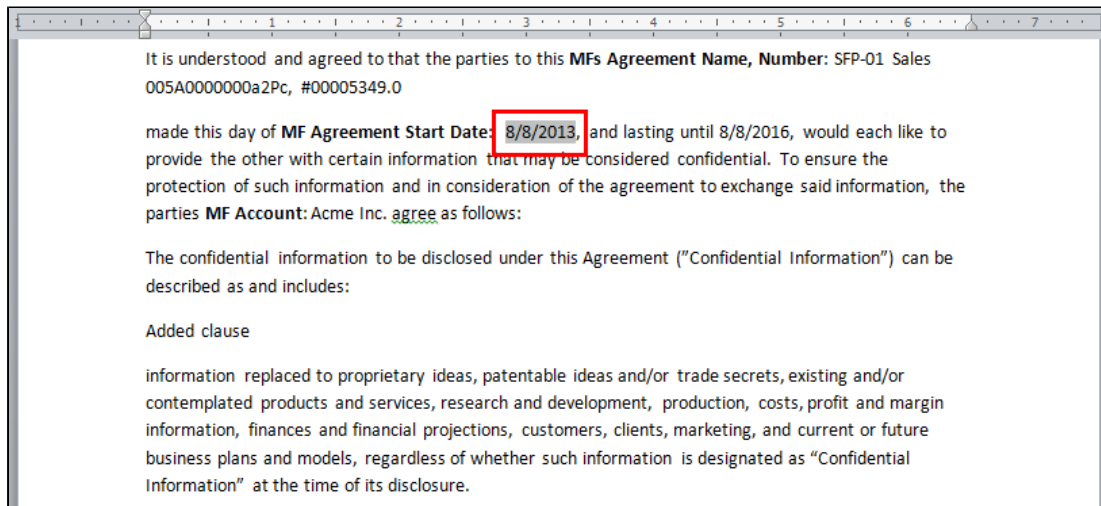
2. Expand **Agreement > Fields** to display the available fields that can be used to tag text in the document as smart fields. This is limited to Header level smart fields for the agreement. No related list or child object fields can be selected.



- Highlight the text you want to associate with an Agreement record field and drag and drop it into the **Fields** window. If the text does not match the field type, a message box lets you know you cannot use the text for that smart field.



- After dragging and then dropping, if you click the text it will be highlighted in grey, indicating it is a smart field. You can continue dragging and dropping fields as necessary.



5. Once you have tagged the fields, click **Check-In** and in the Check-In dialog box, select the **Reconcile Document** option and then click **Checkin**. At this point the tagged smart fields are validated and if any values do not match the values of the Agreement record fields, an error message is displayed. For more details, see the Reconciliation section in the user guide.

The Agreement record fields are updated in Salesforce and the document is updated in the Notes & Attachments related list for the agreement record.

You can return to the document again later to use Tag Smart Fields, to tag additional fields.

Using Enhanced Redlining

Enhanced redlines is Author feature that improves on Microsoft Word's built- comparison tools. Normally if you select a block text (for example a clause you want to replace) and paste a new clause in its place from the clause library - Playbook, Microsoft Word shows the old text as a deletion and the new clause pasted in as an insertion, which often isn't the result users expect to see if only a few words were changed from one clause to another.

The enhanced redlining feature, which can be turned off and on from the Options menu (see Options section), is used if you really want to see what differences exist from one clause to another. If you are pasting a new clause altogether this setting won't make any difference and should only be used if there are only a few or minor differences between the clause and the one replacing it.

For example, here is some text we select and replace with a new clause from the Playbook (with Enhanced Redlining turned off):

Neither this party or any other shall be liable to the other in any manner whatsoever for any decisions, obligations, costs or actual expenses incurred, changes in business practices, plans, organization, products, services, or otherwise, based on either party's decision to use or rely on any information exchanged under this Agreement, and all amendments to this agreement.

After pasting a similarly worded clause from the Playbook with Enhanced Redlining turned off, we now have the default Microsoft Word behavior, which treats the old text as a deletion and the new text as an insertion:

Neither party shall be liable to the other in any manner whatsoever for any decisions, obligations, costs or expenses incurred, changes in business practices, plans, organization, products, services, or otherwise, based on either party's decision to use or rely on any information exchanged under this Agreement.

~~Neither this party or any other shall be liable to the other in any manner whatsoever for any decisions, obligations, costs or actual expenses incurred, changes in business practices, plans, organization, products, services, or otherwise, based on either party's decision to use or rely on any information exchanged under this Agreement, and all amendments to this agreement.~~

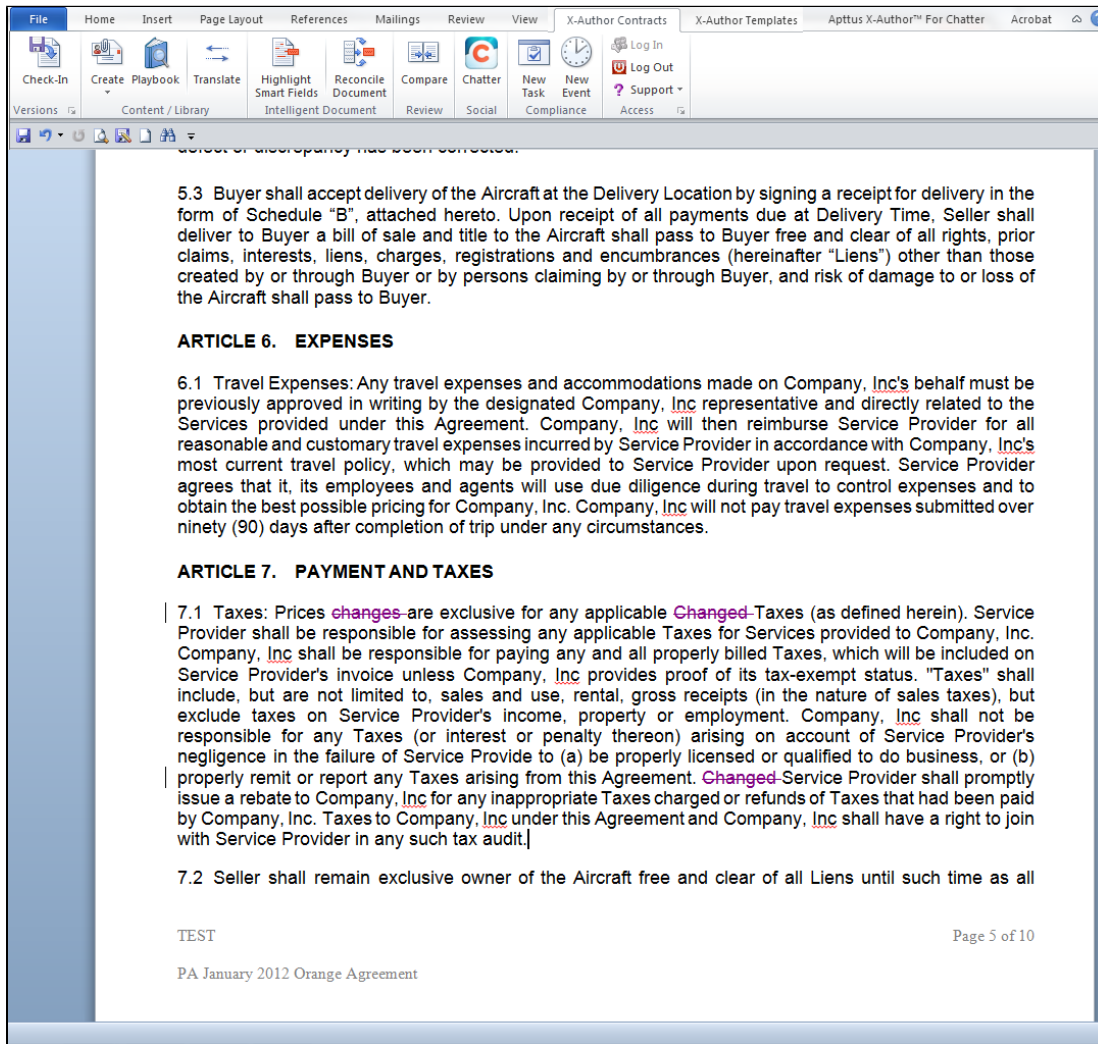
This is not always what the user wants, since it implies every single word changed. If we now turn on the Enhanced Redlining feature and repast the new clause in from the Playbook, we then get the result that would expect since only a few words and parts of the clause are actually different:

Neither ~~this party or any other~~ shall be liable to the other in any manner whatsoever for any decisions, obligations, costs or ~~actual~~ expenses incurred, changes in business practices, plans, organization, products, services, or otherwise, based on either party's decision to use or rely on any information exchanged under this Agreement, ~~and all amendments to this agreement.~~

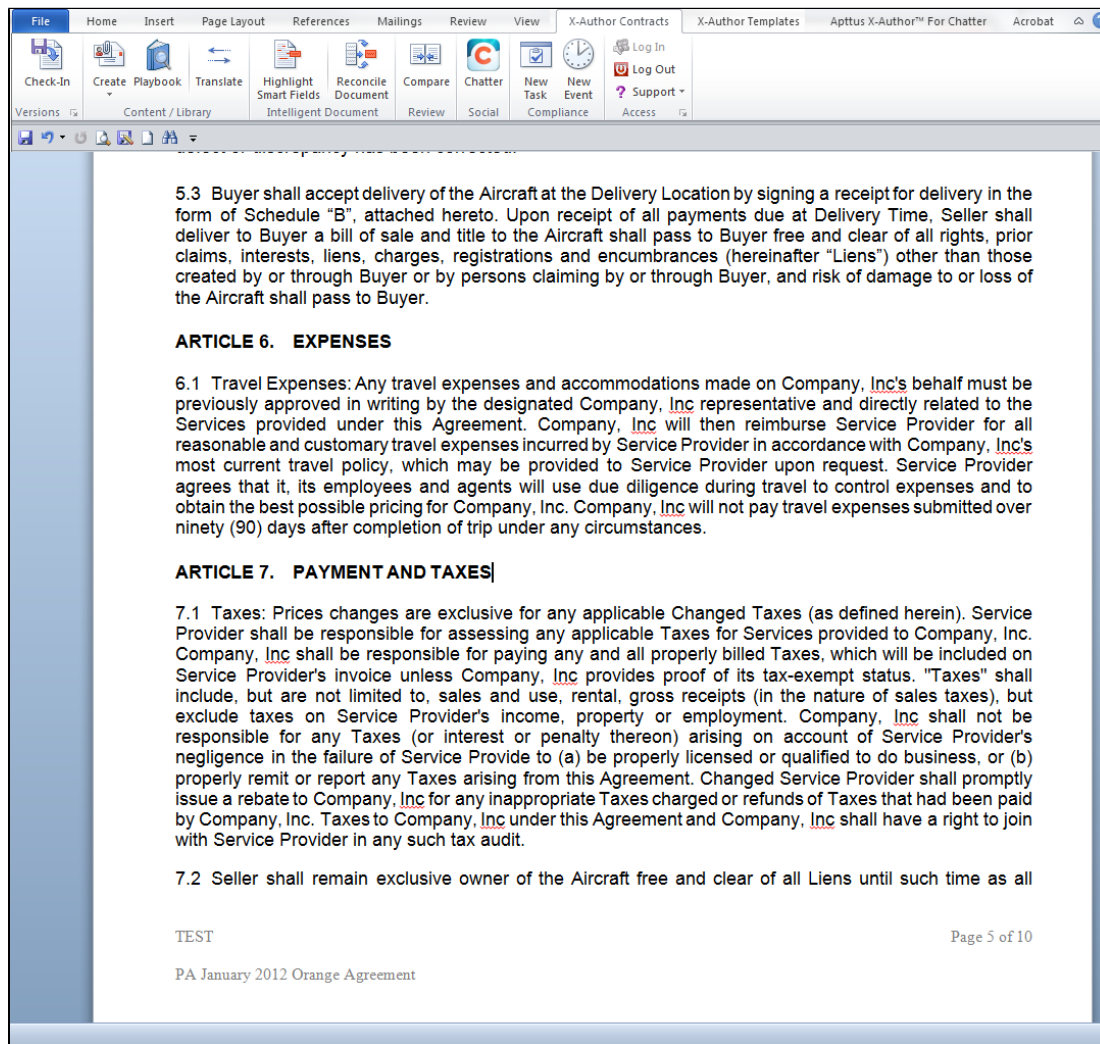
This feature makes it much easier to see what has actually changed from one clause to another, especially when very large clauses are pasted in.

Let's now assume that the clauses which we inserted earlier in the agreement document get changed, for example like the following:

X-Author Contracts on Salesforce Spring 2018 User Guide



and agreement document version which gets saved now looks like below:



You can use Enhanced Redlining capability feature to find out what exactly has been changed in this clause. Open the newer version of the agreement document in Microsoft Word and select the clause *Taxes* and open the Playbook, find the original clause and click **OK** to replace modified clause in the document.

The result would look as follows:

ARTICLE 7. PAYMENT AND TAXES

7.1 Taxes: Prices ~~changes~~ are exclusive for any applicable Changed Taxes (as defined herein). Service Provider shall be responsible for assessing any applicable Taxes for Services provided to Company, Inc. Company, Inc shall be responsible for paying any and all properly billed Taxes, which will be included on Service Provider's invoice unless Company, Inc provides proof of its tax-exempt status. "Taxes" shall include, but are not limited to, sales and use, rental, gross receipts (in the nature of sales taxes), but exclude taxes on Service Provider's income, property or employment. Company, Inc shall not be responsible for any Taxes (or interest or penalty thereon) arising on account of Service Provider's negligence in the failure of Service Provide to (a) be properly licensed or qualified to do business, or (b) properly remit or report any Taxes arising from this Agreement. ~~Changed~~ Service Provider shall promptly issue a rebate to Company, Inc for any inappropriate Taxes charged or refunds of Taxes that had been paid by Company, Inc. Taxes to Company, Inc under this Agreement and Company, Inc shall have a right to join with Service Provider in any such tax audit.

Updating Smart Fields From Salesforce (Pre-FX2)

This can be used to update smart fields in your agreement document in instances where fields have been updated in Salesforce since the document was generated.

Any header level fields that are in your document as smart fields can be updated. If you choose to update the fields from Salesforce, all of the smart fields that have changed will be updated. You cannot select only specific fields.

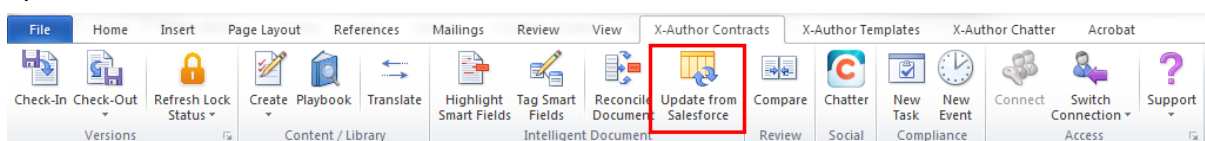
You can also update values in tables or repeating data sets as long as all of the fields in the table are smart fields. If a table consists of some columns with smart fields and some standard merge fields, then a warning message is displayed. If a table consists entirely of standard merge fields or smart fields no message is displayed. Content in Sections cannot be updated using *Update from Salesforce*. While you are using the Update From Salesforce functionality, you can add a new row, if and only if there is an existing table to add a new row to. If you have tables in your existing templates that consist of regular merge fields, and you want the tables to be updatable from Salesforce, you must replace those tables with new ones that use smart fields.

To update smart fields

The document must contain smart fields.

You should reconcile the document first, if you want to ensure values in the document are not overridden by updating from Salesforce.

1. Open an agreement document in X-Author Contracts and the **Update from Salesforce** option is enabled.



2. Click **Update from Salesforce** and all the header level smart fields are displayed, as well all tables containing smart fields.

NOTE: If the document contains a table consisting of regular merge fields and smart fields a warning message is displayed, and that table is not included in the Update from Salesforce window. Only tables that consist solely of smart fields can be updated via *Update from Salesforce*.

3. Review the changed values, which are highlighted in yellow, in the **Fields** and **Table** tabs.
4. Click **Update**.

All of the field values that are highlighted in yellow are updated in the document. Now all smart field values are the same in the document, as in Salesforce.

Importing Offline Agreement Documents

X-Author Contracts enables you to import a document which has not previously been saved in Salesforce and attach it to a pre-existing agreement record. You can also select how you want date and time to be formatted in the footer of imported docs and how you would like an agreement number included in the header.

Like creating a new agreement, when you choose to associate the document with a pre-existing agreement record, it is added to either the *Document Versions* or *Notes & Attachments* related list for that agreement (depending on your versioning settings).

When you import a document, the date and time for when it is imported can be automatically added to the footer of the imported document. To automatically include the date and time when you import a document, you can configure a *Comply System Property* indicating you want the date included and the format in which the info should be displayed.

Another *Comply System Property* is used to indicate that you want the agreement number automatically included in the header and which field you want that value to come from.

When you use these settings, they add values to the header and footer of the document regardless of what other content was already in the header and footer.



You must be using Contract Management 7.0.228 or higher to import offline documents.

To add importing offline agreement actions

1. From **Setup**, go to **Create > Objects > Merge Event**.
2. Under **Custom Fields & Relationships**, click **Action** and for **Picklist Values** click **New**.
3. Enter *Create Offline Agreement* and *Import Offline Agreement* on separate lines and click **Save**.

Add Picklist Values
Action

Add one or more picklist values below. Each value should be on its own line.

Create Offline Agreement
Import Offline Agreement
Check-in

Save Cancel

4. From **Setup**, go to **Create > Objects > Agreement Protection**.
5. Under **Custom Fields & Relationships**, click **Action** and for **Picklist Values** click **New**.
6. Enter *Import Offline Agreement* and click **Save**.

Document protection can now be extended to documents that were imported.

To set the Agreement Number Field for the header

1. From **Setup**, go to **Develop > Custom Settings** and click **Manage** beside **Comply System Properties**.
2. Click **Edit** and for **Agreement Number Field For Imported Docs**, enter the API name of the field you want to use. For instance, you could use `Apttus__Agreement_Number__c` from the Agreement object.
3. Click **Save**.

When a new document is imported into the system, it will include the agreement number in the top right corner of the header on each page, using the field selected above.

To set the date and time format for the footer

1. From **Setup**, go to **Develop > Custom Settings** and click **Manage** beside **Comply System** Properties.
2. Click **Edit** and for **Footer Datetime Format For Imported Docs** enter the format you want to use. For example:



Only the following date and time formats are supported:

Supported DateTime Format	Example
MM/dd/yyyy	08/22/2006
dddd, dd MMMM yyyy	Tuesday, 22 August 2006
dddd, dd MMMM yyyy HH:mm	Tuesday, 22 August 2006 06:30
dddd, dd MMMM yyyy hh:mm:tt	Tuesday, 22 August 2006 06:30 AM
dddd, dd MMMM yyyy H:mm	Tuesday, 22 August 2006 6:30
dddd, dd MMMM yyyy h:mm tt	Tuesday, 22 August 2006 6:30 AM
dddd, dd MMMM yyyy HH:mm:ss	Tuesday, 22 August 2006 06:30:07
MM/dd/yyyy HH:mm	08/22/2006 06:30
MM/dd/yyyy hh:mm tt	08/22/2006 06:30 AM
MM/dd/yyyy H:mm	08/22/2006 6:30
MM/dd/yyyy h:mm tt	08/22/2006 AM

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MM/dd/yyyy HH:mm:ss	08/22/2006 06:30:07
MMMM dd	August 22
yyyy'-'MM'-'dd'T'HH':'mm':'ss	2006-08-22T06:30:07
yyyy'-'MM'-'dd HH':'ss'Z'	2006-08-22 06:30:07Z
dddd, dd MMMM yyyy HH:mm:ss	Tuesday, 22 August 2006 06:30:07

3. Click **Save**.

When a new document is imported into the system, it will include the Date in the bottom left corner of the footer on each page, in the format selected above.

To import an offline document

1. With the document open, connect to the Salesforce org where you want to create the offline document.
2. Go to the **X-Author Contracts** tab and click **Check-In**. The Check-In dialog is displayed.

X-Author Contracts

Specify Import offline Document Attributes
Specify the attributes on how you want to import this document.

Do you want to import this agreement document using the FX2 format? ☒ Yes ☐ No

Options

☐ **Create as a new offline document**
When you choose this option, you will be allowed to create a new agreement and then import this document.

☒ **Upload / Import as an offline document**
When you choose this option, you will be allowed to choose an existing agreement and then import this document.

☐ Make this document private

* = Required Information

OK Cancel

3. Select **Upload/Import as an offline document** and click **OK**. Optionally, you can choose to make the offline document private. For more information on what this means, see [Marking Agreement Documents as Private](#). Depending on the version of Contract Management installed in your org, you will see one of the two screens.
 - a. **(Contract Management 8.4.0319 or higher)** Enter the Agreement Name or Number of the agreement you want the imported document associated with and click . Refine your search by also choosing an Owning **User** and/or a **Primary Contact** for the agreement.


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Checkin

Page 1 of 3 << Previous Next >> Records per page

Enter Agreement Name or Number User Agreement Primary Contact

Action	Agreement Name	Description	Agreement Number	Account Name	Name	Version Aware
<input type="button" value="Select"/>	New Record		00000008.0	ABC Company	Chris Castro	<input type="checkbox"/>
<input type="button" value="Select"/>	SOW #2	Research study.	00000019.0	ABC Company	Chris Castro	<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	SOW		00000020.0	ABC Company	Chris Castro	<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	SOW 012345		00000021.0	ABC Company	Chris Castro	<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	SOW 012345 Copy		00000022.0	ABC Company	Chris Castro	<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	SOW 012345 Copy Copy		00000023.0	ABC Company	Chris Castro	<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	SOW 0123456		00000024.0	ABC Company	Chris Castro	<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	SOW		00000025.0	ABC Company	Chris Castro	<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	SOW 54321		00000026.0	ABC Company	Chris Castro	<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	SOW Example		00000027.0	ABC Company	Chris Castro	<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	SOW 8.19		00000028.0	ABC Company	Chris Castro	<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	SOW 8.19.2		00000029.0	ABC Company	Chris Castro	<input checked="" type="checkbox"/>

- b. **(Contract Management 8.3.0310 or earlier)** Enter the name or number of the agreement you want the imported document associated with and click .

Checkin

Type a Name or Agreement Number and click the Search icon.

AD Sales

Page #: 1 out of 1

Agreements

Action	Account Name	Agreement Name	Agreement Number	AgreementType_String	Description	Version Aware
<input type="button" value="Select"/>	Acme	AD Sales Import Offline 1	00007394.0	Sales		<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	Acme	AD Sales SOW 1.11.16.01	00007397.0	Sales		<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	Acme	AD Sales SOW 1.11.16.02	00007398.0	Sales		<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	Acme	AD Sales SOW 1.18.16.01	00007399.0	Sales		<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	Acme	AD Sales SOW 11.27.2015.1	00007391.0	Sales		<input checked="" type="checkbox"/>
<input type="button" value="Select"/>	Acme	AD Sales SOW 11.30.2015.1	00007393.0	Sales		<input checked="" type="checkbox"/>

Page #: 1 out of 1

4. Click **Select** for the appropriate agreement and the dialog closes. If your agreement record is *Version Aware*, the document is imported and attached to the **Document Versions** related list. Otherwise, it is imported and attached to the **Notes & Attachments** related list.





If you are using Offline documents (documents imported without Apttus properties, such as third party paper) with your agreements, you must ensure that any required documents are converted using OCR (Optical Character Recognition) prior import, or they will not be searchable.

Locking Documents

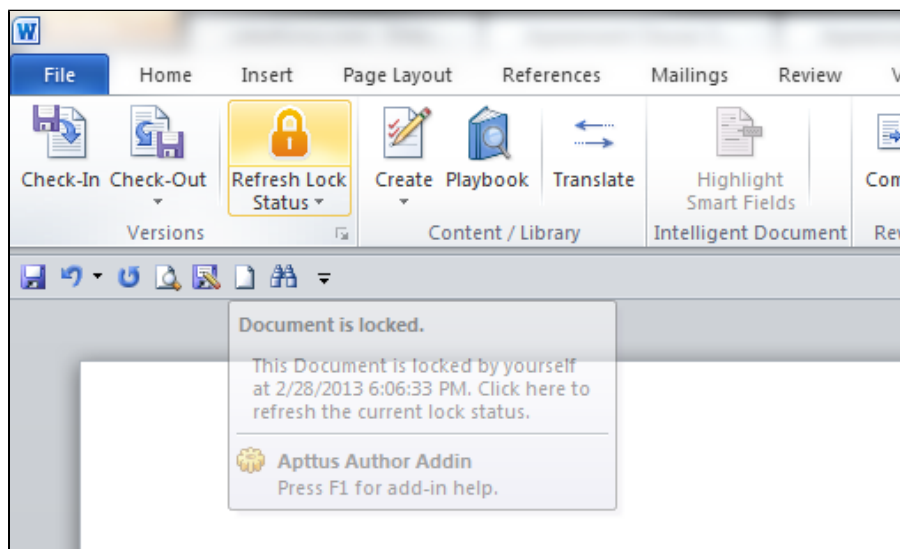
When you check-out a document in X-Author For Contracts, the same document can be locked to prevent others from editing the document and checking in a new version at the same time you are working on it.

When you check-out a document it is automatically locked, which is indicated by the lock icon

being closed . If you choose to refresh the lock status and release it, the icon changes to

open . Once you have unlocked a document, you can relock it by selecting **Check-Out > Currently Opened Document**.

When someone else has a document locked and you open it, you will not be able to edit the document. The *Create*, *Playbook*, and *Highlight Smart Fields* menu options will be disabled. When you mouse over the lock icon, a message will display when the document was locked and by whom.



Configuring Locking Documents


You must have enabled Comply System Properties and applied the correct permissions in Salesforce for this feature to work in X-Author.

From **Setup**, go to **Develop > Custom Settings > Comply System Properties** and select **Enable Version Control**.

From **Setup**, select the profile you want to have access to this feature and select **Object Settings**. Set the object permissions for **Agreement Locks** to *Read, Create, Edit, Delete*.

From **Setup**, go to **Create > Objects > Agreement** and from **Custom Fields & Relationships** select **Is Locked**. Click **Set Field-Level Security** and select the **Visible** check box for each profile that you want to be able to use this feature.

To lock documents

1. From the **X-Author Contracts** tab, check-out a document and it is automatically locked, which is indicated by  .
2. Hover over the lock icon and a message indicates the document is currently locked by you. If someone else opens the document at this point, they will not be able to edit it and the **Create** and **Playbook** options will be disabled.
3. Check-in the document.

The document is checked into Salesforce and the lock is removed, indicated by



.You can use **Check-Out** to relock the document.

Using the Playbook for Agreement Documents

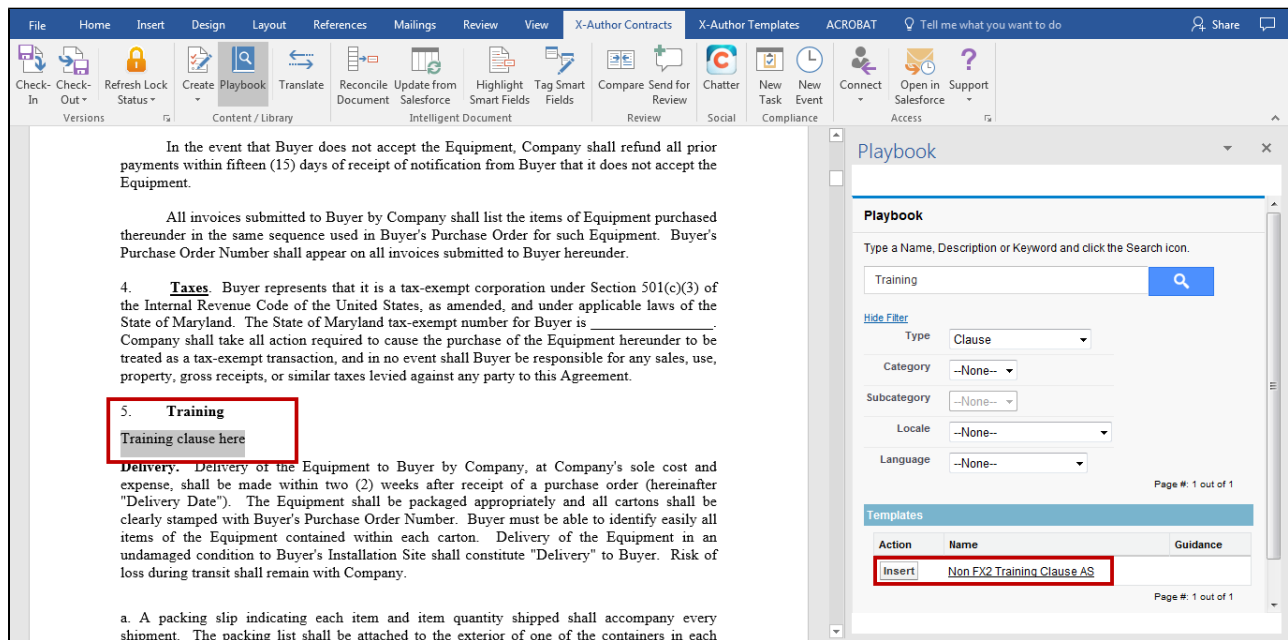
Playbook is a repository of clauses, sections, and supporting documents which can be inserted in the agreement document during the agreement management process. The playbook allows you greater degree of delegation and experience sharing by providing a repository of readily available clauses which can be used during the negotiation process.

Working with the clause library for agreement management process, generally assumes that these clauses actually contain text only, and do not have merge fields, conditional statements, etc. which need to be resolved at runtime. Only clauses that have an agreement type that match the record type of the agreement are displayed in the search results.

Playbook for Pre-FX2 Agreement Documents

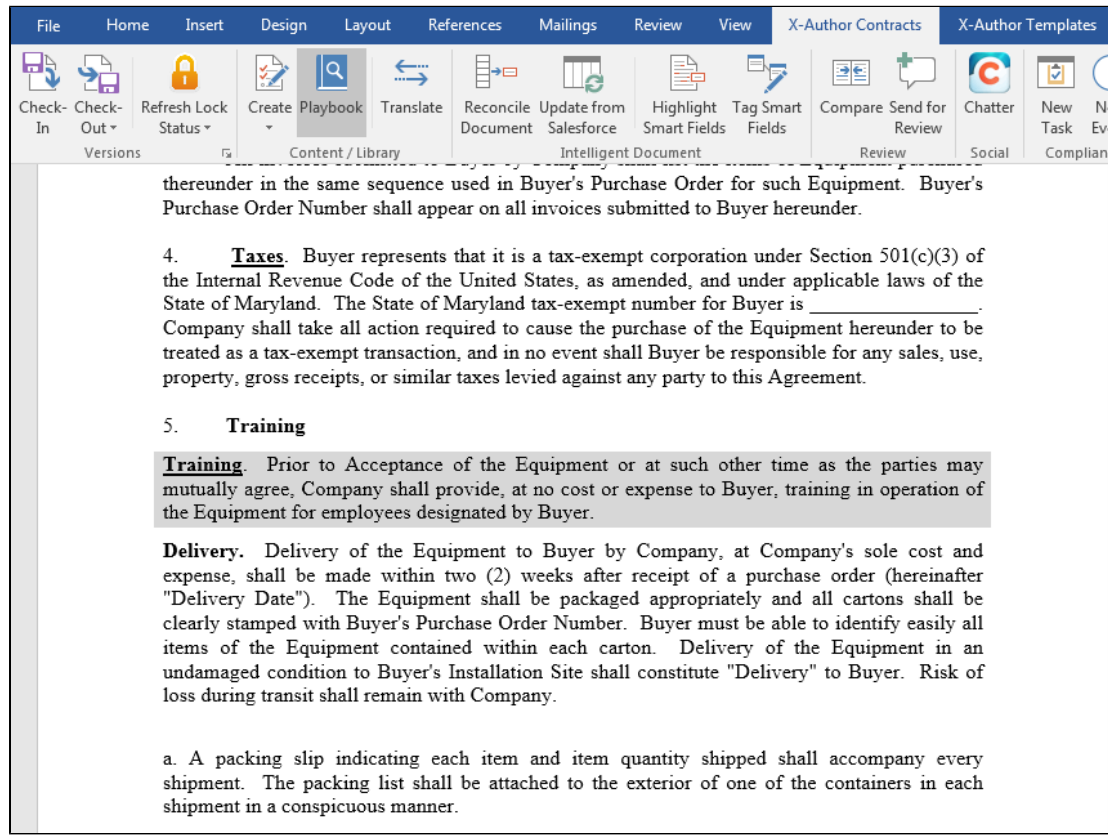
For illustrating the use of Playbook for pre-FX2 agreement documents, Let's consider a case where you need to add two clauses to the agreement document which are concerned with training and confidentiality. To work with Playbook in Pre-FX2 agreement document:

1. Download the agreement document from Salesforce, open it in Microsoft Word.
2. Log in to Salesforce from X-Author Contracts tab from the Microsoft Word ribbon and then click **Playbook**.
3. In the agreement document, place the cursor exactly where you need to insert the clause for Training. Note that by default the search filter **Type** is set to **Clause**:

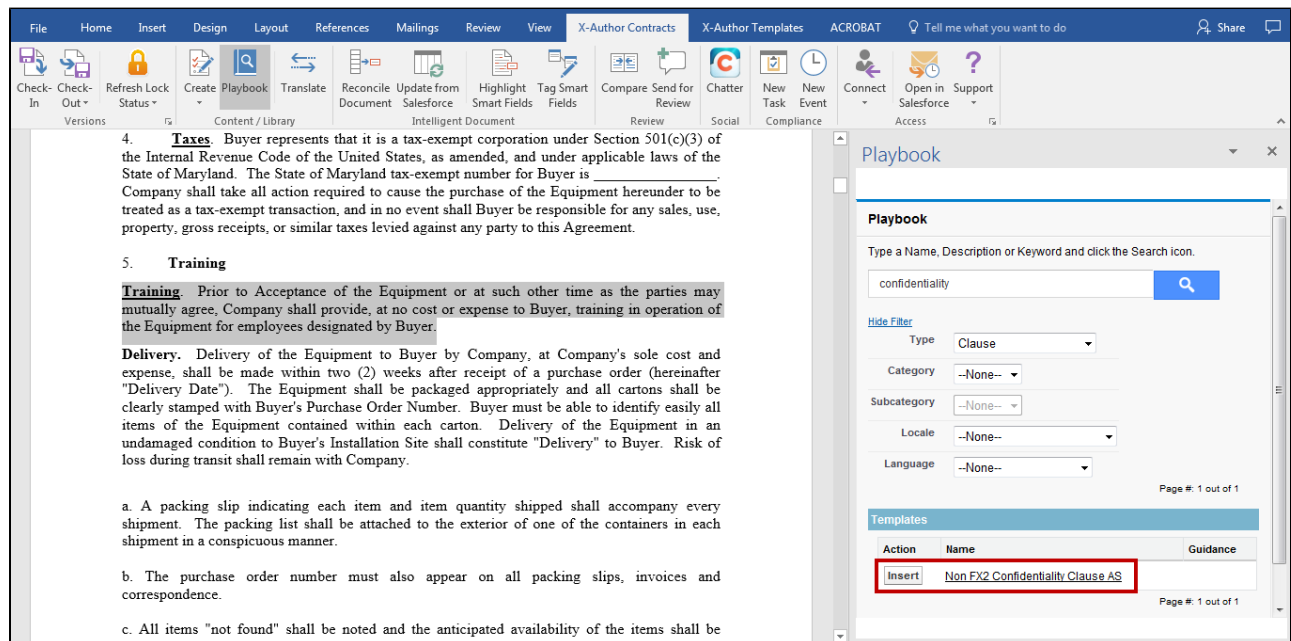


After the clause is inserted the document looks like the following:

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Now you need to insert another clause replacing previously created (in our document it is section 5). Select the clause and click **Playbook** from the **X-Author Contracts** tab:



After the clause is inserted the document looks like the following:

<p>4. Taxes. Buyer represents that it is a tax-exempt corporation under Section 501(c)(3) of the Internal Revenue Code of the United States, as amended, and under applicable laws of the State of Maryland. The State of Maryland tax-exempt number for Buyer is _____. Company shall take all action required to cause the purchase of the Equipment hereunder to be treated as a tax-exempt transaction, and in no event shall Buyer be responsible for any sales, use, property, gross receipts, or similar taxes levied against any party to this Agreement.</p>
<p>5. Confidential Information</p> <p>1.1 To the extent authorized by the law, the parties may wish, from time to time, <u>in connection with</u> work contemplated under this Agreement, to disclose confidential information to each other ("Confidential Information"). Each party will use reasonable efforts to prevent the disclosure of any of the other party's Confidential Information to third parties for a period of three (3) years after the termination of this Agreement, <u>provided that</u> the recipient party's obligation shall not apply to information that:</p> <p>a. is not disclosed in writing or reduced to writing and so marked with an appropriate confidentiality legend within thirty (30) days of disclosure;</p> <p>b. is already in the recipient party's possession at the time of disclosure thereof;</p> <p>c. is or later becomes part of the public domain through no fault of the recipient party;</p> <p>d. is received from a third party having no obligations of confidentiality to the disclosing party;</p> <p>e. is independently developed by the recipient party; or</p> <p>f. is required by law or regulation to be disclosed.</p> <p>1.2 <u>In the event that</u> information is required to be disclosed pursuant to subsection f. and to the extent authorized by the law, the party required to make disclosure shall notify the other to allow that party to assert whatever exclusions or exemptions may be available to it under such law or</p>

The agreement activity history log entries created by the two above actions:

Activity History		Log a Call	Mail Merge	Send an Email	View All	Activity History Help ?	
Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time	
Edit Del	Saved clean version		✓	3/7/2017	Anubha Singh	3/7/2017 5:09 AM	
Edit Del	Replaced text with section 'Non FX2 Confidentiality Clause AS'		✓	3/7/2017	Anubha Singh	3/7/2017 5:09 AM	
Edit Del	Replaced text with section 'Non FX2 Training Clause AS'		✓	3/7/2017	Anubha Singh	3/7/2017 5:09 AM	
Edit Del	Generated Agreement		✓	3/7/2017	Anubha Singh	3/7/2017 4:49 AM	

Also these clauses get inserted into the Agreement Clause related list table associated with an agreement. Here are the two agreement clauses:

Agreement Clauses										New Agreement Clause	Submit For Clause Approval	Agreement Clauses Help ?
Action	Number	Action	Clause	Category	Risk Rating	Status	Text	Previous Text	Comments	Diff Text (Deprecated)		
Edit Del	0002	Modified	Default				Training: Prior to Acceptance of the Equipment or at such other time as the parties may mutually agree, Company shall provide, at no cost or expense to Buyer, training in operation of the Equipment for employees designated by Buyer.		Replaced text with section 'Non FX2 Training Clause AS'			
Edit Del	0003	Modified	Default				Confidential Information 1.1 To the extent authorized by the law, the parties may wish, from time to time, in connection with work contemplated under this Agreement, to disclose confidential information to each other ("Confidential Information"). Each...		Replaced text with section 'Non FX2 Confidentiality Clause AS'			

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

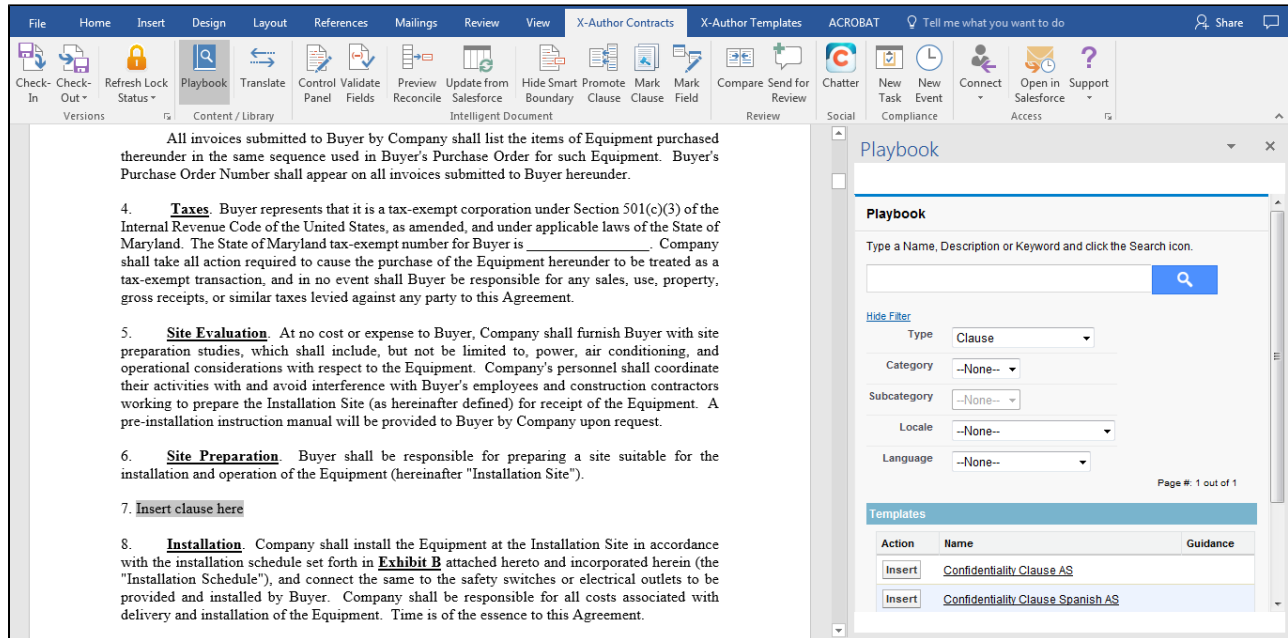
Playbook for FX2 Agreement Documents

To insert clauses using Playbook in agreement documents generated with FX2 formatted template:

1. Login to X-Author Contracts in Microsoft Word and open a generated agreement document using **Check-Out**.

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2. The agreement document opens in Microsoft Word. Select a pre-existing paragraph or place the cursor in appropriate place to replace or insert a clause.
3. Click on **Playbook** on X-Author Contracts tab and search for the required clause you want to insert.
4. Click **Insert**.
5. After you have inserted the clause, click **Check-In**.



Inserting Clauses with Merge & Smart Fields

From the Playbook you can insert clauses into agreements that contain lookup merge fields and header level smart fields and have those field values populated with values from the associated Salesforce object record.

Agreement header level fields are supported with this feature and they must be smart fields. Lookup merge fields are also supported. Related lists, child object fields, and repeating data sets are not supported. Conditional content is also not supported, as that logic can only be resolved at the initial document generation stage.



When you insert an agreement clause into a document, it is only valid for that specific agreement document. If you regenerate the agreement, a new document - without the inserted clause - is created.



You must be using Contract Management and X-Author Contracts 6.3 or higher.

Pre-requisites

- You must have generated an agreement document and have clause templates with merge and/or smart fields available.

To insert clauses

- Open the document and from the **X-Author Contracts** tab open the **Playbook**.
- Search for a **Clause** type template and click **Insert** to insert the clause content into the document. The inserted clause appears redlined in the agreement document if the agreement's protection level is set to *Insert Comments and Track Changes*.

The screenshot shows the X-Author Contracts Playbook interface. On the left, a table lists clause templates with columns for Severity Level, Definition, and Response Times. The table contains three entries: 1. System Down, 2. Critical, and 3. Urgent. The right pane shows the Playbook search and action area.

Severity Level	Definition	Response Times*
1. System Down	AS/400, mainframe, server	Immediate
2. Critical	Business outage or significant customer impact that threatens future	Within 1 hour
3. Urgent	productivity High-impact problem where production is proceeding, but in a significantly impaired fashion; there is a time-sensitive issue important to long term productivity that is not causing an immediate work stoppage; or there is	Within 2 hours



If you are trying to add a clause with both conditional logic and merge fields from the playbook into a newly generated document, the clause will not be evaluated properly.

Fields that can be resolved with values from the agreement record are displayed with those values. For those fields that do not have a value nothing is displayed. If the field does not exist on the agreement record the merge/smart field formula code is displayed. If any changes are made to the values of the fields, you must reconcile them as normal to have the agreement record fields updated accordingly.

Auto Clause Insertion using Bookmarks (FX2)

When managing a contract, there is often legal language that may be required to exist in the agreement document in multiple locations.

This feature provides Contract Managers with the ability to automatically insert clause content into a generated agreement document based on the placement of Clause Reference Bookmarks in the corresponding template document. When you work with a document that contains clause bookmarks, you have the option to automatically insert the content of a clause at *every location in the document with the same bookmark using a single click*. This provides greater flexibility and less work when multiple occurrences of the same clause are required in a document.

Before you can automatically insert clauses from bookmarks, your template must include bookmarks. Refer to [Inserting Clauses as Bookmarks \(FX2\)](#) under Managing Templates in this guide.

The Clause Bookmark feature requires **X-Author Contracts for Word version 8.5.0713 or later** and a connected org with **Apttus Contract Management package version 8.5.0346 or later** installed. Clause bookmarks only work with FX2 format templates and documents.

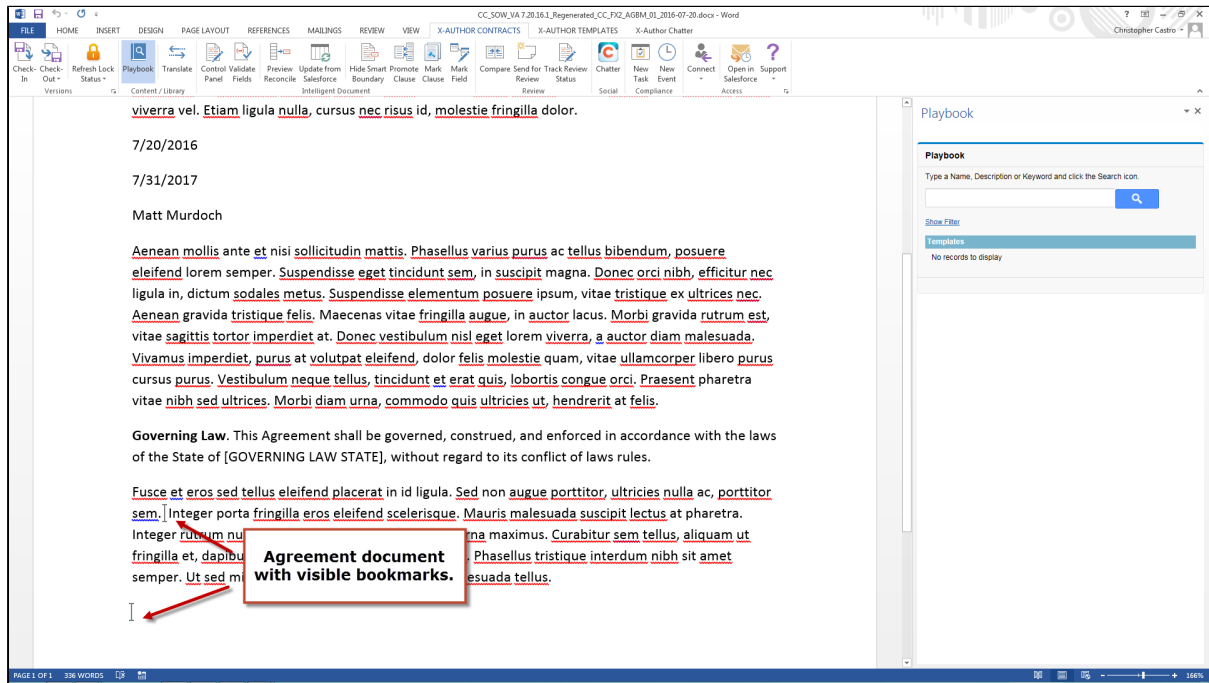


This feature inserts clause content as static text, *not smart clauses*. Smart clauses must still be inserted or marked as normal. Also, any style or text formatting in the inserted clause is removed and will match the format of the agreement document at the point of insertion.

To automatically insert a clause in all bookmark locations

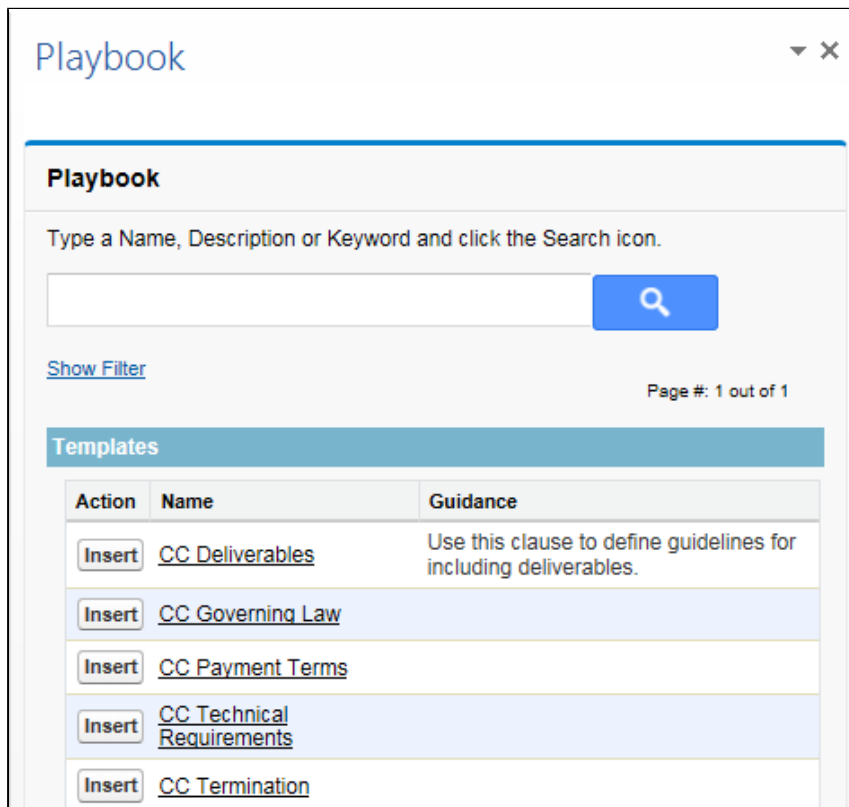
1. Open Microsoft Word and [connect to X-Author Contracts](#).
2. **Check Out** the agreement document containing the bookmark references.

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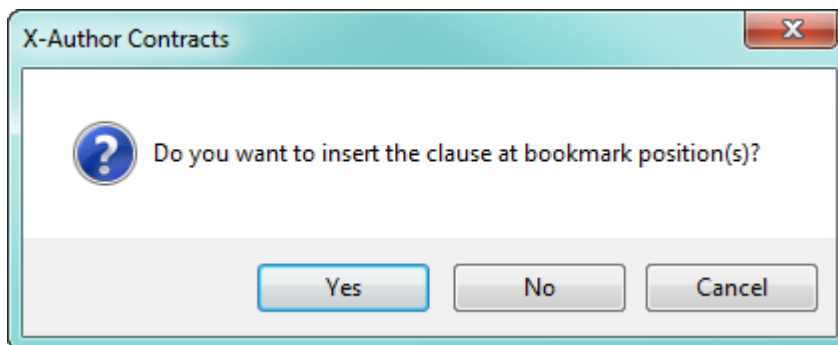


Note: Bookmarks are not visible in the document by default. You must "show bookmarks" in Word to make them visible.

3. From the X-Author Contracts ribbon, select **Playbook**. The Playbook pane is displayed.
4. Use the Playbook search dialog to display the clause or clauses you want to insert.



- From the list in Playbook, click **Insert** next to the bookmarked clause you want to insert. The following dialog is displayed.

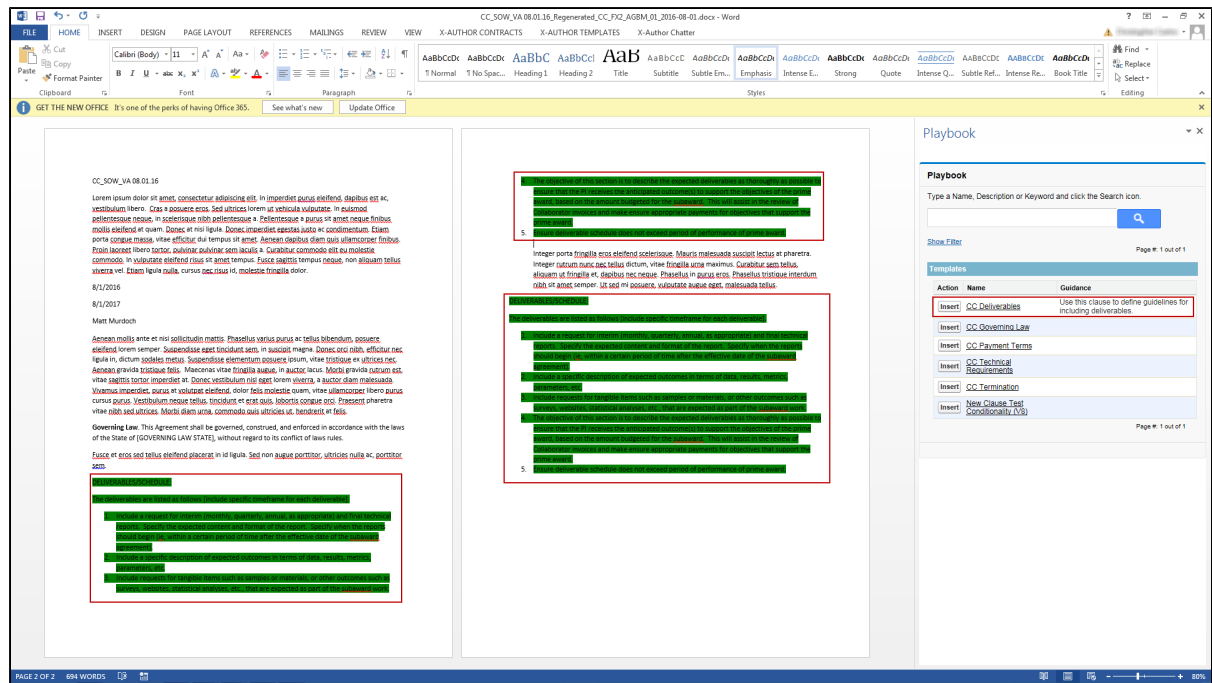


If you click Insert next to a clause that does not have a corresponding bookmark, the dialog will not be displayed and your clause will be inserted into the document at the cursor's current position.

- Choose an option from the dialog:

- Click **Yes** to insert the clause at ALL bookmark positions in the document.
- Click **No** to instead insert the clause at the cursor's current position.
- Click **Cancel** to cancel clause insertion entirely.

Each occurrence of the same clause is inserted into the document at the bookmark's location, replacing the bookmark with the contents of the clause.



7. **Check-In** your contract document after you have inserted all bookmarked clauses.

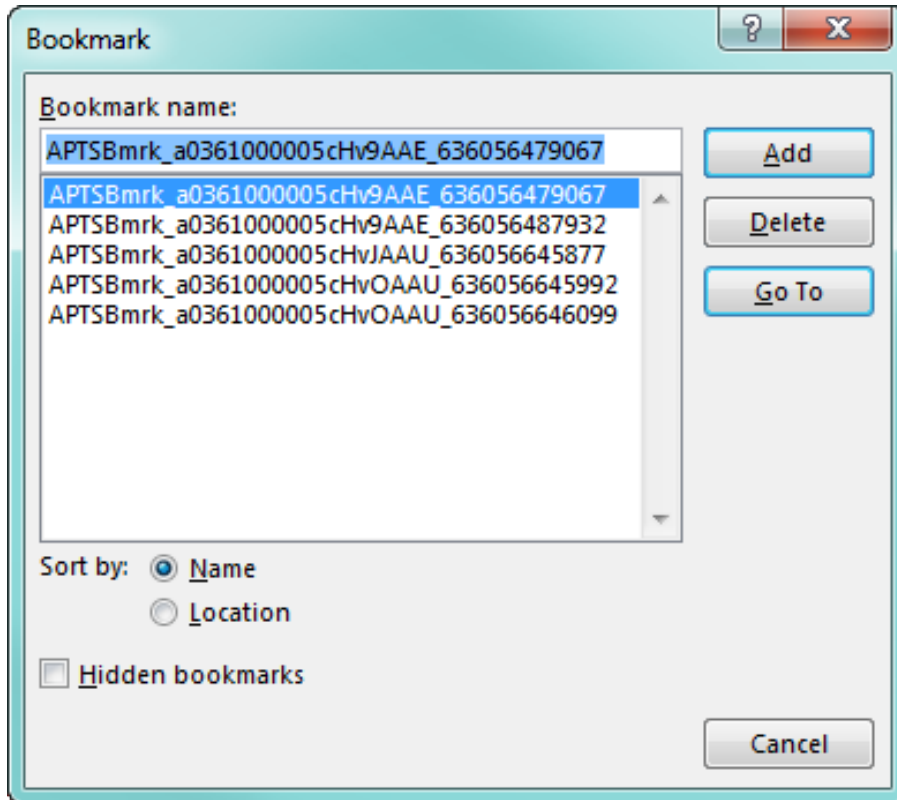
Document highlighting of clauses inserted from bookmarks is removed following check-in with or without reconciliation.

Locating Specific Bookmarks by Clause

When you are working with an agreement document, you may decide to inspect bookmark locations before inserting clause content. If you want to learn which clause reference bookmarks are associated with which clause, you can use Microsoft Word functionality to do so.

To find bookmarks by clause

1. From the "Insert" menu in word, click Bookmark. A list of bookmarks in the document is displayed



2. Bookmark names are a combination of the Clause Reference ID in Salesforce and the current Date/Time. You can identify an Apttus-specific bookmark because the name always begins with "APTSBmrk".
3. Select a bookmark from the list and click **Go To** to jump to the bookmark position in the document. The first string leading up to the underscore in the Bookmark name corresponds to the *Salesforce Record ID* for that specific clause. For example, if the bookmark name is "APTSBmrk_a0361000005cHv9AAE_636056479067", then the Clause Reference ID is "a0361000005cHv9AAE". Knowing this, you can track how many occurrences of the same clause can check Salesforce for the name of the clause corresponding to this ID.

Comparing and Merging Versions

X-Author can be used to compare or combine any two versions of an agreement document in Salesforce.

Compare: The comparison is done on the basis of Word's *Legal Black lines* compare functionality. *Compare Legal Black Lines* compares the documents and displays only what changed between the two documents. The documents being compared are not changed. This type of comparison is always displayed in a new third document, typically named *Compare Result*. Microsoft Word displays a new, third document in which tracked changes in the baseline document are accepted and changes in the selected document are shown as tracked changes. The documents being compared are not changed. There are two ways you can compare the agreement documents:

1. You can compare the different versions of an agreement document within the same agreement record, or,
2. You can compare the different versions of an agreement document from two different agreement records.

Merge: Merging documents uses Word's *Combine* feature to merge selected documents. Merging documents can be advantageous if you have one version of the document that has been redlined, and a regenerated version in the latest format (dynamically inserted fields, new clauses, etc.). Original (pre-merged) documents do not get changed. Merging the documents displays a new third document, named *Merge Result*. At this point, you can accept and reject any of the redlined elements in the combined document and check-in the document as a new version.

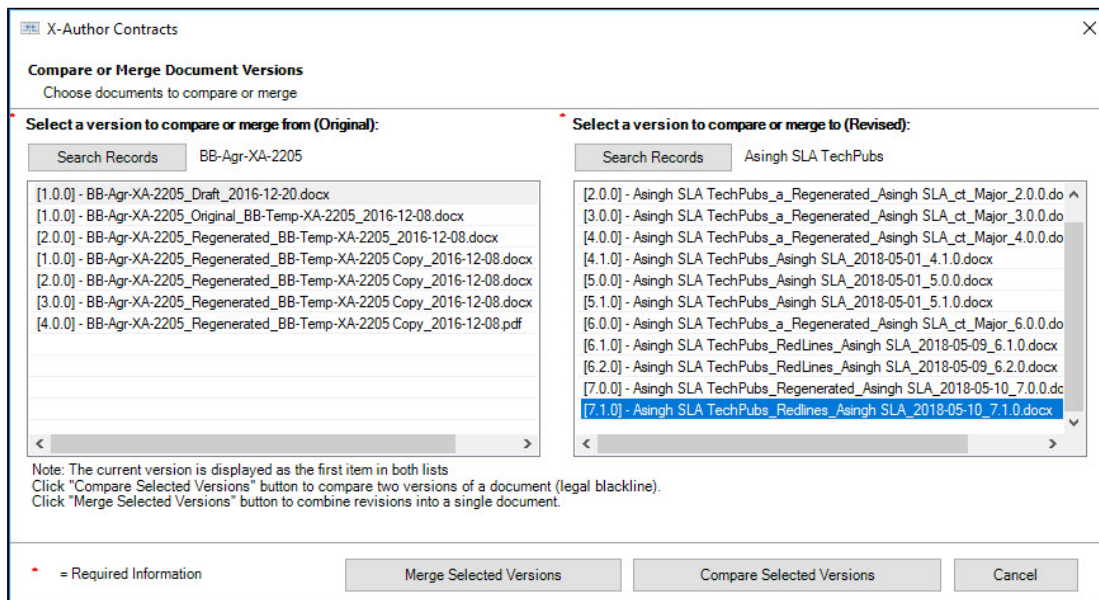
Note

You may want to perform a comparison before you decide to merge documents.

To compare versions

You must be logged into X-Author Contracts and have an agreement document open.


1. From the **X-Author Contracts** tab, select **Compare**. The currently opened agreement is displayed first in the lists.



2. To compare agreement versions from the same agreement record, select a version in '**compare or merge from**' and then a version from '**compare or merge to**' and click **Compare Selected Versions**. The list of agreement documents displayed in '**compare or merge from**' and '**compare or merge to**' list is from the same agreement record.

-OR-

To compare agreement versions from different agreement records click **Search Records** button. Clicking **Search Records** opens the agreement **Checkout** page. Search and checkout the agreement record from which you want to select a contract for comparison. Select the two agreement from the list and click **Compare Selected Versions**.

 The selected agreement record's name is displayed next to the Search Records button (as shown in the screenshot above).

A third document is generated and displayed in Word showing the differences between the two versions, in which tracked changes in the baseline document are accepted and changes in the selected document are shown as tracked changes. If either version of the document has previously tracked changes, Word might display a message box. Click **Yes** to compare the documents.




If your agreement documents have smart date fields inserted in a table cell, after comparing the two agreement documents some of the date fields may lose their smartness property. This problem occurs when you compare two agreement documents which have date fields inserted into a Microsoft Word table and then you navigate to Microsoft Word **Review** tab and click **Accept All Changes**. After accepting all the changes, some of the smart date fields in the agreement document might lose their smartness property.

To prevent this from occurring, avoid using smart date fields within a table.

3. You can select differences from the **Summary** pane to go directly to that part of the document. If the **Summary** pane is not displayed, go to Word's **Review > Reviewing Pane** to enable it. If you want to view the documents that are being compared side by side, along with the combined comparison document, select **Review > Compare > Show Source Documents > Show Both**.


The composite comparison document can be saved.

4. Check-in your document to create a new version.

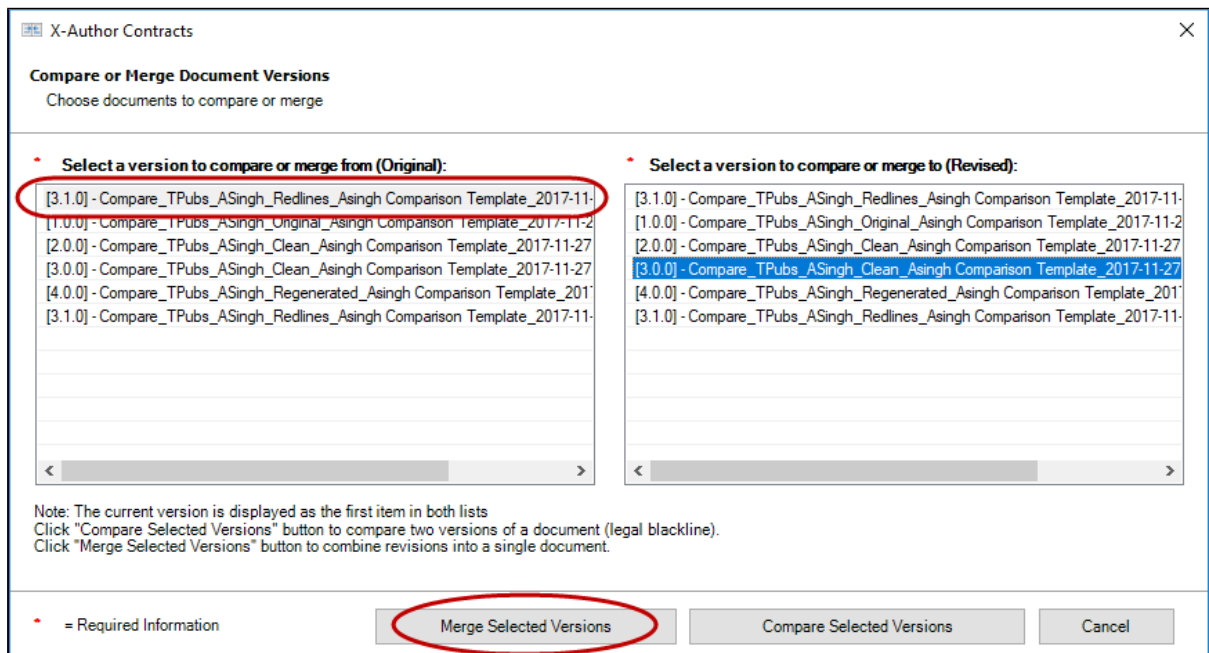
 The compare and check-in feature of X-Author Contracts allows you to compare two agreement documents and check-in the resulting compared document. You can also perform other X-Author Contracts actions on the compared document.

To merge versions

You must be logged into X-Author Contracts and have an agreement document open.

 Merge Document Versions is only supported in **X-Author Contracts version 8.5.1010 or higher**.

1. From the **X-Author Contracts** tab, select **Compare**.
The currently opened agreement is displayed first in the lists.
2. Select a version to combine from and a version from combine to and click **Merge Selected Versions**.



A third document is displayed showing a combination of the selected documents. Redlines are preserved in the combined document.

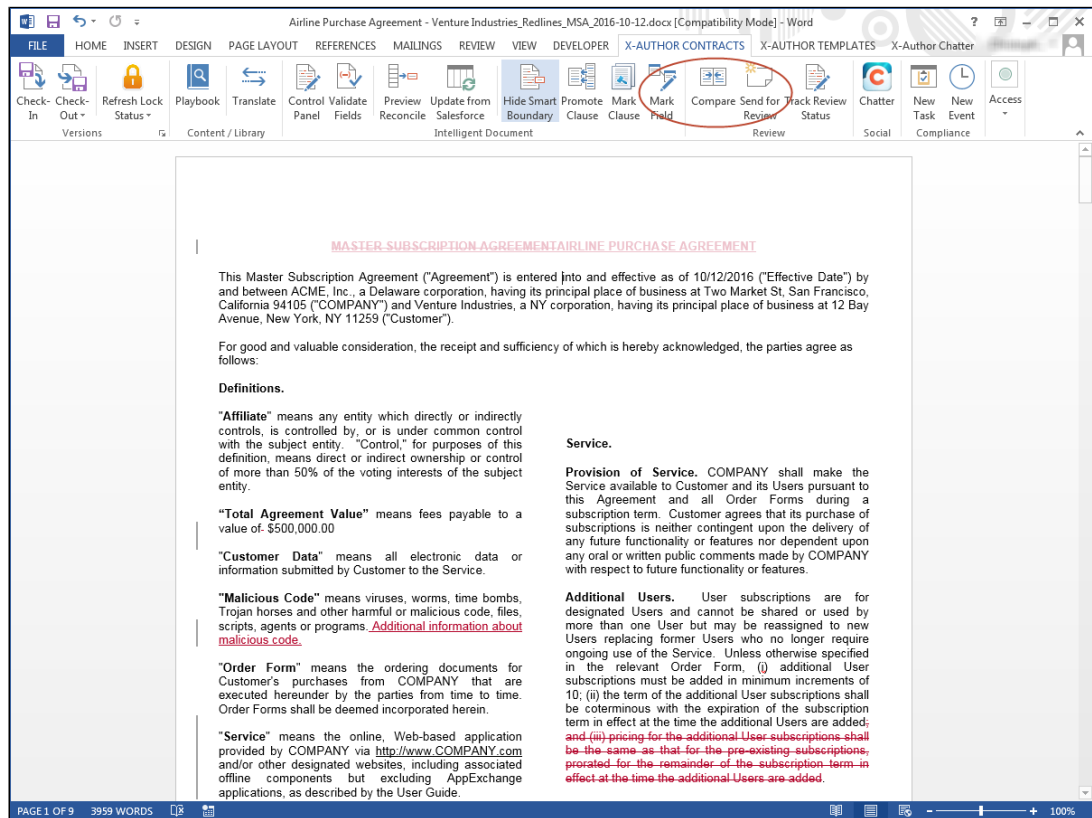
3. Accept or reject changes in the combined document.
4. Check-in your document to create a new version. To avoid errors, it is recommended to append the **Suggested Name** of your document with "Merged." For version-aware documents, the merged document will increment the version based on the "from" document (e.g., previous redlined version was 1.2.0, the new version will be 1.3.0).



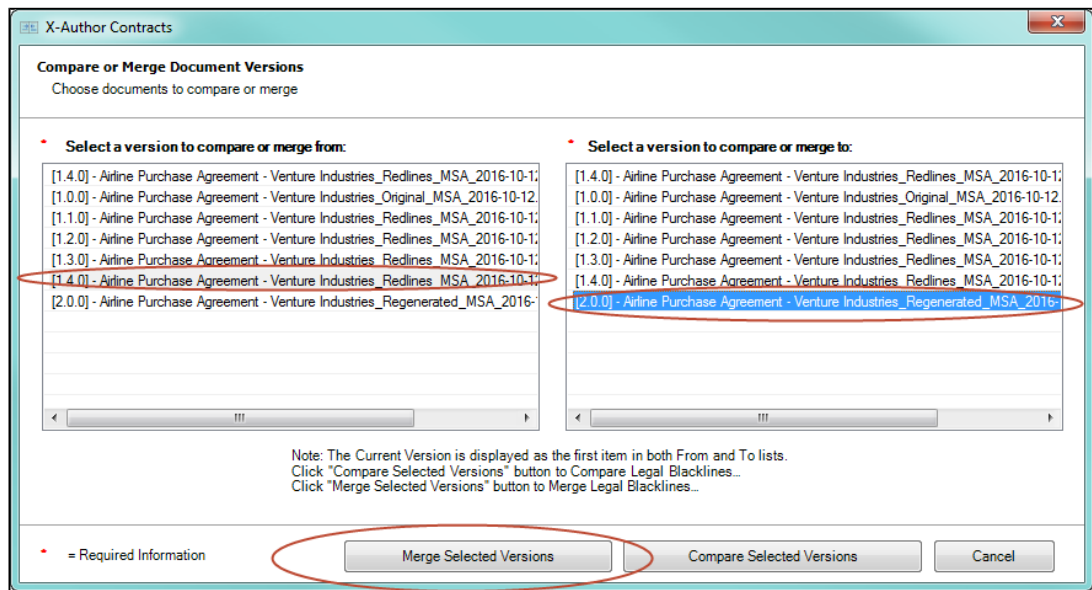
- If you are working with the merged document and change your view to "Show Source Documents" (from Review > Compare), X-Author actions such as insert clause may cause unexpected behavior. Always work with one active document window at a time (merged view).
- Microsoft Word has a limitation which causes X-Author Contracts to give an error when a user tries to merge two agreement documents containing smart date fields. Hence, we recommend you to avoid using **Merge Selected Version** feature with your documents, if your documents have smart date fields and the value of the date field in one of the documents is changed. As a workaround, you can use the **Compare Selected Versions** feature and check-in the resulting compared document.

① Use Case: Merging a redlined MSA with a regenerated version

1. Mary Manager is working with an MSA document generated from an agreement. There have been several rounds of negotiations, mainly consisting of various redlines being made to clauses and text marked as fields.
2. Sam Sales makes changes to the Agreement record in Salesforce, adding several more Agreement Products to the agreement.
3. Mary realizes that this will require the agreement document to be regenerated, but does not want to lose all the changes made to the redlined version. She decides to use X-Author's Merge Versions functionality.
4. On the Agreement record, Mary selects **Regenerate** to generate a new agreement document that captures the Agreement Product information.
5. Mary opens the redlined version in Word, checks it out, and chooses **Compare** from the X-Author Contracts ribbon.



6. Mary chooses the redlined version from the left pane (1.4.0) and the regenerated version from the right pane (2.0.0) and selects **Merge Selected Versions**.



7. Mary verifies that the redlined changes are still present, and checks the agreement line items that were present in the regenerated version.

Redlines

<p>"Total Agreement Value" means fees payable to a value of: \$500,000.00</p> <p>"Customer Data" means all electronic data or information submitted by Customer to the Service.</p> <p>"Malicious Code" means viruses, worms, time bombs, Trojan horses and other harmful or malicious code, files, scripts, agents or programs. <u>Additional information about malicious code.</u></p> <p>"Order Form" means the ordering documents for Customer's purchases from COMPANY that are executed hereunder by the parties from time to time. Order Forms shall be deemed incorporated herein.</p> <p>"Service" means the online, Web-based application provided by COMPANY via http://www.COMPANY.com and/or other designated websites, including associated offline components but excluding AppExchange</p>	<p>and this Agreement and an Order Form during a subscription term. Customer agrees that its purchase of subscriptions is neither contingent upon the delivery of any future functionality or features nor dependent upon any oral or written public comments made by COMPANY with respect to future functionality or features.</p> <p>Additional Users. User subscriptions are for designated Users and cannot be shared or used by more than one User but may be reassigned to new Users replacing former Users who no longer require ongoing use of the Service. Unless otherwise specified in the relevant Order Form, (i) additional User subscriptions must be added in minimum increments of 10; (ii) the term of the additional User subscriptions shall be coterminous with the expiration of the subscription term in effect at the time the additional Users are added; <u>and (iii) pricing for the additional User subscriptions shall be the same as that for the pre-existing subscriptions, prorated for the remainder of the subscription term in effect at the time the additional Users are added.</u></p>
---	--

New Line Items

The below table is the products that are ordered and have a start date of 10/12/2016.

Product	Quantity	List Price	Net Price
CESSNA C-SPEC FASTENER COWLING KITS	2.00000	120.95000	115.00000
GROVE LANDING GEAR	1.00000	1,072.65000	1,072.65000
FL1 ACTUATOR 12 VOLT	2.00000	670.00000	650.00000
FUEL TANK ACRO-SPORT II INVERT	2.00000	1,350.00000	1,300.00000

8. Mary checks in the document as the new redlined version, appending the **Suggested Name** with "Merged."
9. On the agreement record, the merged document is available under Document Versions (because this was a version-aware agreement).

Edit Del	1.4.0	Airline Purchase Agreement - Venture Industries_Redlines_MSA_2016-10-12.docx	1	4	0	Check In	<input type="checkbox"/>
Edit Del	2.0.0	Airline Purchase Agreement - Venture Industries_Regenerated_MSA_2016-10-12.docx	2	0	0	Regenerate Agreement	Regenerate Agreement <input type="checkbox"/>
Edit Del	1.5.0	Airline Purchase Agreement - Venture Industries_Redlines_Merged_MSA_2016-10-12.docx	1	5	0	Check In	<input checked="" type="checkbox"/>

Associating Term Exceptions

X-Author enables you to associate specific clauses in an agreement or proposal document with an exception clause or term exception. A term exception is a stipulated condition that may need approval to grant or prevent certain allowances in an agreement or proposal.

For example: you associate an exception clause for 'Payment Terms' in an agreement document. If the payment terms value is changed and if the change is not in line with the company's policy, which is usually a condition mentioned in the exception clause, then the agreement is sent for approvals.

In X-Author, you can associate term exception in two ways: Create Section and Playbook.

To associate term exceptions using Create Section

You or your system administrator must have set up the following in Salesforce before you can associate term exceptions:

- Create a new term exception using the custom object Term Exception in Salesforce and associate the term exception with an agreement type of your choice.

- Set the Admin property **APTS_EnableTermExceptionsInAuthor** to *True*, to be able to associate Term Exceptions to clauses via X-Author. If this setting has not been created then you must create it and set it to true.
1. Open Microsoft Word and check-out a document in which a section needs to be associated to a term exception.
 2. Select the chunk of text to associate it with a term exception and click **X-Author Contracts > Create > Create Section**.
 3. In the Create Section dialog, fill in the following:

Menu Item	Description
Action	Select an action that will execute the term exception. For example, the term exception will be triggered if the clause that you select is 'modified' or 'deleted'.
Category	Select the category of the clause. For example, Confidentiality, General and so on.
Subcategory	Select the sub-category of the clause.
Risk Rating	Select the risk rating to define a risk rating for the clause.
Exception	Select a term exception to associate the agreement clause. A list of term exceptions available for a particular agreement will be displayed (based on Active & Agreement Type filters).
Section	Enter an appropriate name for the clause.
Comments	Enter appropriate comments for the task.
Section text (selected)	The section that you have selected will be visible here.
Status	Select the status of the clause document

4. Click **Save** and click **Check-In**.

A new Agreement Term Exception record will be created. Also the Agreement Clause and Agreement Term Exception related lists are automatically populated with the Term Exception name.

To associate term exceptions using playbook

You or your system administrator must have set up the following in Salesforce before you can associate term exceptions:

- Create a new term exception using the custom object Term Exception in Salesforce and associate the term exception with an agreement type of your choice.
- Set the Admin property **APTS_EnableTermExceptionsInAuthor** to *True*, to be able to associate Term Exception with clauses via X-Author. If this setting has not been created, then you must create it and set it to true.

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.

Note

In some cases, a smart field may not be displayed in a generated agreement document. This is because of the fact that the field doesn't have any value to display and cannot participate in reconciliation process.

For details on Smart Fields, see [Inserting FX2 Fields in an FX2 Template](#).

In This Section

- [Reconciliation in FX2 format](#)
 - [Smart Clauses in an Agreement Document](#)
 - [Preview Reconciliation Menu](#)
- [Reconciliation in Pre-FX2 format](#)
 - [Compare & Reconcile Values](#)

Reconciliation in FX2 format

Smart Clauses in an 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 during **Preview Reconcile** and **Check-In** Reconciliation. 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 provides visibility onto the changes made in the contract document by allowing the user to view the changed clauses in **Preview Reconcile**, **Check-in** Reconciliation and when a clause change has been checked in, on the agreement record. During either of the reconciliation process, the clause view will be Read Only.

The **Mark Clause** menu in X-Author Contracts allows the user to take a block of text in an agreement document, and turn it into a smart clause. In some cases, the user may be able to take a block of text, and replace it with a clause from the playbook that will become a smart clause. This has implications when looking at use cases pertaining to 3rd party documents and importing offline agreements.

With each action on the smart clause, such as insert, modify or delete, the **Agreement Clause** related list in your agreement record reflects these changes effectively. For more details, refer [Tracking Clauses in your Agreement](#).

Preview Reconciliation Menu

As contract administrators, you can preview clause reconciliation for contracts.

In X-Author Contracts, you can fully preview reconciliation of clauses within an Agreement document's clauses to the current accepted Agreement document's contents. By this, you can have a full understanding of what is going on during the negotiation process. The Preview Reconciliation ribbon tab of X-Author Contracts allows you to preview and compare the changes you make to the fields, tables, and clauses in your generated document.

With November 2015 release, you can view the fields and clauses from the Control Panel, and use **Preview Reconcile** and **Check-In** to view and reconcile the current or changed values of content as read only.

Note

Ensure that you have made all the changes in your agreement document before going for the Preview Reconciliation process.

Note

From November 2015 release onward, ensure that you have at least one smart field or smart clause in your agreement document to access **Preview Reconcile** ribbon tab in X-Author Contracts.

The Preview Reconciliation can be done in 2 ways from the X-Author Contracts ribbon.

- Clicking **Preview Reconcile**.
- Clicking **Check-In** to check in an agreement document to Salesforce.

For both the above mentioned actions, you are presented with a sequence of the following dialog boxes.

1. Existing and new values in the smart fields.
2. Existing and new values for tables.
3. Existing and changed smart clauses.
4. Approvals and terms of exception.

Note

For the **Check-In** action, the above mentioned dialog boxes appear only when you select the Reconcile Document check box.

All of the smart clauses in the check-in reconciliation list are click-able. This enables you to click on a clause and view the previous iteration of the clause that is included in the previous document. You will also see the previous changes you have made to that same clause.

A simple clause comparison is also available to use in order to view the iteration of the clause in the document that is currently undergoing reconciliation.

You can view these changes in the respective records under the Agreement Clause related list under your agreement record also. For more details, refer to [Tracking Clauses in your Agreement](#).

Note

- If your agreement document contains header level smart fields in a section, which is of type *Repeat*, the changes made to these fields are not reflected during the **Preview Reconcile** and **Check-In** processes.
- During reconciliation of smart clauses, X-Author Contracts does not reconcile the clause content containing < and >.

To preview reconciliation of smart clauses in an agreement

Ensure that you have a checked out agreement document containing few smart fields and clauses under the X-Author Contracts ribbon.

1. On the X-Author Contracts ribbon, click **Preview Reconcile**.
2. In the Reconcile the Smart fields dialog box, for each field label, preview the *Previous Value* and the *Current Value* which have Read-Only access.

Reconcile the Smart fields
View the field values within the contract document. Field value changes can be rejected from the control panel.

Field Label	Previous Value	Current Value
Agreement Start Date	08/01/2015	01/30/2015

< Back Next > Cancel

3. Do one of the following.
 - Click **Back** or **Cancel** to return back to the agreement document.
 - Click **Next** to move to the next step for reconciliation of smart fields in the Sections and Tables.

4. In the Reconcile the smart Fields within Sections and Tables dialog box, review the values of the smart fields you want to use in the sections and tables of the Salesforce record. The changed value is highlighted in yellow.

X-Author Contracts - Preview Reconciliation

Reconcile the Smart Fields within Sections and Tables
Select values to be used in the sections or table rows of the Salesforce record

SP 1

Device Name	Device Type (Previous Value)	Device Type (Current Value)	Device Cost (Previous Value)	Device Cost (Current Value)	Device Status
Device 2	Device Type 1	Device Type 1	210.00	210.00	Device Status
Device 3	Device Type 1	Device Type 3	310.00	310.00	Device Status
Device 1	Device Type 1	Device Type 1	110.00	110.00	Device Status

SP 2

FeeOne (Previous Value)	FeeOne (Current Value)
300,000	300,000

< Back Next > Cancel

5. Do one of the following:
 - Click **Back** or **Cancel** to return back to the Reconcile the Smart Fields dialog box.
 - Click **Next** to move to the next step for reconciliation of smart clauses.
6. In the Reconcile the Smart Clauses dialog box, for each changed clause, you see the non-editable *Current Clause Text*, the *Previous Clause Text* and the comments section which contains the comments made inside the clause boundary and the Microsoft Word comments (inlined or balloon).

Reconcile the Smart Clauses
View the changes to the smart clauses within the contract document. Clause changes can be rejected from the control panel.

Clause Name	Changed?	Marked for Deletion?
Service: Additional Users Clause_noTE	<input type="checkbox"/>	<input type="checkbox"/>

Current Clause Text
No Changes Detected.

Previous Clause Text
The following lists mutually agreeable terms and conditions for this agreement. Any changes made to the terms and conditions will delay the contract process as it may require legal intervention and additional internal approvals from Apttus executives.

Comments

< Back Finish Cancel

7. Do one of the following:

- Click **Back** to return to the smart field reconciliation dialog box.
- Click **Next** to move to the next step for term exceptions and its associated approvals.

8. In the Exception Approvals dialog box, you can review the term exceptions and the approval requests for the clause changes accepted in this reconciled document.

Clicking **Select all approvers** selects all the term exception clauses and clicking **Submit for Approval** submits these clauses to the respective approvers.

Exception Approvals
Please review the exceptions and related approval requests for the clause changes accepted in this checked-in document

Seq. #	Step Name	Status	Depends On	Assigned To Type	Assigned To
Professional Document Clause (TE-0506)					
<input type="checkbox"/> 1.001	TEA-0023	Not Submitted		Queue	Approval Queue01
Customer Responsibility (TE-0507)					
<input type="checkbox"/> 1.001	TEA-0025	Not Submitted		User	Oscar E. Borden
<input type="checkbox"/> 1.002	TEA-0024	Not Submitted		User	Jim E. Borden
Third-Party Providers (TE-0506)					
<input type="checkbox"/> 1.001	TEA-0023	Not Submitted		Queue	Approval Queue01
RS Clause with Numbered List (TE-0506)					
<input type="checkbox"/> 1.001	TEA-0023	Not Submitted		Queue	Approval Queue01

☐ Select all approvers ☐ Submit for Approval

< Back Finish Cancel

9. Do one of the following:

- Click **Back** to return to the smart clause reconciliation dialog box.
- Click **Finish** to complete the reconciliation process.

You have completed the reconciliation process in X-Author Contracts.

You can view the red strikethrough for the deleted content and blue text for the newly added content in the Agreement Clause on an agreement record. Also, note that the system may fail to save some of the content of the clause to the fields of the Agreement Clause record.

To check-in and reconcile smart clauses in a contract

Ensure that you have a checked out agreement document containing few smart fields and clauses under the X-Author Contracts ribbon.

1. On the X-Author Contracts ribbon, click **Check-In**. The following sequence of dialog boxes will appear:
2. Select one of the options:
 - To check in the agreement document with redlines, choose *With Redlines*.
 - To check in the agreement document without redlines, choose *Without Redlines*.
 - To check in the agreement document as final, choose *Final - to be signed*.

Steps 3 to 8 appear only when you select the **Reconcile Document** check box.

X-Author Contracts - Check-In Document

Check-In Document
Define the attributes to be applied in checking this document into Salesforce

Options

Save: ☐ With Redlines
☒ Without Redlines
☐ Final - to be signed

Version Details

Suggested Name: JKK 4G Agreement_v4_Clean

☐ Remove Watermark
☒ Reconcile Document
☐ Create PDF attachment
☒ Make this document private

< Back Next > Cancel

3. In the Reconcile the Smart fields dialog box, for each field label, review the *Previous Value* or the *Current Value* which has Read-Only access. The changed value is highlighted in yellow.

Field Label	Previous Value	Current Value
Agreement Start Date	08/01/2015	01/30/2015

4. Do one of the following.
 - Click **Back** or **Cancel** to return back to the agreement document.
 - Click **Next** to move to the next step for reconciliation of smart fields in sections and tables.
5. In the Reconcile the smart Fields within Sections and Tables dialog box, review the values of the smart fields you want to use in the sections and tables of the Salesforce record.

X-Author Contracts - Preview Reconciliation

Reconcile the Smart Fields within Sections and Tables
Select values to be used in the sections or table rows of the Salesforce record

SP 1

Device Name	Device Type (Previous Value)	Device Type (Current Value)	Device Cost (Previous Value)	Device Cost (Current Value)	Device Status
Device 2	Device Type 1	Device Type 1	210.00	210.00	Device Status
Device 3	Device Type 1	Device Type 3	310.00	310.00	Device Status
Device 1	Device Type 1	Device Type 1	110.00	110.00	Device Status

SP 2

FeeOne (Previous Value)	FeeOne (Current Value)
300,000	300,000

< Back Next > Cancel

6. Do one of the following:

- Click **Back** or **Cancel** to return back to the Reconcile the Smart Fields dialog box.
- Click **Next** to move to the next step for reconciliation of smart clauses.

7. In the Reconcile the Smart Clauses dialog box, for each changed clause, you see the non-editable *Current Clause Text*, the *Previous Clause Text* and the comments section which contains the comments made inside the clause boundary and the Microsoft Word comments (inlined or balloon).

X-Author Contracts - Check-In Document

Reconcile the Smart Clauses
View the changes to the smart clauses within the contract document. Clause changes can be rejected from the control panel.

Clause Name	Changed?	Marked for Deletion?
Service, Additional Users Clause_noTE	<input type="checkbox"/>	<input type="checkbox"/>

Current Clause Text
No Changes Detected.

Previous Clause Text
The following lists mutually agreeable terms and conditions for this agreement. Any changes made to the terms and conditions will delay the contract process as it may require legal intervention and additional internal approvals from Apttus executives.

Comments

< Back Finish Cancel

8. Do one of the following:

- Click **Back** to return to the smart field reconciliation dialog box.
- Click **Next** to move to the next step for term exceptions and its associated approvals.

9. In the Exception Approvals dialog box, you can review the term exceptions and the approval requests for the clause changes accepted in this reconciled document.

Clicking **Select all approvers** selects all the term exception clauses and clicking **Submit for Approval** submits these clauses to the respective approvers.

Seq. #	Step Name	Status	Depends On	Assigned To Type	Assigned To
Professional Document Clause (TE-0506)					
<input type="checkbox"/> 1.001	TEA-0023	Not Submitted		Queue	Approval Queue01
Customer Responsibility (TE-0507)					
<input type="checkbox"/> 1.001	TEA-0025	Not Submitted		User	Oscar E. Borden
<input type="checkbox"/> 1.002	TEA-0024	Not Submitted		User	Jim E. Borden
Third-Party Providers (TE-0506)					
<input type="checkbox"/> 1.001	TEA-0023	Not Submitted		Queue	Approval Queue01
RS Clause with Numbered List (TE-0506)					
<input type="checkbox"/> 1.001	TEA-0023	Not Submitted		Queue	Approval Queue01

☐ Select all approvers ☐ Submit for Approval

< Back Finish Cancel

10. Do one of the following.

- Click **Back** to return to the smart clause reconciliation dialog box.
- Click **Finish** to complete the reconciliation process.

You have completed the reconciliation process in X-Author Contracts.

You can view the red strikethrough for the deleted content and blue text for the newly added content in the Agreement Clause on an agreement record. Also, note that the system may fail to save some of the content of the clause to the fields of the Agreement Clause record.

Reconciliation in Pre-FX2 format

Compare & Reconcile Values

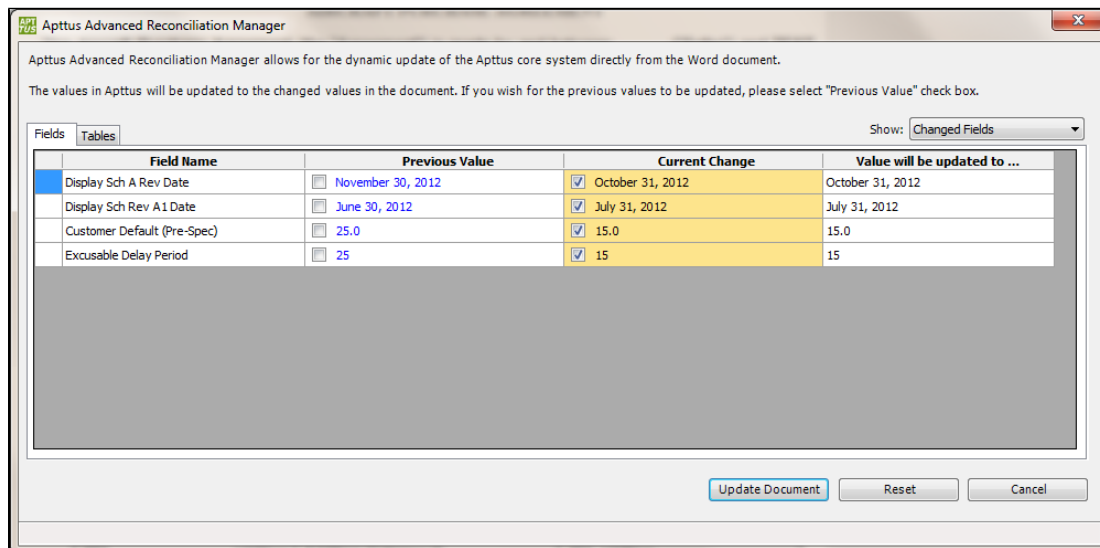
When **Reconcile Document** is clicked, the Advanced Reconciliation Manager is launched. This displays the available smart fields in the negotiated agreement document along with the previous value and current change.

This screen is split into 2 tabs: **Fields** and **Tables**. The Fields tab displays the non-repeating data of the agreement fields. The Tables tab displays various fields that are placed as repeating rows.

Fields Tab

This table describes the columns used in the Reconciliation Manager Fields tab.

Column	Description
Field Name	Displays the Apttus Field Label from the Agreement record.
Previous Value	Displays the value of the smart field from the Agreement record. Selecting the check box indicates the previous value will be retained when you click Update Document .
Current Change	Displays the change made to the field in the document outside of X-Author. Selecting the check box indicates this value will be used to update the fields in the Agreement record.
Value to be updated to...	Displays what the reconciled value will be, based on which check box is selected.



Tables Tab

When at least one smart field value is available in the document within repeating data (merge fields inserted 'in section' and/or 'in table') – the **Tables** tab will display all repeating data.

Each of the smart fields is displayed in two columns: *<Field Label> (Previous Value)* and *<Field Label> (Current Change)*. There is no column *Value will be updated to...* on the Tables tab. When the *(Current Change)* cell in each row is clicked, Author will highlight the corresponding smart field in the document. All the other normal merge fields are displayed as static text. Similar to the Fields tab selection, one can either select previous value or current change during reconciling the data. Any other static data which is not a normal or qualified merge field are not displayed.

Apttus Advanced Reconciliation Manager

Apttus Advanced Reconciliation Manager allows for the dynamic update of the Apttus core system directly from the Word document.

The values in Apttus will be updated to the changed values in the document. If you wish for the previous values to be updated, please select "Previous Value" check box.

Fields | Tables Goto: OB-01 BIS BIS - 36 Months

OB-01 BIS BIS - 36 Months

Service Plan sub Type (Previous Value)	Service Plan sub Type (Current Change)	Service Plan Type (Previous Value)	Service Plan Type (Current Change)	Agreement Service Plan Name	Fee
<input checked="" type="checkbox"/> sT12	<input type="checkbox"/> sT12	<input type="checkbox"/> Voice	<input type="checkbox"/> Voice	OB-01 BIS BIS - 36 Months	150,000

Device Name (Previous Value)	Device Name (Current Change)	Device Status	Device Type (Previous Value)	Device Type (Current Change)
<input checked="" type="checkbox"/> BIS device11	<input checked="" type="checkbox"/> BIS device1	active	<input type="checkbox"/> BIS devtype	<input type="checkbox"/> BIS devtype
<input type="checkbox"/> BIS device55	<input type="checkbox"/> BIS device55	active	<input type="checkbox"/> BIS devtype	<input checked="" type="checkbox"/> BIS devdevtype

Addition "List"	Addition Category (Previous Value)	Addition Category (Current Change)	Addition Name
401 addition 3402 addition	<input type="checkbox"/> Addition Category1	<input checked="" type="checkbox"/> Addition Category4	402 addition
401 addition 3402 addition	<input type="checkbox"/> Addition Category2	<input type="checkbox"/> Addition Category2	401 addition

OB-01 Business Sense - Group 10000 - 36 Months

Updating changes to the document

When **Update Document** is clicked, validations are performed against the Apttus Agreement field definition and once the validations are passed, selected changes are updated in the document. The following section explains the various validations that are performed for reconciling the changes back to Apttus Agreement record.



When **Update Document** is clicked, the changes are updated only to the document and not to the Agreement record. To update the Agreement record, see [Updating changes to the Apttus Agreement Record](#).

Validations

Some basic validations are performed on each type of smart field in relation to the Apttus Agreement field definition.

Pick List Field

Validation: Checks whether the smart field is a pick list field and the selected value is one of the pick list values specified in the Apttus Agreement record. If it is not, a message is displayed and you must then select the correct pick list value from the drop-down list in the Reconciliation Manager.

Other Fields (Number, Boolean, Date, Percent, Currency, etc...)

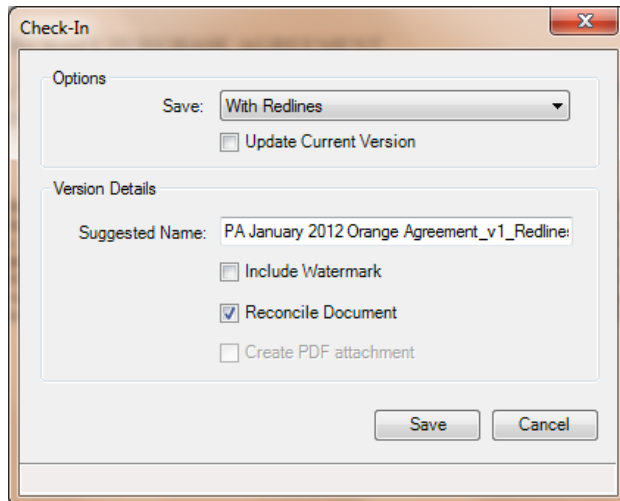
Validation: Checks whether the smart field's value corresponds to the Apttus Agreement Field type.

For instance, if there is a date field type and someone has typed 'O' (alphabetic character) instead of '0' (numeric zero character) for Oct 30, the system will recognize the error and it must be corrected.

Updating changes to the Apttus Agreement Record

Selecting **Check-In** enables you to update a document back to the Agreement Record.

When **Check-In** is selected for an Agreement that contains no smart fields, the user is presented with the check-in dialog window as shown below. Checking **Reconcile Document** and clicking **Save** will take the user back to the Agreement Record. Once the agreement attachment is created, the user is presented with the confirmation and the Agreement record is shown in browser.



When **Check-In** is selected for Agreements that contain smart fields, the user is presented with the same check-in dialog. Checking the **Reconcile Document** box in this case will allow an agreement to be reconciled and user is presented with the Advanced Reconciliation Manager screen as shown below.

X-Author Contracts on Salesforce Spring 2018 User Guide

Apttus Advanced Reconciliation Manager allows for the dynamic update of the Apttus core system directly from the Word document.

The values in Apttus will be updated to the changed values in the document. If you wish for the previous values to be updated, please select "Previous Value" check box.

Fields Tables Show: Changed Fields

Field Name	Previous Value	Current Change	Value will be updated to ...
Display Sch A Rev Date	<input type="checkbox"/> January 31, 2013	<input checked="" type="checkbox"/> July 31, 2013	July 31, 2013
Display Sch Rev A1 Date	<input type="checkbox"/> June 30, 2012	<input checked="" type="checkbox"/> July 30, 2014	July 30, 2014
Customer Default (Post-Spec)	<input type="checkbox"/> 20.0	<input checked="" type="checkbox"/> 15.0	15.0
Customer Default (Pre-Spec)	<input type="checkbox"/> 20.0	<input checked="" type="checkbox"/> 15.0	15.0

Reconcile & View Record Reconcile Don't Reconcile Reset Cancel

On this screen, clicking the **Reconcile & View Record** button reconciles the document and creates an attachment. The user is presented with a confirmation and the Agreement Record is brought up in an internet browser.

The reconciliation function for both agreements with or without smart fields is compatible for versions with redlines, without redlines, updated as well as final agreement versions.

When **Don't Reconcile** is clicked, X-Author will skip the update of the smart field values to the agreement record but proceeds with the saving of the versions of the agreement document.

When **Reconcile** is clicked, the add-in does the same validations as described in section Validations. Once the validations are passed then it will initiate the update of the smart field values back to the Agreement record.

When **Cancel** is clicked, it will cancel the whole operation of updating the smart field values to the Agreement record as well as saving of the version of the agreement document.

During reconciliation process, it is you who will decide which value you want to update back to the Agreement record. So if **Current Value** is chosen it means that the changed data in the agreement document will be used to update the corresponding Agreement record field. If the **Previous Value** check box is chosen then there will not be any update to the corresponding Agreement record field since this is the existing value in the Agreement record and you're choosing to retain the value.

If the Previous Value and the Current Value is the same then no update is required back to the Agreement record.

If the smart field is deleted then either of the check boxes is not allowed to be chosen. This conflict has to be resolved manually.

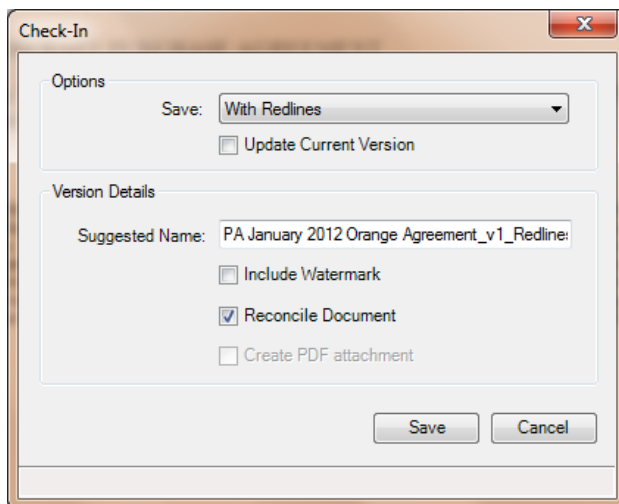


If **Previous Value** and **Current Value** is the same for a field or if a smart field is deleted - in which case any issues must be resolved manually - then you may not be able to select either of the check boxes.

To update changes to the Apttus Agreement Record

The agreement document to be checked-in must contain smart fields.

1. From the X-Author Contracts tab, click Check-In.
2. In the Check-In dialog, select **Reconcile Document** and click **Save**.



The Reconciliation Manager is displayed. For details on Check-In functionality, see [Checking in Versions](#).

3. The options are:

Option	Description
Reconcile & View Record	The smart fields are validated, a new version of the document is saved to the Notes and Attachments section for the agreement and the Agreement details page is displayed in Salesforce.
Reconcile	The smart fields are validated and the values are updated in the agreement record and a version of the document is saved to the Notes and Attachments section for the agreement.

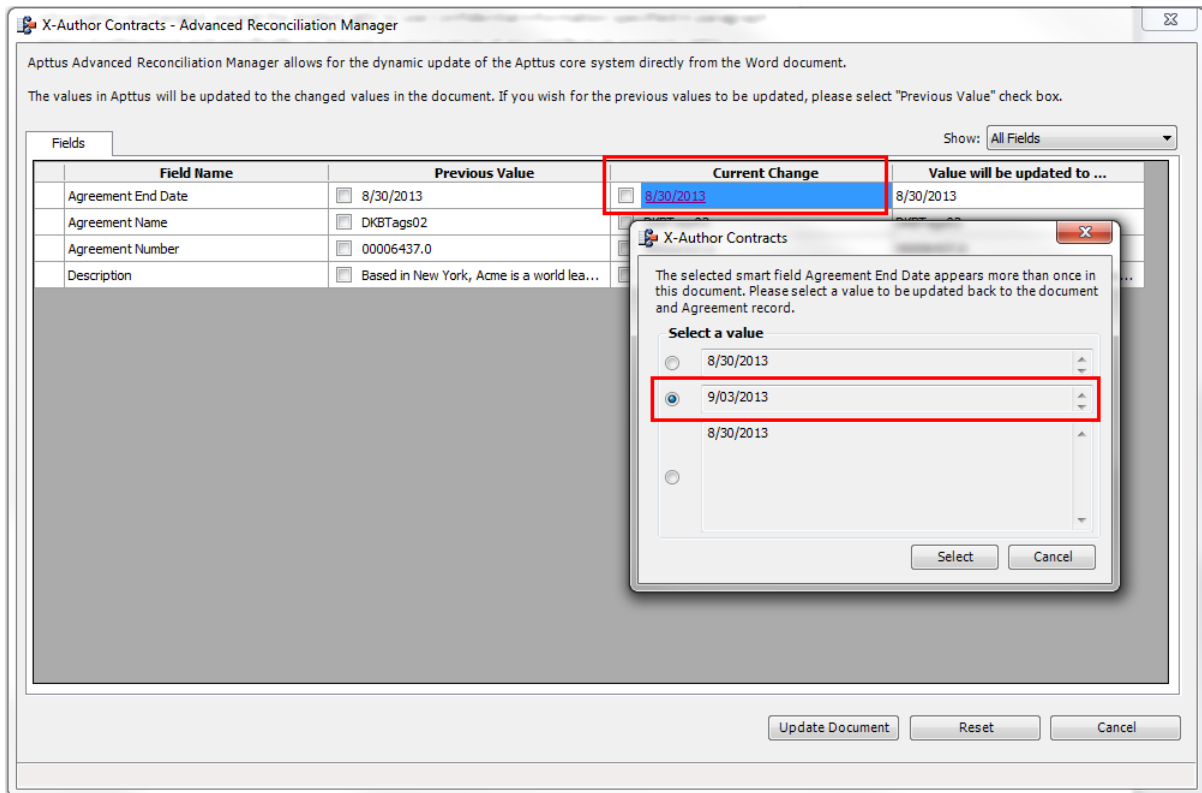
Option	Description
Don't Reconcile	The smart field values are not updated in the agreement record in Salesforce, but a version of the document will be saved to the Notes and Attachments section for the agreement.

Assuming you did not select **Reset** or **Cancel**, all the other options will attach a document to the agreement record in Salesforce.

To reconcile multiple smart fields

The document must have multiple instances of the same smart field in it.

1. Open the document and go to the **X-Author Contracts** tab.
2. Change one of the smart field values for one that has been inserted multiple times and then check-in the document and choose to reconcile the document. From the Advanced Reconciliation Manager window, the smart field is displayed as a hyperlink in the **Current Change** column. The hyperlink in the Current Change column displays the last instance of that smart field in the document, which may not be the instance that changed.
3. Click the hyperlink and a dialog opens displaying each instance of the smart field in the document, select which value you want to use for all instances of the smart field and click **Select**.



4. Finish reconciling other fields and click **Update Document**.

All smart fields in the document for that specific agreement record field are updated with the same value selected during reconciliation. You can review the updated agreement document and see that each instance of the smart field has the same value. You can also review the agreement record in Salesforce and see the same value.

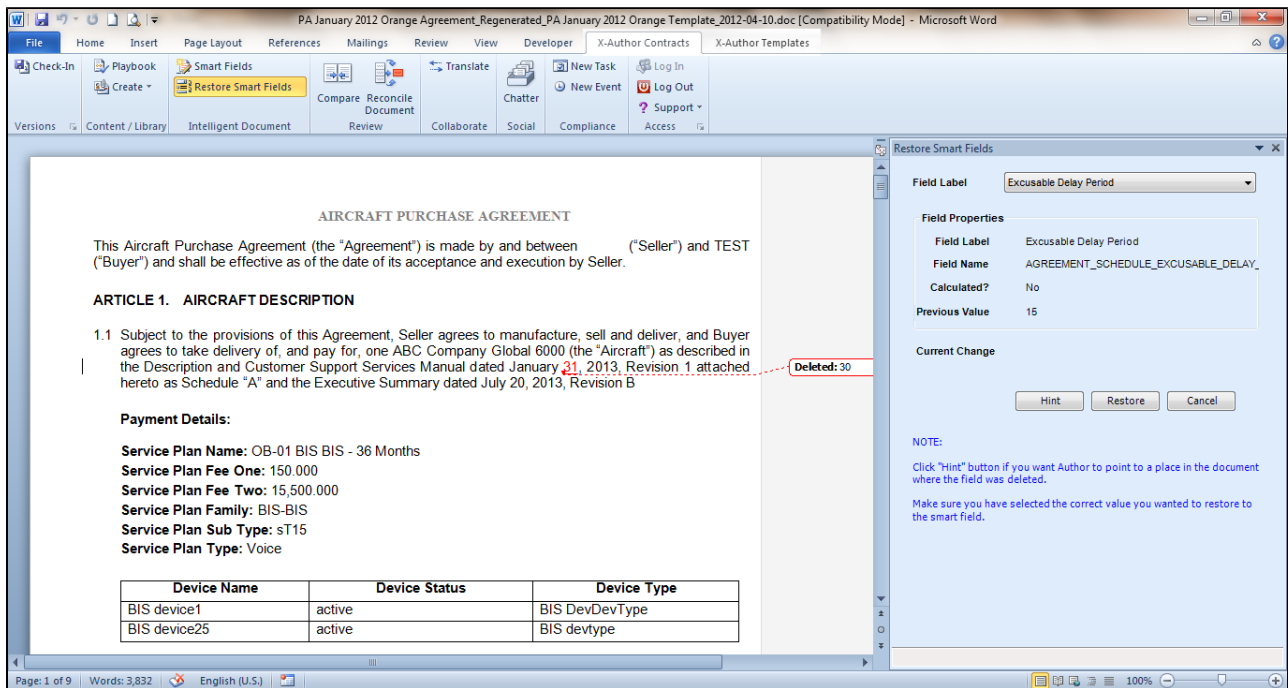
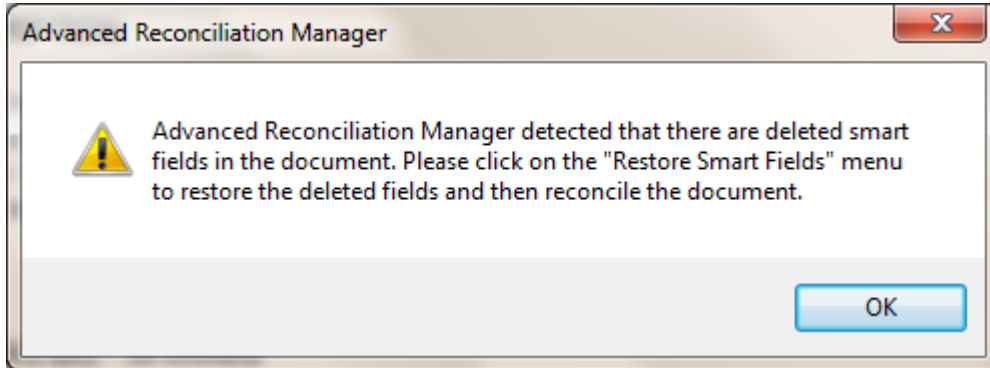
Restore Smart Fields

Restore Smart Fields will be visible if Author detects that smart fields are deleted from the generated Agreement document. When this menu is clicked it will launch the Restore Smart Fields screen. This screen displays the deleted smart fields in the negotiated Agreement document along with the field's properties and previous value.



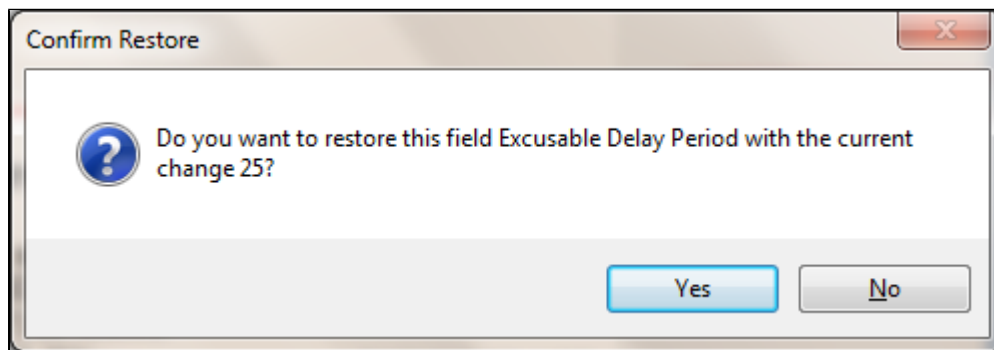
To make Author detect smart fields that are deleted, click on **Reconcile Document** to load the Advanced Reconciliation Manager. If deleted smart fields are detected, then the “Restore Smart Fields” menu will be available.

The following message is displayed when Author detects deleted smart fields.

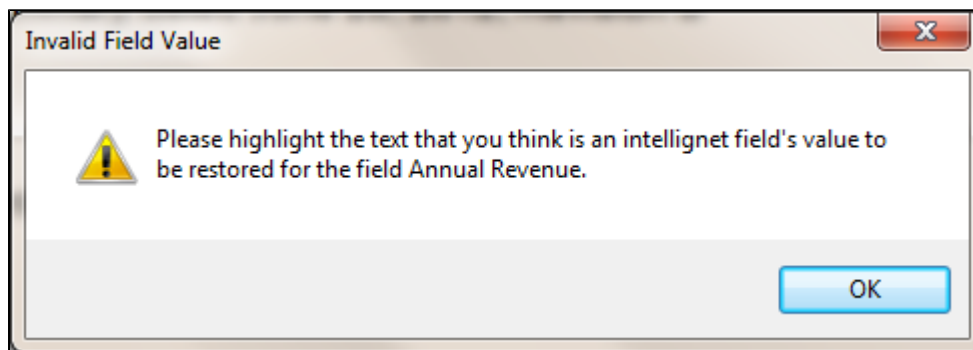


To restore a smart field, highlight the text in the negotiated document (that you think is the field's value) which might have got deleted during negotiation. Once highlighted, click the menu “Restore Smart Field” and choose the corresponding deleted field from the drop-down “Field Label”. The field properties section will display the currently chosen field's property. The current change field displays the currently highlighted text which will be used as the value to be restored for the smart field. Click on the “Restore” button which will prompt for confirm to restore the smart field.


The message below is displayed upon clicking the Restore button.



Clicking on "Yes" will restore the smart field over the highlighted text. If no text is highlighted and the "Restore" button is clicked, then the following error message is displayed:



X-Author can also point you to a place in the document where they might have been deleted. To make Author suggest, click "Hint" button.

 This feature is enabled when you have track changes enabled in your document.

The following screen shot shows the hint suggested by Author. Once you're sure of the pointed location in the document, highlight the text which you think is the correct data for the deleted smart field and click "Restore" button to restore the smart field.

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The screenshot shows a Microsoft Word document titled "PA January 2012 Orange Agreement_Regenerated_PA January 2012 Orange Template_2012-04-10.doc [Compatibility Mode] - Microsoft Word". The ribbon includes tabs for File, Home, Insert, Page Layout, References, Mailings, Review, View, Developer, X-Author Contracts, and X-Author Templates. The X-Author Contracts tab is active, showing options like Check-In, Playbook, Create, Restore Smart Fields, Compare, Reconcile Document, Translate, Chatter, New Task, New Event, Log In, Log Out, Support, and Access.

The document content includes two tables:

Addition "List"	Addition Category	Addition Name
100 addition	Addition Category3	200 addition
200 addition		
300 addition		
100 addition	Addition Category2	100 addition
200 addition		
300 addition		

Comments	Name	Path	URL
	Doc 1	default path	http://login.salesforce.com
	Doc 2	default path	http://login.salesforce.com
	Doc 3	default path	http://test.salesforce.com

Customer Default (Post-Spec): 55.0
Customer Default (Pre-Spec): 25.0
Excusable Delay Period: 20

TEST

PA January 2012 Orange Agreement

Page 2 of 9

The right sidebar shows the "Restore Smart Fields" panel. It displays the "Field Label" as "Excusable Delay Period" and "Field Properties" including "Field Name" (AGREEMENT_SCHEDULE_EXCUSABLE_DELAY_), "Calculated?" (No), and "Previous Value" (15). The "Current Change" section shows buttons for "Hint", "Restore", and "Cancel". A "NOTE" at the bottom states: "Click 'Hint' button if you want Author to point to a place in the document where the field was deleted. Make sure you have selected the correct value you wanted to restore to the smart field."

If X-Author Contracts is unable to point to a place in the document where the smart field might have deleted, a message is displayed.

Sending Agreement Documents for Review from X-Author Contracts

A significant part of the negotiation process for any agreement involves including reviewers—internal or external—in the collaboration process. This typically requires the main agreement document and any supporting documents to be sent by the contract negotiator to reviewers for term changes, additional redlining, clarification of language, or other legal or contractual input. Apttus Contract Management provides a standard Send for Review process from Agreement records in Salesforce, but this may not always be the most ideal solution for contract negotiators. Just as you can use X-Author to check out, redline, manage legal language and terms, check-in, and finalize agreement documents, you can also manage the entire Send for Review process using X-Author and Microsoft Office applications.

Sending for Review from X-Author provides several advantages:

- **Send and receive** agreement documents using the X-Author for Microsoft Outlook add-in. This saves you time and effort by eliminating the need to Send for Review from Apttus Contract Management.
- **Track and manage** review cycles of negotiated documents along with their recipients.
- Use review cycles of agreement documents to **monitor negotiations** at the summary and detail level.
- Complete the end-to-end negotiation process without leaving Microsoft Office.

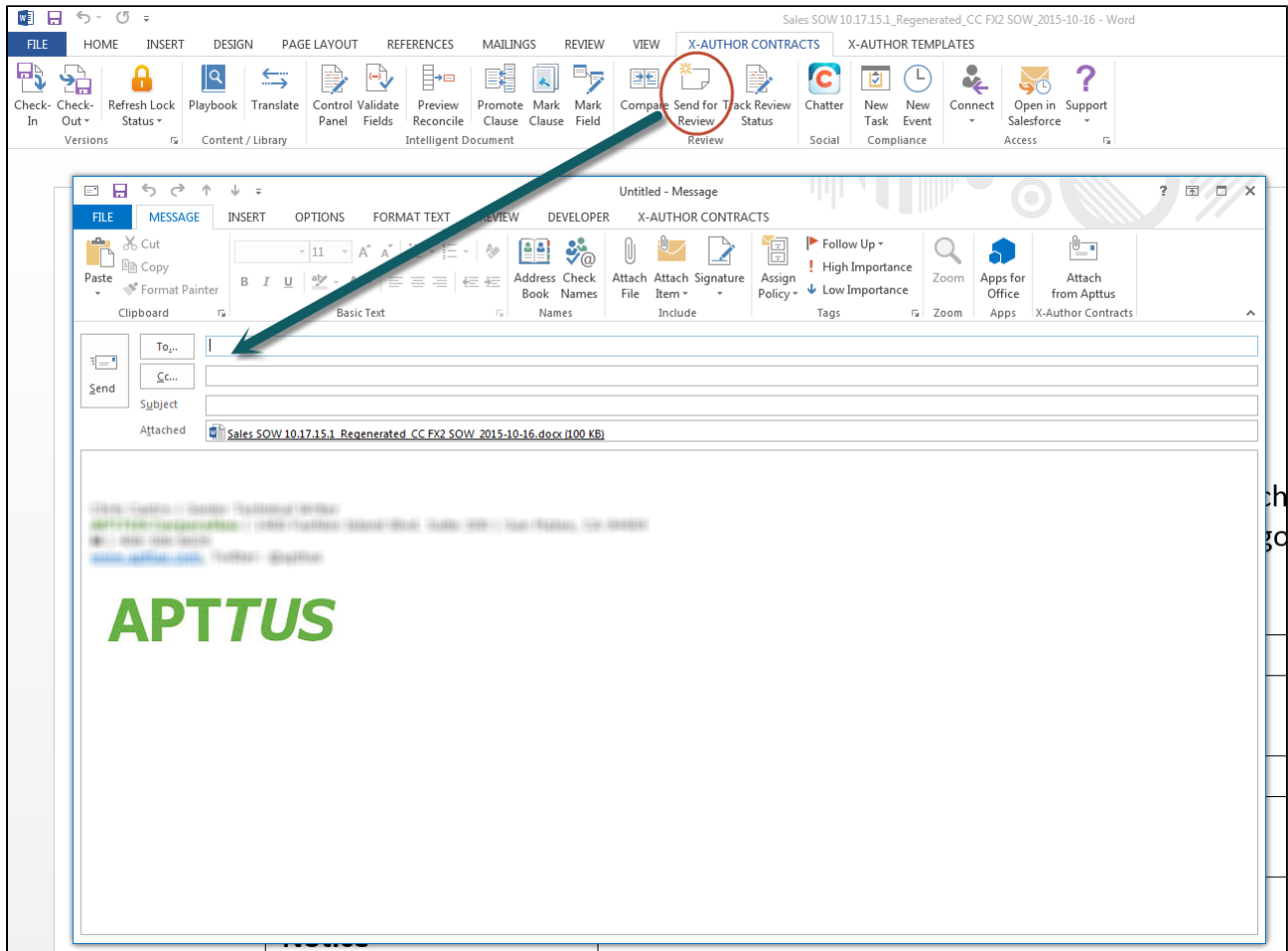


To make use of the full functionality of Send for Review from X-Author Contracts described in this guide, you must send only documents that belong to **Version Aware** agreement records and have the X-Author Contracts for Outlook add-in installed. For documents that are non-Version Aware, tracking and managing of reviews will be disabled. Likewise, review tracking is not enabled if the Outlook add-in is not in use (emails can still be sent and X-Author Contracts functionality is still available for users with access).

For more information on making agreement records Version Aware, see [Contract Document Versioning](#).

From Word or Outlook

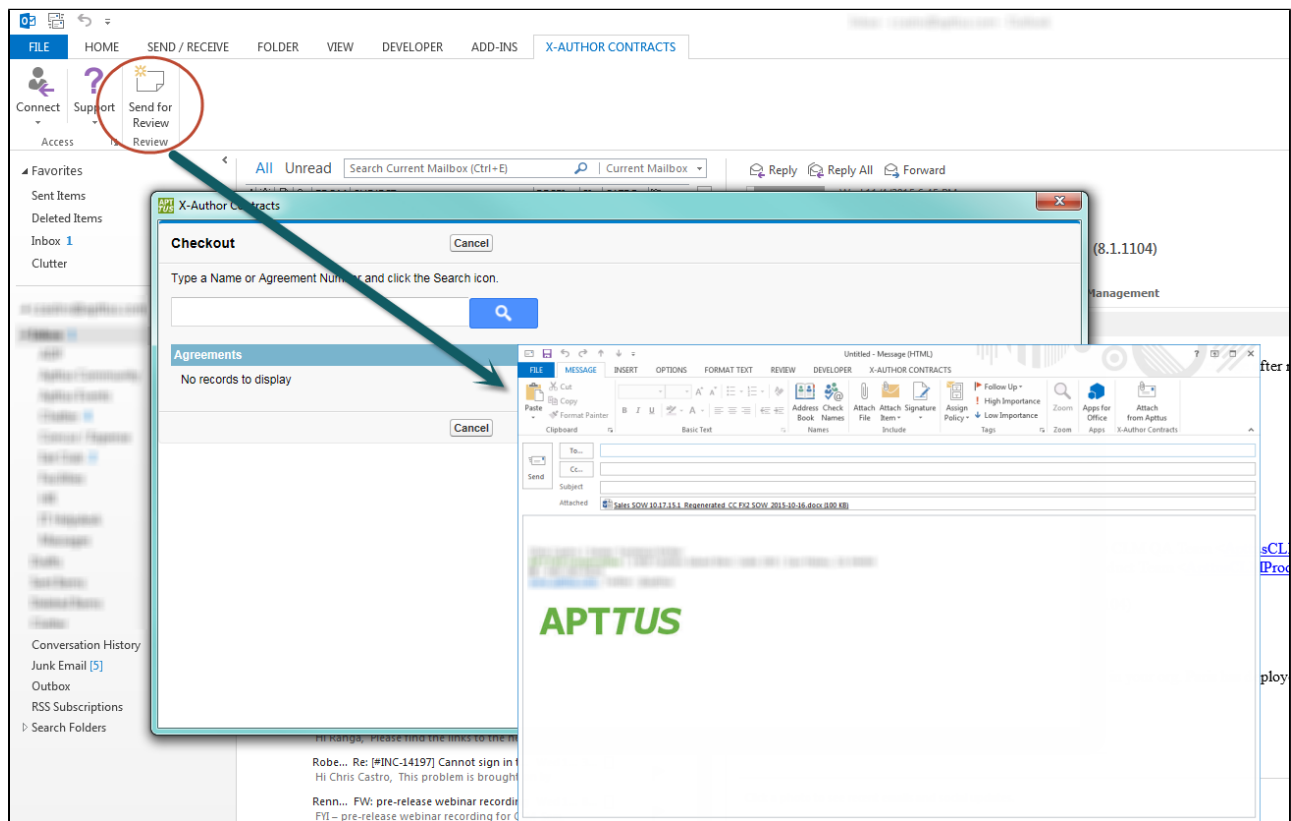
Initiate Send for Review from the X-Author Contracts tab in **Microsoft Word** or **Microsoft Outlook**. This action invokes Outlook to send one or more agreement-related documents to internal or external parties for further review. Using Word, you can then track these documents and recipients as a fixed cycle of negotiations.



From Microsoft Word you can:

- Check in the currently checked-out agreement or supporting document as a new Negotiator (minor) version prior to review.
- Initiate the Send for Review, automatically attaching the currently checked-out agreement document to a new Outlook message.
- Track and manage review cycle status for the opened document or any other existing open cycles.

- Check in an agreement document as Negotiator, on behalf of a reviewer as a new Reviewer (revision) version, or close open cycles.



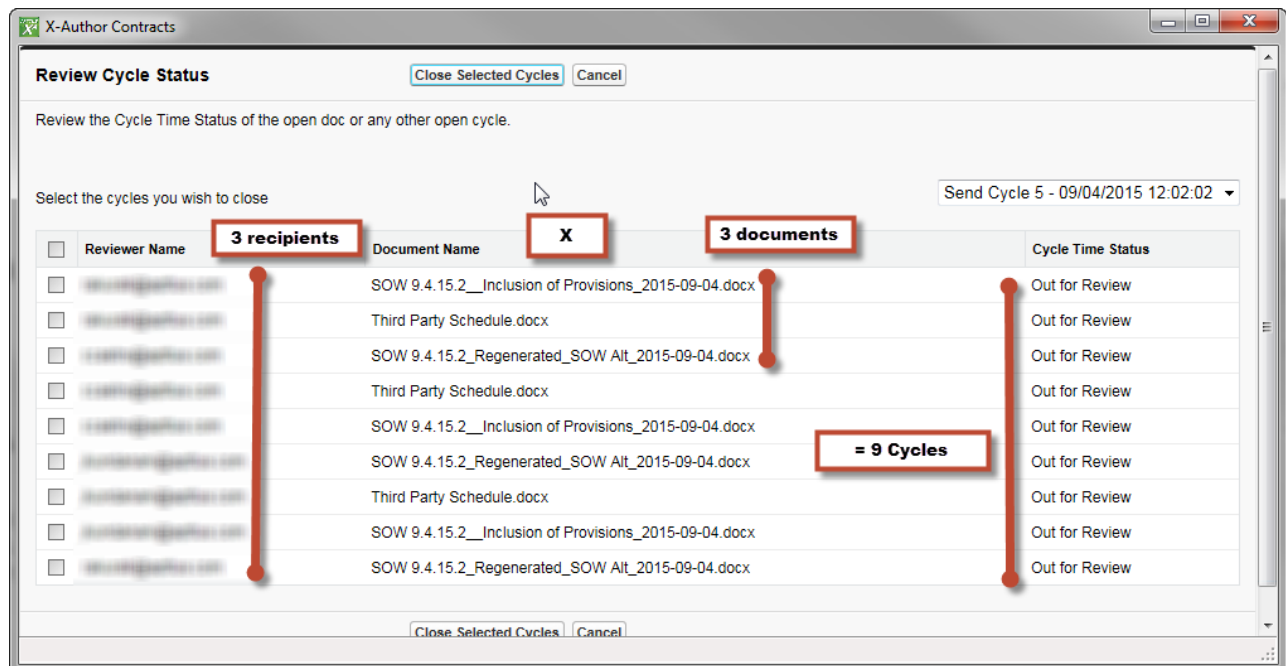
From Microsoft Outlook you can:

- Initiate the Send for Review by checking out an agreement document and attaching it to a new Outlook message.
- Choose To and CC/BCC recipients from your Outlook address book.
- Attach files to your Outlook message for review from the Apttus agreement record, including the agreement document, supporting or offline documents, other versioned documents, or documents from the agreement record's Notes & Attachments.
- Attach files from your local drive, media or other storage.
- Choose which documents are tracked as part of a review cycle (Note: tracking is only enabled for versioned documents and the X-Author Contracts for Outlook add-in).
- Reply as an internal reviewer and check your version of an agreement document in to the agreement record.

Understanding Review Cycles

A tracked **Review Cycle** (also known as a "Send Cycle") is automatically created for every document associated with the Agreement record that is sent by the negotiator for review. This Review Cycle is then further divided into **Cycles** based on the number of recipients and the number of documents sent. *Each unique recipient/document combination creates a separate cycle.*

For example, if 3 tracked documents are sent to 1 recipient, 3 cycles are created for that recipient. Similarly, if 3 recipients each receive 3 tracked documents, 9 cycles are created (3 for each recipient).



Negotiators track open cycles in X-Author Contracts and can manually close cycles from this window or during Check-in. Internal reviewers have the option to check-in agreement documents from their Outlook email instance when they complete their review, returning an attached reviewed version, which automatically closes the cycle for the checked-in document. Negotiators and contract managers can also monitor Cycle status, by using **Merge Event Details** within the Merge Event related list on the Agreement record.

For more details on tracking review cycles, see [Tracking and Managing Review Cycles](#).


Note

Send for Review Cycles differ from agreement lifecycles and are not tracked using Cycle Time Groups or Cycle Time Reporting.

To send an agreement document for review

You can send an agreement document for review from X-Author Contracts using one of the following two workflows:


- [Send for Review from Microsoft Word](#) (does not require X-Author Contracts Outlook add-in)
- [Send for Review from Microsoft Outlook](#) (requires X-Author Contracts Outlook add-in)

 The examples provided in this section use Microsoft Outlook and Microsoft Word 2013. Depending on your version of Microsoft Office, certain menu actions and elements of the user interface may be in different locations. Apttus functionality remains the same regardless of Office version.

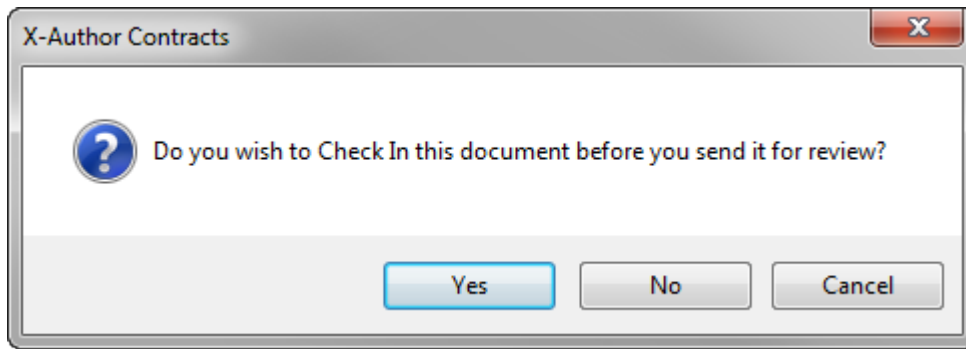
To send an agreement document for review using Word

You must have at least 1 agreement document version generated or imported (Offline document) for the agreement record in question.

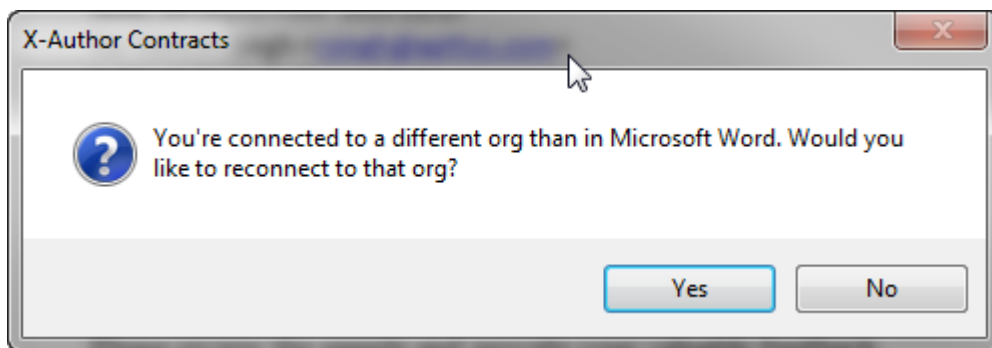
1. Open your generated document in X-Author Contracts for Word or open Microsoft Word and navigate to the **X-Author Contracts** tab.
2. Click **Connect** and choose a connection to log into the Salesforce org where your documents are stored.
3. If the document is open, click **Check-Out** under the Versions section and select **Currently Opened Document**. Otherwise, click **Check-Out** and follow the normal process for checking out a document from Salesforce.

 If you are using Microsoft Office 2007, after login the view will default to the "Home" tab. You must re-select the X-Author Contracts tab to continue.

4. Click **Send for Review** from the Review section to request a review. A pop-up message is displayed.



5. Click **Yes** if you made changes to the document since checking it out. Follow the usual process for checking in your document. Click **No** to continue with the review but keep the document as checked out or **Cancel** to return to the document without initiating a review. As part of this action, X-Author for Outlook automatically connects to the same org you are logged into from Microsoft Word. If Outlook is already connected to another org, you will see the following message.



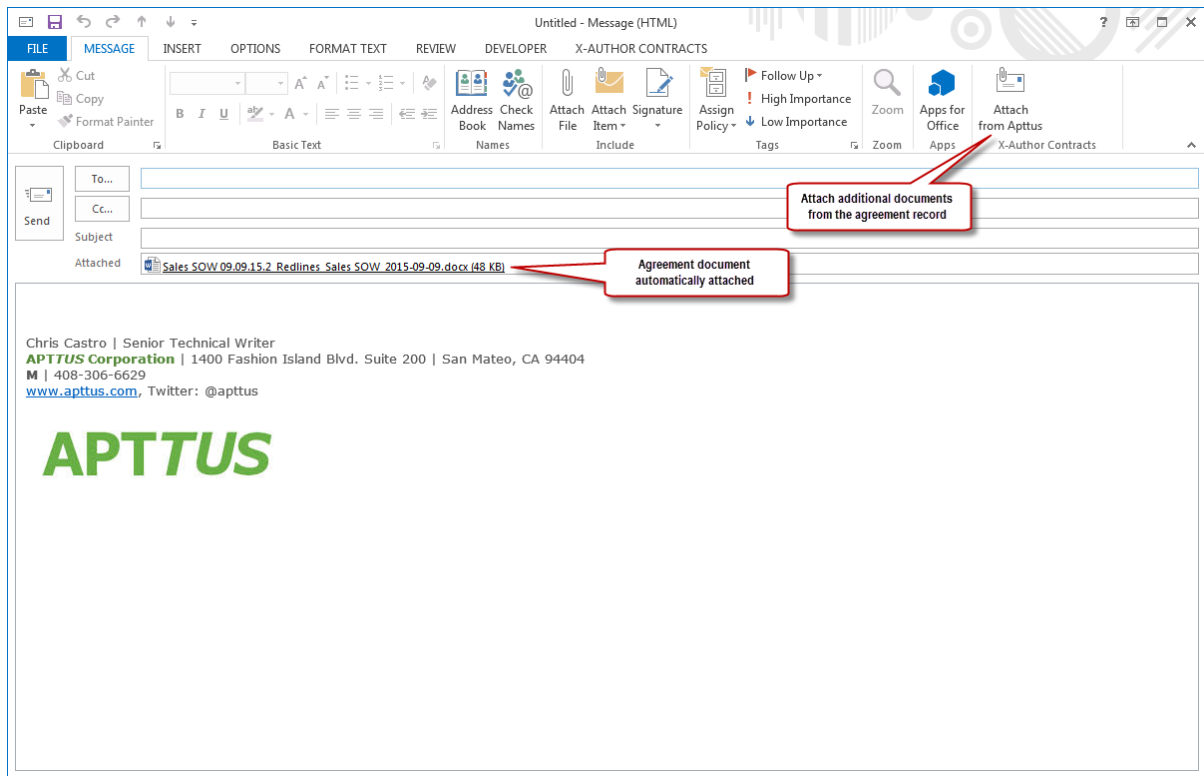
6. Click **Yes** to log into the correct org or click **No** to remain connected to your current org.



If you choose not to connect to the same org in Outlook as in Word you will not be able to complete the Send for Review for the current agreement document. Both Outlook and Word must be connected to the same Salesforce org in order to have access to documents that are part of the same agreement record.

X-Author Contracts invokes Microsoft Outlook to open a new message with the active context agreement document already attached (click image below to enlarge). Note: at this point all actions in Microsoft Word and Outlook will be disabled until you have completed or cancelled the Send for Review.

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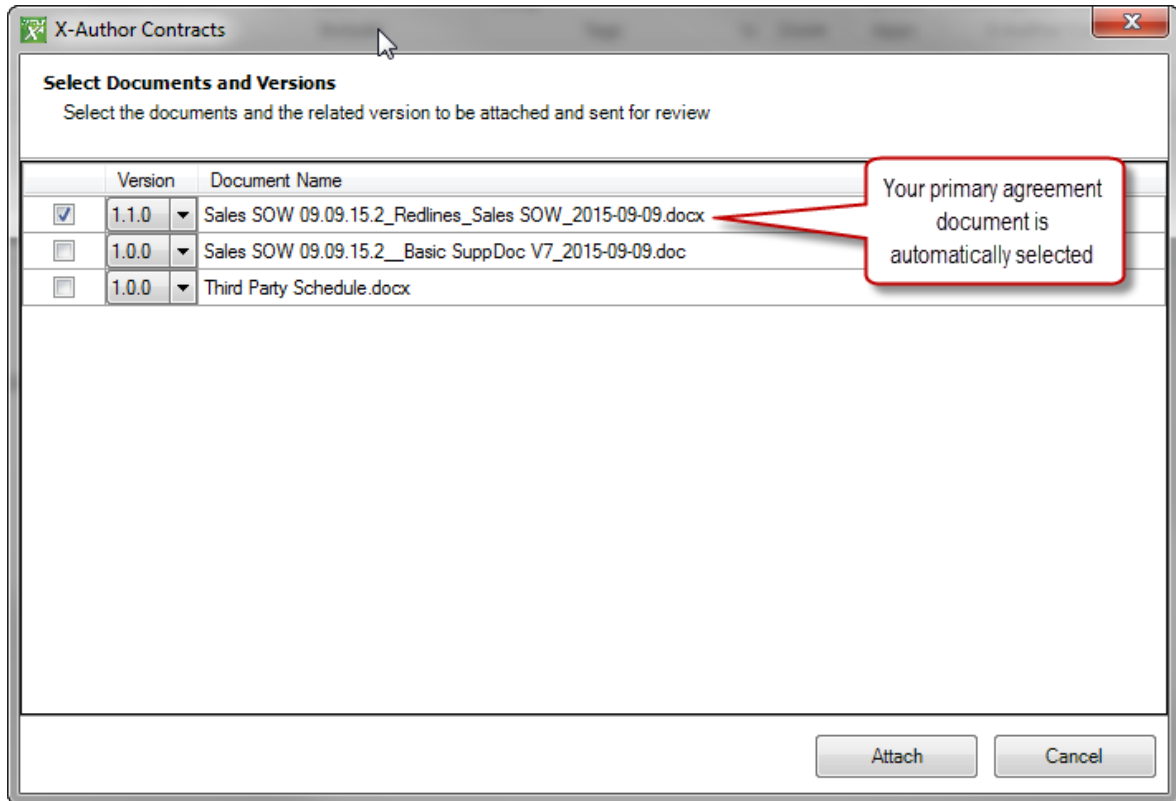


From here, you can send the agreement documents and other documents and attachments to any recipients in your Outlook address book or to other external recipients.



Remember, if you do not have the Outlook add-in installed and are not working with versioned documents (from a Version Aware agreement), you cannot **Attach from Apttus**, as described in the next step. You can still send and receive emails.

7. To attach additional documents associated with your agreement in Apttus Contract Management, click **Attach from Apttus** in the X-Author Contracts section. The Select Documents and Versions window is displayed.



The first document in the list is your primary agreement document, or the document you used to initiated the Send for Review. The most recent version of the document is automatically selected. You cannot deselect this document. Additional documents associated with your agreement records are listed and can be any of the following:

- A supporting document which you have already generated using Apttus Contract Management and tagged with Apttus properties.
 - An offline agreement document attached to an existing agreement record, using the Create Offline or Import Offline agreement actions, tagged with Apttus properties.
 - Any other document attached to the **Notes & Attachments** of the agreement record.
8. Select the check box next to a document to include it and click the drop-down list under the **Version** column to choose a specific Document Version for any attachments you want to include.



Note that only one version of a document can be included as an attachment and you cannot change the version of the original agreement document. Non-versioned documents will not have this option. To attach other versions of a document to the same email instance, you can download them directly from the agreement record. As an alternative, initiate a separate Send for Review using another version of the document (you can track it independently).

9. Click **Attach** to attach the selected documents to your email.
10. Include any attachments stored locally using Outlook's **Attach File** command.
11. Click the **To...** button in your Outlook message to add recipients from your Outlook address book or enter any email address into the To... field.
12. Click the **Cc...** button to add additional recipients. Any recipients that are cc'ed or bcc'ed on the message receive copies of the documents sent for review but *are not tracked by Apttus in review cycles*.
13. Add a Subject to your email (e.g., "Please review the following documents").
14. Add any desired text to the body of the email regarding the review.
15. Click **Send** to send the email with attached agreement documents to your reviewers. The Review process is officially initiated by this Send action and a Review Cycle has been created for the agreement record, including all recipients and documents.



Please note that you cannot initiate a Review Cycle if you save the email message as a **draft** to send later. If you are working from a draft email, please copy any message contents and attachments to a new message using the Send for Review method described above.

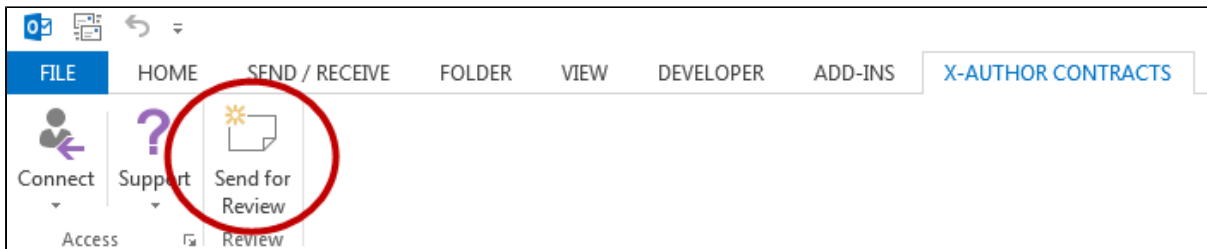
To send an agreement document for review from Outlook

You must have at least 1 agreement document version generated or imported (Offline document) for the agreement record in question.

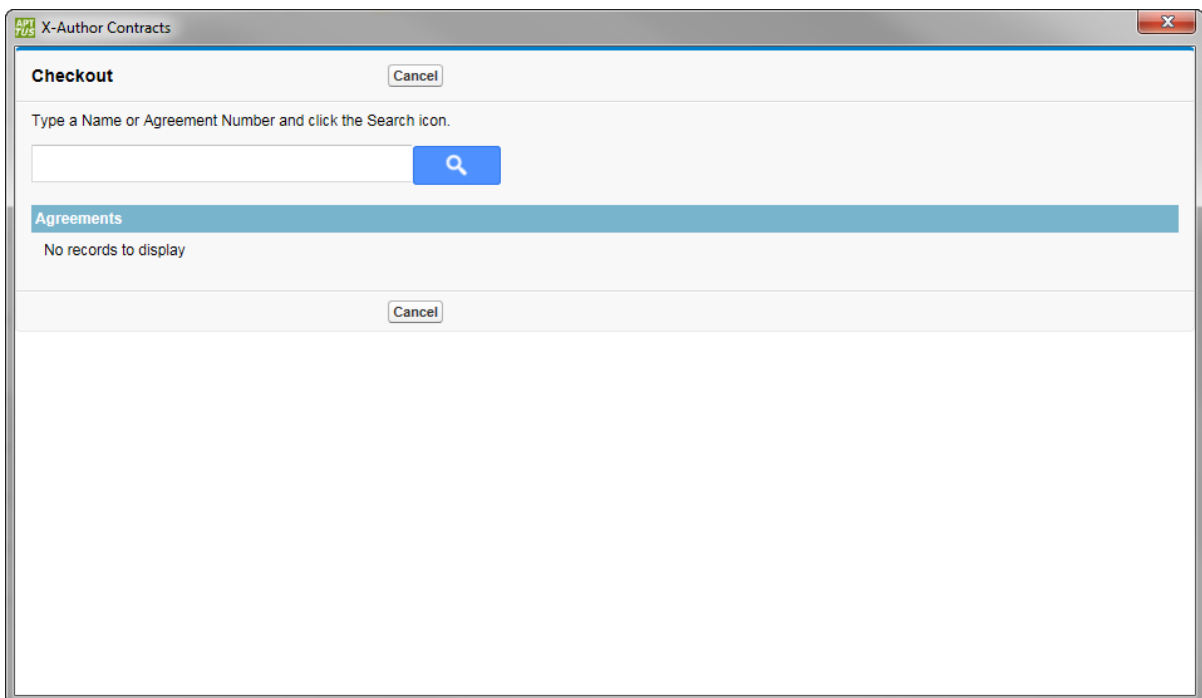
1. Open Outlook and navigate to the **X-Author Contracts** tab.



2. Click **Connect** and choose a connection to log in to log into the Salesforce org where your documents are stored. The **Send for Review** button becomes available.



3. Click **Send for Review**. The X-Author Contracts Checkout dialog opens in a separate window.



4. Enter keywords into the Search box to find the agreement document's related agreement record.

Checkout Cancel

Type a Name or Agreement Number and click the Search icon.

Sales SOW 10 Q

Page #: 1 out of 1

Agreements

Action	Account Name	Agreement Name	Agreement Number	AgreementType_String	Description	Version Aware
Select	Acme	Sales SOW 10.12.15.1	00007379.0	Sales		✓
Select	Acme	Sales SOW 10.12.15.1	00007380.0	Sales		✓
Select	Acme	Sales SOW 10.17.15.1	00007383.0	Sales		✓
Select	Acme	Sales SOW 10.7.15.1	00007374.0	Sales		✓

Page #: 1 out of 1

Cancel

- Click **Select** to choose the agreement record. A list of agreement documents associated with the chosen record is displayed.

Checkout Cancel

Type a Name or Agreement Number and click the Search icon.

Sales SOW 10 Q

▼ **Attachments For Sales SOW 10.17.15.1**

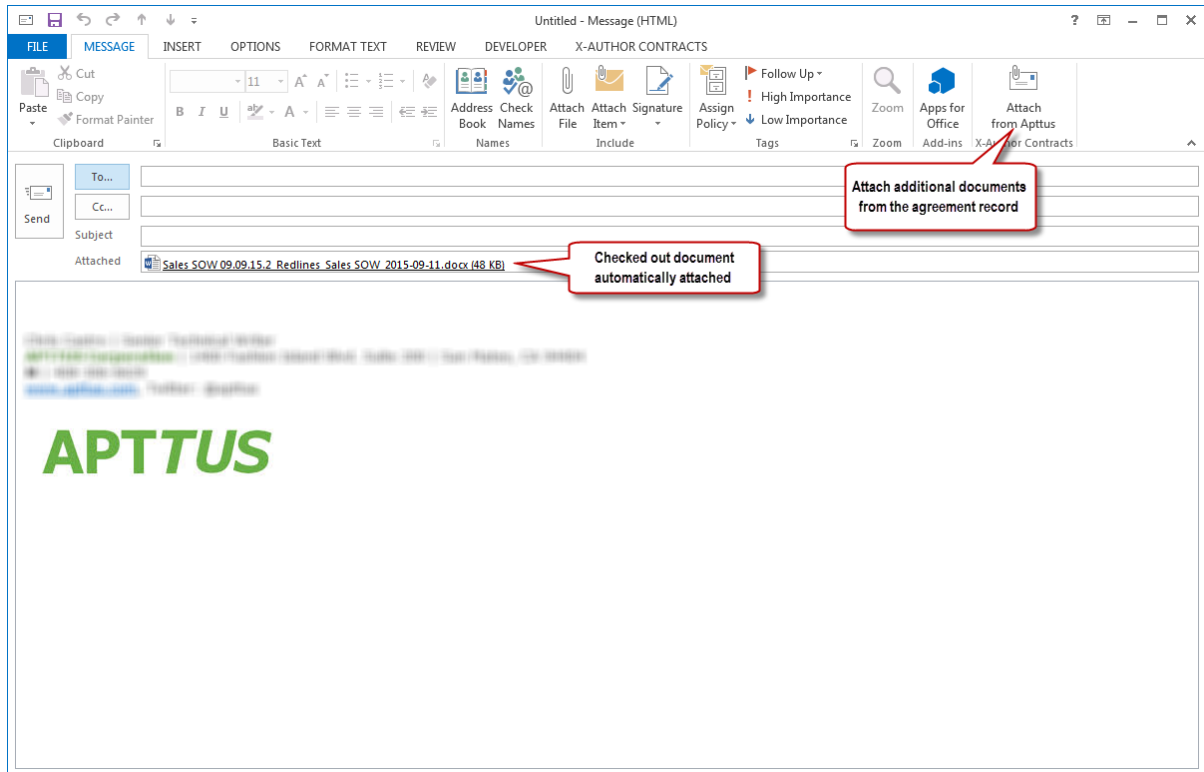
Select a file from the list.

[Back](#)

Action	File Name	Permissions	Owner	Last Modified Date
Open	Sales SOW 10.17.15.1_Regenerated_CC FX2 SOW_2015-10-16.docx	Owner	Tex Righter	
Open	Sales SOW 10.17.15.1_Original_CC FX2 SOW_2015-10-16.doc	Owner	Tex Righter	

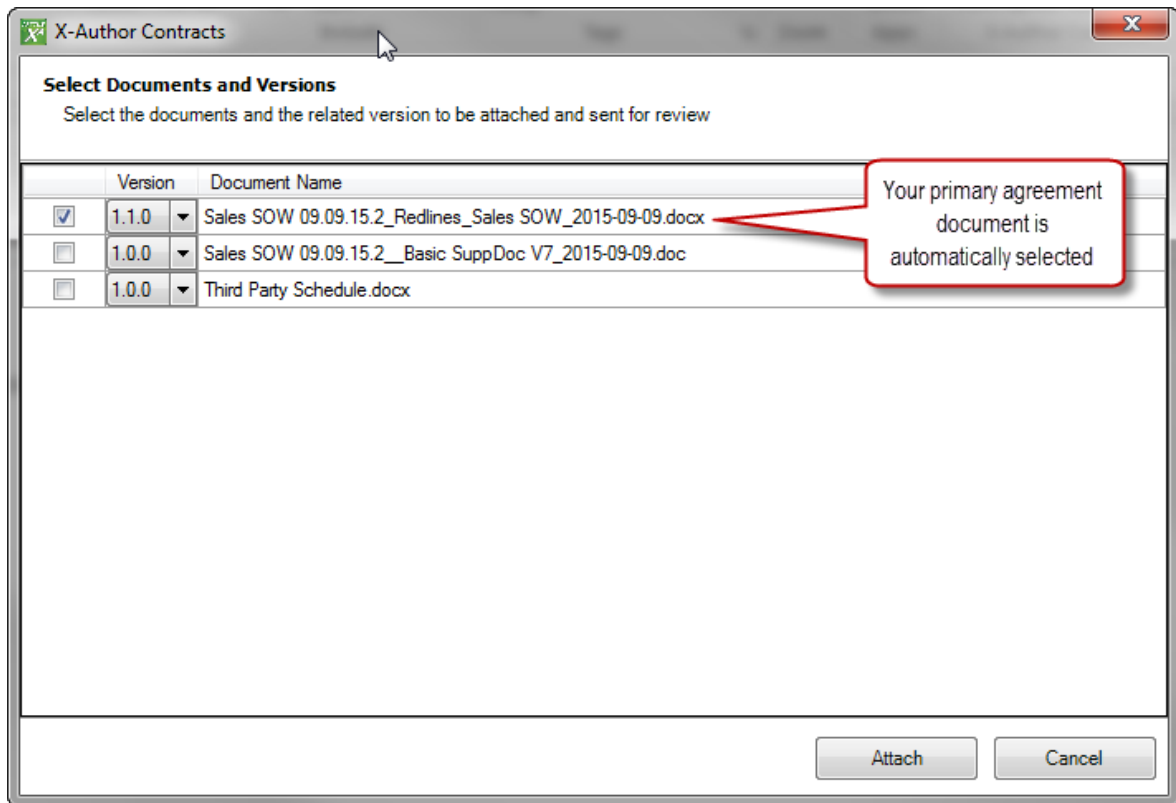
Cancel

6. Click **Open** to choose the agreement document to send for review. Outlook opens a new message with the chosen agreement document already attached (click image below to enlarge). Note: at this point all actions in Outlook will be disabled until you have completed or cancelled the Send for Review.



From here, you can send the agreement documents and other documents and attachments to any recipients in your Outlook address book or to other external recipients.


7. To attach additional documents associated with your agreement in Apttus Contract Management, click **Attach from Apttus** in the X-Author Contracts section. The Select Documents and Versions window is displayed.



The first document in the list is your primary agreement document, or the document you used to initiate the Send for Review. The most recent version of the document is automatically selected. You cannot deselect this document. Additional documents associated with your agreement records are listed and can be any of the following:


- A supporting document which you have already generated using Apttus Contract Management and tagged with Apttus properties.
 - An offline agreement document attached to an existing agreement record, using the Create Offline or Import Offline agreement actions, tagged with Apttus properties.
 - Any other document attached to the **Notes & Attachments** of the agreement record.
8. Select the check box next to a document to include it and click the drop-down list under the **Version** column to choose a specific Document Version for any attachments you want to include. Note that only one version of a document can be included as an attachment and you cannot change the version of the original agreement document. Non-versioned documents will not have this option.
 9. Click **Attach** to attach the selected documents to your email.
 10. Include any attachments stored locally using Outlook's **Attach File** command.

11. Click the **To...** button in your Outlook message to add recipients from your Outlook address book or enter any email address into the To... field.
12. Click the **Cc...** button to add additional recipients. Any recipients that are cc'ed or bcc'ed on the message receive copies of the documents sent for review but *are not tracked by Apttus in review cycles*.
13. Add a Subject to your email (e.g., "Please review the following documents").
14. Add any desired text to the body of the email regarding the review.
15. Click **Send** to send the email with attached agreement documents to your reviewers. The Review process is officially initiated by this Send action and a Review Cycle has been created for the agreement record, including all recipients and documents.

 Please note that you cannot initiate a Review Cycle if you save the email message as a **draft** to send later. If you are working from a draft email, please copy any message contents and attachments to a new message using the Send for Review method described above.

Responding to a Send for Review request from Outlook

The X-Author Contracts add-in for Outlook not only provides negotiators with the ability to send documents for review, but also provides a mechanism for internal reviewers to directly check-in documents to Apttus Contract Management after making changes and/or providing feedback. Internal reviewers can simply reply to the email they received and attach their reviewed, tracked agreement document addressed to the review owner and then choose to check it in at the moment the email instance is sent.

 The examples provided in this section use Microsoft Outlook and Microsoft Word 2013. Depending on your version of Microsoft Office, certain menu actions and elements of the user interface may be in different locations. Apttus functionality remains the same regardless of Office version.

Internal vs. External Reviewers

Send for Review from X-Author Contracts provides a solution that allows contract negotiators to send documents for review to any recipient that can be reached by email. This means that reviews can be sent not only to users who are a part of the negotiators organization (internal) but also to reviewers outside of the organization (external). Internal reviewers are assumed to have both access to the same Salesforce org as the negotiator and the X-Author Outlook add-in installed on their machine. It is not necessary for internal reviewers to have X-Author Contracts for Word as they may not be initiating reviews or tracking documents, but they must have the proper credentials to connect to the right org from within Outlook.

External reviewers can have any email client: Outlook, Gmail, MSN, etc., but it is assumed that even if they do have the X-Author Contracts add-in for Outlook that they are not part of the same organization. External reviewers should not have the ability to check in documents via a response to the review. When they respond to the Send for Review, external reviewers simply return the reviewed document to the contract negotiator. The negotiator then downloads the document and checks it in to the agreement record on behalf of the reviewer.

To respond to a Send for Review request and check-in a tracked document

As a prerequisite, the reviewer responding to the Send for Review request must:

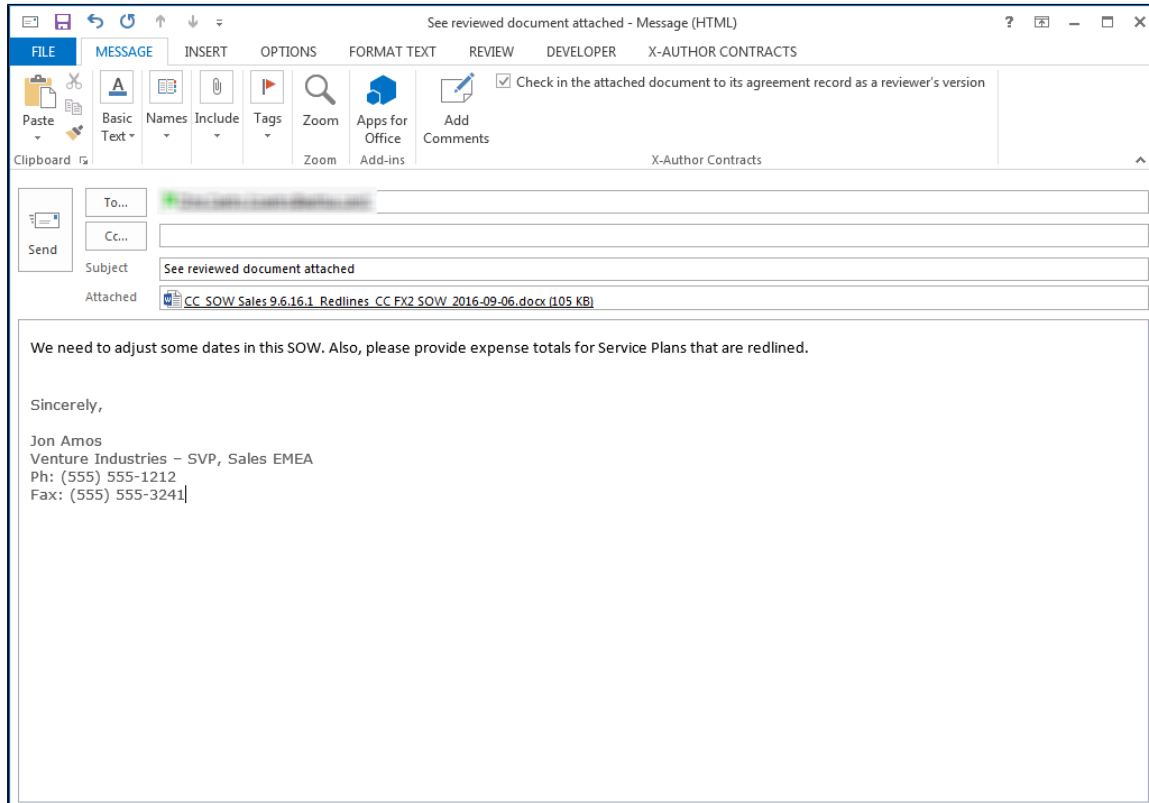
- be an internal reviewer (Apttus customer with a licensed X-Author Outlook add-in).
- have downloaded and saved the document originally sent by the negotiator/SFR owner. This document has properties assigned to it when the review was initiated which are recognized by Outlook and allow for the reviewer to check-in the document when sending an email instance in response. Note: Do not work with a document opened directly from email as it will always be read only.

1. Open Microsoft Outlook and navigate to the **X-Author Contracts** tab.
2. Click the **Connect** icon and log in to the organization with the agreement record that contains the document(s) being reviewed.



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3. Under the Home tab, click **New Email** or find the email message originally sent by the Send for Review requester and click **Reply**. (In this example, we are using a new email message.)
4. In the **To...** field add the negotiator or review owner as recipient and any others as desired.
5. Enter an appropriate **Subject** for the email.
6. Click **Attach File** in the Include section of the message and attach the reviewed document to the email message. Your message should look something like the following.



7. The check box "**Check in the attached document to its agreement record as a reviewer's version**" is enabled by default. Deselect the checkbox to send the response without checking it in. (Note: if you do not enable the check box at this time, the negotiator or contract admin can check the document in on behalf of you using X-Author Contracts).
8. **(Optional)** Click **Add Comments** to open the add comments dialog.

9. Enter your comments (cannot exceed 255 characters) for the draft and click **Add Comment**. A preview of your comments are shown in the Message tab.

10. Click **Send** to send the email response and return the reviewed document. X-Author Contracts for Outlook checks in the agreement document (provided it has the valid properties) to the agreement record as a new Reviewer (revision) version: e.g., **1.0.1**. Any comments you added in Steps 8 – 9 are recorded in the Document Version details of the agreement record.
11. Repeat steps 3 - 10 for each tracked agreement document assigned to you for review. (Note: Each document to be reviewed and returned by the reviewer should be submitted as an attachment to its own individual email message for the close cycle / check-in feature to work properly).



For more information on which documents are "tracked" during a Send for Review, refer to [Tracking and Managing Review Cycles](#).

Tracking and Managing Review Cycles

You can easily track review cycles from X-Author Contracts for Word while agreement documents are out for review. As a negotiator, you have full control over each Review cycle and its sub-cycles (each separate combination of review recipient and document). You have the option to close only selected cycles, or to close all cycles and end negotiations. You can also close a cycle and check-in agreement documents as reviewer versions on behalf of internal or external reviewers.

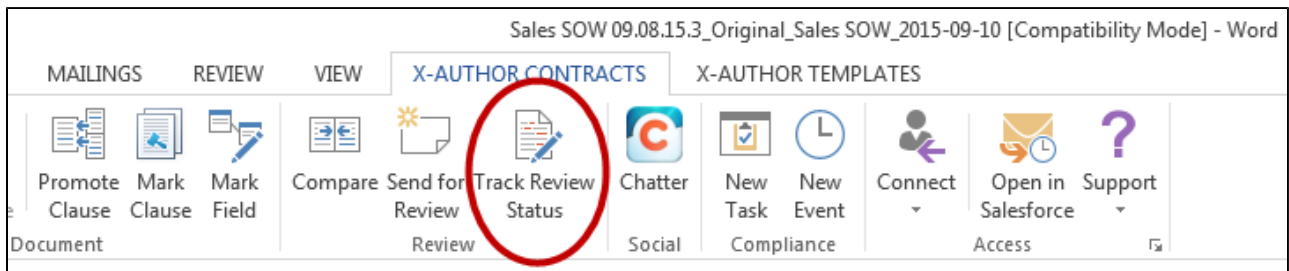
NOTE

The role of "negotiator" is not set by X-Author Contracts and should not be considered a restriction for tracking review cycles. Any user who has permissions to edit the agreement record and agreement documents associated with the record can potentially track and manage a Send for Review. You can manage this in Salesforce by applying proper security settings and sharing rules for users connecting to your org through X-Author Contracts.

There are two main ways to track and manage review cycles in X-Author: **Track Review Status** and **Check-In**. Both are described in detail in the following sections.

Track Review Status

Tracking review status in X-Author works based on document context. That is, the **Track Review Status** action is only available if the currently opened document has been sent for review, and is therefore part of a Review Cycle. The open document can be generated or checked out—the only prerequisite is that it must have already been sent for review.



To track review cycle status for the current document:

1. Click **Track Review Status** from the Review section of the X-Author Contracts tab. The Review Cycle status window is displayed.

Review Cycle Status

Close Selected Cycles Cancel

Review the Cycle Time Status of the open doc or any other open cycle.

Select the cycles you wish to close

Send Cycle 1 - 09/09/2015 16:00:14

	Reviewer Name	Document Name	Cycle Time Status
<input type="checkbox"/>	h.carter@apttus.com	Sales SOW 09.09.15.2_Redlines_Sales SOW_2015-09-09.docx	Out for Review
<input type="checkbox"/>	h.carter@apttus.com	Sales SOW 09.09.15.2__Basic SuppDoc V7_2015-09-09.doc	Out for Review
<input type="checkbox"/>	h.carter@apttus.com	Third Party Schedule.docx	Out for Review
<input type="checkbox"/>	h.carter@apttus.com	Sales SOW 09.09.15.2_Redlines_Sales SOW_2015-09-09.docx	Out for Review
<input type="checkbox"/>	h.carter@apttus.com	Sales SOW 09.09.15.2__Basic SuppDoc V7_2015-09-09.doc	Out for Review
<input type="checkbox"/>	h.carter@apttus.com	Third Party Schedule.docx	Out for Review

Close Selected Cycles Cancel

The Review Cycle Status screen displays the most current Review Cycle, comprised of individual cycles representing each recipient/document combination which is still out for review. The main purpose of this screen is to give the contract negotiator a tool to view a snapshot of the review process at any point in time and to give the negotiator the means to close cycles if it is deemed necessary.

2. To switch between Review Cycles, use the drop-down menu above the table on the far right of the screen. Each Send Cycle represents a separate **Send for Review** action taken by the negotiator. *Additional Send Cycles beyond the first are often created when one or more documents are sent out for a subsequent round of reviews.* If the document(s) have only been sent for review a single time, there will be only one Send Cycle.

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Review Cycle Status Close Selected Cycles Cancel

Review the Cycle Time Status of the open doc or any other open cycle.

Select the cycles you wish to close

Current Review Cycle

Send Cycle 3 - 09/21/2015 16:38:02
 Send Cycle 3 - 09/21/2015 16:38:02
 Send Cycle 2 - 09/21/2015 16:26:59
 Send Cycle 1 - 09/21/2015 15:49:32

<input type="checkbox"/>	Reviewer Name	Document Name	
<input type="checkbox"/>	ccarrigan@apptus.com	Sales SOW 09.21.15.1_Redlines_Sales SOW_2015-09-21.docx	Out for Review
<input type="checkbox"/>	ccarrigan@apptus.com	Third Party Schedule.docx	Out for Review
<input type="checkbox"/>	ccarrigan@apptus.com	Sales SOW 09.21.15.1_Redlines_Sales SOW_2015-09-21.docx	Out for Review
<input type="checkbox"/>	ccarrigan@apptus.com	Third Party Schedule.docx	Out for Review

Close Selected Cycles Cancel

- To close only certain cycles, click the check box next to each cycle you want to close and click **Close Selected Cycles**. Cycle Time Status for these cycles changes to "Closed"—the documents will no longer be tracked for the selected recipient(s).

Review Cycle Status Close Selected Cycles Cancel

Review the Cycle Time Status of the open doc or any other open cycle.

Select the cycles you wish to close

These cycles will no longer be tracked

Send Cycle 1 - 09/09/2015 16:00:14

<input type="checkbox"/>	Reviewer Name	Document Name	Cycle Time Status
<input type="checkbox"/>	ccarrigan@apptus.com	Sales SOW 09.09.15.2_Redlines_Sales SOW_2015-09-09.docx	Closed
<input type="checkbox"/>	ccarrigan@apptus.com	Sales SOW 09.09.15.2__Basic SuppDoc V7_2015-09-09.doc	Closed
<input type="checkbox"/>	ccarrigan@apptus.com	Third Party Schedule.docx	Closed
<input type="checkbox"/>	ccarrigan@apptus.com	Sales SOW 09.09.15.2_Redlines_Sales SOW_2015-09-09.docx	Out for Review
<input type="checkbox"/>	ccarrigan@apptus.com	Sales SOW 09.09.15.2__Basic SuppDoc V7_2015-09-09.doc	Out for Review
<input type="checkbox"/>	ccarrigan@apptus.com	Third Party Schedule.docx	Out for Review

Close Selected Cycles Cancel

- To close ALL cycles, click the check box at the top of the table to select all and click **Close Selected Cycles**. All cycles that are included in this Send Cycle are now closed. Click **Cancel** to exit back to your Word document. You can now continue to work with the agreement or click **Send for Review** to begin a new Review Cycle with new recipients.

Review Cycle Status Close Selected Cycles Cancel

Review the Cycle Time Status of the open doc or any other open cycle.

Select the cycles you wish to close Send Cycle 3 - 09/21/2015 16:38:02 ▼

<input checked="" type="checkbox"/>	Reviewer Name	Document Name	Cycle Time Status
<input checked="" type="checkbox"/>	john.doe@aptus.com	Sales SOW 09.21.15.1_Redlines_Sales SOW_2015-09-21.docx	Out for Review
<input checked="" type="checkbox"/>	john.doe@aptus.com	Third Party Schedule.docx	Out for Review
<input checked="" type="checkbox"/>	john.doe@aptus.com	Sales SOW 09.21.15.1_Redlines_Sales SOW_2015-09-21.docx	Out for Review
<input checked="" type="checkbox"/>	john.doe@aptus.com	Third Party Schedule.docx	Out for Review

Close Selected Cycles Cancel



Closing Cycles from Track Review Status

When a negotiator closes one or more cycles, this only means that *tracking of the individual recipient/document combination is closed*. This does not necessarily mean that contract negotiations or the review has come to an end. All it means is that one or more cycles will no longer be tracked by the system. Internal reviewers can still check in any of these documents from Outlook as part of the review process, and document versions can still be checked out, redlined, and checked back in until the agreement is finalized. Tracking of Review Cycles in this manner gives visibility to the negotiator and the ability to close cycles in a timely fashion. If you want to close cycles and check in a new document version, refer to the steps in the next section instead.

Manage Review Cycles at Check-In

For any given document that has been sent for review, there are three possible outcomes which result in the document being checked in to Apttus Contract Management:

- an internal reviewer attaches the document to an email in Outlook and selects the option to check in the document (see [Responding to a Send for Review request from Outlook](#))
- an internal or external reviewer attaches the document to an email sent to the contract negotiator. The negotiator checks in the document as that reviewer's version (revision) on their behalf.

- an internal or external reviewer attaches the document to an email sent to the contract negotiator. The negotiator checks in the document as a negotiator (minor) version.

Once one or more contract documents have been sent as replies by reviewers, the negotiator can check them in using X-Author.


To manage review cycles and check in a reviewed document:

1. Save the document attached in email by the reviewer to your local drive (or other offline location).
2. Open the document in Word and log in to X-Author Contracts.
3. Review feedback and changes in the document and click **Check-In**. The Check-In Document screen is displayed.


4. Select a check box under **Review Cycle Recipient / Closure** and appropriate Check-In options (if available) and click Finish to complete Check-In of the document. Consult the following table to decide which Review Cycle options works best for your situation.

Action	Recipient	Description	Closed Cycle	Document Version
			None.	

Action	Recipient	Description	Closed Cycle	Document Version
Recipient unknown; check-in as Negotiator	Unknown, external reviewer.	Choose this option if you have received the document but are not certain which reviewer sent the reply. Or choose this option if you received the document from an external reviewer but would like to check in as Negotiator.		Negotiator (minor). e.g., "1.1.0"
someone@example.com	Internal or external reviewer.	<p>Choose this option if you intend to check in the document on behalf of a reviewer. This option is best for any of the following situations:</p> <ul style="list-style-type: none"> • An internal reviewer has been absent for an extended period of time or is not planning to check-in as reviewer. • An internal reviewer was unable to use Outlook to check-in the document. • An external reviewer has reviewed the document and 	Cycle for the specific reviewer /document combination.	Reviewer (revision). e.g., "1.0.1"

Action	Recipient	Description	Closed Cycle	Document Version
		<p>sent it as an attachment back to the negotiator.</p> <div>  Check-In options are <i>disabled</i> when a specific reviewer is chosen under Review Cycle Recipient / Closure. All check-ins on behalf of reviewers will be checked in as Redlined versions in the same document format. </div>		
Close all open cycles	Any	Choose this option to check-in the document as negotiator and close all open cycles. This option may be best if you need to initiate a new send for review with the same or additional recipients, you no longer need any further reviewer versions, or if you do not	All cycles.	Negotiator (minor). e. g., "1.1.0"

Action	Recipient	Description	Closed Cycle	Document Version
		have time to wait for the remaining reviewers to respond.		

 If you do not see the Review Cycle options on the Check-In Document screen it means that you do not have a cycle-tracked document open in Word. A document that has been sent for review is assigned certain properties that identify it as part of a review cycle. Make sure you have the correct version of a tracked document open when intending to manage cycles at check-in.

Cycle Status at Agreement Activation

When an agreement is activated, all open Review Cycles are automatically closed. Reviewers will no longer be able to check-in documents using Outlook and negotiators can no longer manage existing cycles (Merge Event Details and Document Version information is still accessible on the agreement record).

Tracking Reviews on the Agreement Record

You can track individual Review Cycles through the **Merge Event Details** object (child object of Merge Event) on the agreement record. To view information on Out for Review and Complete Review Cycles, drill down to the Merge Event Details through the **Review** action link, located in the **Merge Event** related list. You can also review Document Version information for any document that is part of a Review Cycle.

Pre-requisites

To view merge events on actions taken on your agreement document ensure that **Publish Merge Events** field is selected in the **Comply System Properties** in Contract Management.

For more details on how to set Publish Merge Events setting, refer to Comply System Properties in *Contract Management Administrator Guide*.

Example: Version Aware Agreement Document

1. Prior to Send for Review, the Merge Event related list might display the following merge events already taken on the agreement:

Merge Events New Merge Event			
Action	Event Name	Template	Document Info
Edit Del	Check Out		
Edit Del	Check In		Redlines
Edit Del	Check Out		
Edit Del	Import Offline Agreement		
Edit Del	Generate Supporting Document	Basic SuppDoc V7	
Edit Del	Generate	Sales SOW	

2. Next, you initiate a review of the main agreement document from X-Author Contracts, sending it to 2 recipients. After sending, you refresh the agreement record and view the Merge Event list.

Merge Events New Merge Event			
Action	Event Name	Template	Document Info
Edit Del	Review		
Edit Del	Check Out		
Edit Del	Check In		Redlines
Edit Del	Check Out		
Edit Del	Import Offline Agreement		
Show 2 more » Go to list (7) »			



If you have more than one open Send cycle, click on the Review link containing the recipient/document combinations (sub-cycles) you want to track.

3. You can track status for all Review Cycles by clicking on the [Review](#) event link. The Merge Event Detail screen is displayed.

Merge Event Review

Customize Page | Printable View | Help for this Page

[Merge Event Details \(2\)](#)

Merge Event Detail [Edit] [Delete] [Clone]

Event Name: Review
 Review: Review
 Status: In Review
 Owner: Tex Righter [Change]
 Agreement: Sales SOW 09.14.15.1
 Template:
 Document Format:
 Protection Level:
 Is Draft: ☐
 Last Modified By: Tex Righter, 9/14/2015 2:34 PM

Created By: Tex Righter, 9/14/2015 2:34 PM [Edit] [Delete] [Clone]

2 Review Cycles w/2 Recipients

Click to view document version details

Merge Event Details [New Merge Event Detail] [Merge Event Details Help](#)

Action	Event Name	Sent Version Detail	Reviewer Email	Review Start Time	Review End Time	Received Version Detail
Edit Del	Review	1.1.0	[Redacted]	9/14/2015 2:34 PM		
Edit Del	Review	1.1.0	[Redacted]	9/14/2015 2:34 PM		

The Merge Event Detail page displays information about the Review. **Status** indicates it is currently in-progress. The **Merge Event Details** list contains a separate record for each individual review cycle (unique combination of recipient and document). Each review cycle displays the Reviewer Email and the Review Start Time.

- Click the version number under **Sent Version Detail** to view the Document Version Details for the version of the agreement document under review. The Document Version Detail is displayed.

Document Version Detail 1.1.0

Customize Page | Printable View | Help for this Page

[Notes & Attachments \(1\)](#) | [Async Merge Calls \(0\)](#) | [Merge Events \(2\)](#) | [Merge Event Details \(Sent\) \(2\)](#) | [Merge Event Details \(Received\) \(0\)](#)

Document Version Detail Detail [Edit] [Delete] [Clone]

Name: 1.1.0
 Title: Sales SOW 09.14.15.1_Redlines_Sales SOW_2015-09-14.docx
 Version Major: 1
 Version Minor: 1
 Version Revision: 0
 Action: Check In
 Created By: Tex Righter, 9/14/2015 2:20 PM [Edit] [Delete] [Clone]

Document Version: Generate Agreement
 Ancestor: 1.0.0
 Comment: 00P18000000ILztEAE
 View: View
 Is Transient: ☒
 Last Modified By: Tex Righter, 9/14/2015 2:20 PM

You can view information for the document being reviewed. The version **1.1.0** indicates that it is the first Negotiator (minor) version, checked in by you before being sent for review.

- One of the reviewers replies to your review request and you check-in the document on behalf of the reviewer. You return to the agreement record to track the review.

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Merge Events New Merge Event Merge Events Help ?								
Action	Event Name	Template	Document Info	Result Document	Document Format	Status	Version Detail	Last Modified Date
Edit Del	Check In		Redlines	00P18000000IM2xEAE	DOCX	Queued	1.1.1	9/14/2015
Edit Del	Review					Processing		9/14/2015
Edit Del	Check Out			00P18000000ILztEAE	DOCX	Queued	1.1.0	9/14/2015
Edit Del	Check In		Redlines	00P18000000ILztEAE	DOCX	Queued	1.1.0	9/14/2015
Edit Del	Check Out			00P18000000ILzeEAE	DOCX	Queued	1.0.0	9/14/2015
Show 3 more » Go to list (8) »								

The agreement has been checked in as a new Reviewer (revision) version **1.1.1**.

- Click the [Review](#) link to view the update review cycle.

Merge Event Details New Merge Event Detail Merge Event Details Help ?						
Action	Event Name	Sent Version Detail	Reviewer Email	Review Start Time	Review End Time	Received Version Detail
Edit Del	Review	1.1.0	[redacted]	9/14/2015 2:34 PM	9/14/2015 4:00 PM	1.1.1
Edit Del	Review	1.1.0	[redacted]	9/14/2015 2:34 PM		


A Review End Time has been added, recorded when you checked in the document on behalf of the reviewer. Click **Received Version Detail** to view version information for the checked-in document.

Document Version Detail 1.1.1 Customize Page Printable View Help for this Page ?	
Notes & Attachments (1) Async Merge Calls (0) Merge Events (1) Merge Event Details (Sent) (0) Merge Event Details (Received) (1)	
Document Version Detail Detail Edit Delete Clone	
Name 1.1.1	Document Version Generate Agreement
Title Sales SOW 09.21.15.2_Redlines_Sales SOW_2015-09-21.docx	Ancestor 1.1.0
Version Major 1	Comment [redacted]
Version Minor 1	Content 00P18000000ISvYEAU
Version Revision 1	View View
Action Check In	Is Transient <input type="checkbox"/>
Created By Tex Richter , 9/21/2015 5:06 PM	Last Modified By Tex Richter , 9/21/2015 5:06 PM

- You choose to close all remaining cycles at the next document check-in, rather than check the document in on behalf of the second reviewer. This creates a new Negotiator (minor) version of the document. The Merge Events related list is updated to reflect the Review as complete now that all review cycles are closed.


Merge Events New Merge Event Merge Events Help ?								
Action	Event Name	Template	Document Info	Result Document	Document Format	Status	Version Detail	Last Modified Date
Edit Del	Review					Completed		9/14/2015
Edit Del	Check In		Redlines	00P18000000IM3HEAU	DOCX	Queued	1.2.0	9/14/2015
Edit Del	Check In		Redlines	00P18000000IM2xEAE	DOCX	Queued	1.1.1	9/14/2015
Edit Del	Check Out			00P18000000ILztEAE	DOCX	Queued	1.1.0	9/14/2015
Edit Del	Check In		Redlines	00P18000000ILztEAE	DOCX	Queued	1.1.0	9/14/2015

8. Click the Review link to drill down into Merge Event Details. Review End Time and Version Details information is displayed for all review cycles. View Document Versions and download attachments as needed.


Merge Event Review
Customize Page | Printable View | Help for this Page ?

[Merge Event Details ?](#)

Merge Event Detail
Edit Delete Clone

Event Name	Review	Owner	 Tex Richter [Change]
Action	Review	Agreement	Sales SOW 09.21.15.2
Status	Completed	Template	
		Document Format	
		Protection Level	
		Is Draft	<input type="checkbox"/>
Created By	Tex Richter , 9/21/2015 5:04 PM	Last Modified By	Tex Richter , 9/21/2015 5:11 PM

Edit Delete Clone

Merge Event Details
New Merge Event Detail
Merge Event Details Help ?

Action	Event Name	Sent Version Detail	Reviewer Email	Review Start Time	Review End Time	Received Version Detail
Edit Del	Review	1.1.0	[redacted]	9/21/2015 5:04 PM	9/21/2015 5:06 PM	1.1.1
Edit Del	Review	1.1.0	[redacted]	9/21/2015 5:04 PM	9/21/2015 5:11 PM	1.1.0

Salesforce Chatter Integration





X-Author Contracts add-in integrates Salesforce Chatter within a Word document. You have the ability to either see the chatter feeds for the currently opened agreement document or view other user feeds. You can also share highlighted content or agreement document via chatter.

X-Author Contracts displays Chatter in a native Word task pane, providing the ability to have a side-by-side view of the agreement document and Chatter feed.

To collaborate in Word using Chatter

You must have logged into X-Author and opened the file in Word.

1. Click **Chatter** from the **X-Author Contracts** tab.
Chatter opens in its own window within Word and you may need to resize the document for optimal viewing.
2. Select who you want to collaborate with in your Chatter feed by clicking one of the icons:

Option	Description
	Your audience will be everyone in your organization with a Chatter account.
	Your audience will be everyone who is following the object that the document is associated with. This option is only available when the document is associated with a Salesforce object, such as an Account or an Opportunity.
	Your audience will be all the members of the group you select.
	Your audience will be the single individual you select.

3. Make changes to the document using Word and then choose what content you want to collaborate on.

Is that note after the date accurate? If not please update|

Document Share Options

☐ None
 ☐ Entire Document
 ☒ Highlighted Content
 ☐ Both

Option	Description
None	Enter a comment to solicit feedback, while not presenting any of the document in the feed.
Selected Content	Select the content in the document you want to share in the feed. Only text will be included in the feed. If your content includes an image or other kinds of media, it will be represented with a <i>''</i> and table cell content is taken out of the table and included on individual lines.
Entire Document	The whole document is attached to the Chatter feed entry and standard Chatter actions can be taken on the file.
Both	Combination of <i>Selected Content</i> and <i>Entire Document</i> .



If the highlighted content contains smart fields then, Author automatically detects the smart fields and includes the previous value and current change to each of the smart fields.

- Click **Share** and the Chatter feed entry is added.
- Click **Refresh** to ensure your feed is up to date and that you receive feedback from your colleagues.

Appendices

In This Section

- [Troubleshooting Install or Login Error Messages](#)
- [Troubleshooting Missing Add-In](#)
- [Troubleshooting Component Installation](#)
- [Uninstalling X-Author](#)
- [Time Zone Mapping](#)
- [Troubleshooting Documentation Generation Error Messages](#)
- [List of Apttus Supported Locales and Associated Formatting](#)
- [Converting Pre-FX2 Templates to FX2 Format](#)

Troubleshooting Install or Login Error Messages

If system prerequisites are not met or validation checks fail, then one of the following messages may be displayed.

Message	Reason	Resolution
Admin privileges for installation		
You need to be an Administrator to install X-Author...log out and log in as a System Administrator and run this setup.	The user trying to install X-Author does not have administrative privileges for the computer.	The user should log off of the computer and someone with Windows Administrator permissions should login and restart the installation process.
An error has occurred in the script on this page		

Message	Reason	Resolution
<p>Invalid character.</p> <p>- or -</p> <p>The value of the property 'loader' is null or undefined, not a Function object.</p> <p>URL: https://login.salesforce.com/...</p>	<p>The error is caused by Salesforce UI page issues.</p>	<p>Clear all of your Internet Explorer temporary files and cache.</p>
Microsoft Office 2007 or above is required		
<p>Microsoft Word 2007 or later version is a prerequisite for installing this version of X-Author.</p>	<p>No version of Microsoft Word is detected on the target computer by the installer. The installation process stops at this stage.</p>	<p>A user with Windows Administrator permission must install the required version of Microsoft Word on the computer.</p>
An instance of Microsoft Word is running		
<p>An instance of Microsoft Word is currently running. Please save your work, and close the application before you proceed this installation.</p>	<p>An instance of Microsoft Word is currently running while X-Author is being installed or uninstalled.</p>	<p>Close all instances of Microsoft Word and restart the halted process.</p>
Error while uninstalling the pre-existing version of X-Author		
<p>There was a problem while uninstalling the pre-existing version of Apttus Author. Please uninstall the pre-existing version manually and try this setup again.</p>	<p>There is an error while trying to uninstall the pre-existing version, which may have occurred because the user clicked NO when the dialog was displayed.</p>	<p>User should click Yes when the UAC dialog is displayed. This would allow the pre-existing version of X-Author to be uninstalled.</p>
Microsoft Word with hotfix package 976477		

<p>A hotfix package 976477 for Microsoft Word 2007 is required for X-Author to work correctly.</p>	<p>Microsoft Word 2007 is installed, but it doesn't have the hotfix package 976477 installed. This is required for X-Author to work as expected.</p>	<p>The users are requested to contact their system administrators to install the required hotfix package 976477 for Microsoft Word 2007</p>
--	--	---

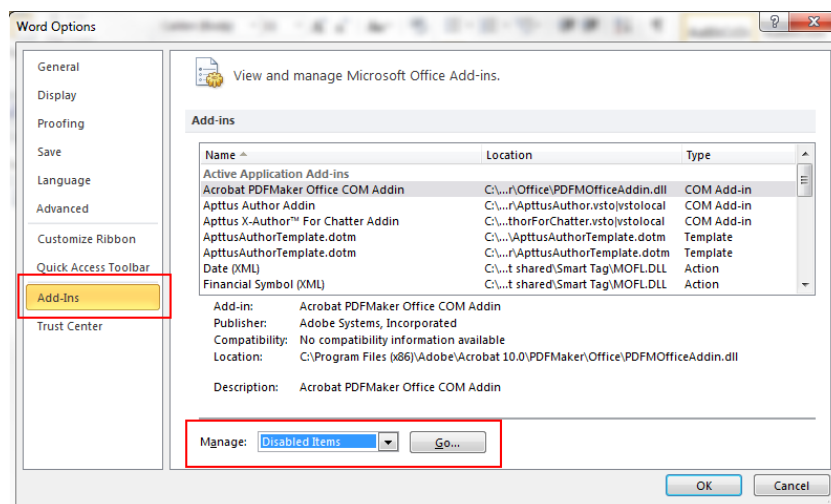
Troubleshooting Missing Add-In

The **X-Author Contracts** and **X-Author Templates** ribbon tabs should always be available after you have successfully installed the Add-In.

If there is an issue with them displaying, you should manually register the Add-In. If it still does not display, check the following options.

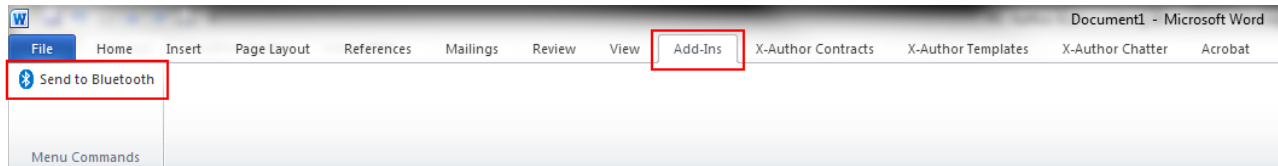
Disabled Items List

If there is still an issue, in Word go to **File > Options > Add-Ins**. From the **Manage** list, select **Disabled Items** and click **Go**. In the Disabled Items dialog, select **X-Author Contracts** and click **Enable**.

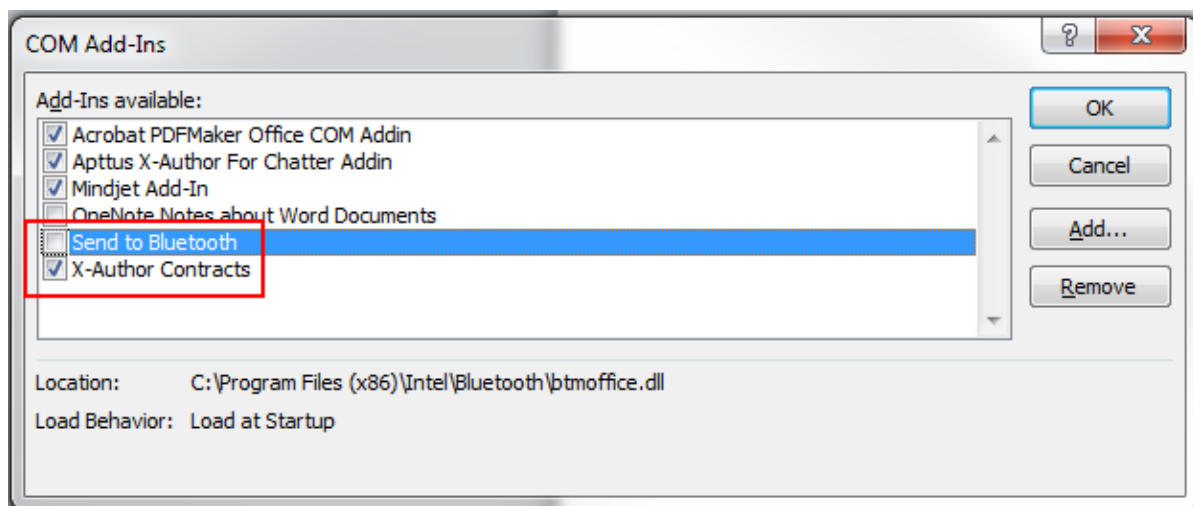


Bluetooth Add-In

Another reason the Add-In may not work, is if the **Send to Bluetooth** Add-In is enabled. If it is displayed in your Word ribbon, you should disable it.



In Word go to **File > Options > Add-Ins**. From the **Manage** list, select **COM Add-ins** and click **Go**. Clear **Send to Bluetooth**, make sure **X-Author Contracts** is selected, and click **OK**. Restart Word and the X-Author add-ins should be displayed.



Troubleshooting Component Installation

While the installation of required components for X-Author should occur automatically, if there is a question as to whether or not they have been installed successfully you can check the following registry settings.

Note that one of the reasons the components could not be installed - or the X-Author installation may fail completely - is that your organization's IT policies may block access to Apttus servers used as part of the installation process. To confirm this, go to either <http://pia.apptus.com> and <http://runtime.apptus.com>. If you cannot access these sites you need to have them added to your organization's trusted sites.

Operating System Level	Registry Entry
Microsoft .NET Framework 4.0 or higher	
32 Bit	HKEY_LOCAL_MACHINE \ SOFTWARE \ Microsoft \ VSTO Runtime Setup \ v4R
64 Bit	HKEY_LOCAL_MACHINE \ SOFTWARE \ Microsoft \ VSTO Runtime Setup \ v4R
Microsoft Visual Studio 2010 Tools for Office Runtime	
32 Bit	HKEY_LOCAL_MACHINE \ SOFTWARE \ Microsoft \ VSTO Runtime Setup
64 Bit	HKEY_LOCAL_MACHINE \ SOFTWARE \ Wow6432Node \ Microsoft \ VSTO Runtime Setup
Microsoft Office 2010 Primary Interop Assemblies	
32 Bit	HKEY_LOCAL_MACHINE \ SOFTWARE \ Classes \ Installer \ Features \ 00004109501100000000000000F01FEC
64 Bit	HKEY_LOCAL_MACHINE \ SOFTWARE \ Classes \ Installer \ Features \ 00004109501100000000000000F01FEC

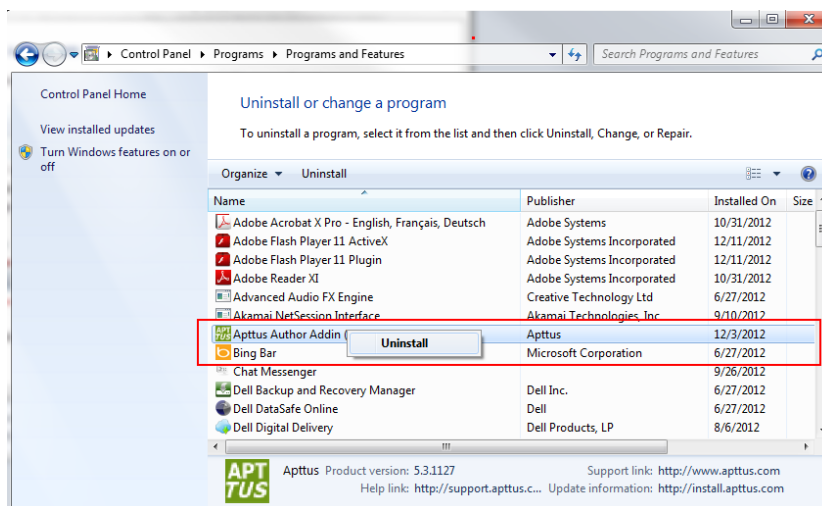
Uninstalling X-Author

Once installed you can uninstall X-Author either by using the installer executable or Windows uninstall programs.

To uninstall X-Author

All Microsoft Office applications should be closed.

1. Double-click the **ApttusInstaller.exe**, it will recognize Author is already installed and give you the option to uninstall.
- OR -
2. Select **Start** and then select **Control Panel**.
3. Select **Uninstall Program** to display the programs list.
4. Right-click **X-Author Contracts** and click **Uninstall**.



X-Author is removed from your machine.

Time Zone Mapping

X-Author maps Salesforce time zones to Microsoft Windows time zones to ensure you can install and use X-Author Contracts as expected. If the Salesforce time zone does not map to a Microsoft equivalent, you must change it to one that does.

Salesforce		Microsoft Windows	
	Salesforce Time Zone Key	Windows Time Zone Key	
GMT+13:00 Phoenix Islands Time	Pacific /Enderbury	Tonga Standard Time	(UTC+13:00) Nuku'alofa
GMT+13:00 Tonga Time	Pacific /Tongatapu	Tonga Standard Time	(UTC+13:00) Nuku'alofa
<i>GMT+12:45 Chatham Standard Time</i>	<i>Pacific/Chatham</i>		
GMT+12:00 Magadan Time	Asia /Kamchatka	Magadan Standard Time	(UTC+12:00) Magadan
GMT+12:00 New Zealand Standard Time	Pacific /Auckland	New Zealand Standard Time	(UTC+12:00) Auckland, Wellington
GMT+12:00 Fiji Time	Pacific/Fiji	Fiji Standard Time	(UTC+12:00) Fiji
<i>GMT+11:30 Norfolk Islands Time</i>	<i>Pacific/Norfolk</i>		
GMT+11:00 Solomon Islands Time	Pacific /Guadalcanal	Central Pacific Standard Time	(UTC+11:00) Solomon Is., New Caledonia
<i>GMT+10:30 Lord Howe Standard Time</i>	<i>Australia /Lord_Howe</i>		
GMT+10:00 Australian Eastern Standard Time	Australia /Brisbane	E. Australia Standard Time	(UTC+10:00) Brisbane

Salesforce		Microsoft Windows	
	Salesforce Time Zone Key	Windows Time Zone Key	
GMT+10:00 Australian Eastern Standard Time	Australia /Sydney	AUS Eastern Standard Time	(UTC+10:00) Canberra, Melbourne, Sydney
GMT+09:30 Australian Central Standard Time	Australia /Adelaide	Cen. Australia Standard Time	(UTC+09:30) Adelaide
GMT+09:30 Australian Central Standard Time	Australia /Darwin	AUS Central Standard Time	(UTC+09:30) Darwin
GMT+09:00 Korean Standard Time	Asia/Seoul	Korea Standard Time	(UTC+09:00) Seoul
GMT+09:00 Japan Standard Time	Asia/Tokyo	Tokyo Standard Time	(UTC+09:00) Osaka, Sapporo, Tokyo
GMT+08:00 Hong Kong Time	Asia /Hong_Kong	China Standard Time	(UTC+08:00) Beijing, Chongqing, Hong Kong, Urumqi
GMT+08:00 Malaysia Time	Asia /Kuala_Lumpur	Singapore Standard Time	(UTC+08:00) Kuala Lumpur, Singapore
GMT+08:00 Singapore Standard Time	Asia/Singapore	Singapore Standard Time	(UTC+08:00) Kuala Lumpur, Singapore
GMT+08:00 Philippine Time	Asia/Manila	North Asia East Standard Time	(UTC+09:00) Irkutsk
GMT+08:00 China Standard Time	Asia/Shanghai	China Standard Time	(UTC+08:00) Beijing, Chongqing, Hong Kong, Urumqi

Salesforce		Microsoft Windows	
	Salesforce Time Zone Key	Windows Time Zone Key	
GMT+08:00 Taipei Standard Time	Asia/Taipei	Taipei Standard Time	(UTC+08:00) Taipei
GMT+08:00 Australian Western Standard Time	Australia/Perth	W. Australia Standard Time	(UTC+08:00) Perth
GMT+07:00 Indochina Time	Asia/Bangkok	SE Asia Standard Time	(UTC+07:00) Bangkok, Hanoi, Jakarta
GMT+07:00 Western Indonesia Time	Asia/Jakarta	SE Asia Standard Time	(UTC+07:00) Bangkok, Hanoi, Jakarta
GMT+07:00 Indochina Time	Asia/Saigon	SE Asia Standard Time	(UTC+07:00) Bangkok, Hanoi, Jakarta
GMT+06:30 Myanmar Time	Asia/Rangoon	Myanmar Standard Time	(UTC+06:30) Yangon (Rangoon)
GMT+06:00 Bangladesh Time	Asia/Dacca	Bangladesh Standard Time	(UTC+06:00) Dhaka
GMT+06:00 Yekaterinburg Time	Asia /Yekaterinburg	Ekaterinburg Standard Time	(UTC+06:00) Ekaterinburg
GMT+05:45 Nepal Time	Asia/Katmandu	Nepal Standard Time	(UTC+05:45) Kathmandu
GMT+05:30 India Standard Time	Asia/Calcutta	India Standard Time	(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

Salesforce		Microsoft Windows	
	Salesforce Time Zone Key	Windows Time Zone Key	
GMT+05:30 India Standard Time	Asia/Colombo	Sri Lanka Standard Time	(UTC+05:30) Sri Jayawardenepura
GMT+05:00 Pakistan Time	Asia/Karachi	Pakistan Standard Time	(UTC+05:00) Islamabad, Karachi
GMT+05:00 Uzbekistan Time	Asia/Tashkent	West Asia Standard Time	(UTC+05:00) Tashkent
GMT+04:30 Afghanistan Time	Asia/Kabul	Afghanistan Standard Time	(UTC+04:30) Kabul
GMT+04:30 Iran Daylight Time	Asia/Tehran	Iran Standard Time	(UTC+03:30) Tehran
GMT+04:00 Gulf Standard Time	Asia/Dubai	Arabian Standard Time	(UTC+04:00) Abu Dhabi, Muscat
GMT+04:00 Georgia Time	Asia/Tbilisi	Georgian Standard Time	(UTC+04:00) Tbilisi
GMT+04:00 Moscow Standard Time	Europe /Moscow	Russian Standard Time	(UTC+04:00) Moscow, St. Petersburg, Volgograd
GMT+03:00 East Africa Time	Africa/Nairobi	E. Africa Standard Time	(UTC+03:00) Nairobi
GMT+03:00 Arabian Standard Time	Asia/Baghdad	Arabic Standard Time	(UTC+03:00) Baghdad

Salesforce		Microsoft Windows	
	Salesforce Time Zone Key	Windows Time Zone Key	
GMT+03:00 Israel Daylight Time	Asia/Jerusalem	Israel Standard Time	(UTC+02:00) Jerusalem
GMT+03:00 Arabian Standard Time	Asia/Kuwait	Arab Standard Time	(UTC+03:00) Kuwait, Riyadh
GMT+03:00 Arabian Standard Time	Asia/Riyadh	Arab Standard Time	(UTC+03:00) Kuwait, Riyadh
GMT+03:00 Eastern European Summer Time	Europe/Athens	E. Europe Standard Time	(UTC+02:00) E. Europe
GMT+03:00 Eastern European Summer Time	Europe /Bucharest	E. Europe Standard Time	(UTC+02:00) E. Europe
GMT+03:00 Eastern European Summer Time	Europe/Helsinki	FLE Standard Time	(UTC+02:00) Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius
GMT+03:00 Eastern European Summer Time	Europe/Istanbul	Turkey Standard Time	(UTC+02:00) Istanbul
GMT+03:00 Further-Eastern European Time	Europe/Minsk	Kaliningrad Standard Time	(UTC+03:00) Kaliningrad, Minsk
GMT+02:00 Eastern European Time	Africa/Cairo	Egypt Standard Time	(UTC+02:00) Cairo

Salesforce		Microsoft Windows	
	Salesforce Time Zone Key	Windows Time Zone Key	
GMT+02:00 South Africa Standard Time	Africa /Johannesburg	South Africa Standard Time	(UTC+02:00) Harare, Pretoria
GMT+02:00 Central European Summer Time	Europe /Amsterdam	W. Europe Standard Time	(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna
GMT+02:00 Central European Summer Time	Europe/Berlin	W. Europe Standard Time	(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna
GMT+02:00 Central European Summer Time	Europe /Brussels	Romance Standard Time	(UTC+01:00) Brussels, Copenhagen, Madrid, Paris
GMT+02:00 Central European Summer Time	Europe/Paris	Romance Standard Time	(UTC+01:00) Brussels, Copenhagen, Madrid, Paris
GMT+02:00 Central European Summer Time	Europe/Prague	Central Europe Standard Time	(UTC+01:00) Belgrade, Bratislava, Budapest, Ljubljana, Prague
GMT+02:00 Central European Summer Time	Europe/Rome	W. Europe Standard Time	(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna
<i>GMT+01:00 Central European Time</i>	<i>Africa/Algiers</i>		

Salesforce		Microsoft Windows	
	Salesforce Time Zone Key	Windows Time Zone Key	
GMT+01:00 Irish Summer Time	Europe/Dublin	GMT Standard Time	(UTC) Dublin, Edinburgh, Lisbon, London
GMT+01:00 Western European Summer Time	Europe/Lisbon	GMT Standard Time	(UTC) Dublin, Edinburgh, Lisbon, London
GMT+01:00 British Summer Time	Europe/London	GMT Standard Time	(UTC) Dublin, Edinburgh, Lisbon, London
GMT+00:00 Greenwich	MeanTime (GMT	GMT Standard Time	(UTC) Dublin, Edinburgh, Lisbon, London
GMT-01:00 Cape Verde Time	Atlantic /Cape_Verde	Cape Verde Standard Time	(UTC-01:00) Cape Verde Is.
GMT-02:00 South Georgia Time	Atlantic /South_Georgia	Mid-Atlantic Standard Time	(UTC-02:00) Mid-Atlantic
GMT-02:30 Newfoundland Daylight Time	America /St_Johns	Newfoundland Standard Time	(UTC-03:30) Newfoundland
GMT-03:00 Argentina Time	America /Buenos_Aires	Argentina Standard Time	(UTC-03:00) Buenos Aires
GMT-03:00 Atlantic Daylight Time	America/Halifax	Atlantic Standard Time	(UTC-04:00) Atlantic Time (Canada)
			(UTC-03:00) Brasilia

Salesforce		Microsoft Windows	
	Salesforce Time Zone Key	Windows Time Zone Key	
GMT-03:00 Brasilia Time	America /Sao_Paulo	E. South America Standard Time	
GMT-03:00 Atlantic Daylight Time	Atlantic /Bermuda	Atlantic Standard Time	(UTC-04:00) Atlantic Time (Canada)
GMT-04:00 Eastern Daylight Time	America /Indianapolis	Eastern Standard Time	(UTC-05:00) Eastern Time (US & Canada)
GMT-04:00 Eastern Daylight Time	America /New_York	Eastern Standard Time	(UTC-05:00) Eastern Time (US & Canada)
GMT-04:00 Atlantic Standard Time	America /Puerto_Rico	SA Western Standard Time	(UTC-04:00) Georgetown, La Paz, Manaus, San Juan
GMT-04:00 Chile Time	America /Santiago	Pacific SA Standard Time	(UTC-04:00) Santiago
GMT-04:30 Venezuela Time	America /Caracas	Venezuela Standard Time	(UTC-04:30) Caracas
GMT-05:00 Colombia Time	America /Bogota	SA Pacific Standard Time	(UTC-05:00) Bogota, Lima, Quito
GMT-05:00 Central Daylight Time	America /Chicago	Central America Standard Time	(UTC-06:00) Central America
GMT-05:00 Peru Time	America/Lima	SA Pacific Standard Time	(UTC-05:00) Bogota, Lima, Quito

Salesforce		Microsoft Windows	
	Salesforce Time Zone Key	Windows Time Zone Key	
GMT-05:00 Central Daylight Time	America /Mexico_City	Central America Standard Time	(UTC-06:00) Central America
GMT-05:00 Eastern Standard Time	America /Panama	US Eastern Standard Time	(UTC-05:00) Indiana (East)
GMT-06:00 Mountain Daylight Time	America /Denver	US Mountain Standard Time	(UTC-07:00) Arizona
GMT-06:00 Central Standard Time	America /El_Salvador	Central America Standard Time	(UTC-06:00) Central America
GMT-07:00 Pacific Daylight Time	America /Los_Angeles	Pacific Standard Time	(UTC-08:00) Pacific Time (US & Canada)
GMT-07:00 Mountain Standard Time	America /Phoenix	US Mountain Standard Time	(UTC-07:00) Arizona
GMT-07:00 Pacific Daylight Time	America /Tijuana	Pacific Standard Time	(UTC-08:00) Pacific Time (US & Canada)
GMT-08:00 Alaska Daylight Time	America /Anchorage	Alaskan Standard Time	(UTC-09:00) Alaska
GMT-10:00 Hawaii-Aleutian Standard Time	Pacific /Honolulu	Hawaiian Standard Time	(UTC-10:00) Hawaii
GMT-11:00 Niue Time	Pacific/Niue	Samoa Standard Time	(UTC+13:00) Samoa

Salesforce		Microsoft Windows	
	Salesforce Time Zone Key	Windows Time Zone Key	
GMT-11:00 Samoa Standard Time	Pacific /Pago_Pago	Samoa Standard Time	(UTC+13:00) Samoa

Troubleshooting Documentation Generation Error Messages

Message	Reason	Resolution
Document Generation Error		
'Unknown switch' is printed on a generated document.	{ REF _Ref238023765 \r \h * MERGEFORMAT } is causing an error in the generated document.	<p>Instead of :</p> <pre>{ REF _Ref238023765 \r \h * MERGEFORMAT }</pre> <p>use:</p> <pre>{ REF _Ref238023765 \r \h }</pre>

List of Apttus Supported Locales and Associated Formatting

This page lists all locales supported by Apttus for the purposes of defining locale format in your templates. The following table presents for each Locale value, the corresponding set of formats of the Currency fields and Number/Percent fields, and defaults for precision values and date formats.

Locale	Currency Format	Number /Percent Format	Default Currency Precision	Default Number /Percent Precision	Default Date Format
English (US)	X,XXX. XX	X,XXX.XX	2	0	M/dd/yyyy
English (UK)	X,XXX. XX	X,XXX.XX	2	0	dd/mm/yyyy
English (Canada)	X,XXX. XX	X,XXX.XX	2	0	dd/mm/yyyy
English (Ireland)	X,XXX. XX	X,XXX.XX	2	0	dd/mm/yyyy
Italian	X.XXX, XX	X.XXX,XX	5	0	dd/mm/yyyy
German	X.XXX, XX	X.XXX,XX	5	0	dd.mm.yyyy
Chinese	X,XXX. XX	X,XXX.XX	2	0	yyyy-M-dd
Japanese	X,XXX. XX	X,XXX.XX	2	0	yyyy/mm/dd
Korean	X,XXX. XX	X,XXX.XX	2	0	yyyy. M. dd
Thai	X,XXX. XX	X,XXX.XX	2	0	dd/M/yyyy **(+543 to the year value)
Norwegian	X XXX, XX	X XXX,XX	0	0	dd.mm.yyyy

Locale	Currency Format	Number /Percent Format	Default Currency Precision	Default Number /Percent Precision	Default Date Format
Swedish	X.XXX,XX	X XXX,XX	0	0	yyyy-mm-dd
Russian	X XXX,XX	X XXX,XX	0	0	dd.mm.yyyy
Portuguese	X.XXX,XX	X.XXX,XX	5	0	dd/mm/yyyy
Polish	X XXX,XX	X XXX,XX	5	0	dd.mm.yyyy
Greek (Greece)	X.XXX,XX	X.XXX,XX	5	0	dd/M/yyyy
Spanish	X.XXX,XX	X.XXX,XX	2	0	dd/mm/yyyy

Formatting standard of negative values for Number and Percent data type fields is same across all locale-dependent formats and it is defined as:

Negative values are preceded by minus sign, immediately followed by the value formatted according to the locale setting. E.g., -1,000.0

Currency ISO Codes and Symbol

In X-Author Contracts, Currency ISO codes and Symbols for the supported currencies are not controlled by Locale value. Whenever a user will select 'ISO Code' or 'Symbol' as the value of 'Currency Format' property of a template or field level attribute, the system will prefix the corresponding value at runtime.

For Multi-Currency Orgs- Currency values in the generated documents are values of the business object record, currency. The following table represents the ISO Codes/ Symbols associated with the currency of the business object record:

Currency of the Business Object Record	Currency ISO Code	Currency Symbol
USD	USD	\$
GBP	GBP	£
CAD	CAD	\$
EUR	EUR	€
CNY	CNY	¥
JPY	JPY	¥
KRW	KRW	
THB	THB	
NOK	NOK	kr
SEK	SEK	kr
RUB	RUB	
BRL	BRL	R\$
PLN	PLN	z

For Single Currency Org- In the single currency org, resolved currency values can be populated with just one symbol or ISO code, dependent on the **Currency Locale** setting of the org. The following table lists the ISO Codes/Symbols associated with the org-wide setting:

Currency Locale Setting of the Org	Currency ISO Code	Currency Symbol
English (United States)- USD	USD	\$

Currency Locale Setting of the Org	Currency ISO Code	Currency Symbol
English (United Kingdom)- GBP	GBP	£
English (Canada)- CAD	CAD	\$
English (Ireland)- EUR	EUR	€
Italian (Italy)- EUR	EUR	€
German (Germany)- EUR	EUR	€
Chinese (China)- CNY	CNY	¥
Japanese (Japan)- JPY	JPY	¥
Korean (South Korea)- KRW	KRW	
Thai (Thailand)- THB	THB	
Norwegian (Norway)- NOK	NOK	kr
Swedish (Sweden)- SEK	SEK	kr
Russian (Russia)- RUB	RUB	
Portuguese (Brazil)- BRL	BRL	R\$
Polish (Poland)- PLN	PLN	z
Greek (Greece)- EUR	EUR	€
Spanish (Spain)- EUR	EUR	€

Formatting Standard of Currency Values

The formatting standard for positive and negative currency values is the same across all types of business objects, and across all locale-dependent formats of the values.

Formatting of Positive Currency Value

Use Case: If a user enters the currency value of 100, the following table shows how the currency value shall be displayed according to the currency format selected.

Currency Format	Formatting Description	Formatting Example of Positive Currency Value
Symbol	For symbol currency format, Value will be displayed as Symbol prefix immediately followed by the value.	£100.00
ISO Code	For ISO Code currency format, Positive currency value will be resolved into the documents with ISO code prefix followed by space and then value.	EUR 100.00

Formatting of Negative Currency Value

Use Case: If a user enters the currency value of 100, the following table shows how the currency value shall be displayed according to the currency format selected.

Currency Format	Formatting Description	Formatting Example of Negative Currency Value
Symbol	For symbol currency format, Value will be displayed as Symbol prefix immediately followed by the value surrounded by parenthesis.	£(100.00)
ISO Code	For ISO Code currency format, negative currency value will be resolved into the documents with ISO code prefix followed by space and then value surrounded by parenthesis.	EUR (100.00)

Converting Pre-FX2 Templates to FX2 Format

The purpose of this appendix is to provide you with manual instructions for converting your Pre-FX2 format (Merge format) agreement templates to the new FX2 format. There is no automated solution to convert your templates at this time.

This guide is designed in a manner which allows you to tackle the conversion process one step at a time by addressing the different elements of an agreement template. The following elements are required when converting a template to the new FX2 format:

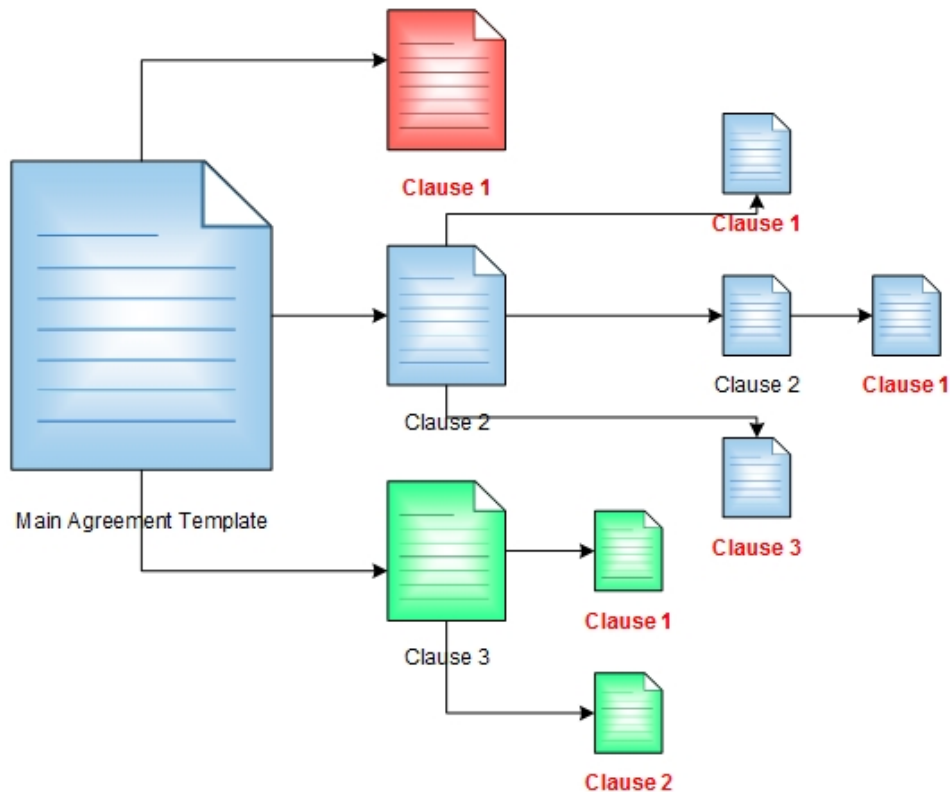
- All clause references must be replaced by FX2 format clauses.
- All merge fields must be replaced by FX2 format fields.
- All Pre-FX2 sections and tables must be replaced with FX2 format sections and tables.
- Smartness must be reapplied to fields and clauses as required.
- Conditional content must be reviewed, removed and defined for FX2 format.



This conversion guide provides the minimum guidance necessary to complete template conversion to the FX2 format. Please follow links in the document to guide content for information on working with FX2 template features.

Using a Bottom-Up Approach to Conversion

Because agreement template design often involves a lot of conditionality and clauses nested within clauses, it is recommended to approach the conversion process using a "bottom-up" method. In many cases, you are not only converting a single agreement template to the new format, but several clause templates as well. Your Pre-FX2 format agreement template may contain clause references which refer to clause templates in your system. These clause templates may then have more clause references, and so on, until you reach a clause template which does not contain any references. These final nested clause references may still contain merge fields, tables and sections, which also need to be converted. Consider the following representative diagram of a typical agreement template structure.



All clauses marked in **red** must be converted to FX2 format first, then the templates (clause or agreement) which contain them can be converted, and so on until you reach the main agreement template. Because of this, a **bottom-up approach** is required in *most cases*. You need to assess your agreement template and make all changes furthest out from the template before making changes to references inside the agreement template document itself.

FX2 Format Conversion Steps

Follow the steps below to successfully convert your Pre-FX2 format templates to the new FX2 format.

1. [Prepare Your Agreement Template for Conversion](#).
2. [Convert Clause References](#) in the agreement template.
 - a. [Convert Merge Fields](#) in the clause template to FX2 format.
 - b. [Convert Clause References](#) in the clause template to FX2 format.
 - c. [Convert Tables and Sections](#) in the clause template to FX2 format.
 - d. [Convert Conditional Tables](#) in the clause template (as needed).

3. [Convert Merge Fields](#) in the agreement template to FX2 format.
4. [Convert Tables and Sections](#) in the agreement template to FX2 format.
5. [Convert Conditional Tables](#) (as needed).

VIDEO: [Assess Your Agreement Template Conversion Requirements](#)

Prepare Your Pre-FX2 Template for Conversion

Two methods are provided for preparing your agreement template document for conversion to the new FX2 format. **Method 1** is recommended for most cases, as it allows you to rebuild the template "from scratch." **Method 2** is slightly more advanced, and should be used in cases where Method 1 may not be ideal.



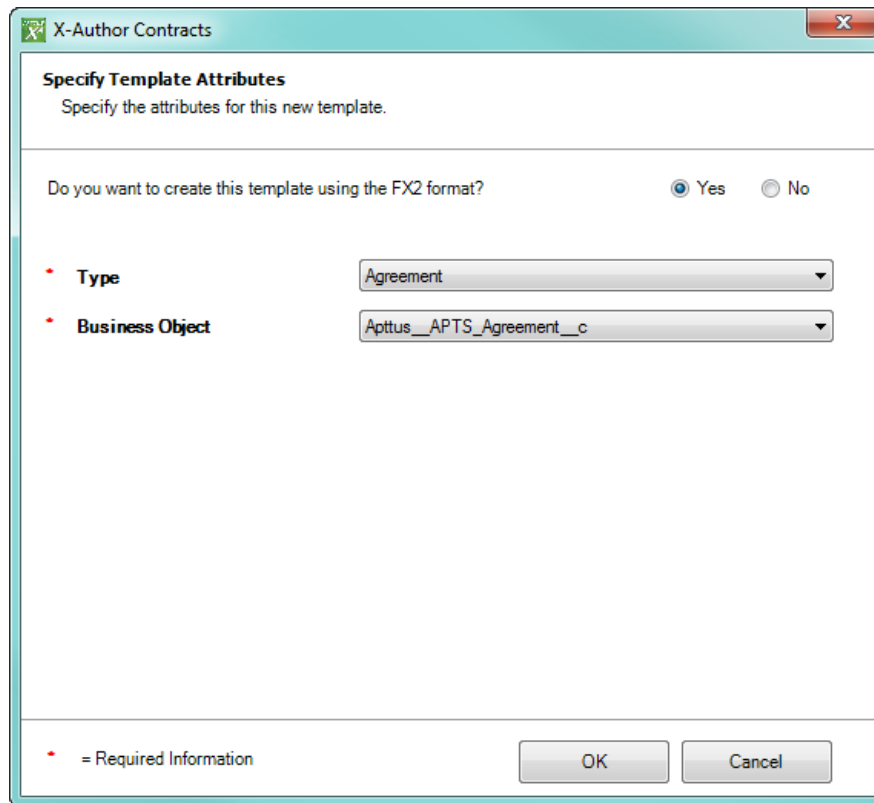
The instructions provided in this section also apply to any clause templates referred to from your agreement template.

VIDEO: [Prepare Your Pre-FX2 Template for Conversion](#)

Method 1: Copy the Text of Your Template to a New Document

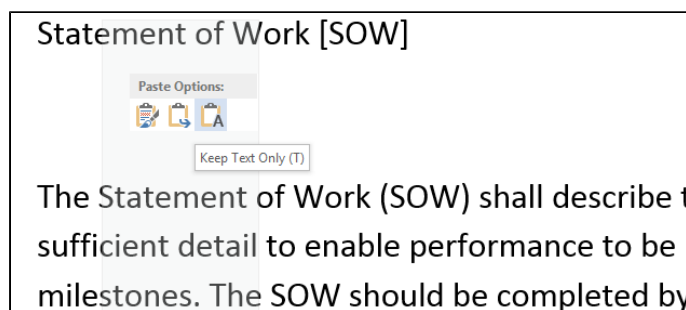
This method allows you to begin the conversion process by building your agreement template "from scratch." This method gives your business or legal departments an opportunity to review the document in its entirety and mark up any recent changes and/or conditionality which needs to be incorporated into the template prior to conversion.

1. To begin, open Microsoft Word and **Connect** to X-Author. You must be connected to an org with **Apttus Contract Management 8.0 or later** installed (a version which supports FX2 format).
2. Click **New** from the X-Author Templates ribbon. The Template Attributes dialog is displayed.



The image shows a dialog box titled "X-Author Contracts" with a close button (X) in the top right corner. The main heading is "Specify Template Attributes" with a subtext "Specify the attributes for this new template." Below this, there is a question "Do you want to create this template using the FX2 format?" with two radio buttons: "Yes" (selected) and "No". Underneath, there are two required fields, each marked with a red asterisk: "Type" with a dropdown menu showing "Agreement", and "Business Object" with a dropdown menu showing "Apttus__APTS_Agreement__c". At the bottom left, a legend indicates that a red asterisk means "= Required Information". At the bottom right, there are "OK" and "Cancel" buttons.

3. Choose **FX2 Format**, the appropriate template type (Agreement or Clause) and Business Object (Agreement). Click **OK**.
4. Open your Pre-FX2 format template in a separate window.
5. **Select-all** text in your Pre-FX2 template (including merge fields, clause references, tables, etc.) and **Copy** it into the new blank template document. It is recommended to paste as text and apply formatting in subsequent steps.



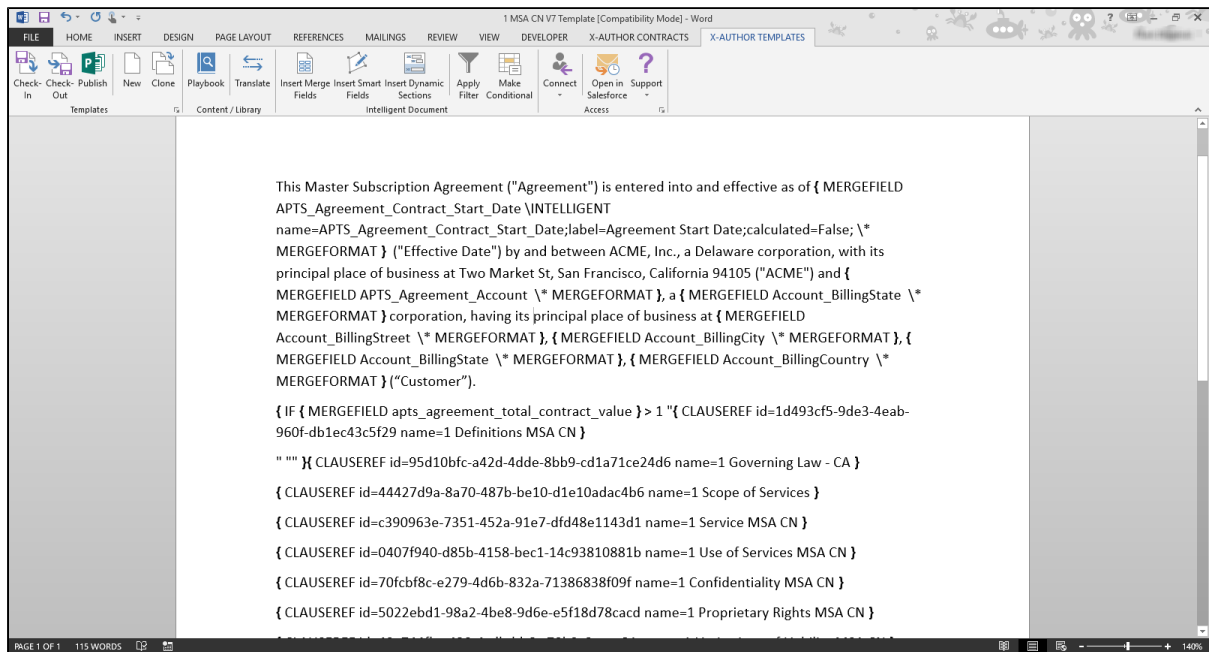
6. Re-apply formatting to your template, including font size, face and paragraph styles as required.

7. Click **Check-in** from the X-Author Templates ribbon to complete the check-in of your new FX2 format template.

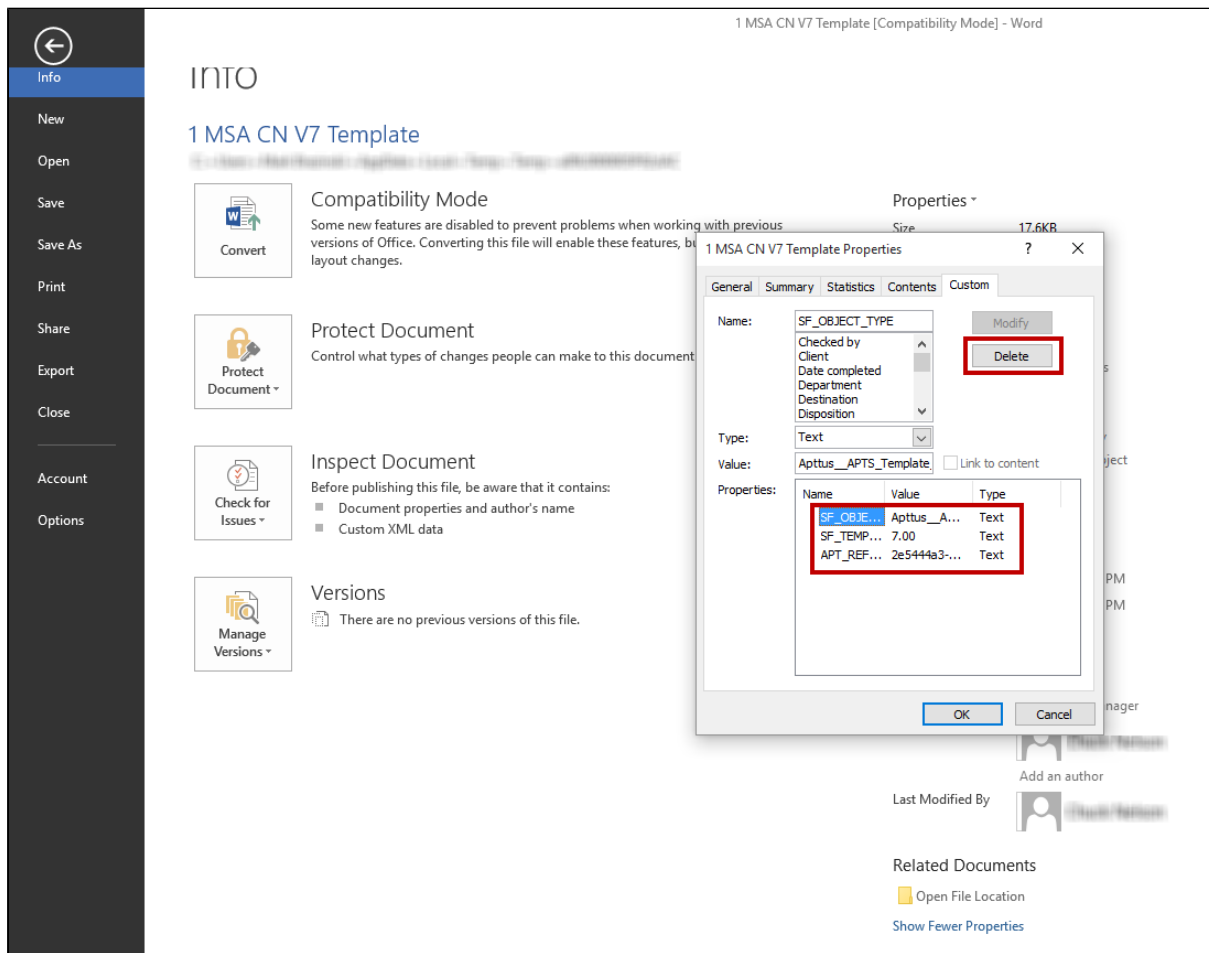
Method 2: Remove Pre-FX2 Template Properties and Create New FX-2 Template

You may choose to use this method if your template contains a lot of visuals or other properties built in which don't transfer well using the copy-paste method described above. Rather than creating a new document from scratch, you will convert the existing template document directly. Because your Pre-FX2 template document has properties associated with Salesforce objects, field and clause references that identify it as being in a particular format. These properties must be stripped to convert the template to FX-2 format.

1. To begin, check out your agreement template in X-Author:
 - a. Click **Connect** to log in to the correct org.
 - b. Click **Check-Out**.
 - c. Search for your template and click **Open** to check out the document.



2. Click **File** to go to the Microsoft Word Info page (select the **Info** section if it is not already displayed).
3. Click on the **Properties** drop-down located in the far-right column of the page.
4. Choose **Advanced Properties > Custom**. The list of document properties is displayed.



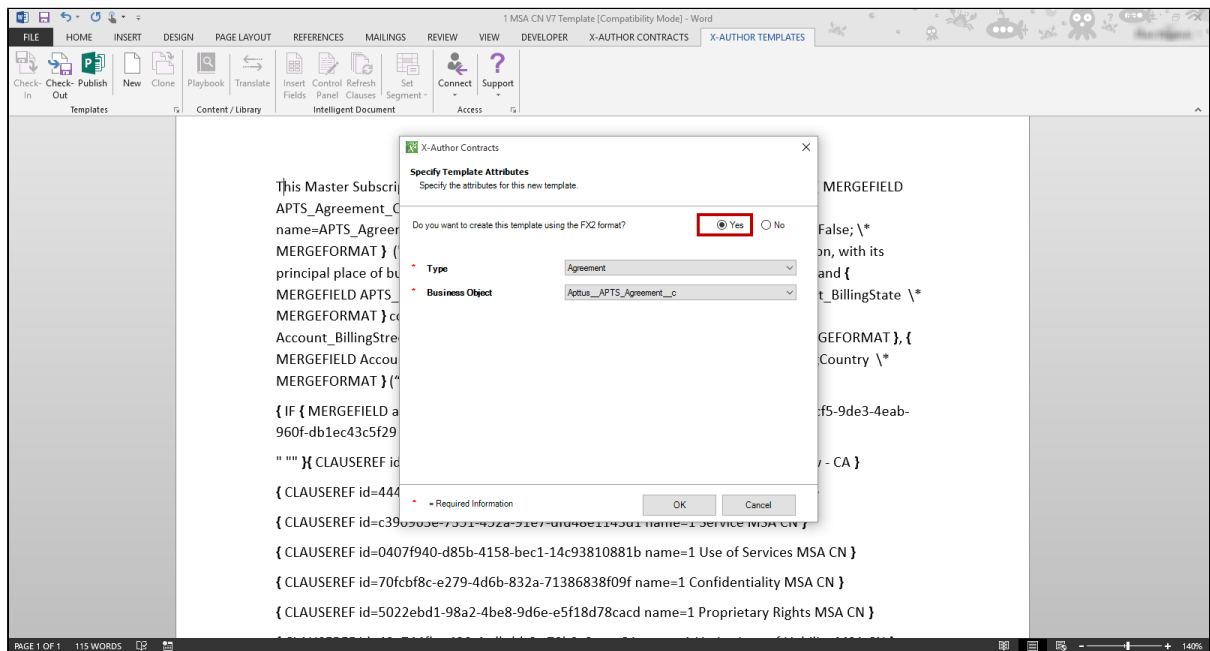
5. Delete all values under Properties and click **Ok**.



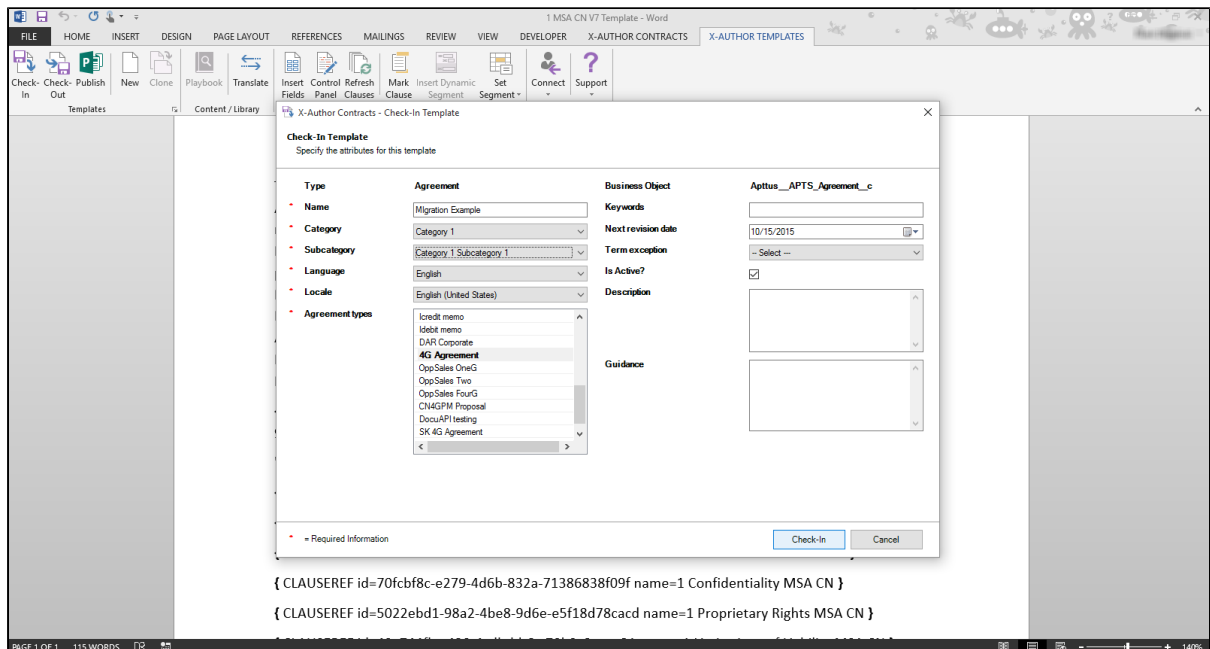
Stripping your Pre-FX2 template of its properties will not affect the template in your environment as long as you do not check it back in after stripping the properties.

6. Click on the **X-Author Templates** tab to return to your template.
7. Click **New** under the Templates section to use your existing template to create a new FX2 format template.

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8. Choose **Yes** to make your template FX2 format, confirm Type and Business Object and click **OK**.
9. Click **Check-in** under the Templates section to check in your new FX2 format template.



10. Enter a name for your template, an Agreement type to associate it with, and all remaining fields.

11. Click **Check-In** to complete the check-in of your new FX2 format template.



If your agreement happens to be 100% text, this is the bare minimum you need to convert your agreement to FX-2 Format. If your agreement contains Apttus fields, clauses, sections or tables, move to the next section in this document to continue the conversion process.

Convert Clause References to FX2 Format

FX2 format does not include any clause references. Instead, clauses are inserted as inline text inside "segments."

You must convert all clause references into FX2 format clauses. *Always convert nested clause references first* (clause references within clauses). See the diagram [on the overview page](#) for details.



Consider three important steps prior to converting any clause reference:

- If there are any existing fields, tables or sections inside the clause, *you must first convert those fields, tables or sections* as described in [Convert Merge Fields to FX2 Format](#) and [Convert Tables and Sections](#) before you check in the clause template.
- If the clause itself contains any clause references, *you must convert those clauses first*. Check out nested clause references, convert them as described on this page and check them in, converting any fields contained inside the nested clauses as well.
- Remember when you are inserting clauses from Playbook, you must first check-in the destination template (agreement or clause).

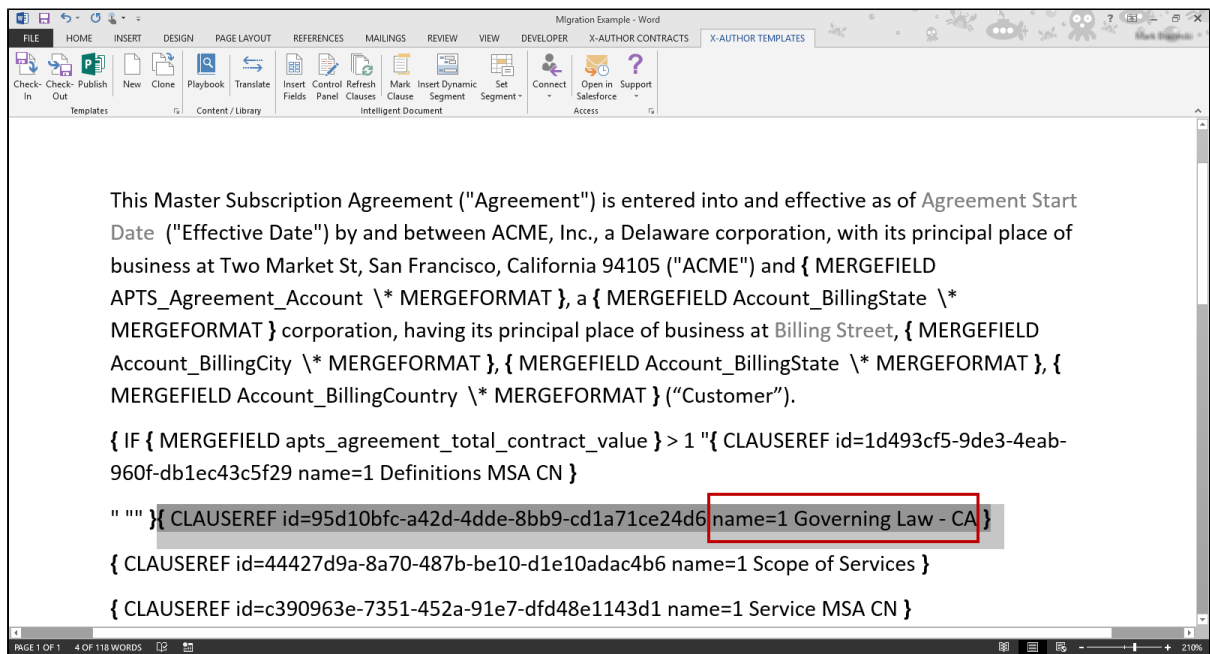
Converting clause reference that contain **conditions** is a bit more complex—the procedure for converting conditional clause references is covered later on this page.

VIDEO: [Convert Clause References and Fields to FX2 Format](#)

To convert clause references to FX2 format

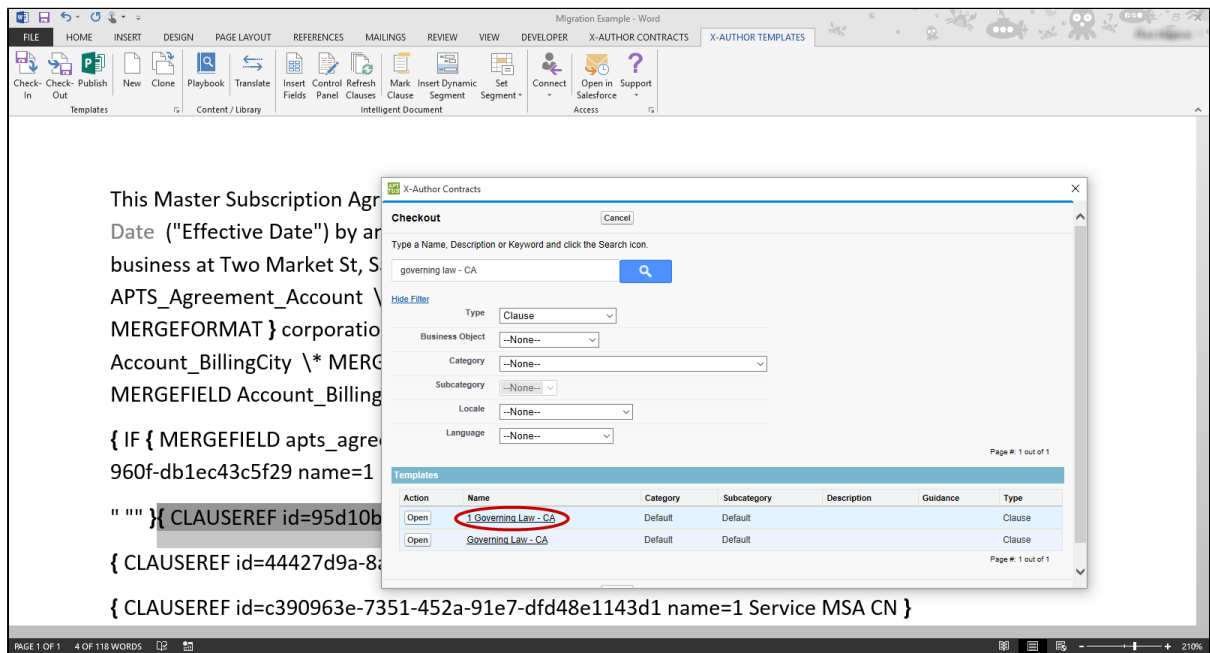
You must have at least one clause reference in the agreement or clause template you are working with AND the agreement or clause template must have already been checked in (you cannot insert clauses from Playbook unless your template has been previously saved).

1. Highlight the clause reference you want to replace. Note the name of the clause in the merge code.

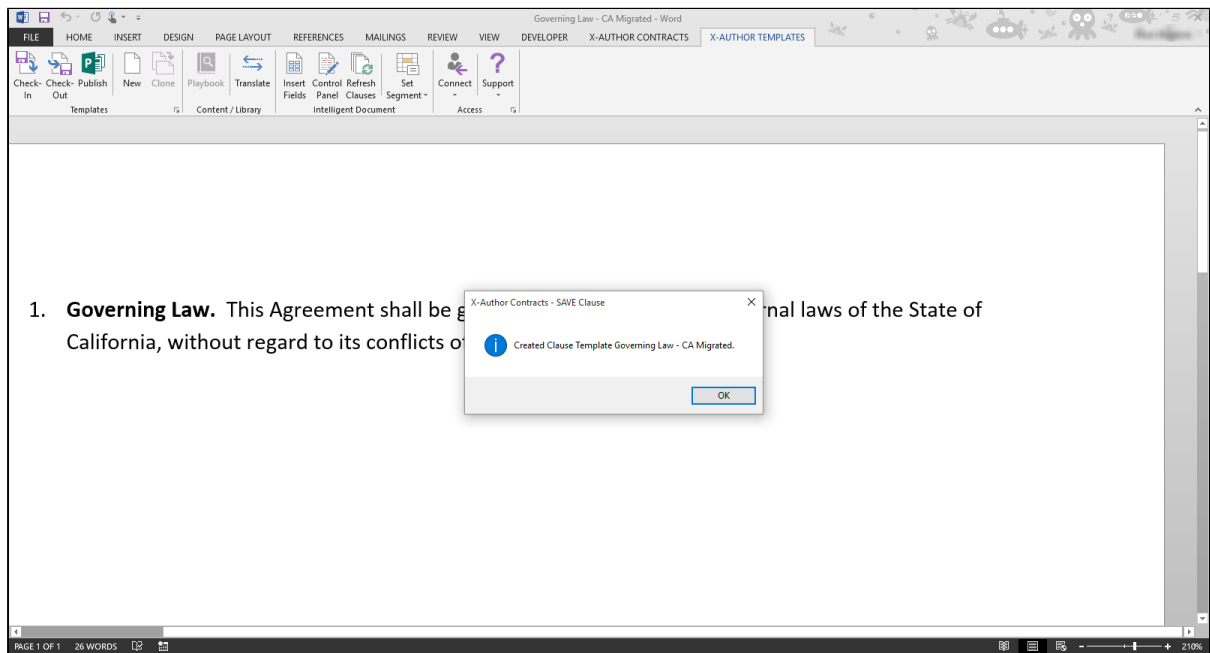


2. Click **Check-out**. You will be checking out the existing clause template for the clause you highlighted.
3. Click **Show Filter** and change the **filter** to Type=Clause. Search for the clause template name in the Checkout dialog.


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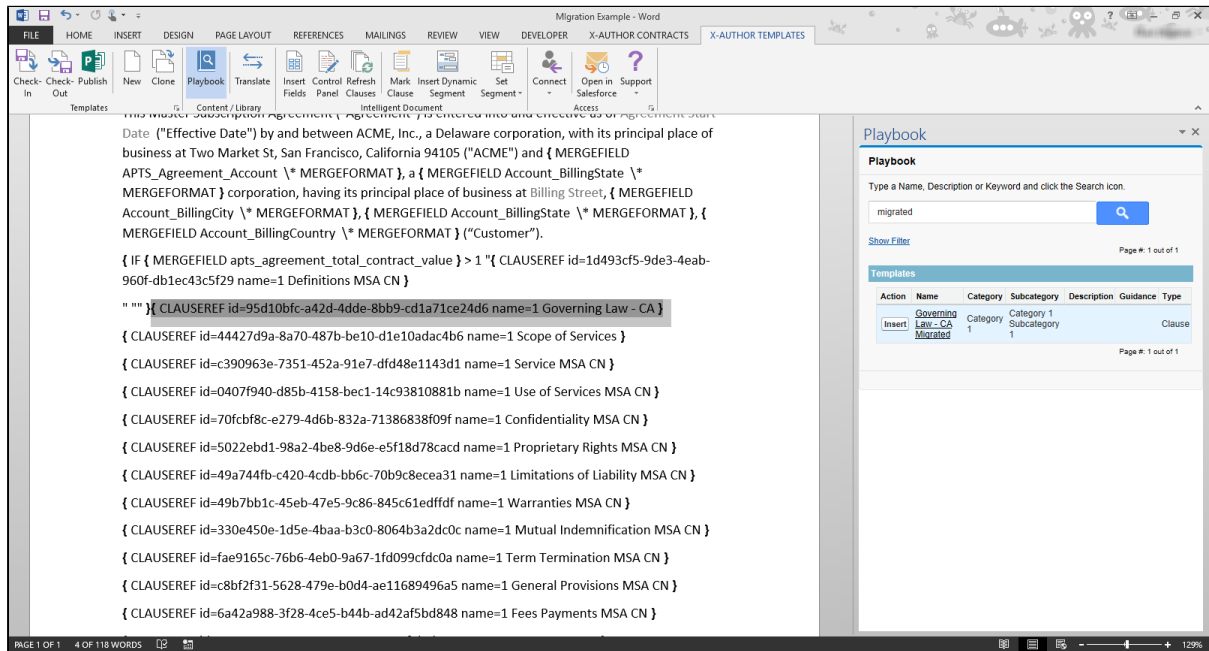
4. Click **Open** to open the clause template.
5. Use **one of two methods** to prepare your clause template for conversion (by copying and pasting Pre-FX2 clause contents into a new document or stripping properties from the current template) See [Prepare Your Pre-FX2 Template for Conversion](#) for instructions.
6. Check if there are any clause references in the checked out template. If there are, repeat Steps 1-5 for the referenced clause.
7. Click **Check-in** to check in the new clause so you can replace your Pre-FX2 clause reference in your template.
8. Choose a new name for your clause in the Check-in Template dialog. (e.g. "1 Governing Law - CA Migrated").
9. Click **Check-in**. The new FX2 format clause can now be used in your template.



10. Return to your agreement template. Make sure the clause reference you want to replace is still highlighted. Click on **Playbook**.
11. Search for the new clause you created and click **Insert** to replace the clause reference with a new segment containing your FX2 clause contents.

 Note that only FX2 clauses which match the business object of your template will be available when you search in Playbook.

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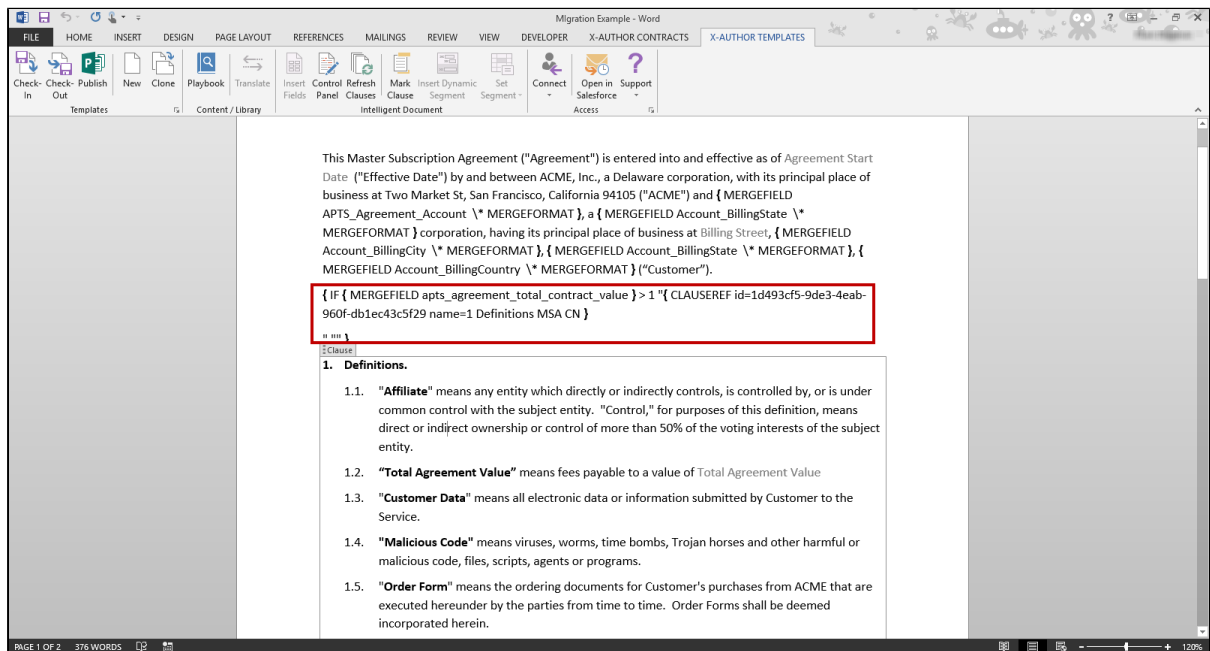
12. Repeat steps 1 – 12 for all clause references in your template.

To convert a conditional clause

The process for converting a conditional clause is nearly identical to converting a clause reference without conditions. To properly convert a conditional clause reference, you must replace the clause with an FX2 version and reapply any conditions the previous clause used.

VIDEO: [Convert Conditional Clauses and Segments](#)

1. Follow 1 – 11 from the previous section to create a new FX2 version of your clause. Do not highlight the existing conditional clause reference.
2. On a new line directly under the conditional clause reference, **Insert** the new clause into your template from Playbook.



3. Make note of the conditions built into the existing clause reference. In a clause reference there are three basic parts that comprise the condition:

- Between the IF and the first set of quotes is the condition (e.g. "Total Contract Value > 1")
- Content between the first set of quotes is generated if the condition resolves to TRUE. (e.g. Clause Reference inserted into document).
- Content between the second set of quotes is generated if the condition resolves to FALSE.

To understand how to interpret complex clause conditionality from Pre-FX2, please refer to [Using Conditional Clauses and Text](#).



FX2 format does not support the FALSE or "Else" calculation for conditional clauses. Separate conditional clauses must be created to cover all conditions.

4. Make your FX2 clause conditional using the instructions provided in [Set Segment Menu in X-Author Templates](#).
5. Delete the merge code for the Pre-FX2 conditional clause reference.
6. Repeat steps 1 – 5 for all conditional clauses in your agreement template.

Convert Merge Fields to FX2 Format

You must convert Pre-FX2 fields into FX2 format fields. The process is slightly different for **smart** fields versus regular fields.



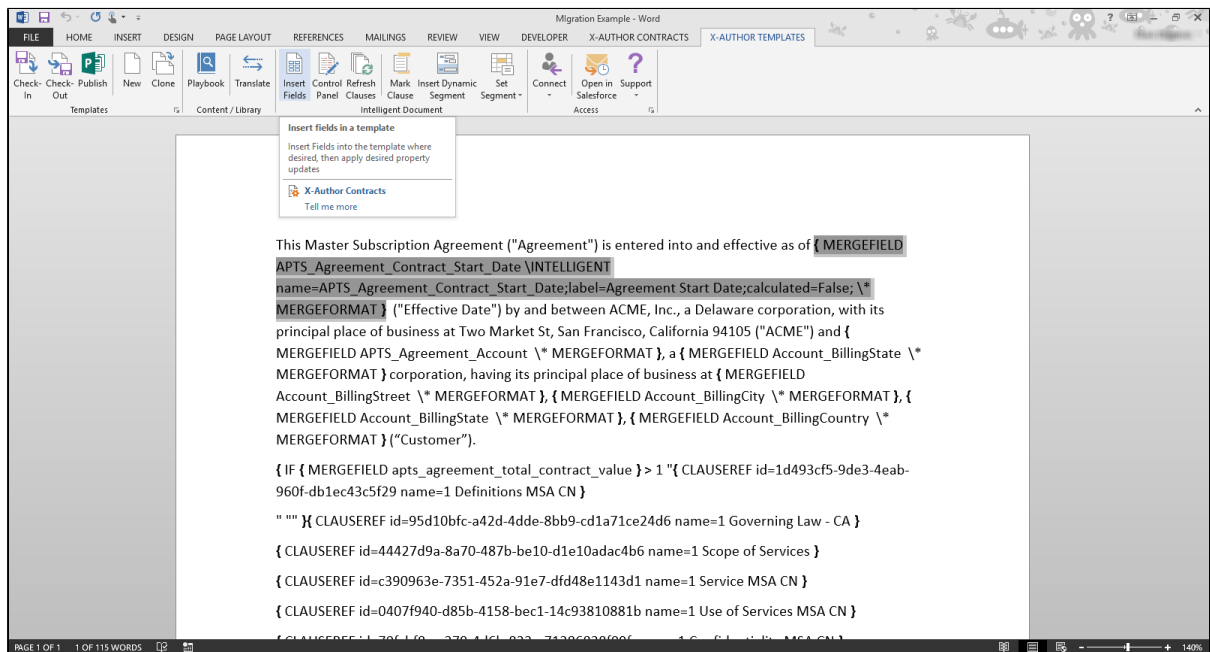
You will know a field is smart if the Merge code contains the "INTELLIGENT" string.

VIDEO: [Convert Clause References and Fields to FX2 Format](#)

To convert fields to FX2 format

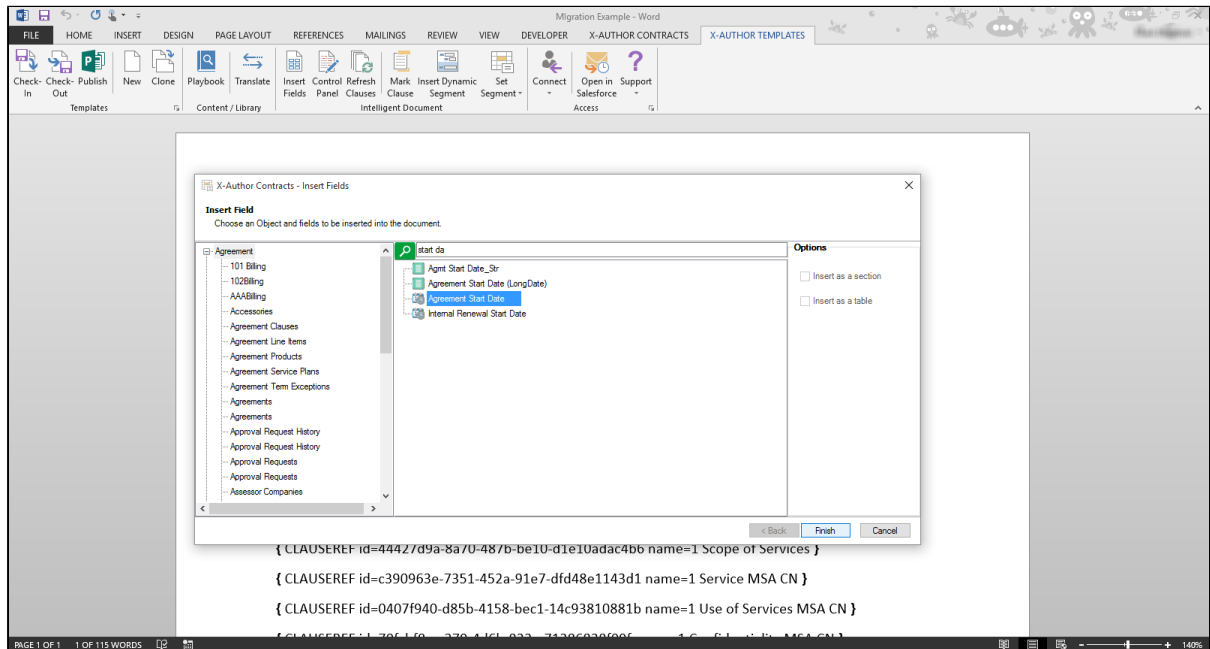
You must have at least one merge field in your template document or clause template.

1. **Check-out** your new FX2 template if it is not checked out already.
2. Highlight the entire merge field (brackets and all text between). Note the field name defined by the "label=" parameter in the code. When you replace the merge field with an FX2 field you will need to choose this field name.

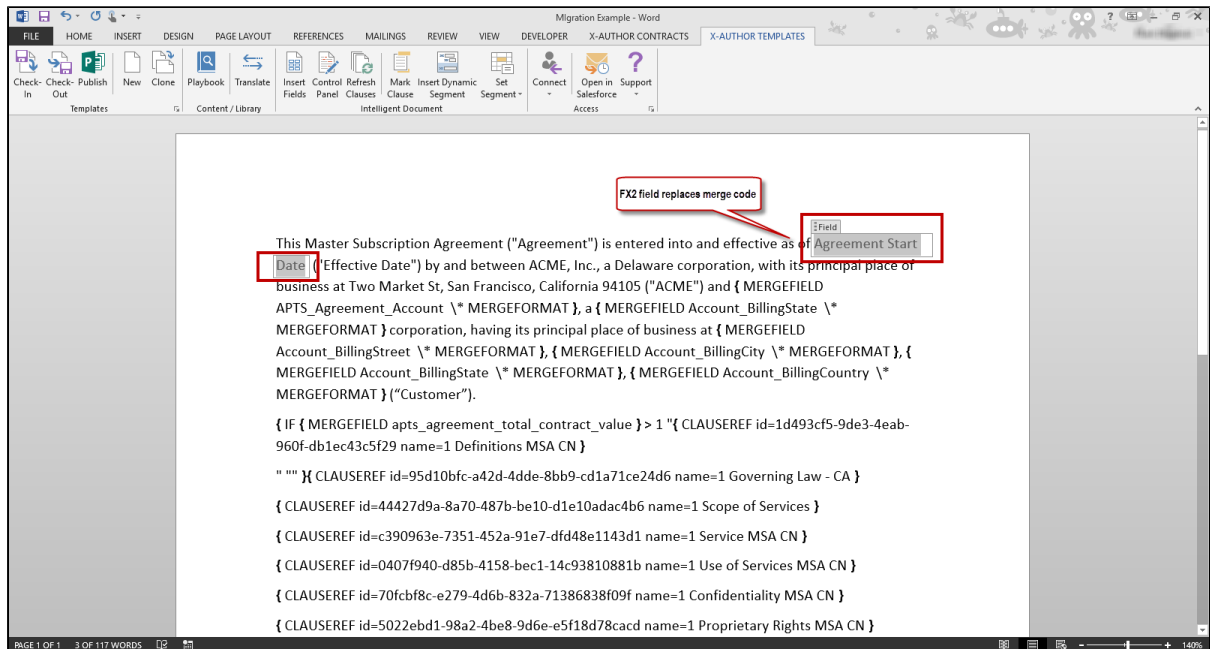


3. Click **Insert Fields** in the Intelligent Document section of the X-Author Templates ribbon.

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4. Search for the same field as defined by the merge code (you made note of this label earlier). Highlight the field in the list.
5. Click **Finish**. The inserted field replaces the merge code you highlighted in the document.




6. Repeat steps 2 – 5 for all non-smart merge fields.

7. To convert an INTELLIGENT merge field into an FX2 smart field, follow the same instructions as above then refer to [Inserting Smart FX2 Fields into an FX2 Template](#) to make the field smart.
8. Repeat steps 7 – 8 for all smart merge fields in the document.

Convert Tables and Sections

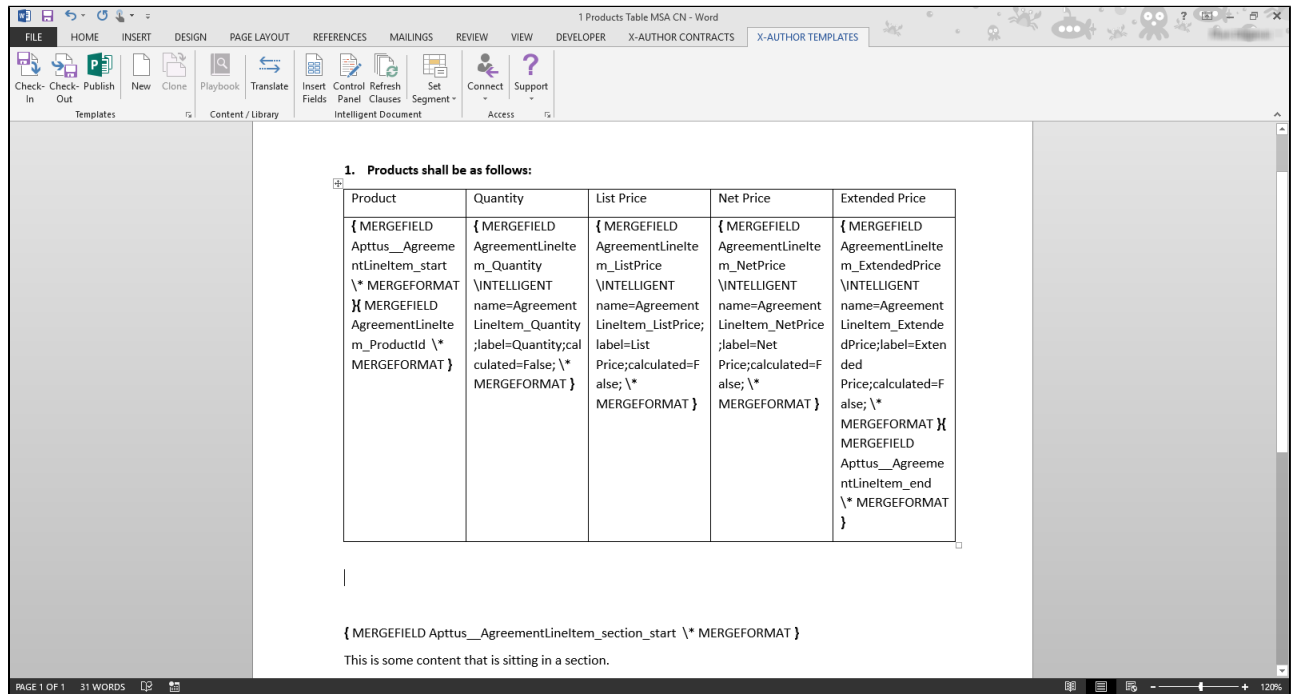
Tables and Sections in your agreement document must also be converted to FX2 format.

 Often Tables and Sections will be stored as clauses, rather than existing directly in templates. In these circumstances, you should Check Out the clause ahead of time and prepare your clause template for conversion as described in [Prepare Your Pre-FX2 Template for Conversion](#). You can then follow the procedures on this page to convert to FX2 format.

VIDEO: [Convert Tables and Sections to FX2 Format](#)

To convert a Table to FX2 Format

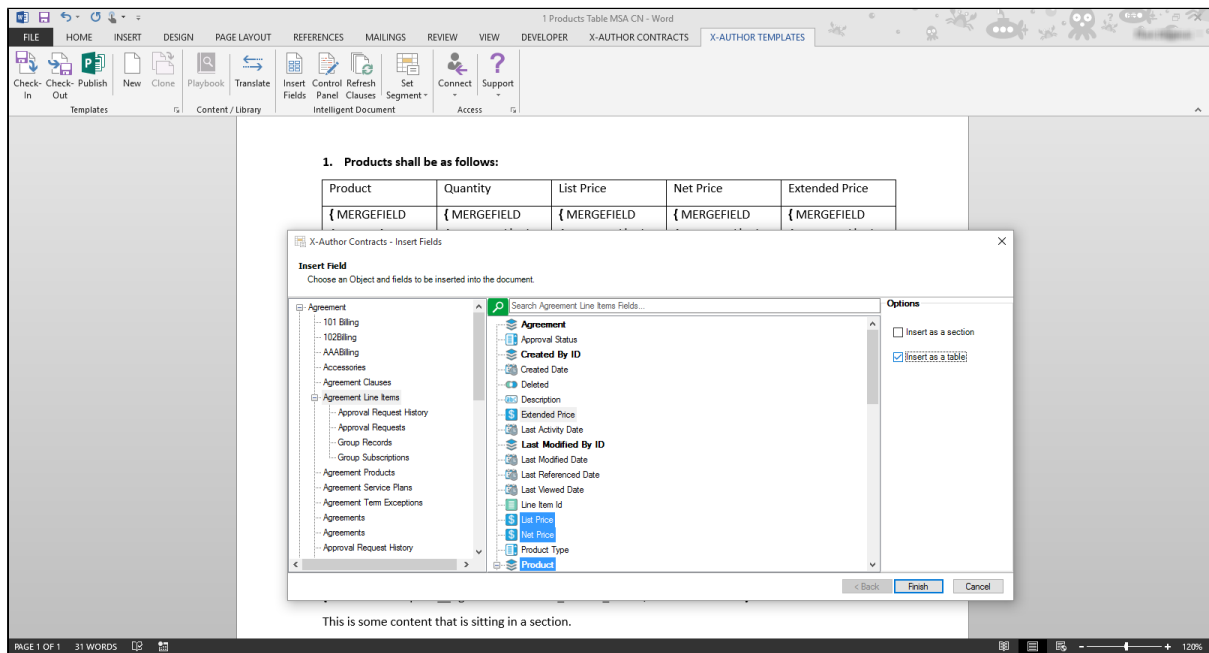
In the example we are using below, a Products Table has been inserted as part of a Pre-FX2 clause. The clause has been checked out and its properties have been stripped. As you can see in the following image, second-level merge fields have been inserted into the table as merge code.



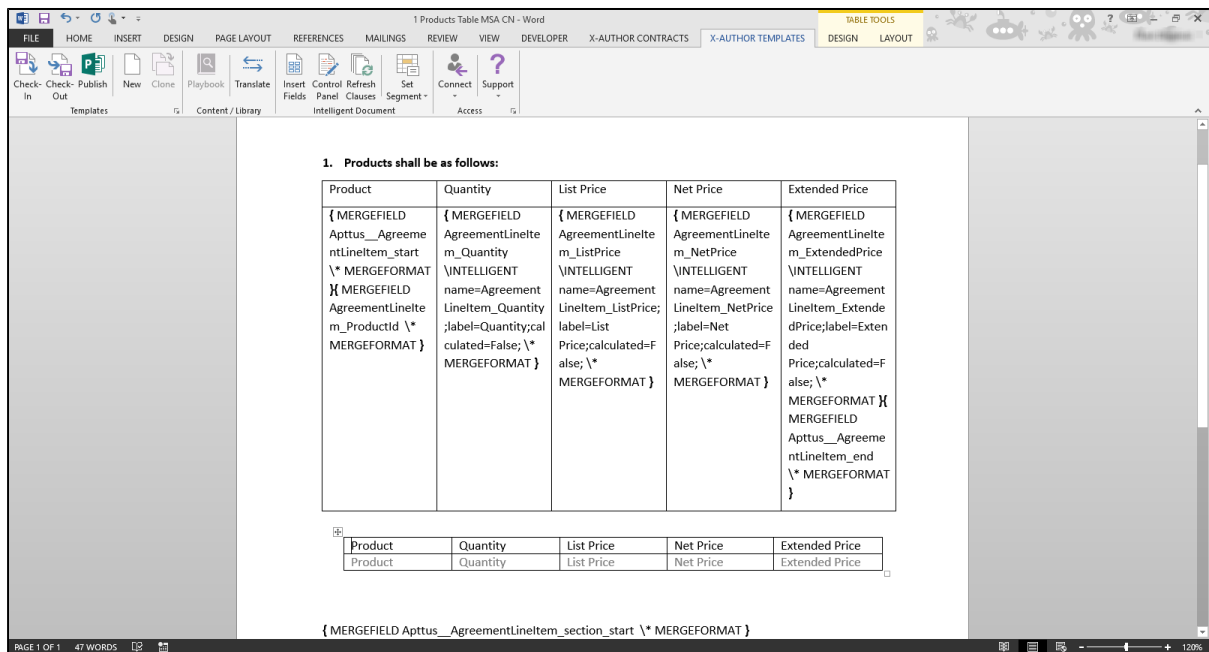
To replace the same table in FX2, we need to insert the same fields as a repeating table. Note the individual fields between the "MERGEFIELD start" and "MERGEFIELD end" tags. These are the fields you will be inserting.

1. To begin, place your cursor below the Pre-FX2 table and click **Insert Fields**.
2. Locate the fields you want to populate the table. Hold **Ctrl** to multi-select all fields, being sure to select them in the order you want them displayed in the table (left-to-right).

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3. Select the checkbox under Options to **Insert as a table**.
4. Click **Finish** to insert the new table into your document or clause template.
5. Mark fields as smart by following the instructions provided in [Inserting Smart FX2 Fields into an FX2 Template](#).



6. **Delete** the Pre-FX2 table.

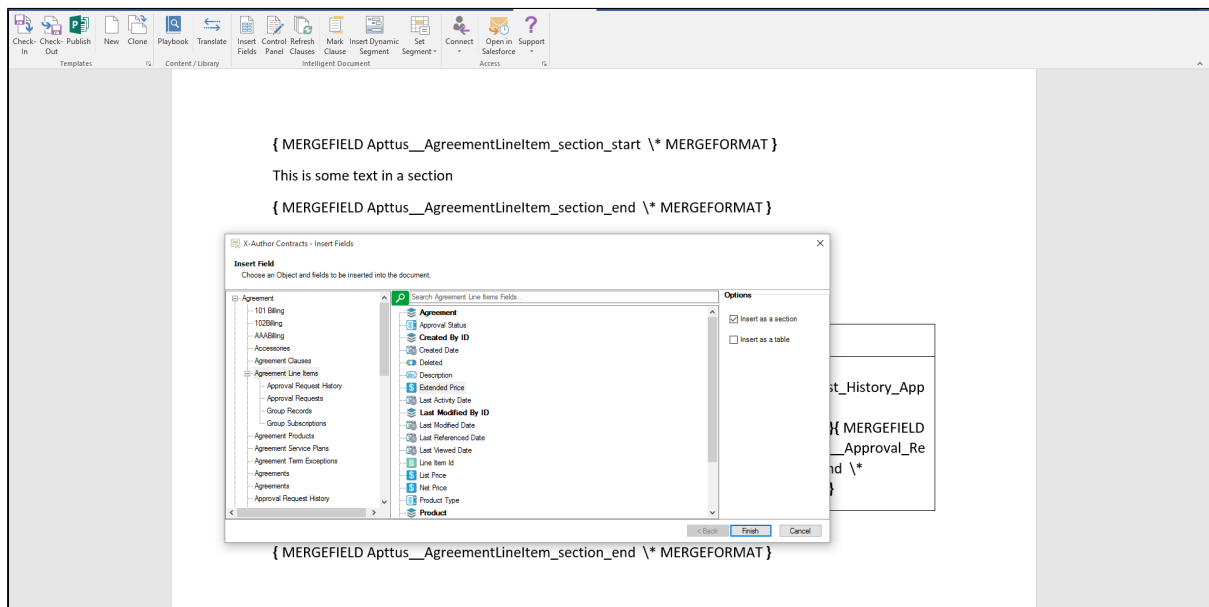
To convert a Section to FX2 Format

Sections, like tables are designed to hold fields with a second-level (child) relationship to the parent object and often third-level (grandchild) object fields stored as tables within the section. Because a section is designed to repeat, multiple instances of the same fields are populated when the document is generated. Like tables and fields, sections exist in a template differently in FX2 format.



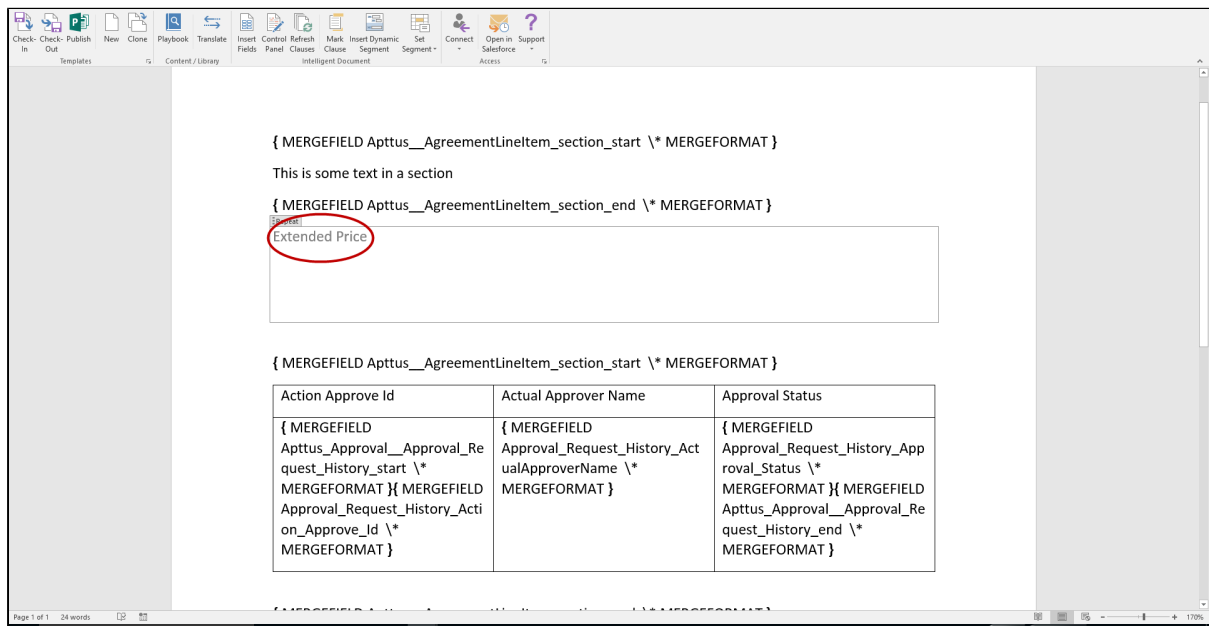
Also remember that if the section is stored separately from the agreement template as a clause, you must first prepare the clause template for conversion using the procedure described in [Prepare Your Pre-FX2 Template for Conversion](#).

1. Place your cursor in the document where you would like to insert the new section and click **Insert Field**.

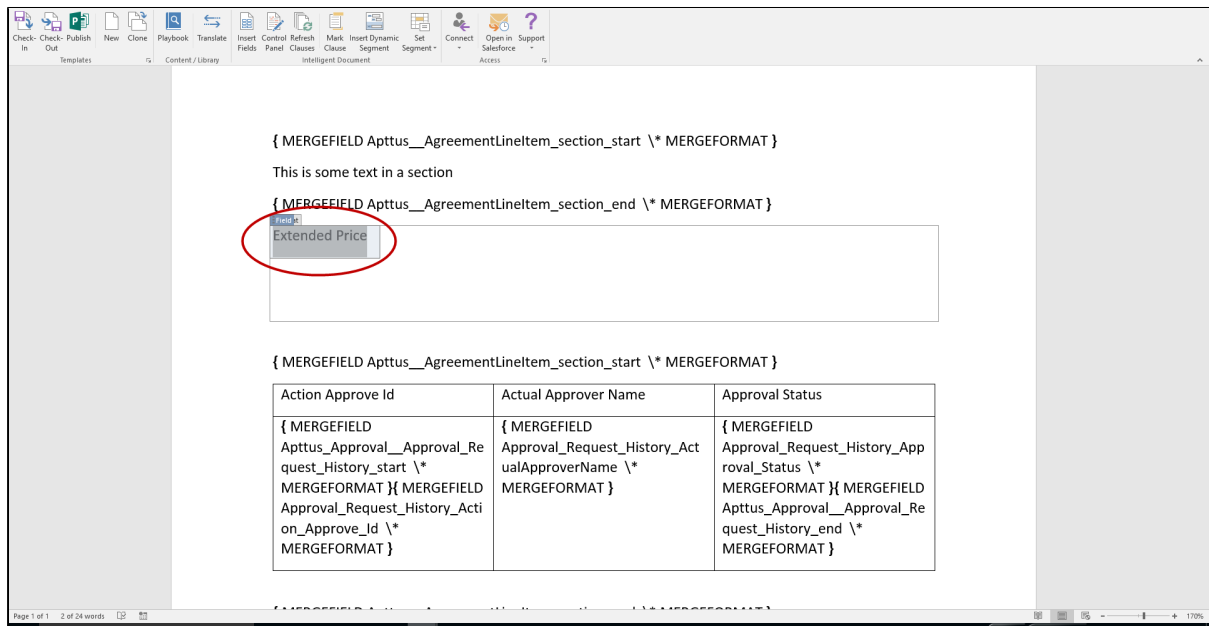


2. Choose any second-level field and select the checkbox under Options to **Insert as a section**.
3. Click **Finish** to insert the new section into your template.

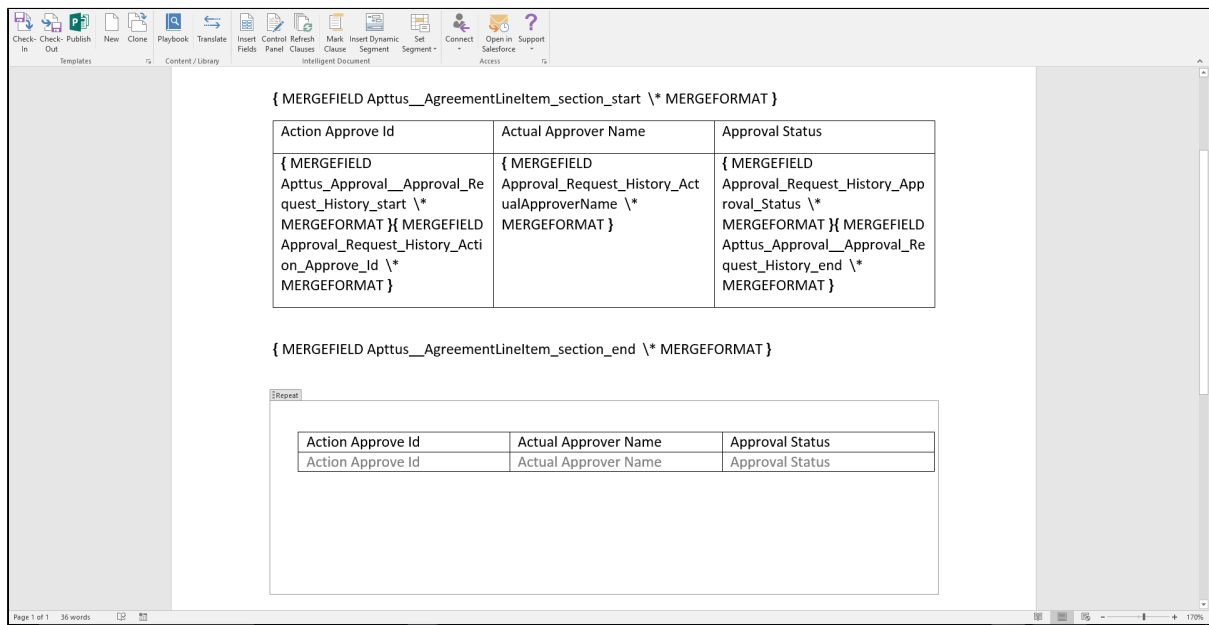
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4. Click on the **Field** header at the top of the section. Use the right arrow on your keyboard to highlight the **Repeat** header and click **Enter** on your keyboard twice to expand the section.



5. Remove the field if necessary by clicking on the field and Delete on your keyboard (make sure you have selected the **Field** and not the **Repeat** section!). You can now copy-and-paste any *static text* content between of your Pre-FX2 section into the new section (Pre-FX2 section is between the "MERGEFIELD...section_start" and "MERGEFIELD...section_end" tags).
6. Use the instructions provided in [Inserting FX2 Fields into an FX2 Template](#) to insert any second and third-level fields into the section, including tables. The following image shows an example of the original Pre-FX2 section containing a table and a replacement FX2 section containing the same table in FX2 format.



7. **Delete** the Pre-FX2 section.
8. If you have successfully converted all fields, clauses, table and sections, you are finished! **Check in** your converted FX2 format template. If you have more to convert, revisit any of the sections in this guide to complete the process. For help with converting sections containing filters/conditions for tables, please refer to [Convert Conditional Tables](#).

Convert Conditional Tables

Conditional tables are an element that were introduced with the FX2 format. Previously, Apttus tables (Generated using insert mergefields in Pre-FX2) could only have one filter (condition) applied to them. As a workaround, you may have created a Word generated table inside of a repeating section so that multiple filters could be applied to the table. In FX2, Apttus generated

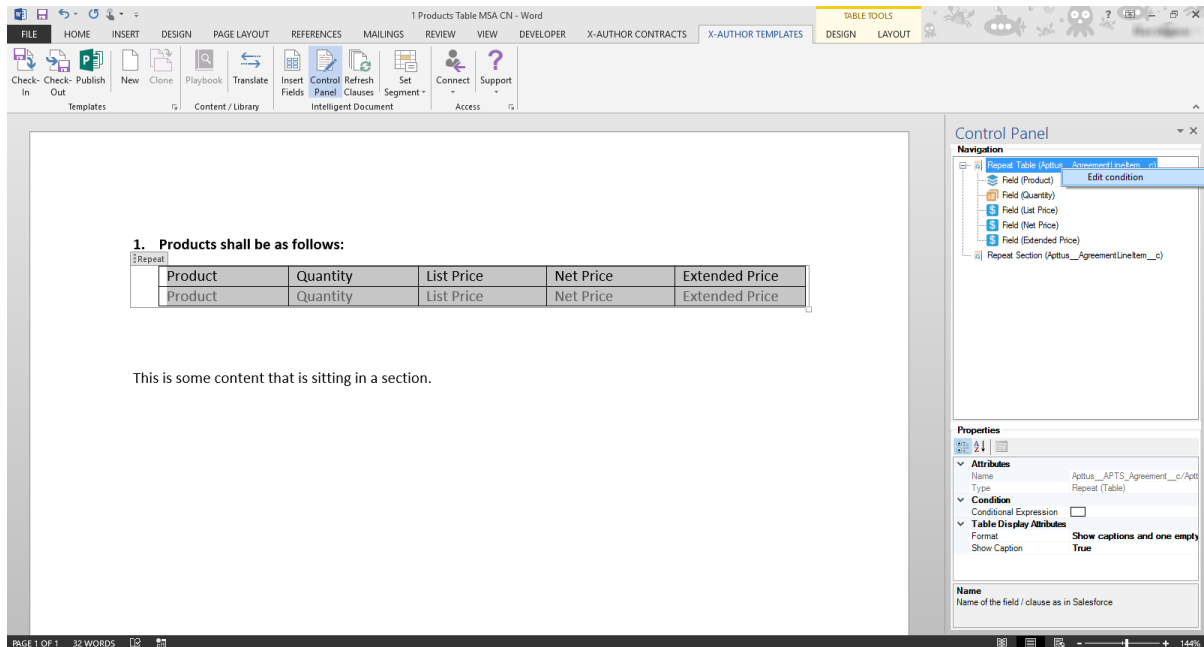
tables can handle multiple filters. Apttus tables are easier to maintain and it is considered a best practice to use them over Word generated tables nested inside of a repeating section, where possible.

To understand how to interpret complex clause conditionality from Pre-FX2, please refer to [Using Conditional Clauses and Text](#).

VIDEO: [Convert Conditional Tables to FX2 Format](#)

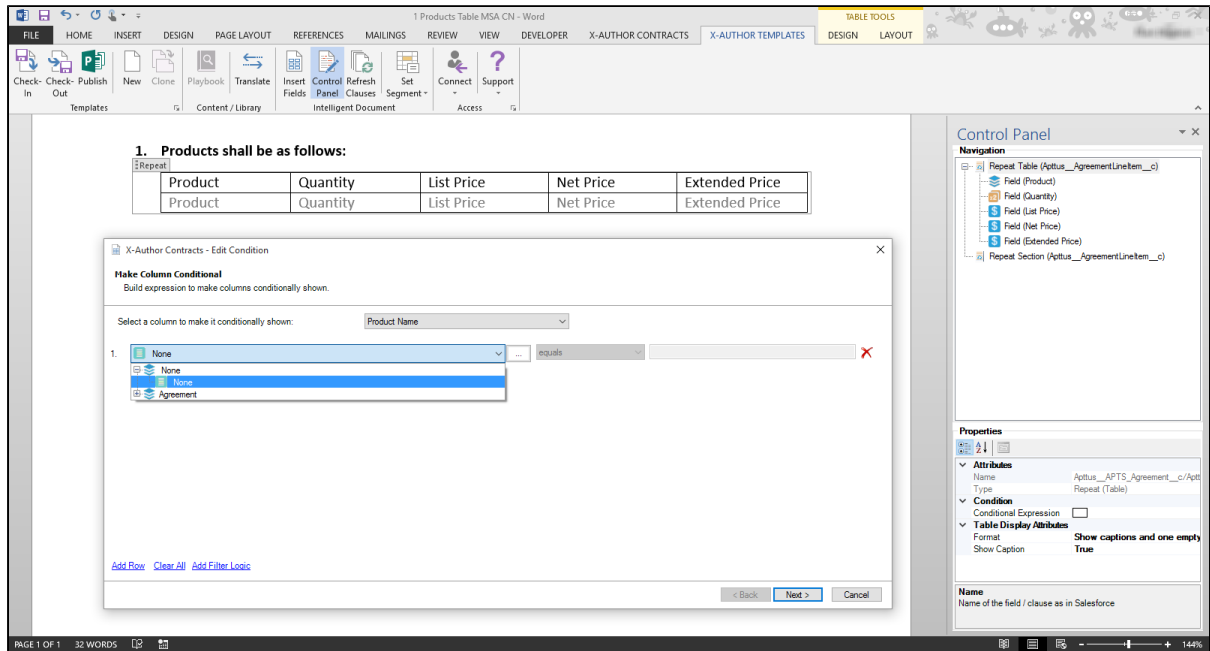
To convert Conditional Tables to FX2 format

1. Follow the instructions to [Convert Tables](#) to FX2 format. Make sure your new tables contain all fields you want to populate under any and all given conditions.
2. Open the **Control Panel** under X-Author Templates.
3. Right-click on the table that you want to make conditional and choose **Edit condition**.

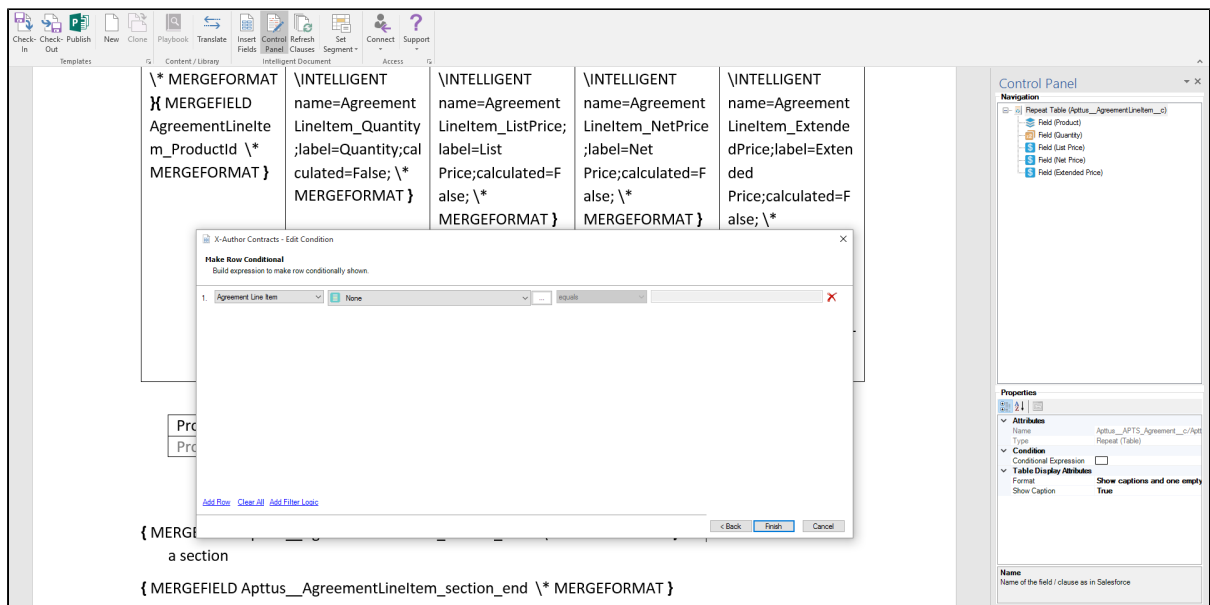


Note: You can also edit the condition of a table by clicking on the box next to **Conditional Expression** in the **Properties** panel and selecting a choice from the drop-down list that appears.

4. In FX2 format, you can define one or more conditions for each column in a table. **Choose** the column from the drop-down list of fields to make conditionally shown and create an expression to show the column when the expression resolves to true.



5. Repeat the process for additional columns by choosing **Add Row** and add filter logic as needed. Click **Next** to proceed.
6. On the next screen, create one or more expressions to make table rows conditional as needed.



7. Click **Finish**.
8. Delete any Pre-FX2 tables from your template.
9. **Check-in** your template to complete the conversion process.

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