



Contract Management on Salesforce Spring 2018 Administrator Guide

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Overview

Apttus Contract Lifecycle Management empowers Sales to drive deals to completion quickly, while giving Legal the control and visibility needed to mitigate risk. Apttus Contract Lifecycle Management integrates with sales, customer, and product information, centralized clause libraries, and legal playbooks inside Salesforce – the world’s most secure cloud business platform – to ensure accurate contracts can be created in minutes. With a secure cloud repository, automated workflows and approvals, and sophisticated alerts and notification, Sales can stay one step ahead of renewals, and Legal can stay one step ahead of audits with the help of effective contract management software.

As your business relationships change over time, Apttus’ contract management software gives Legal visibility into executed contract changes and ensure that they don’t introduce risk. With full Microsoft integration via [Apttus X-Author](#), Legal can author, negotiate, and collaborate inside Microsoft Word, while benefiting from the workflows and controls of Salesforce.

Key Benefits

- Compliance with Insight: Reduce risks in your agreements through complete visibility and insight into all contract details, changes and history.
- Work Your Way: Work on contracts inside Microsoft Word to increase legal productivity.
- Make Contracts Easy for Sales: Accelerate deals by making contracts easy for Sales to create, manage and approve.
- Confidentiality with Confidence: Protect sensitive data with contract management software within the world’s most secure and robust cloud platform.

Key Capabilities

- Salesforce Integration: Create contracts from a Salesforce1 opportunity, account or other records.
- Contract Wizard: Fill out fields to quickly generate an agreement and leverage your Legal Playbook.
- Conditional Assembly: Drive contract exhibits and clauses by selecting key terms.
- Third-Party Paper: Tag third-party paper with Apttus Smart Fields to manage changes.
- Contracts with X-Author: Manage the entire enterprise contract lifecycle management process inside Word.
- Contract eSignature: Obtain electronically signed approval for contracts.
- Contract Compliance: Store final contracts, prior versions, metrics and entire approval histories.
- Contract Analytics: Analyze contract compliance, risks and cycle times.
- Contract Tracking: Search clauses and terms within contract playbook and repository.

About This Guide

Apttus Contract Management (CM or CLM or Comply) Admin Guide is designed to provide administrators, involved with the contracting process in your organization, with information on configuring and setting up

Apttus Contract Management. This guide is designed to cover the most common use cases for the Apttus CM Administration and assumes a level of familiarity with basic Salesforce. See Salesforce User Guide for details on standard Salesforce functionality.

A contract is an agreement with specific terms between two or more entities in which there is a promise to perform something in return for a valuable consideration or benefit. Contract Management (CM) or Contract Lifecycle Management (CLM) or Comply Management is the process of systematically and efficiently managing contract creation, execution, and analysis for the purpose of maximizing financial and operational performance and minimizing revenue leakage, legal risks and operating costs. Apttus Contract Management automates the entire contract lifecycle, provides broader comprehensive contract lifecycle functions associated with amendments, renewals, terminations, and expirations, and can manage any type of contract, process, or function.

Because Apttus runs on the Salesforce platform and all contract data is stored in Salesforce, the following Apttus Contract Management data-handling practices are the same for Apttus as they are for any Salesforce implementation: cross-border data exchange; data transmission methods; data storage and encryption; and logical and physical separation of data.

The common components of a contract are:

- An offer
- An acceptance
- A valuable consideration
- A time or event for performance
- Terms and conditions defining performance
- The prescribed performance

The following is the list of some common terms and clauses associated with the Contract Management.

Contract Management Terms

- Term Start and End Dates
- Payment terms
- SLA terms
- Customer support levels
- Line Item values
 - Product numbers
 - Descriptions
 - Quantities
 - Prices
 - Extended values
- Warranty period
- Agreement value

Contract Management Clauses

Parties	Governing law
Purpose, assumptions	Taxes
Obligations	Modification handling
Specific performances	Notices
Term of contract	Entire agreement
Price, considerations	Severability
Payment terms	Time of the Essence
Service Levels	Survival
Warranties	Ambiguities
Liability	Waiver
Indemnification	Headings
Termination	Necessary acts, assurances
Confidentiality	Execution
Default on commitments	Force Majeure
Dispute handling	Signatures

Key Terminology

It is important to understand how terms are used when working with Apttus products.

Term	Description
Organization/Org	A deployment of Salesforce that has a defined set of licensed users. Your organization includes all of your data and applications and is separate from all other organizations.
Object	A definition of a specific type of information you can store in Salesforce. Some objects are native to Salesforce, such as Contacts or Accounts, while others are specific to Apttus functionality, such as Templates or Agreements.
Record	A collection of fields that store information about a specific item of a specific type (represented by an object), such as a Contact, an Account, or an Opportunity.
Agreement	The set of terms and conditions agreed between two or more parties. An Apttus Agreement consists of structured Salesforce data and stored language dynamically generated into a static document.
Template	Blueprints used to generate a wide variety of document types when merged with data from agreements or quotes.
Document	Generated through merging information stored in a record with an existing template. Output documents can be sent for review, approval or signature.

Installation

- **Pre-installation Settings**
Before you install Apttus Contract Management package, you must enable Salesforce CRM content in your organization.
- **Installing Apttus Contract Management**
- **Post-installation Settings**
After installing Apttus Contract Management, configure admin settings and system properties to meet the business objectives of your implementation.

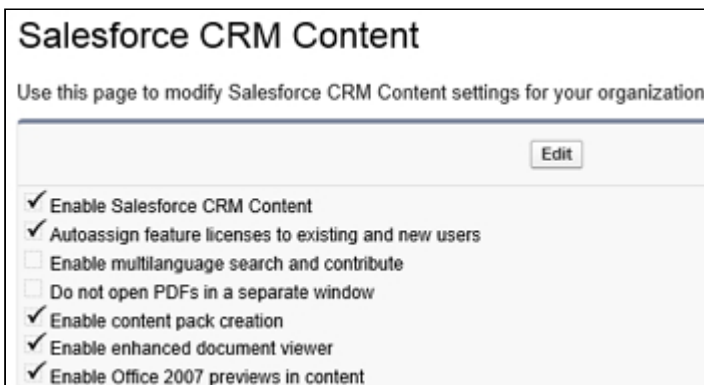
Pre-installation Settings

Before you install Apttus Contract Management package, you must enable Salesforce CRM content in your organization.

To enable Salesforce CRM content

Contract Management uses Chatter Files functionality, which requires Salesforce CRM Content to be enabled before installing the Contract Management package. Ensure this setting is enabled before installing the Contract Management package because it impacts migration.

1. Go to **Setup > App Setup > Customize > Salesforce Files > Settings** and click **Salesforce CRM Content**.



Salesforce CRM Content

Use this page to modify Salesforce CRM Content settings for your organization

Edit

- ☒ Enable Salesforce CRM Content
- ☒ Autoassign feature licenses to existing and new users
- ☐ Enable multilanguage search and contribute
- ☐ Do not open PDFs in a separate window
- ☒ Enable content pack creation
- ☒ Enable enhanced document viewer
- ☒ Enable Office 2007 previews in content

2. Click **Edit**.
 3. Ensure that **Enable Salesforce CRM Content** is selected.
 4. Click **Save**.
- You can now install the Contract Management package.

Installing Contract Management Application

You can install Apttus Contract Management from the Apttus Customer Success Portal.

To install Contract Management

You must have Apttus provided login credentials.

1. Go to <https://apptusportal.force.com/community> and use the credentials to log in to the portal.
2. Click **Install Center** and go to the **Contract Management** tab and click **Get It Now**.
3. Choose *Production* or *Sandbox*, and click **Get It Now** on the AppExchange site.
4. Click **Login to the AppExchange** and use your Salesforce credentials to log in.
5. Select the environment to install the package and follow instructions on the page.
6. Select **I have read and agree to the terms and conditions** and click **Confirm and Install**. You may be prompted to log in using your Salesforce credentials.
7. Enter the password provided by Apttus and click **Submit**. Review the package items being installed. In case of upgrade, the details of currently installed version are also displayed.
8. Click **Continue** and click **Next**.
9. To approve package API access, click **Next**. These settings control the access components in this package have to standard objects through the API.
10. Select a security level and click **Next**.

Note

If you do not know the security settings, leave it as Grant access to admins only. You can change the security settings later.

11. To install all the components in the package, click **Install**.

Contract Management is successfully installed in your selected environment. Complete the post-installation settings.

Post-installation Settings

After installing Apttus Contract Management, configure admin settings and system properties to meet the business objectives of your implementation.

- [Admin Custom Object Entries](#)
- [Customize the Comply System Properties settings](#)

If there are any issues with your installation, [verify all of the objects](#) were installed as expected.

If you have too many agreement records, you can [index the agreement number](#).

Creating or Verifying Administration Entries

Admin entries have different values and you can use them for different purposes. See Appendix A for a list of all the admin settings available in the system. The fields that are displayed in the Recent Admin list are determined by the following view settings:

Recent Admin Entry View Setting	Description
Recently Viewed	The most recent custom Admin entries or records you viewed, with the most recently viewed item listed first. This list is derived from your recent items and includes records owned by you and other users.
Recently Created	The last ten or twenty-five Admin entries or records you created, with the most recently created item listed first. This list only includes records owned by you.
Recently Modified	The last ten or twenty-five Admin entries or records you updated, with the most recently updated item listed first. This list only includes records owned by you.

To create or verify admin entries

1. Click **+** and click **Admin**. All the out-of-the-box Admin entries are displayed on the Admin home page. Based on your organizations requirement, you may want to add or create new Admin entries.
2. To create new Admin entry, click **New**.
3. Type Name, Value and Code for the Admin entry and click **Save**.

Your new Admin entry is saved and added.

Admin
RecordType Selection

« Back to List: Admin

Open Activities [0] | Activity History [0] | Notes & Attachments [0]

Admin Detail

Name	RecordType Selection
Value	True
Code	Sharing of Confidential Information, Amgen, CDA(Amgen) Purchasing, Software as a Service(SaaS), MSA(Software as a Service(SaaS)) Sharing of Confidential Information, 3rd Party, OCDA(3rd Party) Work Order, SOW, SOW(SOW)
Created By	Nick McCoy, 5/28/2013 1:35 PM
Last Modified By	Nick McCoy, 5/28/2013 1:35 PM

Customizing the Comply System Properties Settings

System Properties describes the configuration of the working environment and allows you to customize your system settings. Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache that you can access efficiently, without the cost of repeated queries.

To use the Apttus Comply System Properties custom setting, create a dataset named **System Properties**.








To customize the comply system properties settings

1. Go to **Setup > App Setup > Develop > Custom Settings**.
 2. Click **Manage** for *Comply System Properties* and click **New**.
 3. In **Name**, type *System Properties* as the data set name.
 4. Enter details in one or more of the required fields and click **Save**.
- You have customized the comply system properties settings.

Verifying Contract Management Package Objects

Contract Management is installed with several objects which are used to control the behavior of an application.

1. Go to **Setup > Create > Objects**.

Action	Label	Installed Package	Master Object
Edit Del	101 Billing		Agreement
Edit Del	102Billing		Agreement
Edit Del	AAABilling		Agreement
Edit Del	Accessory		Agreement
Edit	 Ad Group	Salesforce for Google AdWords	
Edit Del	AddBilling Product		Additional Billing
Edit Del	Additional Billing		
Edit	 Admin	Apttus Contract Management	
Edit	 Agreement	Apttus Contract Management	
Edit	 Agreement	EchoSign	
Edit	 Agreement Clause	Apttus Contract Management	Agreement
Edit	 Agreement Document	Apttus Contract Management	Agreement
Edit	 Agreement Document Output Format	Apttus Contract Management	

2. Verify that the Contract Management objects are displayed on the Custom Objects page.

Indexing Agreement Number

If there are too many agreement records in your org environment and you query excessive amount of data (for example, 100000 agreement records), or initiate actions such as Amend/Renew, the `SOQL_EXECUTE_BEGIN` error is displayed. This is because the Agreement Number field is not indexed.

Contact SFDC support to index `Agreement_Number__c` field on the Agreement object, as you cannot index any field out-of-the-box except for those indexed by Salesforce.

By default, Salesforce indexes the following fields:

- **Primary Keys**
For example, *ID*, *Name*, and *Owner*.
- **Foreign Keys**
For example, look-up, or master-detail relationship fields.
- **Audit Dates**
For example, *LastModifiedDate*.
- **Custom Fields**
For example, *External ID*, *Unique*.

Getting Started

In This Section

- [Logging in to Contract Management](#)
- [Managing User Profile](#)
- [Creating a User Profile](#)
- [Adding a Single User](#)
- [Assigning Apttus License to a User](#)
- [Assigning Users to Queues](#)
- [Providing Read Access](#)
- [Configuring Custom Links on the Home Page](#)
- [Configuring a Custom Link for Opportunity](#)

Logging in to Contract Management

Note

It is recommended not to use the **Back** button of your browser during the entire Contract Management Lifecycle.

To log in to Contract Management

Apttus Contract Management package must have been installed.

You must have Apttus provided login credentials.

1. Go to <http://www.salesforce.com/>. If your organization is using a sandbox or test environment to access Apttus Contract Management, for example, as part of your User Acceptance Testing (UAT) process, go to <http://test.salesforce.com/>.
2. Click **Login**.
3. Type your **User Name** and **Password**, and click **Login in to Salesforce**.

You are successfully logged in to Apttus Contract Management.


Navigate to the **Salesforce.com App Menu**, select **Apttus Contract Management** to access the Contract Management tabs.

Navigate to the **Opportunities** or **Accounts** tab.

Managing User Profile

A profile contains user permissions and access settings. There are five basic profiles used with Apttus Contract Management:

Profile Name	Available Permissions Description
Apttus Administrator	Can configure and customize the application. Has access to all Contract Management functionality that does not require an additional license.
Contract Manager/Template Admin	Can create, edit, execute, and approve contracts. This profile can also delete contracts as long as they are not executed. Can manage clause and language template library. Has access to Apttus X-Author functionality
Read Only	Can view the organization's setup, run and export reports, and view, but not edit other records.
Requester/Approver	Can initiate new contract requests and use the Contract Wizard to assemble standard contracts, but does not have access to X-Author. Can perform some limited searches and reporting.
Contract Creator/Negotiator	Can create, edit execute and approve contracts. This profile cannot delete agreements and does not have any permissions to manage clauses or templates. Has access to Apttus X-Author in a negotiator role.

 For details on profile settings and related securities, see Appendix: Profile Settings and Security.

- **Contract Management User Roles & Tasks**

The following table presents the broad view of some of the key CLM roles and their descriptions:

Role	Description
Legal function	<ul style="list-style-type: none"> • Design, creation, maintenance of contract template contents • Review, negotiation, and contract legal content assurance • Legal admin, Internal counsel, External counsel

Role	Description
Finance function	<ul style="list-style-type: none"> • Evaluation and validation of contract's financial impact and risks • Approval of the commitment of resources per the contract • Financial analyst, Controller, CFO, Treasurer
SMEs	<ul style="list-style-type: none"> • Evaluation and validation of specific areas of contract commitments • Approval of their functional area of the contract's deliverables • VP / Director for Products, Procurement, Sales, Partner Management
Contract Facilitator	<ul style="list-style-type: none"> • Definition of non-standard, complex, or global contract components • Assignment of contributors, scoring, approval, and strategic aspects • VP Strategic Accounts, CEO, CFO, COO
Admin	<ul style="list-style-type: none"> • General definition of process, contributors, contract elements • Configuration of applications and tools required by the process • Application admin, system analyst, business analyst

- **Creating a User Profile**

Profile is essentially a definition of a set of permissions granted to a group of users.

- **Adding a Single User**

The maximum number of users you can create is determined by your Salesforce Edition.

- **Adding Multiple Users**

The maximum number of users you can create is determined by your Salesforce Edition. Depending on the number of available licenses, you can create up to 10 users.

- **Assigning Apttus License to a User**

In addition to Salesforce licensing, a user profile must be assigned to the Apttus Contract Management license.

- **Assigning Users to Queues**

Queues allow groups of users to manage a shared workload more effectively. A queue is a location

where records can be routed to await processing by a group member. If the sharing model for all objects in the Queue is Public Read/Write/Transfer, you do not need to assign users to the queue, as all users already have access to the records for those objects.

- **Providing Read Access**

This allows preview and generate agreement actions to read the document password from the Admin object without allowing them to view it. You can set the permissions and page layouts for the selected profile. The permissions defined here control access at the object level. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators.

Creating a User Profile

Profile is essentially a definition of a set of permissions granted to a group of users.

To create a user profile

You must have administrative privileges.

1. Click **Setup > Manage Users > Profiles**.
2. Click **New**.
3. From **Existing Profile**, select a mandatory profile. For example: *System Administrator*.
4. Type a mandatory **Profile Name**.
5. Click **Save**. If this profile already exists, examine the settings or permissions.
6. Click **Edit**.
7. Use the available settings to ensure the profile settings correspond to the Apttus custom profile.
8. If needed, repeat the steps for other Apttus profiles.

Adding a Single User

The maximum number of users you can create is determined by your Salesforce Edition.

To add a single user, refer to the standard Salesforce Help.

Adding Multiple Users

The maximum number of users you can create is determined by your Salesforce Edition. Depending on the number of available licenses, you can create up to 10 users. To add a single user, refer to the standard Salesforce Help.

Assigning Apttus License to a User

In addition to Salesforce licensing, a user profile must be assigned to the Apttus Contract Management license.

To assign an Apttus license to a user

Before you assign Apttus Contract Management license to a user, you must first add a user.


1. Click **Setup > Deploy > Installed Packages**.
2. Locate the *Apttus Contract Management* installed package and click **Manage Licenses**.
3. To assign the license, click **Add Users**.
4. Select the user that you wish to assign a license and click **Add**.

The user has been assigned Apttus Contract Management license.

Assigning Users to Queues

Queues allow groups of users to manage a shared workload more effectively. A queue is a location where records can be routed to await processing by a group member. If the sharing model for all objects in the Queue is Public Read/Write/Transfer, you do not need to assign users to the queue, as all users already have access to the records for those objects.

To assign a user to a queue

 Before you assign a user to a queue, you must add the user. To assign a user to a queue, refer to the standard Salesforce Help.

When you create a queue, Salesforce automatically creates a corresponding list view. You can now access the queue list view from the Cases, Leads, Service Contracts or custom object tabs. Only queue members and users above them in the role hierarchy have access to the queue list view depending on your sharing settings.

Set up lead or case assignment rules to automatically reassign ownership of leads and cases to the queue.

Providing Read Access

This allows preview and generate agreement actions to read the document password from the Admin object without allowing them to view it. You can set the permissions and page layouts for the selected profile. The permissions defined here control access at the object level. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators.

To allow documents to be protected correctly when the *Preview Agreement* or *Generate Agreement* actions are taken, the field level security needs to be setup so the **Value** field is *Read Only* for any profile you want to create protected documents for. You must follow the below process for each profile you want to hide the document protection password from.

To provide users unviewable read access

1. Go to **Setup > Manage Users > Profiles**, and select the Requester or other appropriate profile.
2. Click **Edit** next to the left of the profile you want to edit. Scroll down to the Custom Object Permissions related list, and for **Admin** custom object, select **Read**.

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Account Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACHS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add File Attachments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add Recipients	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ad Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Adjustment Line Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agreements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

3. Click **Save** and then click on the Requestor profile link. Scroll down to the Field-Level Security Settings and find the Admin object in the Custom Field-Level Security area.
4. Click **View**. Ensure that all the fields are visible and the read-only attributes for the Value field are set to the following fields:
 - Created By

- Last Modified By
 - Value
5. Go to **Setup > Security Controls > Sharing Settings**.
 6. Click **Edit** and locate the Admin entry to Public Read-Only for all the users in the organization.
 - This ensures the Contract Wizard can read the password from Salesforce and protect generated documents with it.
 - Other users can read the Admin password values but cannot set or see them when the Admin tab is hidden for that profile. Furthermore, layouts can be modified to hide the Value field, if required.
 7. To hide the Admin tab from all users except for Administrators, click the Requester profile and find the Tab Settings.
 8. From the Admin drop down list, select the *Tab Hidden* option.

Configuring Custom Links on the Home Page

Setting up Home page links allows quick and easy access to common functions of the applications from the Home page.

The following steps are involved to set up a home page.

1. Create New Agreement Component
2. Create New Home Page Layout (*alternatively, you may further customize your own home page layout, if any*)
3. Assign New Layout to Appropriate User Profile

User Permissions Needed

To create or change home page layouts:

Customize Application

Creating a New Agreement Component

1. Go to **Setup > Customize > Home > Home Page Components**.
2. To create a custom component, click **New**. You can use custom components to tailor the Home page to different user profiles. Also, you can add your own components to your Home page.
3. Provide your own component name, for example *My Custom Links*, and select the **Links** custom type. Click **Next**.
4. From the left column, select **NewAgreementRequest**, **CreateOfflineAgreement**, **StoredExecutedAgreement** custom links, and add it to the Custom Links to show column. To select multiple elements individually, use CTRL+click. To select multiple elements as a group, use SHIFT+click.
5. Click **Save**.

A new Agreement component has been successfully created. Create a new Home page layout.

Creating a New Home Page Layout

1. Go to **Setup > Customize > Home > Home Page Layouts**.
2. To create new home page layout, click **New**.
3. From the Existing Home Page Layout list, select the layout on which you want to base the new layout. For example, **Home Page Default**.
4. Provide your own layout name in the Custom Home Page text area. For example, *My Custom Page*.
5. Click **Save**.
6. From the Narrow Components to Show list, select **My Custom Links**, and click **Next**. A custom component is added to the Home Page Layout. Use the arrow keys to move a new component up or down in the list to display in the desired order. Typically this component is at the top, under Search.
7. Click **Save**.
8. Optionally, to display the home page layout, click **Preview**. Click **Save & Assign** to save the page layout and assign it to a profile. Initially, all users, including Customer Portal users, are assigned to the Home Page Default layout.

A new Home Page layout has been created.

After you have created a new Home page layout, assign the new layout to an appropriate user profile.

Assigning a New Layout to an Appropriate User Profile

1. Go to **Setup > Customize > Home > Home Page Layouts**.
2. Click **Page Layout Assignment**.
3. Click **Edit Assignment**.
4. Select the newly created home page layout for appropriate user profile.
5. Click **Save**.

A new layout has been assigned to the user and new customized links have been created to enable quick and easy access of the application from the Home page.

Configuring a Custom Link for Opportunity

Setting up the custom link allows you to quickly create an agreement from an existing opportunity. This is beneficial to Legal Users or Contract Managers.

To set up Opportunity links

User Permissions Needed

To add custom links to the Opportunity page layout:

Customize Application

1. Go to **Setup > Customize > Opportunities > Page Layouts**.
2. Click **Edit** beside the Page Layout Name to which you want to add the Create Agreement From Opportunity custom link. The Page Layout Edit screen is displayed.
3. On the top-left, click **Custom Links**.
4. Drag the **Create Agreement** custom link to the Custom Links section in the Opportunity Details related list.
5. To review the page layout, click **Preview As**. Select a profile to see how the pages will look for users with different profiles. Ensure that the **Create Agreement** custom link is displayed under the Custom Links section. Most related lists' columns preview without data.
6. To save your changes, click **Save**. If you navigate away from your page layout without saving the changes, you will lose your changes. To create a copy of your page layout, click **Save** and select **Save As**. When you copy a page layout, any actions assigned to it are also copied to the new layout. Here are a few points to keep your page layouts well-organized and easy to use.
 - Do not include unnecessary fields.
 - Keep the minimum number of required fields.
 - Check your layouts in Read and Edit modes.
 - To optimize related lists, adjust their overall order, the sorting of the records, and display of relevant columns and buttons.

A customized opportunity link is created and you have customized your organization's page layouts. If required, add the Create Offline Agreement custom link.

Agreement Object

Before you use the Apttus Contract Management application to manage contracts, you must define the agreement record types. An agreement record type is a way of categorizing agreements and allows us to provide different page layouts to users based on their profile. The page layout provides a canvas for adding fields and related lists.

The following are some of the agreement record types:

- Non-Disclosure Agreement (NDA)
- Master Subscription Agreement (MSA)
- Software License Agreement (SLA)
- Statement of Work (SOW)

To enable a new agreement type,

1. [Define a new Page Layout](#)
2. [Create a new Record Type and associate it with the page layout](#)
3. [Enable the Record Type for Template Authoring](#)

Creating a Page Layout

A page layout allows you to control the layout and organization of detail and edit pages. It also enables you to control which fields, related lists, and custom links users see, on detail and edit pages only. Page layouts control the layout and organization of buttons, fields, s-controls, Visualforce, custom links, and related lists.

To create a standard page layout, refer to the standard [Salesforce Help](#).

Creating a Record Type

Record types allow you to offer different business processes, picklist values, and page layouts to different users. After saving the new record type, you will be able to customize the picklist values.

To create a standard record type, refer to the standard [Salesforce Help](#).

Creating an Agreement Record Type

Agreement records type setup allows support for creating and maintaining multiple types of agreements.

To Create Agreement Record Types

User Permissions Needed

To create record types for custom objects:	"Customize Application"
--	-------------------------

1. Go to **Setup > Create > Objects**.
2. Click **Agreement** under the Label column to edit the custom Agreement object. The custom object definition details are displayed.
3. Scroll down to the Record Types objects. To create a new record type, click **New**.
4. Select **Master** from the Existing Record Type drop-down list to copy all available picklist values, or select an existing record type to clone its picklist values.
5. Enter a unique Record Type Label.
6. Enter a Record Type Name. The Record Type Name refers to the component when using the Web services API and prevents naming conflicts on package installation in managed packages.
7. Enter a description.
8. Select **Active** to activate the record type.
9. Select **Enable for Profile** next to a profile to make the record type available to users with that profile. Select the check box in the header row to enable it for all profiles. If each profile is associated with a single record type, you will not be prompted to select a record type when creating new records.
10. For enabled profiles, select **Make Default** to make it the default record type for users of that profile. Select the check box in the header row to make it the default for all profiles.
11. Click **Next**.
12. Choose a page layout option to determine what page layout displays for records with this record type:
 - To apply a single page layout for all profiles, select **Apply one layout to all profiles** and choose the page layout from the drop-down list.
 - To apply different page layouts based on user profiles, select **Apply a different layout for each profile** and choose a page layout for each profile.
13. Click **Save** to edit the values of the standard and custom picklists available for the record type. Optionally, click **Save & New** to create another record type.

A new record type is created and a layout is assigned to profiles.

Enabling Record Type for Template Authoring

After you create a new record type, you must add it to the list of available X-Author agreement types.

To Assign Agreement Record Types to Template Agreement Types

1. Click **Setup > Create > Objects > Template**

2. Under the Custom Fields & Relationships section, click **Agreement Types**.
3. Scroll-down to the Picklist Values section and click **New**.
4. In the Agreement Types box, add one or more Agreement type picklist values and click **Save**.

If you have installed X-Author, you can view the record type in the list of available options.

Populating Contract and Template Picklists

Templates are contract language templates available in the system. An Apttus template is a common set of sections, clauses, text, and placeholders for terms and conditions. Templates can be merged with structured data to generate agreements or proposals. Templates are stored within an Apttus template repository, and are used to create quotes and contracts. You can create distributable documents with Apttus templates.

Templates can include standard and non-standard language. Contract and template picklists are populated to define subtypes for contracts, categories, subcategories, and supported contract types for templates.

The following topics will provide you information about creating contract picklists and template picklists.

Populating Picklist Values for Contract Object

1. Go to **Setup > Create > Objects**.
2. Under the Label column, click **Agreement** to edit the custom Agreement object. The custom object definition is displayed.
3. Scroll down to the Custom Fields & Relationships related list and click the **Record Types** Field Label. The Subtype custom field definition is displayed.
4. Scroll to the Picklist values section and click **New**.
5. Add one or more picklist values. For example, for an NDA agreement, you can add *One Way Inbound NDA*, *One Way Outbound NDA*, *Mutual NDA*, *Subcontractor* picklist values. These picklist values can be applied to any type of agreement.
6. Select the Record Type Names for the picklist values and click **Save**.
7. To sort the picklist items in the desired order, click **Reorder**. You can sort the list alphabetically and select one of the values as the default value by choosing one of the values from the Default Value list. To keep the changes, click **Save**.

Picklist values for the contract object is populated.

Populating Picklist Values for Template Contract Types

1. Go to **Setup > Create > Objects**.

2. Under the Label column, click **Template** to edit the custom Template object. The custom object definition is displayed.
3. Scroll down to the Custom Fields & Relationships related list and click the **Agreement Types** Field Label.
4. Click **New** to define a picklist value for each and every record type you have defined in the system. If you add a new contract record type, you must also add the type to this set of picklist values for the system to work properly. In other words, the values in this picklist and the record types defined for the system must be kept in sync. For example, if you have defined an NDA agreement record type, add it to the picklist values.
5. Add one or more picklist values and click **Save**. You can reorder the picklist values and select one as the default value. The default value selected must be the same as the default record type. Also, you can sort and define the default.

Picklist values for the template contract types is populated.

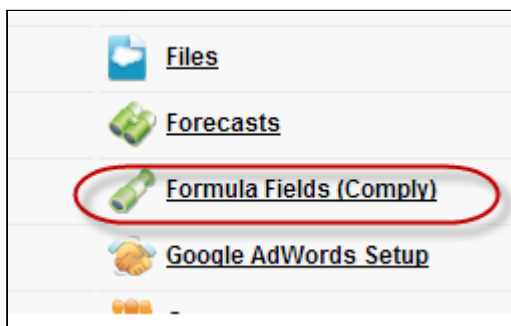
Populating Picklist Values for Template Subcategory

1. Go to **Setup > Create > Objects**.
2. Under the Label column, click **Template** to edit the custom Template object. The custom object definition is displayed.
3. Scroll down to the Custom Fields & Relationships related list.
4. Click the **Subcategory** Field Label.
5. Click **New** to create subcategory picklist values. Create subcategory picklist values similar to the way you created picklist values for the category.
6. Assign subcategory values to the appropriate categories.
7. Scroll to the Field Dependencies related list and click the **Edit** action to the left of the Subcategory dependent field. Follow the instructions to include or exclude subcategory values for a particular category.
8. Click **Save**.


Picklist values for the template subcategory is populated.

Creating Formula Fields for an Agreement Rule Criteria

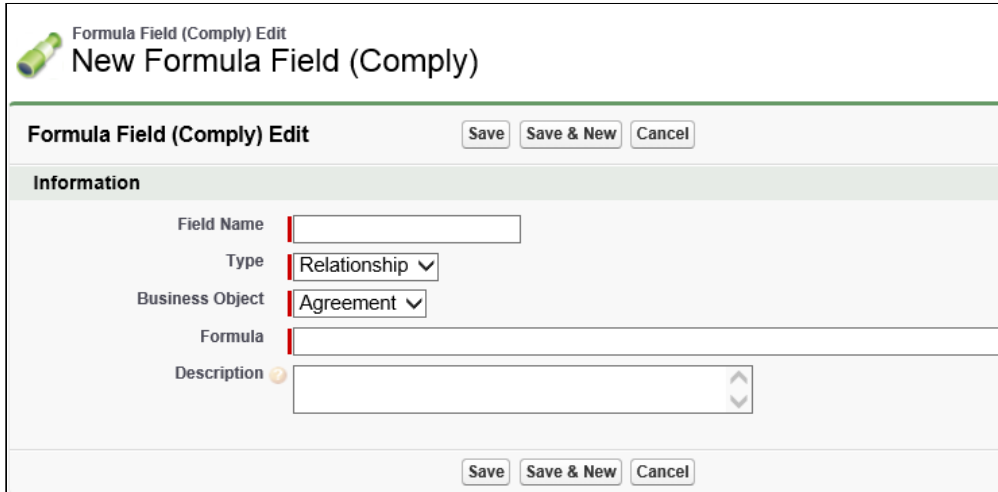
You may use the Formula Fields tab to create relationship fields which may be used in the Agreement Rule conditions.



To create a formula field

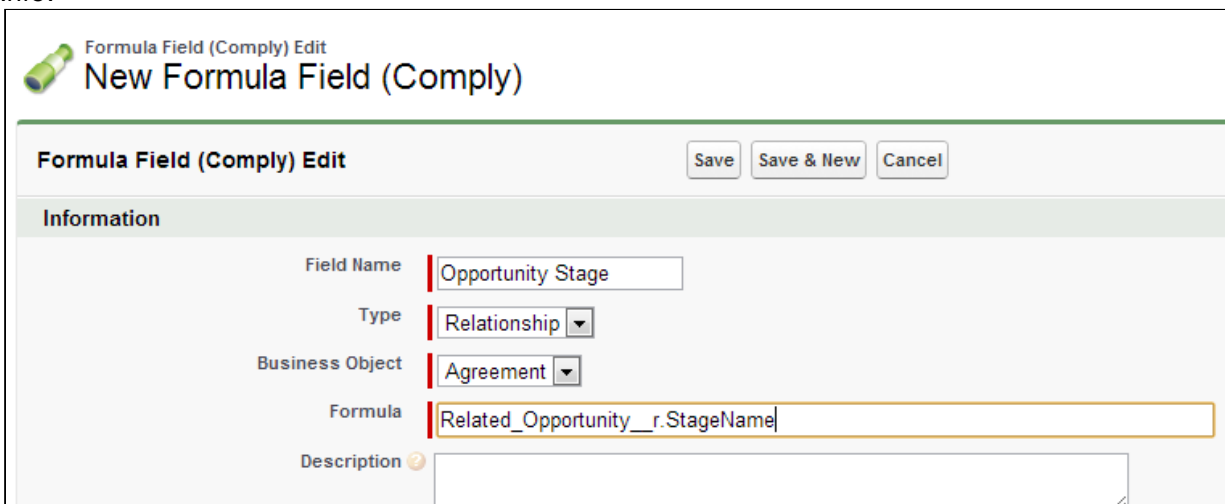
1. Click  and click **Formula Fields (Comply)** and to create a new formula field, click **New**.

Info:



2. Type a mandatory **Field Name**, and select a mandatory **Business Object**. For example, to create a new Formula Field for the Opportunity Stage field from the Agreement object using the **Related Opportunity** lookup, type Field Name = Opportunity Stage, and select Business Object = Agreement.
3. Type a mandatory Formula, and type a **Description** and click **Save**. For example: Formula = **Aptus__Related_Opportunity__c.StageName**.

Info:



4. To create a new Formula Field for the Opportunity Type field from the Agreement object using the Related Opportunity lookup, type Field Name = Opportunity Type and Formula = **Aptus__Related_Opportunity__c.Type**.

5. Click Save.

Info:

The Formula Fields are added and displayed in the Field list as a Related Field.

Saving Agreement Data

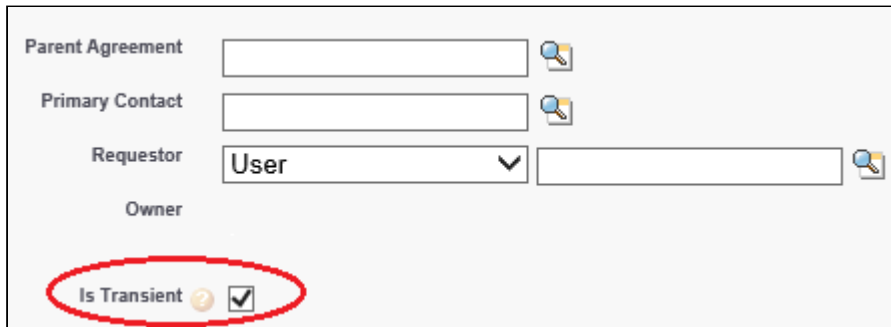
The *Is Transient* feature ensures the safety of your agreement data against the following unexpected events:

- **Hardware failure.** For example, network or system break-down.
- **Human error.** For example, the user suddenly abandons the record creation process midway, without knowing the impact or consequence.

The above mentioned cases could cause agreement data loss, resulting in time-consuming, costly, and long contract cycles making monitoring and managing agreements a challenge.

Is Transient feature keeps records in a transient state as a precautionary measure. This allows you to retain or retrieve your data at any stage in the contract life cycle until you save the data.

This field is displayed as a check box on the agreement record. By default, the Is Transient check box is selected, signifying the agreement data is safe and retainable until you explicitly save it.

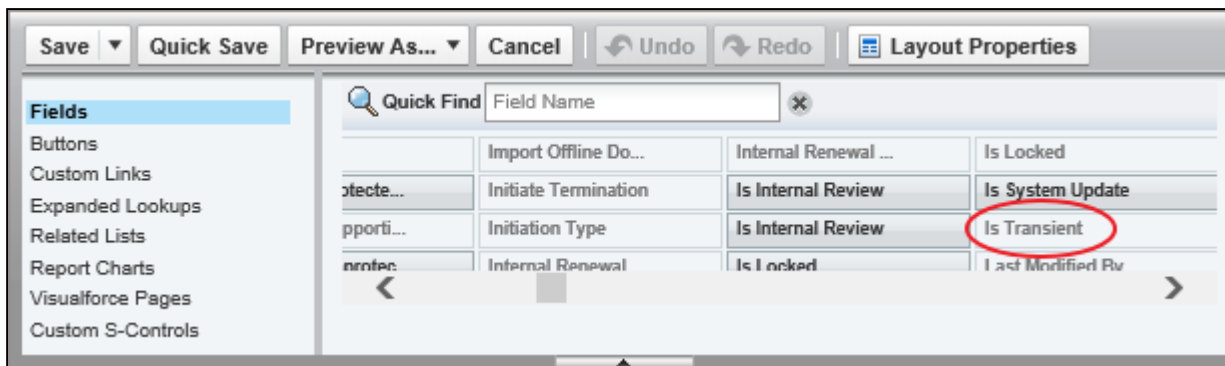


The screenshot shows a form with fields for 'Parent Agreement', 'Primary Contact', 'Requestor' (set to 'User'), and 'Owner'. At the bottom, the 'Is Transient' checkbox is checked and circled in red.

Apttus Contract Management application treats all such freshly created agreements as a transient data and displays the Is Transient check box as selected. This helps you (System Administrator) easily identify, run a report, and delete all the transient agreements (or such agreements which are not explicitly saved).

This is standard behavior of the application and a critical facet to the design, implementation, and usage of any system which stores, processes or retrieves data.

If this field is not displayed, you can add it by editing the page layout.



The screenshot shows the Salesforce Page Layout Editor. The 'Fields' tab is selected on the left. In the main area, a table of fields is displayed. The 'Is Transient' field is circled in red, indicating it has been added to the layout.

Customizing Agreement Actions

You can customize the standard agreement actions and override their default behaviour. The following agreement actions can be customized by using the code mentioned in their respective Visualforce pages:

Action Name	Description
create_new_agreement	Create New agreement

Action Name	Description
create_offline_agreement	Create Offline Agreement
create_oppty_agreement	Create Agreement From Opportunity
create_child_agreement	Create New Child Agreement
store_executed_agreement	Store Executed Agreement
clone_agreement	Clone Agreement
amend_agreement	Amend Agreement
renew_agreement	Renew Agreement

Customization is achieved by using the existing Visualforce page containing javascript code and configuring the action to invoke the javascript code in a new Visualforce page before displaying the agreement to the user for editing. Ajax javascript libraries supplied by Salesforce are available for use in the javascript code.

Overriding Base Clone Specifications

Configuring clone specification indicates which custom objects need to be cloned as part of the agreement clone operation.

Use the clone specifications to override the base configuration for cloning the agreement. The base clone specifications are defined in the APTS_ComplyConfig admin entry.

The APTS_ComplyConfig XML admin property is used to override base clone specifications for agreements. The base clone specification and the custom clone specification are merged in to a single clone specification to determine the objects to clone.

Admin Detail		Edit	Delete	Clone
Name	APTS_ComplyConfig			
Value	XML			
Code	<pre><ComplyConfig> <AgreementSpec> <CloneSpec> <Excludes> <ChildObject> <Name>Apttus__Agreement_Clause__c</Name> </ChildObject> </Excludes> </CloneSpec> </AgreementSpec> </ComplyConfig></pre>			

Overriding clone behavior of custom objects


By default, all custom objects related to an agreement are automatically cloned. If one or more custom objects are to be excluded, it can be accomplished by creating a custom clone specification listing the custom objects in the `excludes` element.

By default only the base objects listed in the `includes` element are cloned. If one or more base objects are to be included, it can be accomplished by creating a custom clone specification and listing the base objects in the `includes` element. If one or more base objects are to be excluded, they can be listed in the `excludes` element, provided the base clone specification allows the override (or, the `isOverridable` property is set to true).

Clearing Cloned Agreement Field Values


You can configure the clone feature to automatically clear certain field values for the cloned agreement.

When you clone an agreement and go to the Agreement Edit page, any fields that have been configured to be cleared will have their values removed. This eliminates the need to have to go through the edit page clearing values before you save the agreement. Clearing field values applies to all your agreements, regardless of their agreement type.

 This property can be used when you renew an agreement and want to control the fields which should be excluded during the cloning process.

You must add code to `APTS_ComplyConfig` to indicate which fields you want to clear after cloning an agreement.

Configuring APTS_ComplyConfig

1. Click  and click **Admin**.
2. From the Recent Admin relation list, select `APTS_ComplyConfig`. Optionally, if the property is not listed on the page, click **Go** and then select `APTS_ComplyConfig`.

Info:

Admin Edit
APTS_ComplyConfig

Admin Edit Save Save & New Cancel

Information

Name

Value

Code

```
<ComplyConfig>
  <AgreementSpec>
    <CloneSpec>
      <Excludes>
        <ChildObject>
          <Name>Attachment</Name>
        </ChildObject>
        <ChildObject>
          <Name>echosign_dev1__SIGN_Agreement__c</Name>
        </ChildObject>
        <ChildObject>
          <Name>dsfs__DocuSign_Status__c</Name>
        </ChildObject>
        <ChildObject>
          <Name>dl_authorized_payment__c</Name>
        </ChildObject>
        <ChildObject>
          <Name> dl_linkage__c </Name>
        </ChildObject>
      </Excludes>
    </CloneSpec>
  </AgreementSpec>
</ComplyConfig>
```

- Click **Edit** and between the `<ComplyConfig><AgreementSpec><CloneSpec>` and `</CloneSpec></AgreementSpec></ComplyConfig>` tags, enter the new `<ClearFields>` tags and then enter the API name for each agreement field that you want to clear.

```
1  <ClearFields>
2  <ClearField>
3  <Name>Apttus__Company_Signed_By__c</Name>
4  </ClearField>
5  <ClearField>
6  <Name>Apttus__Company_Signed_Date__c</Name>
7  </ClearField>
8  </ClearFields>
```

The above code snippet example, the Company Signed By and Company Signed Date fields are be cleared from the Agreement record when you clone any agreement.

Note: You can add various items that can be configured in the XML.

```

1      <ComplyConfig>
2          <AgreementSpec>
3              <CloneSpec>
4                  <Excludes>
5                      <ChildObject>
6                          <Name>Attachment</Name>
7                      </ChildObject>
8                      <ChildObject>      <Name>echosign_dev1__SIGN_Agreement__c</Name>
9                      </ChildObject>
10
11                      <ChildObject>
12                          <Name>dsfs__DocuSign_Status__c</Name>
13                      </ChildObject>
14                      <ChildObject>
15                          <Name>dl_authorized_payment__c</Name>
16                      </ChildObject>
17                      <ChildObject>
18                          <Name> dl_linkage__c </Name>
19                      </ChildObject>
20                      <ChildObject>
21                          <Name>Apttus__AgreementLineItem__c </Name>
22                      </ChildObject>
23                  </Excludes>
24                  <ClearFields>
25                      <ClearField>
26                          <Name> Apttus__Company_Signed_By__c</Name>
27                      </ClearField>
28                      <ClearField>
29                          <Name>Apttus__Company_Signed_Date__c </Name>
30                      </ClearField>
31                      <ClearField>
32                          <Name>Apttus__Company_Signed_Title__c</Name>
33                      </ClearField>
34                      <ClearField>
35                          <Name>Apttus__Other_Party_Returned_Date__c</Name>
36                      </ClearField>
37                      <ClearField>
38                          <Name>Apttus__Other_Party_Sent_Date__c</Name>
39                      </ClearField>
40                      <ClearField>
41                          <Name>Apttus__Other_Party_Signed_By__c</Name>
42                      </ClearField>
43                      <ClearField>
44                          <Name>Apttus__Other_Party_Signed_By_Unlisted__c</Name>
45                      </ClearField>
46                      <ClearField>
47                          <Name>Apttus__Other_Party_Signed_Date__c</Name>
48                      </ClearField>
49                      <ClearField>

```

```

50         <Name>Apttus__Other_Party_Signed_Title__c</Name>
51     </ClearField>
52     <ClearField>
53         <Name>Test_Apicklist__c</Name>
54     </ClearField>
55     <ClearField>
56         <Name>Test_Ccheckbox__c</Name>
57     </ClearField>
58     <ClearField>
59         <Name>New_DateTime__c</Name>
60     </ClearField>
61     <ClearField>
62         <Name>RichText1__c</Name>
63     </ClearField>
64     <ClearField>
65         <Name>Apttus__Special_Terms__c</Name>
66     </ClearField>
67 </ClearFields>
68 </CloneSpec>
69 </AgreementSpec>
70 <TemplateSpec>
71     <CloneSpec>
72         <Excludes>
73             <ChildObject>
74                 <Name>Apttus__Agreement_Clause__c</Name>
75             </ChildObject>
76         </Excludes>
77     </CloneSpec>
78 </TemplateSpec>
79 <SortSpec>
80     <SortObjects>
81         <SortObject>
82             <Name>Apttus__Agreement_Clause__c</Name>
83             <SortFields>
84                 <SortField>
85                     <Name>Apttus__Category__c</Name>
86                 </SortField>
87                 <SortField>
88                     <Name>Name</Name>
89                 </SortField>
90             </SortFields>
91         </SortObject>
92
93         <SortObject>
94             <Name>Invoice_Relay_Service__c</Name>
95             <SortFields>
96                 <SortField>
97                     <Name>Name</Name>
98                 </SortField>
99             </SortFields>
100        </SortObject>

```


```

101
102     <SortObject>
103         <Name>AddBilling_Product__c</Name>
104         <SortFields>
105             <SortField>
106                 <Name>Name</Name>
107             </SortField>
108         </SortFields>
109     </SortObject>
110
111     <SortObject>
112         <Name>Accessory__c</Name>
113         <SortFields>
114             <SortField>
115                 <Name>Accessory_Category_Type__c</Name>
116             </SortField>
117         </SortFields>
118     </SortObject>
119
120     <SortObject>
121         <Name>Business_Diode__c</Name>
122         <SortFields>
123             <SortField>
124                 <Name>Diode_Number_N__c</Name>
125             </SortField>
126         </SortFields>
127     </SortObject>
128
129 </SortObjects>
130 </SortSpec>
131 </ComplyConfig>

```

4. Add all the required fields and click **Save**.

A full list of fields to be cleared is included in APTS_Config.

Admin

APTS_ComplyConfig

[Open Activities \[0\]](#)

Admin Detail

Edit
Delete
Clone

Name	APTS_ComplyConfig
Value	XML
Code	<pre> <ComplyConfig> <AgreementSpec> <CloneSpec> <Excludes> <ChildObject> <Name>echosign_dev1__SIGN_Agreement__c</Name> </ChildObject> <ChildObject> <Name>Apttus__AgreementLineItem__c</Name> </ChildObject> </Excludes> <ClearFields> <ClearField> <Name>Apttus__Company_Signed_By__c</Name> </ClearField> <ClearField> <Name>Apttus__Company_Signed_Date__c</Name> </ClearField> <ClearField> <Name>Apttus__Company_Signed_Title__c</Name> </ClearField> <ClearField> <Name>Apttus__Other_Party_Returned_Date__c</Name> </ClearField> <ClearField> <Name>Apttus__Other_Party_Sent_Date__c</Name> </ClearField> <ClearField> <Name>Apttus__Other_Party_Signed_By__c</Name> </ClearField> <ClearField> <Name>Apttus__Other_Party_Signed_By_Unlisted__c</Name> </ClearField> <ClearField> <Name>Apttus__Other_Party_Signed_Date__c</Name> </ClearField> <ClearField> <Name>Apttus__Other_Party_Signed_Title__c</Name> </ClearField> </ClearFields> </CloneSpec> </AgreementSpec> <TemplateSpec> <CloneSpec> <Excludes> <ChildObject> </pre>

Creating Validation Rules

Validation rules verify the data entered by a user in a record meets the specified standards before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of *True* or *False*.

The following task creates a validation rule for evaluating the agreement start and end dates. It will ensure you cannot save an agreement record with a start date that begins after the end date.

To create a validation rule

1. Go to **Setup > Create > Objects > Agreement**.
2. Scroll-down to the Validation Rules related list and click **New**.
3. Type **End Date** after **Start Date** in the Rule Name box and select **Active**.
4. Type a logical description for the validation rule.
5. Click **Insert Field** to select the *Apttus Agreement* and *Agreement Start Date* and click **Insert**.
6. Click **Insert Operator** to select the *> Greater Than* operator.
7. Click **Insert Field** again to select the *Apttus Agreement* and *Agreement End Date*.
8. In the Error Message box, type an appropriate error message and click **Save**.

Agreement Lifecycle Management

This section describes how to request an agreement, manage it through the Agreement Lifecycle and which actions are available to manage your agreement after it goes into effect.

Here is a brief summary of the following sections:

- **Requesting and Drafting Agreement**
Requesting for an agreement is the first stage of the contract management process. At this stage, users initiate agreements and find apposite documents.
- **Generating An Agreement**
Apttus enables you to generate an agreement using an existing template.
- **Configurable Wizard**
This feature makes it possible to create your own agreement-creation wizards. These wizards can then be used by your sales representatives, purchasing agents, HR managers and other users to quickly create their own agreements.
- **Negotiating An Agreement**
This stage is designed for you to manage the agreement negotiation process. You can manage redlined versions of agreements in various formats side-by-side, Lock / send document, insert clauses, respond, chat, and compare versions. This also allows you to quickly observe any discrepancies and reduce negotiation time.
- **Marking an Agreement Document as Private**
Contract Management now allows you mark your agreement document as private.
- **Finalizing An Agreement**
This stage covers the process for sending agreements for executing, gathering signatures and logging into the repository.
- **Routing Documents to Content Libraries**
The Libraries tab has several publishing-related options at the top of the page that allows you to upload, classify, and publish files in the Salesforce CRM Content repository.
- **Managing Templates**
Apttus template is a common set of sections, clauses, text, and placeholders for terms and conditions. Templates can be merged with structured data to generate agreements or proposals. Templates are stored within an Apttus template repository, and are used to create quotes and contracts. An Apttus template can be termed as a blueprint or mold for creating distributable documents.
- **Agreement Phases**
The contract process goes through typical sequences of events, or *phases*.

- **Managing Obligations**

Obligation management refers to email alerts and reminders that ensure internal and external obligations in connection to your agreements are properly fulfilled.

- **Searching and Reporting**

Apttus provides the default set of capabilities for searching, views, dashboards, and reporting. This is one of the key benefits from a Contract Management system. The ability to get the key information out, for example, dates, amounts and number of contracts to make business decisions is crucial. Modifying the search and reports is based on standard Salesforce functionality.

About Agreement Lifecycle Management Process

Contract Lifecycle Management includes processes that contribute, create or utilize contract data. Apttus has defined the contract lifecycle to encompass everything from the initial request right through to the settlements of financial transactions around the agreement and enables you to have complete visibility and control over any given contract. Apttus Contract Management covers multiple business functions that can be managed seamlessly through a single application across the enterprise.

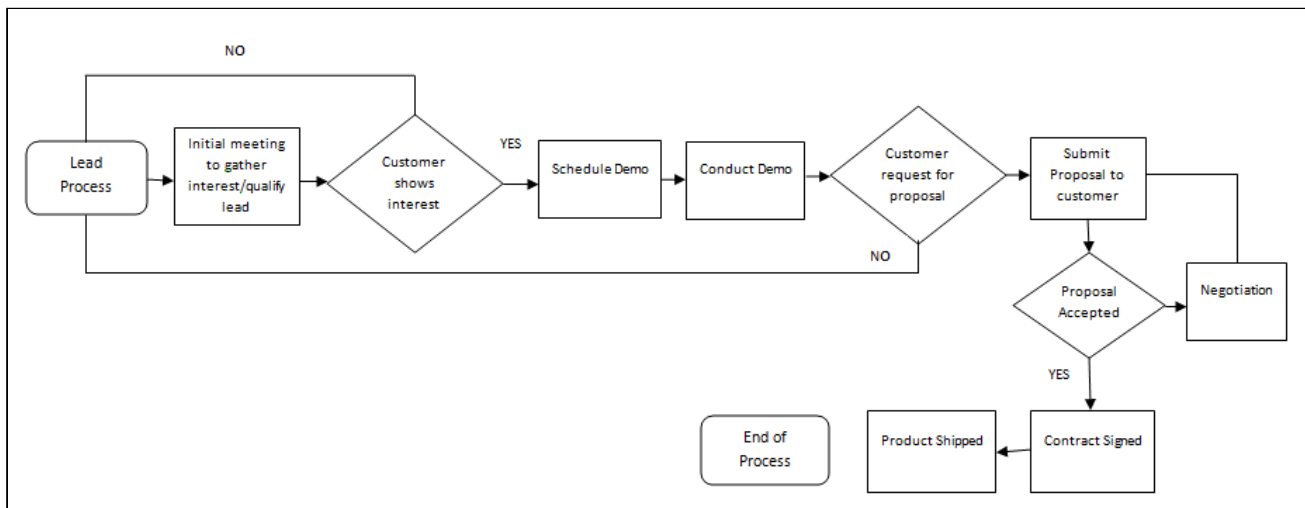
Contract Management process includes the following stages.

- Requesting and Drafting an Agreement
- Agreement Negotiation
- Agreement Finalization
- Agreement Phases
- Obligation Management
- Searching and Reporting

Apttus Contract Management allows you to do the following actions.

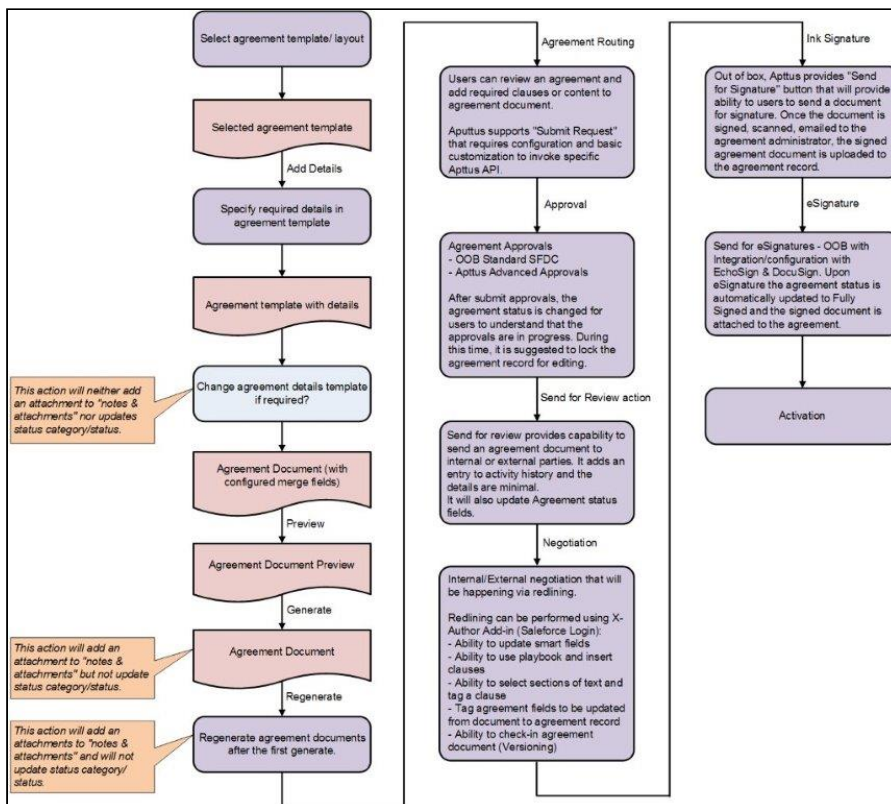
- Leverage Salesforce as a central repository for all corporate contractual agreements.
- Set up a central repository, which provides visibility into contractual commitments, and reduces the risk of litigation and revenue leakage.
- Setup alerts and notifications around predefined trigger points.

The following diagram provides an example of a typical agreement process flow.



Agreement Actions and Corresponding Behaviors

The diagram provides the flow of typical **Agreement Actions** and behaviors, based on **Apttus Status Categories and Statuses** and requirements.



Requesting and Drafting an Agreement

Requesting for an agreement is the first stage of the contract management process. At this stage, users initiate agreements and find apposite documents.

This capability is designed with the idea of having the contract requestor fill out necessary information around an agreement and have it auto-populated into the relevant Agreement template to create an Agreement Document for presenting to trading partner. For details, refer to the *Apttus Contract Management User Guide*.

- [Setting Up Agreement Request Process](#)
Setting up an agreement request process enables the default process for managing and fulfilling Agreement Requests submitted by Requesters.
- [Setting Up Rule-based Agreement Request Process Parameters](#)
The Agreement Request process requires parameters to identify the Auto Agreement Generation (Self Service Mode), Agreement Type, Queue for assigning, Agreement Template, and email template for notification. If the parameters are identified based on the values in the agreement record, Agreement Rules can be defined to identify these parameters.
- [Drafting an Agreement](#)
While drafting an agreement, Apttus can accommodate any Agreement template type (Sales, Procurement, Services, Intellectual Property, etc.). The Out-of-the-box system does not have default Agreement types.

Setting Up Agreement Request Process

Setting up an agreement request process enables the default process for managing and fulfilling Agreement Requests submitted by Requesters.

The following are the examples of a typical agreement request process.

- Requester enters relevant details for the Agreement and clicks on **Submit Request**.
- Based on the information provided by requester, system decides if an agreement is a Standard self-service agreement or a non-standard agreement requiring authoring and negotiations.
- In case of a Standard Agreement, system creates an agreement document from the configured template and sends an email containing the agreement document as an attachment to the requester, agreement owner and the primary contact. Requester obtains the signatures on the agreement document, scans the hard copy, and attaches it to the agreement record. Clicking **Activate** puts the agreement In Effect.
- In case of non-standard Agreement, the agreement owner is changed to the configured queue. Members of the queue will take ownership of the agreement, author the contract, and negotiate with the other party. After finalization of the contract they click **Return** to Requester link to inform the

requester that the contract is ready for printing and getting the signatures. Requester obtains the signatures on the agreement document, scans the hard copy and attaches it to the agreement record. Clicking **Activate** puts the agreement *In Effect*.

To set up an agreement request process

User Permissions Needed

To create a new admin entry or edit an existing entry:	Admin: Read, Create, Edit.
--	----------------------------

1. Click **+** and click **Admin**.
2. Click **New**.
3. Enter the APTS_SubmitRequestConfig property and XML value, and paste the following code into the Code area:

```

1  <SubmitRequest>
2  <Defaults>
3    <RequestMode>Manual</RequestMode>
4    <SendEmail>true</SendEmail>
5    <UpdateAgreementType>false</UpdateAgreementType>
6    <AutoMode>
7      <AgreementType>Other</AgreementType>
8      <Template>ComplyAgmtTemplate</Template>
9      <EmailTemplate>Agreement Review Notification (Auto)</
10     EmailTemplate>
11      <DocumentFormat>DOC</DocumentFormat>
12    </AutoMode>
13    <ManualMode>
14      <Queue>Reviewers</Queue>
15      <EmailTemplate>Agreement Review Notification</EmailTemplate>
16    </ManualMode>
17  </Defaults>
18 </SubmitRequest>

```

The defaults specified in the above code is:

- Agreement Template = **ComplyAgmtTemplate**.
- Agreement Type = **Other**.
- Email Template(*sent when standard or self service contract is generated by system*) = **Agreement Review Notification**.
- Queue to which request is sent in case of request for Non Standard Agreement = **Reviewers**.

This is the minimum override with which you must enable the Agreement Request process functionality so that defaults are defined for Agreement types, templates, and queues if rules are not fired during the process.

Note

- Ensure that the default values in the above code piece are replaced with values applicable to your implementation, if necessary.
- A sampleSubmitRequestConfigSampleXML file is in the Static Resources as part of the standard Apttus product. The contents of this XML file can be copied, customized and pasted into the above Admin entry to enable additional processing logic.

Setting Up Rule-based Agreement Request Process Parameters

The Agreement Request process requires parameters to identify the Auto Agreement Generation (Self Service Mode), Agreement Type, Queue for assigning, Agreement Template, and Email Template for notification. If the parameters are identified based on the values in the agreement record, Agreement Rules can be defined to identify these parameters.

A rule filter criteria is evaluated in memory using the Apttus expression library and is not dependent on SOQL. All the configurations to create an agreement rule is done from the Agreement Rules tab and you can use Filter Criteria to set conditions based on the field, operator, and corresponding values.

Parameters (Rule Types) and respective description.

Submit Request Mode	If the value for this parameter is set to <i>Auto</i> , this mode triggers the automatic generation of agreement document. If the value for this parameter is set to <i>Manual</i> , the next Agreement Rule in the sequence is executed.
Agreement Type	This parameter is used to identify the type of agreement to be created for this request. In case the Agreement Type is already identified by the requester, this parameter can be skipped.
Agreement Template	This parameter is used to identify the agreement template to be used for automatic generation of the agreement document. This parameter can be skipped if there is no requirement for automatic agreement generation.
Queue	This parameter identifies the queue to which the agreement ownership is transferred to process the agreement request.
Email Template	This parameter is used to identify the template used for sending email with automatically generated agreement document to predefined set of recipients. In non-Auto mode of agreement request processing the template identifies the email format sent to the Queue members processing the agreement request. For example, if Agreement Category is Sales, send the Agreement Request to Legal – Procurement Queue.

Document Folder	The default repository to store executed contracts is Apttus Documents folder. If you want to use the custom folder to store published contracts, specify the folder name by selecting 'Document Folder' rule type with required conditions. In this way you can store your published contracts in multiple folders.
-----------------	--

To setup Agreement Rules to identify Agreement Request Process parameters

User Permissions Needed

To create, edit or delete an Agreement Rule:

Agreement Rule: Read, Create, Edit, Delete.

Agreement: Read

Template: Read

1. Click **+** and select **Agreement Rules**.
2. Click **New** and type a mandatory **Sequence** for the rule to determine the order in which the agreement rules are evaluated.

3. Select a mandatory **Rule Type** and enter a correct **Rule Value**. For example, if you select *Queue Assignment* as **Rule Type**, enter a valid Queue name for **Rule Value**.
4. Select the **Active** check box to activate an agreement rule.

Note

By default, the Active check box is selected.

Inclusion Criteria and **Filter Criteria** sections for an agreement rule are optional, so you may skip Step 5 and Step 6.

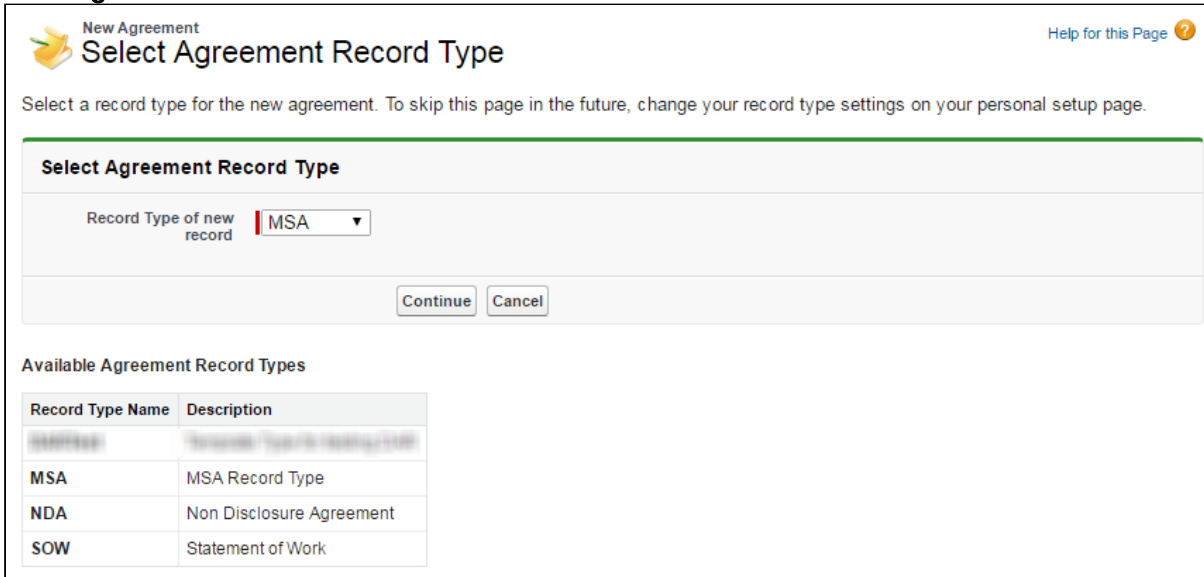
5. In the **Inclusion Criteria** section, select the field and expression you want to use as entry criteria for the filter. For example, if you want to use agreement records of MSA record type, it can be included in the Inclusion Criteria.
6. In the **Filter Criteria** section, select the fields and expressions you want to use to control which agreement records will be visible when the inclusion criteria is met. For example, if you want to filter only the agreement records whose Start Date is after May 21, 2015, enter this condition in the **Filter Criteria**. If you use multiple fields, you can have a standard *AND* relationship between the expressions, meaning each expression must evaluate as true or use **Advanced Options** to the fields together in a more complex formula.
7. Click **Save**.

Similarly, you can setup the rules for the other parameters using the Rule Type field in step 3 for Email Template, Agreement Type, Agreement Template, Submit Request Mode, and Document Folder parameters.

Drafting an Agreement

You must set up the agreement type. Apttus can accommodate any Agreement template type (Sales, Procurement, Services, Intellectual Property, etc.). The Out-of-the-box system does not have default Agreement types. If agreement types are not setup or if you have access to only one agreement type, then the step 2 is skipped and you will be navigated to the next step.

1. Click **Agreements > New**.



New Agreement Help for this Page ?

Select Agreement Record Type

Select a record type for the new agreement. To skip this page in the future, change your record type settings on your personal setup page.

Select Agreement Record Type

Record Type of new record: MSA ▼

Continue
Cancel


Available Agreement Record Types

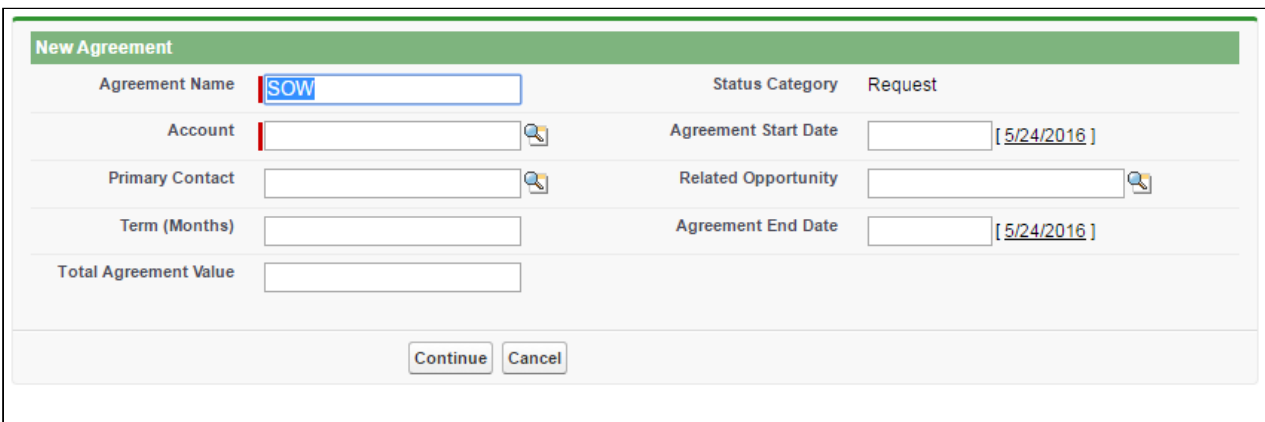
Record Type Name	Description
MSA	MSA Record Type
NDA	Non Disclosure Agreement
SOW	Statement of Work

Note

If the default Agreement type is not set up for your org or you see only one agreement type, you will be navigated to the New Agreement page.

2. In the Select Agreement Record Type page, choose the desired Agreement Record Type and click **Continue**.
3. The New Agreement page is displayed. This is an intermediate page that allows you to enter values for certain important fields in your agreement record. Fill all the required fields (marked in **red**) and click **Continue**.

 Fields included on this page are configured in the **Agreement New Field Set**. Go to **Setup > Create > Objects > Agreement > Field Sets** to edit the set of fields displayed on this page.



New Agreement	
Agreement Name	<input type="text" value="SOW"/>
Status Category	Request
Account	<input type="text"/>
Agreement Start Date	<input type="text" value="5/24/2016"/>
Primary Contact	<input type="text"/>
Related Opportunity	<input type="text"/>
Term (Months)	<input type="text"/>
Agreement End Date	<input type="text" value="5/24/2016"/>
Total Agreement Value	<input type="text"/>
<input type="button" value="Continue"/> <input type="button" value="Cancel"/>	

4. In the Agreement Edit form fill out various data fields relevant to this agreement to complete the agreement. Fields marked in **red** are required fields. For the complete list of agreement fields, see [Agreements Fields](#).

Agreement Edit

SOW_AD_VA_5.24.16.1

Help for this Page

SaveSave & NewCancel

Information

= Required Information

Agreement NameSOW_AD_VA_5.24.16.1

AccountPartner Technologies

Related Opportunity

Total Agreement Value500,000.00

Description

Special Terms

Business Hours

Service Level--None--

Record TypeSOW

Agreement Category--None--

Status CategoryRequest

Status--None--

Subtype--None--

Parent Agreement

Primary ContactJoshua Johnson

RequestorUserChris Castro

OwnerChris Castro

Term & Renewals

Agreement Start Date5/24/20165/24/2016

Perpetual

Term (Months)12

Agreement End Date5/31/20175/24/2016

Auto Renew

Renewal Term (Months)

Renewal Consent

Renewal Terms

Note

The **Status Category** and **Status** fields are system fields, which help in identifying which step of the agreement process is currently in the agreement lifecycle. Agreement Status Category is a group of various Statuses. You can select the Status based on their respective process steps. The combination of **Status Category** and **Status** determines the actions available for a particular agreement. See [Agreement Status Categories](#) and [Agreement Actions](#) for details on various Status categories, corresponding Status and the Actions available at the respective Statuses respectively. Each agreement type can have data fields that are specific to an agreement type.

5. Fill in the Agreement details form applicable for the selected Agreement Type and click **Save**.
6. You can search and report the created draft agreement. The following table describes the usage of available buttons.

Button	Description
Save	Click Save to keep and retain your agreement details. If you need to change or modify the agreement details, click Edit , and continue working without any risk of losing your work until the point of your last save.

Button	Description
Save & New	Click Save & New to save your work and start creating a new Agreement Record. The system navigates you to the intermediary screen to select a new Agreement Type. <i>This is useful if you need to create a master and subordinate agreement or related agreements, such as the primary agreement and a related Non-Disclosure Agreement (NDA), and want to save time by jumping right from creating the first agreement record to creating another one.</i>
Cancel	Click Cancel to adjourn the process of editing the Agreement Record and discard all the changes made since the last edit. Click Yes to confirm your selection.

After you save the agreement, the following new sections are enabled on the agreement page (depending on your configuration, there may be additional sections and/or Related Lists displayed).

Agreement Section	Description
Actions	Lists the various actions you can execute for a particular stage of the agreement process. For details on agreement actions with the description of their respective functions, see Appendix H: Agreement Actions .
Notes & Attachments	Enables you to attach any reference document or file relevant to a particular agreement. The agreement document when generated from the template is stored by the application in this section.
Agreement Documents	Enables you to store reference to external URL or files. Common uses for this functionality is to store the URL reference to a document stored within the computer firewall.
Agreement Clauses	System store for any clauses that you choose to identify for reference and reporting purpose. For example, during negotiation if you add any clause, which may be considered non-standard and high risk, select that clause and makes it into a Agreement Clause to enable higher visibility for other users who are accessing this agreement, and also reporting on High Risk contracts.
Child Agreements	Enables you to initiate and store references to child agreements for the current agreement.
Open Activities	Enables you to create and assign new task corresponding to a particular agreement. On completion of a task, the user marks the activity closed by clicking the Cls link.

Agreement Section	Description
Approval History	<p>Initiate and track approvals corresponding to the agreement.</p> <div> <p>Note</p> <p>Approvals can be initiated only if the corresponding approval rules or process has been setup by the System Administrator.</p> </div>
Activity History	Lists an audit history of significant changes during the life of the agreement.
Related Agreements (To and From)	Enables users to relate other agreements in the repository for reference purposes. For example, the NDA with a particular vendor can be associated to the Master Services Agreement with the same vendor to enable a single point of access for all relevant information for this account. The <i>To and From</i> refers to the relationship direction.

- To preview the agreement document, click **Preview**. For details, see [Preview Agreement in Appendix H](#).
- To send the agreement document to the third party for review, click **Send For Review**. This button is available if the **Status** for the Agreement Record is *In Authoring* or *In Signatures*. The button allows you to specify the attachment to send and then either look up or type in the other individuals to receive the Agreement Document. Use the lookup item to add contacts from within the system, and/or use the **Additional To:** field to enter email addresses of recipients manually. Once completed, click **Send** and the activity is logged in the **Activity Log** allowing others to see that the step has been taken, by whom, along with a time/date stamp.

Generating An Agreement - User Permissions

Apttus enables you to generate an agreement using an existing template.

User Permissions Needed	
To preview an agreement:	<p>Agreement: Read</p> <p>Template: Read</p> <p>AsyncMergeCall: Read, Create, Edit (Field Access: Read, Edit)</p>
To generate/regenerate an agreement:	<p>Agreement: Edit</p> <p>Template: Read</p> <p>AsyncMergeCall: Read, Create, Edit (Field Access: Read, Edit)</p>

Templates can be created using Apttus X-Author Contracts. For each agreement record type, a different template can be created in Microsoft Word. For more information on creating a template using X-Author Contracts, refer to the *X-Author Contracts User Guide*.

Negotiating An Agreement

This stage is designed for you to manage the agreement negotiation process. You can manage redlined versions of agreements in various formats side-by-side, Lock/ Send a document, insert clauses, respond, chat, and compare versions. This also allows you to quickly observe any discrepancies and reduce negotiation time.

Typically, this part of the process is handled by the following key roles ([Agreement Negotiators](#)):

- Agreement Facilitator
- Legal admin, counsel
- Financial analyst, controller
- VP/Director/Sales manager, sales operations, procurement, partners

Key Tasks Associated With the Negotiation Phase

The following key tasks are involved to complete the negotiation:

- Timely internal collaboration in the negotiation process
- Maintenance of persistent repository of predefined agreement clauses
- Reconcile redline / compare negotiated changes to terms, clauses, lines

- Retention of artifacts throughout negotiation

You can [secure documents](#) during the negotiation cycle.

As an Agreement Negotiator, you coordinate changes to the agreement that might occur over the course of agreement negotiation. They are generally involved in finalizing the process in accordance with company policies and legal requirements. Agreement Negotiators can perform the following:

- Amend and save agreements/proposals in Salesforce
- Highlight reconcilable data
- Reconcile agreement/proposal records
- View chatter feeds from within Microsoft Word
- Share content and document to Salesforce Chatter
- Translate agreement/proposal documents from one language to another
- Create reminder tasks or schedule appointment events in relation to the opened agreement/proposal document
- Redline and store versions of the document during negotiations
- Compare different versions of agreements/proposals side by side

To create and negotiate an agreement, the X-Author Contracts Word add-in is designed for agreement administrators and legal users to help streamline the process of maintaining agreements and associated agreement and clause templates. Using the Apttus X-Author Contracts, agreement administrators can manage complex negotiation cycles, clause and agreement template easily. The add-in is not a required component but adds tremendous value to the agreement administrator by leveraging the power of Apttus within Word.

The add-in provides support for versioning of agreements, and agreement administrators can save redlined, clean and final versions of non-standard language in a Word document opened either from Salesforce or locally. When saving final versions, the add-in also helps the user to reconcile any terms that might have changed during the approval process. Agreement 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 an agreement document.

For details on the X-Author functions, refer to the *X-Author Contracts User Guide*.

To negotiate an agreement

1. Next, to the Agreement Document in the Notes & Attachments area, click **View**. Save the document to any location on your computer.
2. Open the document using Microsoft Word.
3. On the toolbar, click Apttus X-Author Contracts.
4. Login with your credentials.

Note

To use X-Author Contracts, you do not need to login directly via Salesforce. You only need to connect from the X-Author ribbon in Word. For details, see *Connecting to X-Author Contracts* section in *Apttus X-Author Contracts User Guide*.

Using Alternate and Fallback Provisions During the negotiation process, you may wish to incorporate existing alternate and fallback provisions that have been stored in your clause library. To perform this function, click X-Author Contracts, and then click the Playbook option. At the top of the new search window which opens on the right, you will be able to select from various filters to locate desired clauses that you may want to insert. You may insert the selected clauses as a reference or as inline text in your template. When querying the Clause Library, you can elect to query the full language that will be included in your agreement or only the guidance. You can control this option by selecting X-Author, and then clicking **Options > Template** tab. Select or clear Store Template / Clause Content as Text. Add new text and delete a clause anywhere in the document. The X-Author plug-in provides the following options:

Save as Internal Version	Save to Apttus and preserve redlines. You can use the default name that comes up or overrides and enters one of your own.
Save as External Version	Save to Apttus and remove redlines. All changes are automatically accepted and the redlines are removed. You can use the default name provided by the plug-in when you enter this option or override and enter one of your own.
Save as Final Version	Save to Apttus, remove redlines, and prepare for obtaining signatures. The Save as Final Version initiates the process of finalizing an Agreement by accepting all changes and changing the Status Category to In Signatures.

Tip

By using consistent naming conventions in your organization, you can simplify the process of keeping everyone on the same page in terms of what is happening in a negotiation and provide an easy-to-follow historical record of activities.

- When the agreement document is open and ready to be edited, go to Apttus X-Author and choose **Save as Final Version**.
- If you are prompted to Reconcile, click **No**.

Note

If the variables (for example, start date, end date) were modified, ensure the same change has been made on the agreement detail page.

- Click **View Refresh** in Apttus browser. This action updates the agreement version in the repository and activity history.

8. Go to X-Author Contracts in Microsoft Word and click **Compare**, and select two versions of the agreement that you need to compare. The two versions of the agreement are presented side by side and you can quickly see any differences.

About 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
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> .

Actions taken on the Clause before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
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

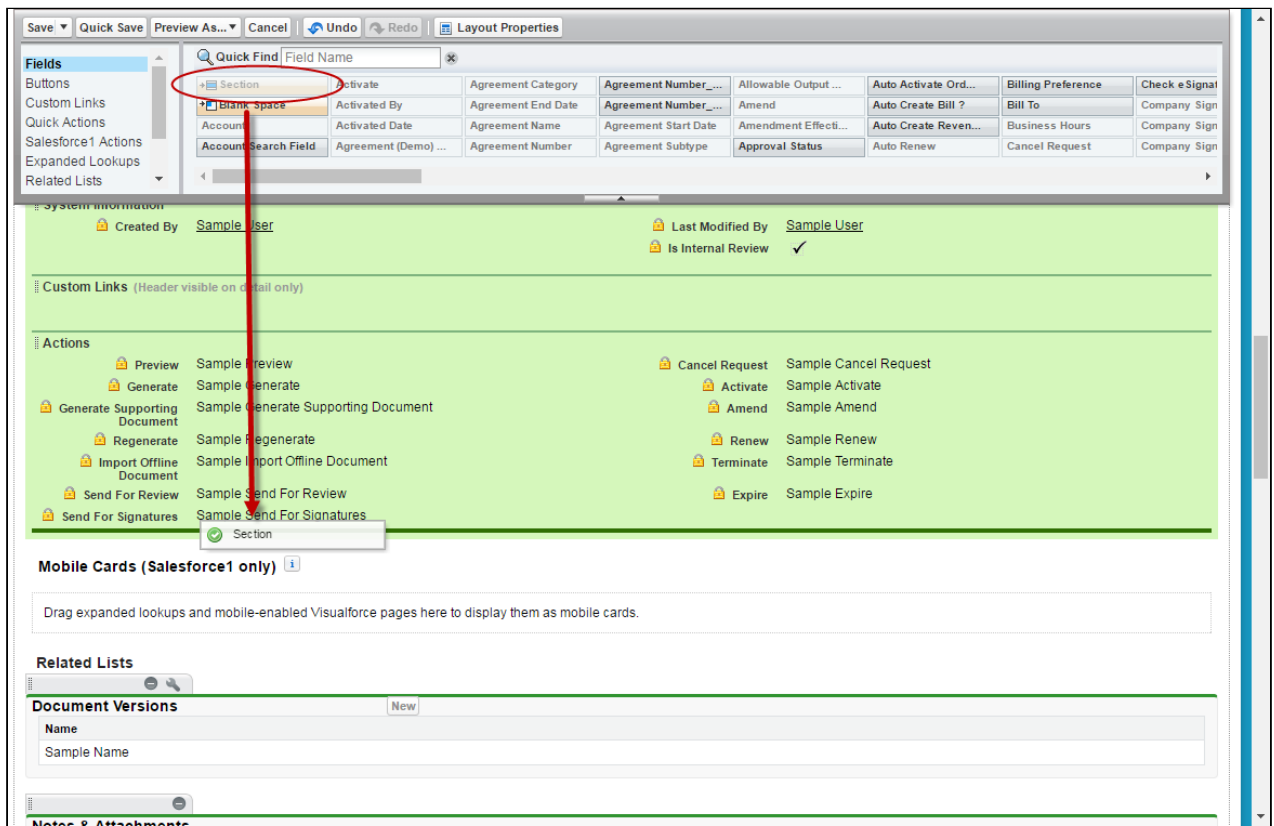
The Agreement Clauses Visualforce page is automatically enabled for all user profiles.

To make it visible on the agreement record, you must add it to the appropriate agreement layout.

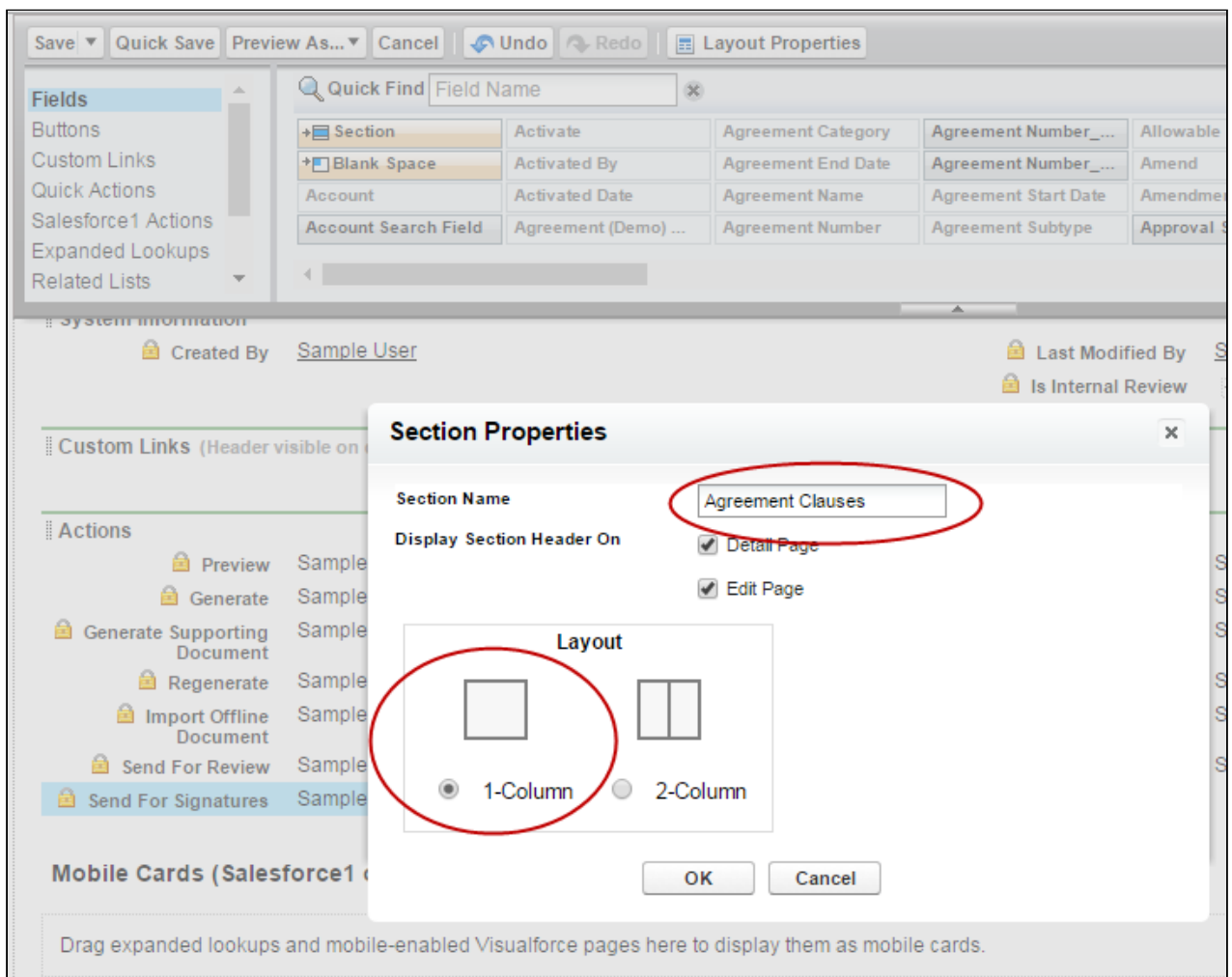
1. Go to **Setup > Create > Objects > Agreement**
2. Under Page Layouts, click the **Edit** link next to the layout you want to modify.

Custom Object					
Agreement (Managed)					
This Custom Object Definition is managed, meaning that you may only edit certain attributes. Display More Information					
Standard Fields [5] Custom Fields & Relationships [134] Validation Rules [4] Page Layouts [5] Field Sets [4] Compact Layouts [1] Search Layouts [6] Buttons, Links, and Actions [43] Record Types [4]					
Page Layouts					
New Page Layout Assignment					
Page Layouts Help					
Action	Page Layout Name	Installed Package	Created By	Modified By	Feed-Based Layout
Edit Del	Agreement Layout	Apttus Contract Management	TPub Admin , 8/15/2016 11:19 AM	TPub Admin , 8/15/2016 11:19 AM	<input type="checkbox"/>
Edit Del	MSA		TPub Admin , 8/15/2016 11:19 AM	TPub Admin , 8/15/2016 11:19 AM	<input type="checkbox"/>
Edit Del	NDA		TPub Admin , 8/15/2016 11:19 AM	TPub Admin , 8/15/2016 11:19 AM	<input type="checkbox"/>
Edit Del	Rebate Agreement Layout	Apttus Rebate Management	TPub Admin , 8/15/2016 11:19 AM	TPub Admin , 8/15/2016 11:19 AM	<input type="checkbox"/>
Edit Del	SOW		TPub Admin , 8/17/2016 4:07 PM	TPub Admin , 9/12/2016 1:24 PM	<input type="checkbox"/>

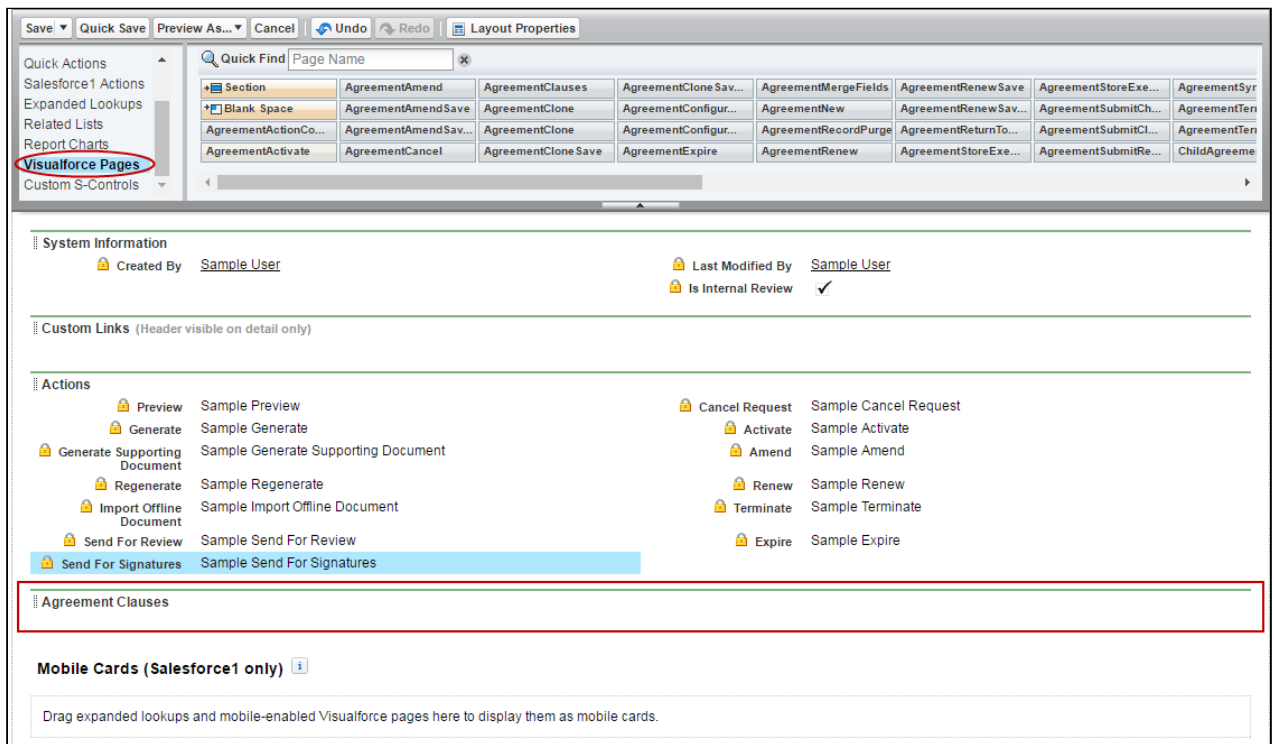
3. Drag-and-drop the **Section** field onto the area below the Actions section of the Agreement layout.



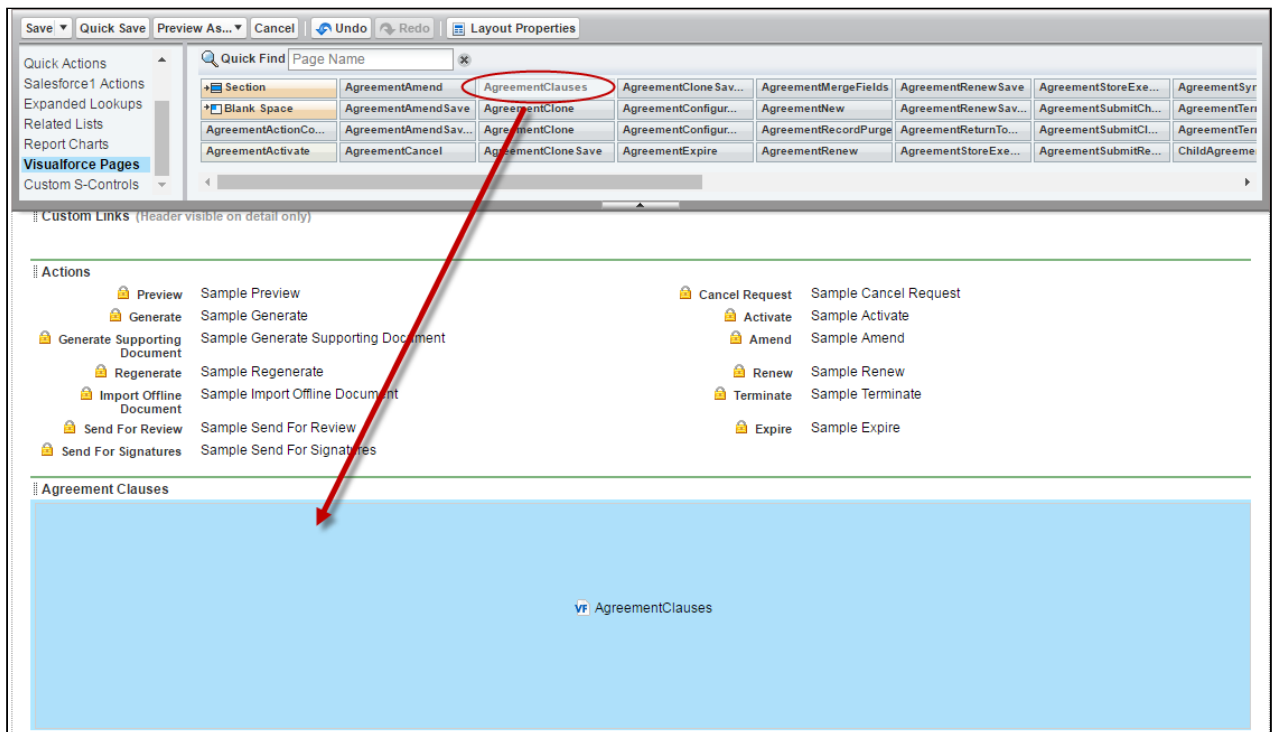
4. Enter **Agreement Clauses** as the section name and choose a **1-Column** layout.




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  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.

▼ Agreement Clauses							
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 on 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.

Clause Iterations					
Back					
Agreement Number 00000048.0			Name CC Payment Terms		
Agreement Name Sales SOW VI 10.3.16.1			Template		
Account Name Venture Industries					
Number	Action	Previous Text	Clause Text	Created On	Created By
0074	Final		PAYMENTS The first payment for this agree...	10/3/2016 3:28 PM	TPub Admin
0070	Modified	PAYMENTSThe first payment for this agree...	PAYMENTSThe first payment for this agree...	10/3/2016 3:27 PM	TPub Admin
0069	Modified	PAYMENTSThe first payment for this agree...	PAYMENTSThe first payment for this agree...	10/3/2016 3:26 PM	TPub Admin
0067	Inserted		PAYMENTS The first payment for this agree...	10/3/2016 2:58 PM	TPub Admin

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 Iterations Details			
<div>Back</div>			
Agreement Number	00000048.0	Name	CC Payment Terms
Agreement Name	Sales SOW VI 10.3.16.1	Iterations	0070
Account Name	Venture Industries	Template	
Clause Text	PAYMENTSThe first payment for this agreement will be made within two business days of 10/3/2016, 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 fifteen (15) 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.		
Previous Text	PAYMENTSThe first payment for this agreement will be made within two business days of 10/3/2016, 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.		
Diff Text	PAYMENTSThe first payment for this agreement will be made within two business days of 10/3/2016, failing which a late fee of \$1000 will be charged. The last		

Clause Iteration Records

First Check-out: Iterations of a 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.

▼ Agreement Clauses					
Agreement Number 00000048.0			Name CC Deliverables		
Agreement Name Sales SOW VI 10.3.16.1			Template CC Deliverables		
Account Name Venture Industries					
Number	Action	Previous Text	Clause Text	Created On	Created By
0068	Modified	DELIVERABLES/SCHEDULE:The delivera...	DELIVERABLES/SCHEDULE:The delivera...	10/3/2016 2:58 PM	TPub Admin
0066	Modified	DELIVERABLES/SCHEDULE:The delivera...	DELIVERABLES/SCHEDULE:The delivera...	10/3/2016 2:53 PM	TPub Admin
0062	Original		DELIVERABLES/SCHEDULE:The delivera...	10/3/2016 2:47 PM	TPub Admin

During the course of negotiation, changes are made to the agreement document that insert, or modify clauses. When any of these actions occur, they are recorded as in the **Master Agreement Clauses** list or **Clause Iterations**.

Clause activity during 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 Inserted .	Creates a single record in Master Agreement Clauses & Clause Iterations with Action as Inserted .

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 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> .

Actions taken on the Clause before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
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.

i 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*.

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	Mary Manager	10/06/16 18:29:48	Mary Manager	10/06/16 18:29:48
CC Technical Requirements	TECHNICAL REQUIREMENTS: The followi...	1	Original	Mary Manager	10/06/16 18:29:48	Mary Manager	10/06/16 18:29:48
CC Termination	Term and TerminationTerm. This License Ag...	1	Original	Mary Manager	10/06/16 18:29:49	Mary Manager	10/06/16 18:29:49

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*.

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	Mary Manager	10/06/16 18:29:48	Mary Manager	10/06/16 18:29:48
CC Technical Requirements	TECHNICAL REQUIREMENTS: The followi...	1	Original	Mary Manager	10/06/16 18:29:48	Mary Manager	10/06/16 18:29:48
CC Termination	Term and TerminationTerm. This License Ag...	1	Original	Mary Manager	10/06/16 18:29:49	Mary Manager	10/06/16 18:29:49
CC Governing Law Alt	Governing Law. This Agreement shall be go...	1	Original	Mary Manager	10/06/16 18:29:53	Mary Manager	10/06/16 18:29:53
CC Payment Terms	PAYMENTS The first payment for this agree...	1	Inserted	Mary Manager	10/06/16 18:32:22	Mary Manager	10/06/16 18:32:22

On a subsequent check-out, Mary Manger adds an Indemnification clause from Playbook and modifies the clause language in the same session. She checks the document back in to 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.

Clause Iterations

Back

Agreement Number00000050.0

Agreement NameSales SOW V1 10.6.16.2

Account NameVenture Industries

NameCC Indemnification

TemplateCC Indemnification

Number	Action	Previous Text	Clause Text	Created On	Created By
0086	Modified	Indemnification. Each party to this agreeme...	Indemnification. Each party to this agreeme...	10/6/2016 12:13 PM	Mary Manager
0085	Inserted		Indemnification. Each party to this agreeme...	10/6/2016 12:12 PM	Mary Manager

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.

Edit Del 0088	Modified	CC Payment Terms	Definitions	PAYMENTSThe first payment for this agreement will be made within three business days of 10/6/2016, failing which a late fee of \$1000 will be charged. The last payment must be made within 6 months of the first paymentAll payments due under this Agreement...	PAYMENTSThe first payment for this agreement will be made within two business days of 10/6/2016, failing which a late fee of \$1000 will be charged. The last payment must be made within 12 months of the first paymentAll payments due under this Agreement ...
Edit Del 0089	Deleted	CC Governing Law Alt	Confidentiality	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.	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.

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.

Clause Iterations					
Back					
Agreement Number <u>00000050.0</u>			Name <u>CC Payment Terms</u>		
Agreement Name <u>Sales SOW VI 10.6.16.2</u>			Template		
Account Name <u>Venture Industries</u>					
Number	Action	Previous Text	Clause Text	Created On	Created By
<u>0093</u>	Final		PAYMENTS The first payment for this agree...	10/6/2016 12:23 PM	<u>Mary Manager</u>
<u>0088</u>	Modified	PAYMENTS The first payment for this agree...	PAYMENTS The first payment for this agree...	10/6/2016 12:22 PM	<u>Mary Manager</u>
<u>0087</u>	Modified	PAYMENTS The first payment for this agree...	PAYMENTS The first payment for this agree...	10/6/2016 12:19 PM	<u>Mary Manager</u>
<u>0084</u>	Inserted		PAYMENTS The first payment for this agree...	10/6/2016 11:32 AM	<u>Mary Manager</u>

Controlling Access Permissions for Agreements

Contract Management now allows you to mark your agreement document as private from X-Author Contracts.

User Permissions Needed

To enable agreements as private:

Agreement: Edit.

You can select the **Make this document private** checkbox for any agreement document at the following actions in X-Author Contracts:

- Checking in an agreement document to Salesforce.
- Creating an offline agreement.
- Importing an Offline document.

Marking a document as private is a feature that must be extended by custom implementations to have any practical impact on the security of your agreement documents.

When you mark a document as private it sets the Is 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.

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** check box 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.

For more information on this feature, refer to Marking Agreement Documents as Private in the *X-Auth Contracts User Guide*.

Routing Documents to Content Libraries

When you activate an agreement, executed agreement documents are stored in the Document Folder **Apttus Documents**. This option will be sufficient for some users, but may prove to be too basic a solution. Apttus offers an alternative contract repository option that takes advantage of **Salesforce CRM Content** by allowing you to publish executed agreements to content libraries. There are many advantages to using content libraries:

- Multiple content libraries can be created by administrators to store agreements by any number of classifications.
- Library content can be tagged with labels and libraries are fully searchable and allow you to create filters to locate agreements.
- Content access can be restricted based on member groups which are configured when libraries are created.
- Users can subscribe to specific libraries to get notifications when content has been changed or added.

To publish activated agreements to the Salesforce CRM content repository:

- The **Apttus Content Integration** package must be installed in your Salesforce organization.
- Salesforce CRM Content must be enabled.
- The Libraries tab and other settings must be configured.

You can also create "Content Workspace" [Agreement Rules](#) to route activated agreements to different libraries based on expressions you define.

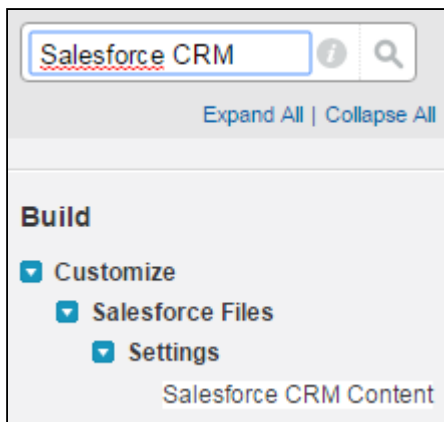
Installing Apttus Content Integration

1. Navigate to the **Apttus Community Portal > Resources > Install Center**.
2. In the left hand navigation, click **Integrations** tab.
3. In the **Integrations** packages page go to **Apttus Content Integration**, click **Install Now** and follow the instructions to install the package in your org.
4. Choose the type of org where you will install the package (Production or Sandbox).

Enabling Salesforce CRM Content

To properly route agreements to your content libraries, you must first enable Salesforce CRM Content in your Salesforce org. To enable Salesforce CRM content:

1. Go to **Setup > Customize > Salesforce Files > Settings > Salesforce CRM Content** or enter "Salesforce CRM" into the Quick Search dialog and select **Salesforce CRM Content**.



2. Click **Edit** on the Salesforce CRM Content page and select **Enable Salesforce CRM Content**.

Salesforce CRM Content

Use this page to modify Salesforce CRM Content settings for your organization.

- ☒ Enable Salesforce CRM Content
- ☒ Autoassign feature licenses to existing and new users
- ☐ Files user interface allows sharing files with libraries [i](#)
- ☐ Enable multilanguage search and contribute
- ☒ Enable content pack creation
- ☒ Enable enhanced document viewer

[Save](#) [Cancel](#)

- Click **Save**.
- Go to **Setup > Customize > Salesforce Files > Settings > Content Deliveries**. Ensure that both content delivery options are enabled.

Content Deliveries

This page allows you to enable content deliveries for your organization. A content delivery converts documents inside or outside your organization, and salesforce.com tracks how frequently the content is viewed.

Because content-delivery URLs can be sent to leads, customers, or any unauthenticated user, Salesforce default for content-delivery password protection.

After enabling content delivery and choosing a default for password protection, add the Content Deliveries content delivery and find details about existing content deliveries for the record you are viewing.

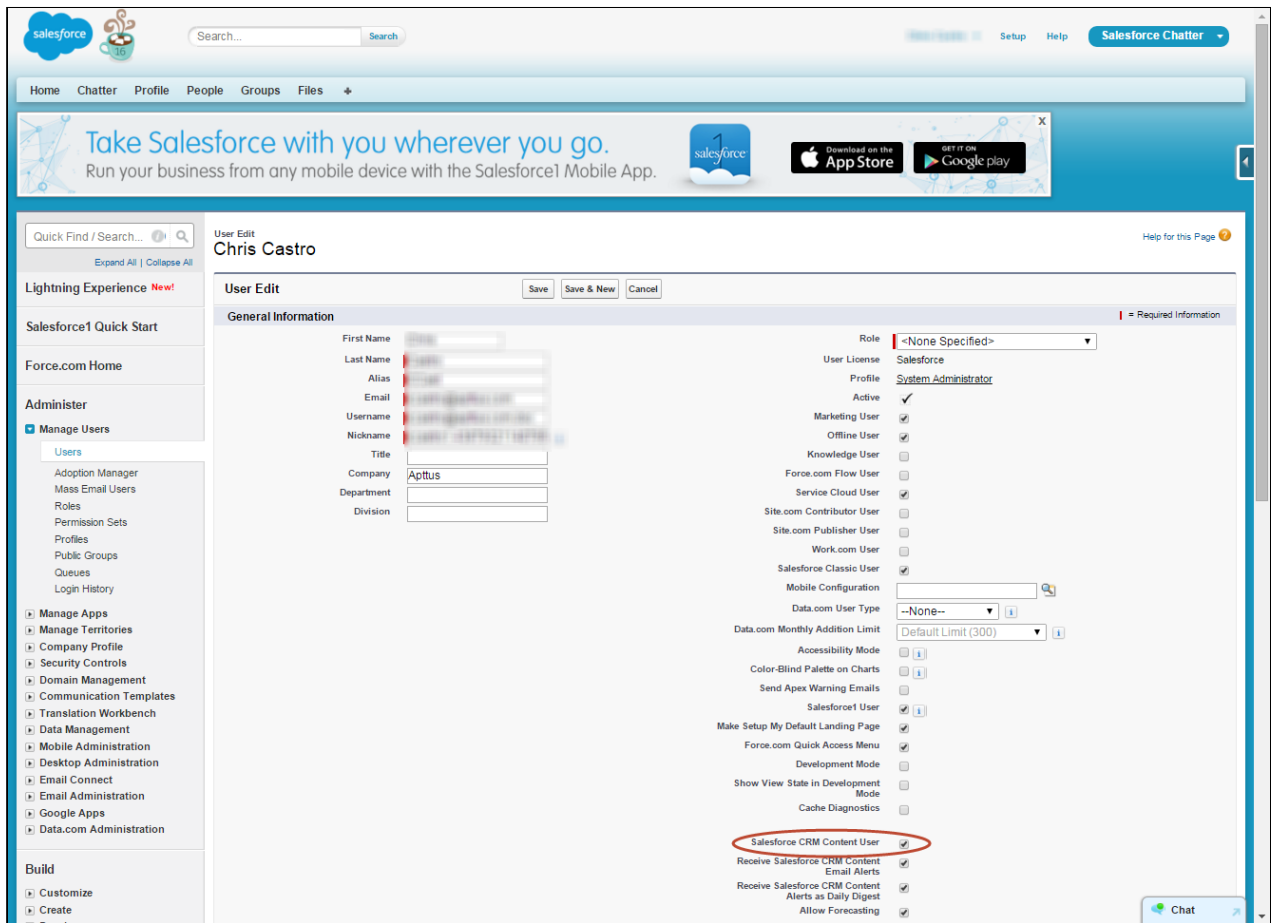
Enable [Edit](#)

- ☒ Enable content deliveries
- ☒ Enable Creation of Content Deliveries for Chatter Files

Choose password defaults

- ☒ Password protection is optional and defaults to OFF
- ☐ Password protection is optional and defaults to ON
- ☐ Password protection is required

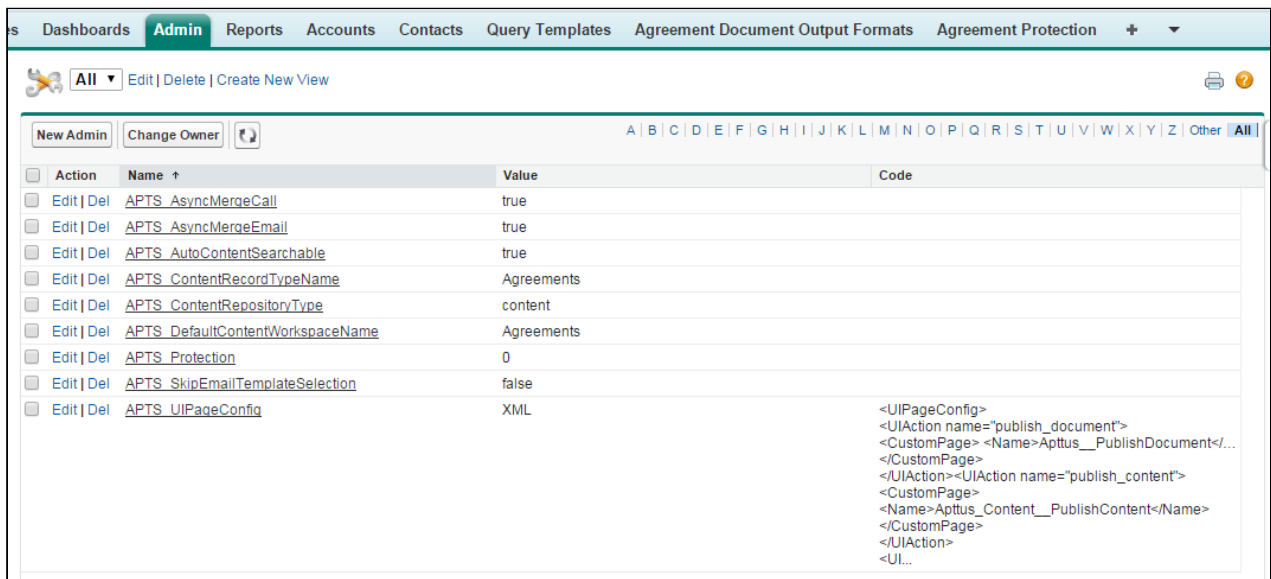
- Users who are activating agreements must also have Salesforce CRM Content enabled. Turn on Salesforce CRM Content for all users who will be activating or managing agreement documents published to your content libraries. Go to **Setup > Administer > Manage Users > Users**



Configuring Admin Properties

Several Admin Objects (properties) must be created or modified to identify the type of content to be routed and the default workspace to use for activated agreements.

1. Go to the **Admin** tab (click '+' and choose the Admin tab.) Click **Go** to view all Admin objects (your list will vary depending on which objects have already been created).



Action	Name	Value	Code
Edit Del	APTS_AsyncMergeCall	true	
Edit Del	APTS_AsyncMergeEmail	true	
Edit Del	APTS_AutoContentSearchable	true	
Edit Del	APTS_ContentRecordTypeName	Agreements	
Edit Del	APTS_ContentRepositoryType	content	
Edit Del	APTS_DefaultContentWorkspaceName	Agreements	
Edit Del	APTS_Protection	0	
Edit Del	APTS_SkipEmailTemplateSelection	false	
Edit Del	APTS_UIPageConfig	XML	<pre><UIPageConfig> <UIAction name="publish_document"> <CustomPage> <Name>Apttus_PublishDocument</Name> </CustomPage> </UIAction> <UIAction name="publish_content"> <CustomPage> <Name>Apttus_Content_PublishContent</Name> </CustomPage> </UIAction> </UIPageConfig></pre>

2. Create the following four Admin properties to enable content delivery for your activated agreements. Set values as required:

- **APTS_ContentRepositoryType** – Set this property value to "content." The default setting is "document," which routes ALL activated documents to an Apttus folder. Changing this setting tells the system to use content repository settings for routing documents.
- **APTS_ContentRecordTypeName** – Set this property value to "Agreements."
- **APTS_DefaultContentWorkspaceName** – Set the default workspace name for your content library to "Agreements." This is the default content library which will store all activated agreements that are not routed to other content libraries defined in your Agreement Rules.
- **APTS_UIPageConfig** – Set up a UIPage Config for the *content* repository type. Enter "XML" as the value and the following chunk of XML under Content:


```
<UIPageConfig>
<UIAction name="publish_content">
<CustomPage>
<Name>Apttus_Content_PublishContent</Name>
</CustomPage>
</UIAction>
</UIPageConfig>
```
- **APTS_AutoContentSearchable** – (Optional) Set this property to "True" to skip the optional step when activating an agreement that allows a user to determine which agreement documents are available for content search. This property is not required, but recommended when you are routing content to ensure that all relevant agreement documents make it into the library and are searchable.
- **APTS_ContentConfig** – (Optional) Set this property to override the default field mappings used by the Apttus Content Integration package. The default field mapping only maps the Agreement name field to the same field in the Content Version object and is found as a Static Resource in the Contract Management package labeled "ContentConfig" (Go to Setup --> Quick Search --> Static Resources --> ContentConfig to view the static resource).

- i. Copy the XML contents from the ContentConfig static resource into your new Admin Object (APTS_ContentConfig).
 - ii. Any [custom fields](#) you add to the Content Version object and layout (detailed in the next section) which you want displayed in Content Version details for any stored agreement document must be mapped as part of this Admin property.
- For example, if you want the values of the Account and Opportunity for the document's related Agreement automatically added to Content Version details, you would create the Admin Object and code as shown in the following image:

The screenshot shows the 'Admin Detail' page for the Admin Object 'APTS_ContentConfig'. The 'Value' is 'XML' and the 'Code' contains the following XML:

```
<ContentConfig>
  <AgreementSpec>
    <Description>
      AgreementSpec contains agreement mapping specification
    </Description>
    <FieldMappings>
      <Description>
        FieldMappings holds the map of agreement fields to copy to the content object.
      </Description>
      <FieldMapping>
        <FromField>
          <Name>Id</Name>
        </FromField>
        <ToField>
          <Name>Agreement__c</Name>
        </ToField>
      </FieldMapping>
      <FieldMapping>
        <FromField>
          <Name>Aptus__Account__c</Name>
        </FromField>
        <ToField>
          <Name>Account__c</Name>
        </ToField>
      </FieldMapping>
      <FieldMapping>
        <FromField>
          <Name>Aptus__Related_Opportunity__c</Name>
        </FromField>
        <ToField>
          <Name>Opportunity__c</Name>
        </ToField>
      </FieldMapping>
    </FieldMappings>
  </AgreementSpec>
</ContentConfig>
```

Annotations on the image:

- Default mapping:** Points to the first `<FieldMapping>` block, which maps the `Id` field to the `Agreement__c` field.
- Mapping Account Field:** Points to the second `<FieldMapping>` block, which maps the `Aptus__Account__c` field to the `Account__c` field.
- Mapping Opportunity Field:** Points to the third `<FieldMapping>` block, which maps the `Aptus__Related_Opportunity__c` field to the `Opportunity__c` field.
- FromField = Agreement Field, ToField = Content Version Field:** A box on the right with arrows pointing to the `<FromField>` and `<ToField>` elements of the second `<FieldMapping>` block.

- iii. After an agreement document is activated and routed to the proper library, mapped fields will pull data from the document's associated agreement record and be displayed on the Content Version Details page.

Content
CC FX2 SOW 03.07.16.1_Original_CC FX2 SOW_2016-03-07.docx
Last Modified By: [User] 25 minutes ago

Content Details

Created from Attachment (CC FX2 SOW 03.07.16.1_Original_CC FX2 SOW_2016-03-07.docx)

Tags: 00000098 00000098.0 Partner Technologies

Author: [User] 25 minutes ago

Version: 1

Featured: ☐ [Feature]

Size: 102 KB

In My Libraries: AgreementSOW

Preview Comments Versions Downloads Subscribers Content Packs

Additional Information

Agreement	CC FX2 SOW 03.07.16.1
Account	Partner Technologies
Opportunity	Edge SLA

Custom fields mapped using APTS_ContentConfig

Setting Up Salesforce Files for Content

Before you can configure the content libraries which will store your activated agreements, you must create a custom field lookup relationship to Agreement on the Content Version object, to associate Content Version records with Agreement records and to allow for related records to appear on Agreement layouts. You can also create different page layouts to display content version data, depending on the library where your documents are stored.

Configuring Content Permissions for Libraries

You can define content permissions for managing your libraries. Each library permission represents a set of user privileges.

Go to **Setup > Customize > Salesforce Files > Content Permissions** to view, edit or add library permissions.

Setup
Library Permissions
« Back

This page allows you add, edit, and delete Library Permissions. A Library Permission is a set of user privileges for Salesforce CRM Content libraries.

Build

- Customize
 - Salesforce Files
 - Settings
 - Salesforce CRM Content
 - Content Deliveries
 - Salesforce Files Sync
 - Files Connect Settings
 - Triggers
 - Content Version
 - Content Document
 - Content Delivery **New!**
 - Content Document Link **New!**

Content Permissions
Fields

Actions	Library Permission Name	Description
Edit Del	Library Administrator	
Edit Del	Author	
Edit Del	Viewer	

Add a Library Permission

Add a Library Permission

Users who activate agreements will use this permission

i Users who will be activating agreements must have "Author" permission for content libraries. When you configure the libraries and edit members you will be able to assign permission to users.

Adding Custom Fields to the Content Version Object

To properly view information and navigate to your contract repository from the Content Versions related list on your Agreements, you must add "Agreement" as a custom lookup field to the Content Version object.

1. Go to **Setup > Customize > Salesforce Files > Fields**.
2. Click **New** under "Content Version Custom Fields & Relationships."
3. Enter information into the form to create the **Agreement** field.

The screenshot shows the APTTUS Admin console interface. The top navigation bar includes the APTTUS logo, a search bar, and user information (Chris Castro). The main navigation menu lists various sections: Home, Agreements, Templates, Dashboards, Admin, Reports, Accounts, Contacts, Query Templates, Agreement Document Output Formats, Agreement Protection, and a plus icon for more options. The left sidebar contains a 'Quick Find / Search...' bar and a list of administrative tasks under 'Administer' and 'Build'. The main content area is titled 'Edit Content Version Custom Field Agreement' and features a 'Custom Field Definition Edit' form. The form has three main sections: 'Field Information', 'Lookup Options', and 'Lookup Filter'. In the 'Field Information' section, the 'Field Label' and 'Field Name' are both set to 'Agreement', and the 'Data Type' is 'Lookup'. The 'Description' is 'Related agreements'. In the 'Lookup Options' section, the 'Related To' is 'Agreement', the 'Child Relationship Name' is 'Content_Versions', and the 'Related List Label' is 'Content Versions'. The 'Required' checkbox is unchecked, and the 'What to do if the lookup record is deleted?' options are 'Clear the value of this field. You can't choose this option if you make this field required.' and 'Don't allow deletion of the lookup record that's part of a lookup relationship.' The 'Lookup Filter' section has a link to 'Show Filter Settings'.

4. Click **Save**.
5. Add more fields as needed to, such as Opportunity and Account. These lookups are made available in the Content Details of activated agreements routed to your content libraries.

i If you want any custom fields beyond Agreement to map field data from the Agreement record to your content library, you need to configure the optional **APTS_ContentConfig** Admin object, as detailed in [Set Admin Properties](#).

Content Version Fields

This page allows you to specify the fields available for files. You can create up to 500 custom Content Version fields.

[Set History Tracking](#)

Content Version Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History
Edit	Description	Description	Text Area(1000)			<input type="checkbox"/>
Edit	File Type	FileType	Text(20)			<input type="checkbox"/>
Edit	Freeze Sharing	SharingOption	Picklist			<input checked="" type="checkbox"/>
Edit	Language	Language	Picklist			<input type="checkbox"/>
Edit	Owner	Owner	Lookup(User)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edit	Tags	TagCsv	Text Area(2000)			<input type="checkbox"/>
Edit	Title	Title	Text(255)			<input type="checkbox"/>

Content Version Custom Fields & Relationships

[New](#) [Field Dependencies](#)

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By	Modified Date	Track History
Edit Del	Account	Account__c	Lookup(Account)	<input checked="" type="checkbox"/>		View History	10/22/2015 3:13 PM	<input type="checkbox"/>
Edit Del	Agreement	Agreement__c	Lookup(Agreement)	<input checked="" type="checkbox"/>		View History	1/4/2016 4:50 PM	<input type="checkbox"/>
Edit Del	Opportunity	Opportunity__c	Lookup(Opportunity)	<input checked="" type="checkbox"/>		View History	10/22/2015 3:14 PM	<input type="checkbox"/>

Assigning Custom Fields to Page Layouts

Now that you have created custom fields for your content, you must assign them a page layout. Which page layout is used determines which fields are displayed when for the content you are storing. You can use the pre-existing General layout, or you can create additional layouts to display Content Version data.

1. Go to **Setup > Customize > Salesforce Files > Record Types**.
2. Click **New** to create a new record type with its own Library Content Version Layout.

New Record Type Help for this Page ?

Content Version

Step 1. Enter the details Step 1 of 2

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type ! = Required Information

Existing Record Type: --Master--

Record Type Label: Agreements

Record Type Name: Agreements i

Description:

Active: ☐

Select the Enable for Profile checkbox to make the new record type available to a profile. Users assigned to this profile will be able to create records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select the Make Default checkbox.

Profile Name	Record Types Currently Available	<input type="checkbox"/> Enable for Profile	<input type="checkbox"/> Make Default
Agreements User	Agreements (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	Agreements (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User	Agreements (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User	Agreements (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Chatter Moderator User	Agreements (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	Agreements (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	Agreements (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile	Agreements (Default)	<input type="checkbox"/>	<input type="checkbox"/>

3. Create the record type "Agreements" and assign it to profiles you want to give access to Content Version data.
4. Repeat steps 2 – 3 to create additional Content Version Record Types as needed.
5. Go to **Setup > Customize > Salesforce Files > Page Layouts**.
6. Click **New** to create a custom layout and name it "Agreements."
7. Click **Edit** next to the General layout.

The screenshot shows the Apttus Contract Management interface. The top navigation bar includes the Apttus logo, a search bar, and links for Setup and Help. The main navigation menu lists various sections: Home, Agreements, Templates, Dashboards, Admin, Reports, Accounts, Contacts, Query Templates, and Agreement Document Output Formats. A search bar on the left contains the text "salesforce files".

The main content area is titled "Content Version Page Layout". Below the title, there is a description: "This page allows you to create different page layouts to display Content Version data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default." Below this description is a table titled "Content Version Page Layouts".

Action	Page Layout Name	Created By	Modified By
Edit Del	Agreements	[User Avatar]	10/22/2015 3:15 PM
Edit Del	General	[User Avatar]	10/22/2015 3:16 PM

The left sidebar contains a "Build" section with a "Customize" button. Under "Customize", there are two main categories: "Salesforce Files" and "Triggers". The "Salesforce Files" category includes "Settings" (General Settings, Salesforce CRM Content, Content Deliveries, Files Connect) and "Triggers" (Content Version, Content Document, Content Delivery, Content Document Link). The "Triggers" category includes "Content Permissions", "Fields", "Field Sets", "Regenerate Previews", and "Limits". The "Page Layouts" link is highlighted in the sidebar.

The footer of the interface contains the copyright notice: "Copyright © 2000-2016 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliant".

8. Add the new Agreement lookup field and any other Content Version fields you want to add to the General layout.

Edit Page Layout Help for this Page

General

- To set your page layout, select items from the right-hand box and drag them to a page layout section on the left.
- You can select and move multiple items together by using Ctrl+click to select items individually or Shift+click to select a group of items.
- To rearrange the sections on the page layout, select the section header and drag it to the desired location.
- To change the properties of a field, related list, s-control, or the Detail Page Buttons item, double click it.
- Note that s-controls can only be placed in field sections.

Layout Properties Save Quick Save Cancel

Page Layout Name

Button Section

Detail Page Buttons

Fields Edit | Delete

Agreement
Account
Opportunity
★ Title
Description
Tags
Language
★ Owner

Legend

Not in Page Layout
Used in Page Layout
Selected
★ Required
🔒 Read-Only
🔗 Dependent Field(s):
🔧 Controller
⏏ Custom S-Control
⏏ Page
Always Displayed

View: Content Version Fields ▾

Content Version Fields [Page 1/1]	
Account	
Agreement	
Description	
File Type	
Language	
Opportunity	
Owner	
Prevent other...	
Tags	
Title	

Click and drag
Content
Version fields
to the layout

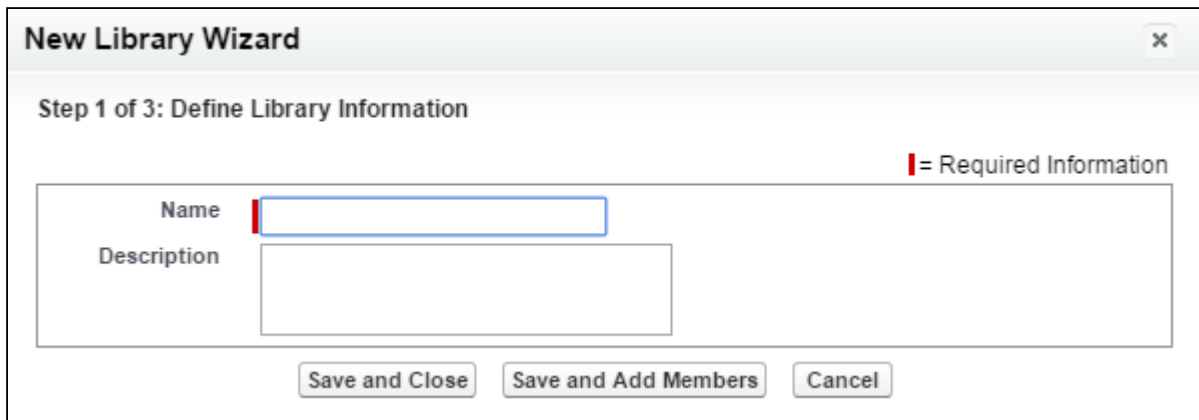
9. Click **Save**.
10. Repeat steps 7 – 9 for the Agreements layout.

Configuring the Libraries Tab

You now need to create the content libraries that will hold your documents. You can create as many content libraries as you want. Your initial content library will be the default library for stored agreements when no agreement rules are applied. You can create additional libraries for content routed using agreement rules.

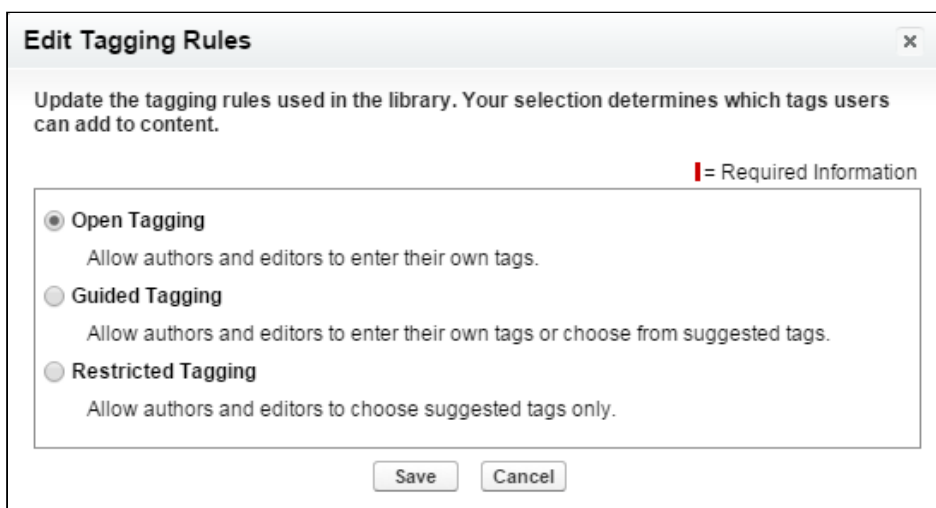
1. Go to the **Libraries** tab (click + and click **Libraries**).

2. From "My Libraries," click **New** to launch the New Library Wizard.



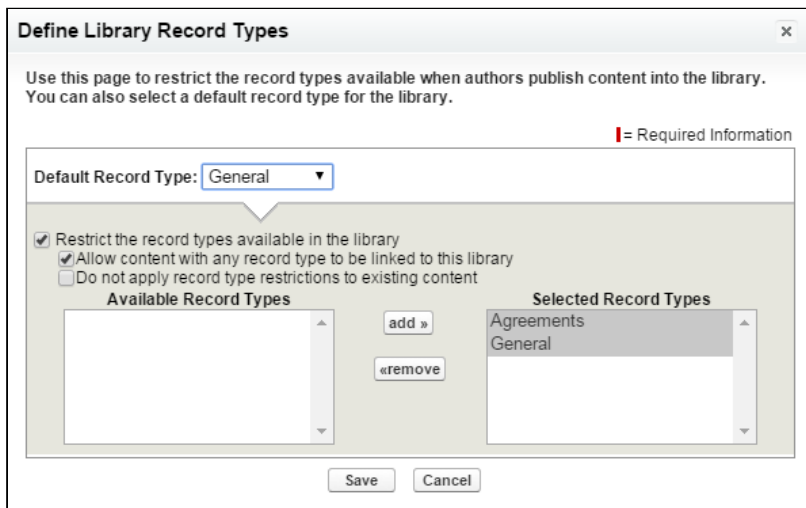
The "New Library Wizard" dialog box is shown, titled "Step 1 of 3: Define Library Information". It includes a legend indicating that a red vertical bar next to a field name signifies "Required Information". The "Name" field is marked as required and contains a blue border, while the "Description" field is not. At the bottom, there are three buttons: "Save and Close", "Save and Add Members", and "Cancel".

3. Enter the name you want to use for your library (e.g., "Agreements") and a description (e.g., "Activated Agreement Documents") and click **Save and Close**.
4. From "My Libraries," click on the library name.
5. Click **Tagging Rules** to edit tagging rules for your library. Click **Save** to save any changes.



The "Edit Tagging Rules" dialog box is shown, with the instruction: "Update the tagging rules used in the library. Your selection determines which tags users can add to content." It includes a legend indicating that a red vertical bar next to a field name signifies "Required Information". There are three radio button options: "Open Tagging" (selected), "Guided Tagging", and "Restricted Tagging". Each option has a description: "Allow authors and editors to enter their own tags.", "Allow authors and editors to enter their own tags or choose from suggested tags.", and "Allow authors and editors to choose suggested tags only." At the bottom, there are two buttons: "Save" and "Cancel".

6. Click **Record Types** to assign content version record type restrictions to your library.



Define Library Record Types

Use this page to restrict the record types available when authors publish content into the library. You can also select a default record type for the library.

Default Record Type: General

Restrict the record types available in the library

- ☒ Restrict the record types available in the library
 - ☒ Allow content with any record type to be linked to this library
 - ☐ Do not apply record type restrictions to existing content

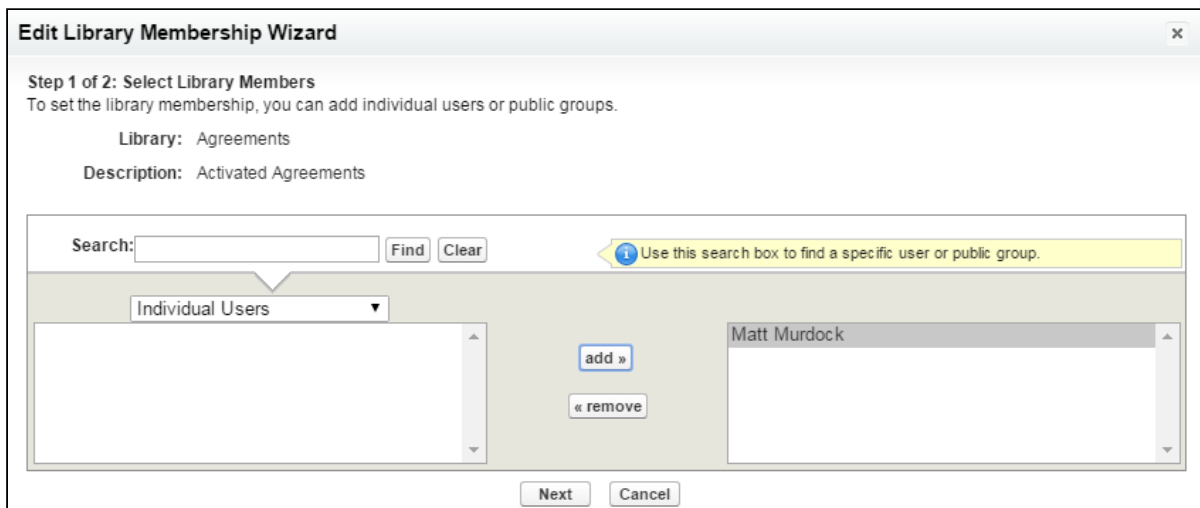
Available Record Types

Selected Record Types

Agreements
General

Save Cancel

- Choose which record types to restrict to your library. Be sure to add the Record Type you defined in the previous section.
- Click **Save**.
- Click **Edit Members** to choose which members have access to this library.



Edit Library Membership Wizard

Step 1 of 2: Select Library Members

To set the library membership, you can add individual users or public groups.

Library: Agreements

Description: Activated Agreements

Search: **Find** **Clear**

Individual Users

add »

« remove

Matt Murdock

Next **Cancel**

- Click **Next** to choose which permission profile to apply to the library members you added. Remember, members must at least have "Author" permissions to publish documents to the library.

Name	Type	Library Permissions
Matt Murdock	User	<div>Library Administrator ▼</div> <div>Library Administrator</div> <div>Author</div> <div>Viewer</div>

Save Cancel

11. Click **Save**. Your content library is now ready to use! Repeat the process to create additional libraries. Route content to specific libraries [using Agreement Rules to Route Content](#).

Using Agreement Rules to Route Content

One of the advantages to setting up Content Libraries for your activated agreement documents is the ability to develop agreement rules to route your content to specific libraries. By default, when you have content repositories configured your content will all route to the default content library. You can create additional libraries and rules which send your documents to these libraries based on the criteria you define. Follow the instructions in this section to set up Agreement Rules for content delivery.

Setting up a Formula Field on the Agreement Object

1. Go to **Setup > Create > Objects** and click on the **Agreement** object.
2. Under Customer Fields & Relationships click **New**.
3. Choose **Formula** and click **Next**.

Agreement Help for this Page ?

New Custom Field

Step 1. Choose the field type Step 1

Next Cancel

Specify the type of information that the custom field will contain.

Data Type

☐ None Selected Select one of the data types below.

☐ Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☒ Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

4. Enter "Contract Routing Formula" into the **Field Label** field and press tab to automatically create the Field Name.
5. Choose **Text** as the Formula Return Type. Click **Next**.

Agreement Help for this Page ?

New Custom Field

Step 2. Choose output type Step 2 of 5

Previous Next Cancel

Field Label Field Name

Formula Return Type

☐ None Selected Select one of the data types below.

☐ Checkbox Calculate a boolean value
Example: `{TODAY() > CloseDate}`

☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `{GrossMargin = Amount - Cost__c}`

☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `{Reminder Date = CloseDate - 7}`

☐ Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `{Next = NOW() + 1}`

☐ Number Calculate a numeric value.
Example: `{Fahrenheit = 1.8 * Celsius__c + 32}`

☐ Percent Calculate a percent and automatically add the percent sign to the number.
Example: `{Discount = (Amount - Discounted_Amount__c) / Amount}`

☒ Text Create a text string, for example, by concatenating other text fields.
Example: `{Full Name = LastName & ", " & FirstName}`

6. For the formula, enter "\$RecordType.Name" and click **Next**.

Agreement Help for this Page ?

New Custom Field

Step 3. Enter formula Step 3 of 5

Previous Next Cancel

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Full Name = LastName & ", " & FirstName` [More Examples](#)

Simple Formula Advanced Formula

Select Field Type: Agreement -- Insert Merge Field -- Insert Operator

Contract Routing Formula (Text) =

`$RecordType.Name`

Quick Tips

- [Getting Started](#)
- [Operators & Functions](#)

7. Make the formula available to the appropriate user profiles and available to page layouts as needed and click **Save** in the final step.

Extending the Agreement Rule Object to Include Content

In order to allow users to create rules to route content to specific libraries, you must first extend the Agreement Rule object to create a new "Content Workspace" Rule Type.

1. Go to **Setup > Create > Objects** and click on the **Agreement Rule** object.
2. Under Custom Fields & Relationships, click on the **Rule Type** field.

Create

Apps

Custom Labels

Interaction Log Layouts

Objects

Picklists BETA

Packages

Report Types

Tabs

Action Link Templates

Global Actions

Workflow & Approvals

Develop

Schema Builder

Lightning App Builder

Canvas App Previewer

Installed Packages

AppExchange Marketplace

Critical Updates

Deploy

Deployment Settings

Created By

Last Modified By

Name

Edit

Owner

Created By

LastModifiedBy

Name

Owner

Lookup(User)

Lookup(User)

Auto Number

Lookup(User,Queue)

Custom Fields & Relationships

New

Field Dependencies

Custom Fields & Relationships Help ?

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
Edit	Active	Apttus__Active__c	Apttus Contract Management	Checkbox			8/5/2015 9:57 AM
Edit	Condition Filter Logic	Apttus__ConditionFilterLogic__c	Apttus Contract Management	Text(255)			8/5/2015 9:57 AM
Edit	Edit Inclusion Criteria	Apttus__EditInclusionCriteria__c	Apttus Contract Management	Formula (Text)			1/20/2016 4:05 PM
Edit	Inclusion Criteria Field	Apttus__InclusionCriteriaFieldName__c	Apttus Contract Management	Text(255)			8/5/2015 9:57 AM
Edit Replace	Inclusion Criteria Operator	Apttus__InclusionCriteriaCompOper__c	Apttus Contract Management	Picklist			8/5/2015 9:57 AM
Edit	Inclusion Criteria Value	Apttus__InclusionCriteriaFieldValue__c	Apttus Contract Management	Text(255)			8/5/2015 9:57 AM
Edit	Rule Description	Apttus__Rule_Description__c	Apttus Contract Management	Text Area(255)			8/5/2015 9:57 AM
Edit	Rule Field	Apttus__Rule_Field__c	Apttus Contract Management	Text(255)			8/5/2015 9:57 AM
Edit Replace	Rule Object	Apttus__Rule_Object__c	Apttus Contract Management	Picklist		Rule Type	8/5/2015 9:57 AM
Edit Replace	Rule Type	Apttus__Rule_Type__c	Apttus Contract Management	Picklist			8/5/2015 9:57 AM
Edit	Rule Value	Apttus__Rule_Value__c	Apttus Contract Management	Text(255)			8/5/2015 9:57 AM
Edit	Sequence	Apttus__Order__c	Apttus Contract Management	Number(2, 0)			8/5/2015 9:57 AM

3. Scroll down to Picklist Values for the field and click **New**.

Build

- Customize
 - Create
 - Apps
 - Custom Labels
 - Interaction Log Layouts
 - Objects
 - Picklists **BETA**
 - Packages
 - Report Types
 - Tabs
 - Action Link Templates
 - Global Actions
 - Workflow & Approvals
 - Develop
 - Schema Builder
 - Lightning App Builder
 - Canvas App Previewer

Action **Dependent Field** **Data Type** **Modified By**

Edit | Del Rule Object Picklist 8/5/2015 9:57 AM

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

Picklist Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Picklist Values Help](#)

Action	Values	Default	Chart Colors	Modified By
Edit Del	Agreement Template	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Agreement Type	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Email Template	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Queue Assignment	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Submit Request Mode	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Document Folder	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM

Back To Top Always show me [more records per related list](#)

4. Add the picklist value "Content Workspace" and click **Save**.

Validation Rules [New](#)

No validation rules defined.

Picklist Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#)

Action	Values	Default	Chart Colors	Modified By
Edit Del	Agreement Template	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Agreement Type	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Email Template	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Queue Assignment	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Submit Request Mode	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Document Folder	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Content Workspace	<input type="checkbox"/>	Assigned dynamically	3/1/2016 4:56 PM

5. Return to the Agreement Rules Object Details page and click on the **Rule Object** Custom Field.

Custom Fields & Relationships [New](#) [Field Dependencies](#) [Custom Fields & Relationships Help](#)

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
Edit	Active	Apttus__Active__c	Apttus Contract Management	Checkbox			8/5/2015 9:57 AM
Edit	Condition Filter Logic	Apttus__ConditionFilterLogic__c	Apttus Contract Management	Text(255)			8/5/2015 9:57 AM
Edit	Edit Inclusion Criteria	Apttus__EditInclusionCriteria__c	Apttus Contract Management	Formula (Text)			1/20/2016 4:05 PM
Edit	Inclusion Criteria Field	Apttus__InclusionCriteriaFieldName__c	Apttus Contract Management	Text(255)			8/5/2015 9:57 AM
Edit Replace	Inclusion Criteria Operator	Apttus__InclusionCriteriaCompOper__c	Apttus Contract Management	Picklist			8/5/2015 9:57 AM
Edit	Inclusion Criteria Value	Apttus__InclusionCriteriaFieldValue__c	Apttus Contract Management	Text(255)			8/5/2015 9:57 AM
Edit	Rule Description	Apttus__Rule_Description__c	Apttus Contract Management	Text Area(255)			8/5/2015 9:57 AM
Edit	Rule Field	Apttus__Rule_Field__c	Apttus Contract Management	Text(255)			8/5/2015 9:57 AM
Edit Replace	Rule Object	Apttus__Rule_Object__c	Apttus Contract Management	Picklist		Rule Type	8/5/2015 9:57 AM
Edit Replace	Rule Type	Apttus__Rule_Type__c	Apttus Contract Management	Picklist			8/5/2015 9:57 AM
Edit	Rule Value	Apttus__Rule_Value__c	Apttus Contract Management	Text(255)			8/5/2015 9:57 AM

6. Add the value "Content" to the Rule Object picklist.

Picklist Values				
New Reorder Replace Printable View Chart Colors				
Action	Values	Default	Chart Colors	Modified By
Edit Del	APTS_Agreement__c	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	APTS_Template__c	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	EmailTemplate	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	QueueSObject	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Folder	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Apttus__APTS_Agreement__c	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Apttus__APTS_Template__c	<input type="checkbox"/>	Assigned dynamically	8/5/2015 9:57 AM
Edit Del	Content	<input type="checkbox"/>	Assigned dynamically	3/1/2016 5:01 PM

7. Now that you have added new picklist options, you need to edit field dependencies. From the Rule Object detail, click **Change** under Picklist Options.

Agreement Rule Custom Field
Rule Object (Managed)
[Back to Agreement Rule](#)

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

[Validation Rules](#) (0)

Custom Field Definition Detail
[Edit](#)
[Set Field-Level Security](#)
[View Field Accessibility](#)

Field Information

Field Label	Rule Object	Object Name	Agreement Rule
Field Name	Rule_Object	Data Type	Picklist
Namespace Prefix	Apttus		
API Name	Apttus__Rule_Object__c		
Description			
Help Text			
Created By	8/5/2015 9:57 AM	Modified By	8/5/2015 9:57 AM

Package Information

Installed Package	Apttus Contract Management	Available in Versions	8.277 - Current
-------------------	--	-----------------------	-----------------

Picklist Options

Strictly enforce picklist values	<input type="checkbox"/>
Controlling Field	Rule Type [Change]

8. Click **Next** to display the last column in the picklist.
9. Under the Content Workspace column, click on **Content** and click **Include Values**.

Edit Field Dependency [Help for this Page](#)

Save Cancel Preview

Controlling Field Rule Type
Dependent Field Rule Object

▼ Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Showing Columns: 6 - 7 (of 7) < Previous | Next > View All Go to

Rule Type:	Document Folder	Content Workspace
Rule Object:	APTS_Agreement__c	APTS_Agreement__c
	APTS_Template__c	APTS_Template__c
	EmailTemplate	EmailTemplate
	QueueSObject	QueueSObject
	Folder	Folder
	Apttus__APTS_Agreement__c	Apttus__APTS_Agreement__c
	Apttus__APTS_Template__c	Apttus__APTS_Template__c
	Content	Content

Showing Columns: 6 - 7 (of 7) < Previous | Next > View All Go to

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

10. Click **Save**.

Creating a Content Workspace Agreement

Now that you have extended the Agreement Rule object for document routing, you can begin creating Agreement Rules to route your content to specific libraries. For example, if you have created a library for all your agreements of record type SOW, you can create a new rule to move all documents for records that match the Contract Routing Formula (RecordType.Name) to this library.

When you create a Content Workspace Agreement Rule, observe the following:

- Rule Type must equal "Content Workspace"
- Rule Value must be the name of the Content Library where you want to route the documents (e.g., "AgreementSOW").

For full instructions on creating Agreement Rules, refer to [Setting Up Rule-based Agreement Request Process Parameters](#).

The following image shows an example of an Agreement Rule to route all SOW agreement documents to the appropriate library.

Agreement Rule R-0001

Edit Delete Clone

Rule Information

Name R-0001
 Sequence 3
 Rule Type Content Workspace
 Rule Value AgreementSOW
 Rule Description To move all documents for records with SOW value for Contract Routing Formula field to Content Agreements library - AgreementSOW
 Active ☒

Inclusion Criteria

Field	Operator	Value
--None--	--None--	

Filter Criteria

Field	Operator	Value
Contract Routing Formula	equal to	SOW AND

Finding Content After Activation

Using the above rule, following activation, any SOW agreement is routed to the appropriate library. Go to **Libraries** to access stored documents.

APTUS Configure - Quote - Contract

Search... Search

Home Agreements Templates Dashboards Admin Reports Accounts Contacts Query Templates Agreement Document Output Formats Agreement Protection Agreement Rules Retention Policies

Content Search

All Libraries Search

Recent Items

- CC SOW FX2 03.02.16.1 Original CC SOW_2016-03-02.docx
- CC SOW FX2 03.02.16.1
- CC SOW FX2 03.01.16.1 Original CC SOW_2016-03-01.docx
- CC SOW FX2 03.01.16.1
- APTS AutoContent
- Chris Castro
- a0161000005065F
- R-0001
- AD Sales SOW VA 02.09.16.1
- a0161000004zQXn

Recycle Bin

Libraries Overview

Contribute Create New... Manage Library: Select Library

Use the tabs below to view and manage shared libraries or your private library.

Shared Content My Private Files

My Libraries

Actions	Library Name
Browse	Agreements Activated Agreements
Browse	AgreementSOW Activated SOW Agreements

Top Content

Title	Author	Publication Date
CC SOW FX2 03.02.16.1 Original CC FX2 SOW_2016-03-02.docx	Chris Castro	32 minutes ago
CC SOW FX2 03.01.16.1 Original CC FX2 SOW_2016-03-01.docx	Chris Castro	22 hours ago

Show All

Popular Tags

Sort Alphabetically | Sort By Popularity

00000091 00000091.0 00000094 00000094.0
 Partner Technologies

Recent Activity

- subscribed to CC SOW FX2 03.02.16.1_Original_CC FX2 03-02.docx in AgreementSOW 11 minutes ago
- published CC SOW FX2 03.02.16.1_Original_CC FX2 SOW_2016-03-02.docx into AgreementSOW 32 minutes ago
- published CC SOW FX2 03.01.16.1_Original_CC FX2 SOW_2016-03-01.docx into AgreementSOW 22 hours ago

Most Active Contributors

Chris Castro

Chat

Click on a **Library Name** to view content stored in the library.

The screenshot shows the APTTUS interface with the 'AgreementSOW' library selected. The 'Top Content' section displays a table of documents:

Title	Author	Publication Date
CC SOW FX2 03.02.16.1 Original_CC FX2 SOW_2016-03-02.docx	[User]	34 minutes ago
CC SOW FX2 03.01.16.1 Original_CC FX2 SOW_2016-03-01.docx	[User]	22 hours ago

The 'Members' section shows a table with columns for Action, Name, and Permissions. The 'Recent Activity' section lists recent actions such as 'published CC SOW FX2 03.02.16.1_Original_CC FX2 SOW_2016-03-02.docx into AgreementSOW'.

You can also search for your activated agreements by going to **Content**.

The screenshot shows the 'Search for Content' page. The 'Search Results' section displays a table of documents:

Title	Size	Author	Last Modified	Downloads
CC SOW FX2 03.02.16.1 Original_CC FX2 SOW_2016-03-02.docx	102 KB	[User]	36 minutes ago	
CC SOW FX2 03.01.16.1 Original_CC FX2 SOW_2016-03-01.docx	102 KB	[User]	22 hours ago	

Content Versions Related List

After an agreement is activated, the attached documents are displayed in the Content Versions Related List (these examples use the above SOW Agreement Rule).

Agreement
CC SOW FX2 03.02.16.1

Customize Page | Edit Layout | Printable View | Help for this Page

Content Versions [1] | Agreement Line Items [0] | Notes & Attachments [0] | Document Versions [1] | Agreement Locks [0] | Previews [0] | Merge Events [1] | Cycle Time Field Data [0] | Cycle Time Group Data [0] | Agreement Clauses [0] | Agreement Documents [0] | Agreement Term Exceptions [0] | Child Agreements [0] | Open Activities [3] | Approval History [0] | Activity History [0] | Related Agreements (Relationship From) [0] | Related Agreements (Relationship To) [0] | Content Events [0] | Async Merge Calls [0]

Agreement Detail Edit Delete Clone

Agreement Number	00000094.0	Record Type	SOW [Change]
Agreement Name	CC SOW FX2 03.02.16.1	Agreement Category	
Account	Partner Technologies	Status Category	In Effect
Related Opportunity	Edge SLA	Status	Activated
Total Agreement Value	\$500,000.00	Subtype	
Description		Parent Agreement	
Special Terms		Primary Contact	Bertrand Roberts
Business Hours		Requestor	
Service Level		Owner	
Contract Routing Formula	SOW		

Content Versions Content Versions Help

Action	Title	Created Date	Last Modified Date
	CC SOW FX2 03.02.16.1_Original_CC FX2 SOW_2016-03-02.docx	3/2/2016 2:58 PM	3/2/2016 2:58 PM

Agreement Line Items New Agreement Line Item Agreement Line Items Help

No records to display

Notes & Attachments New Note Attach File Notes & Attachments Help

No records to display

Drill down into the Content Version details for a document by clicking on the **Title** in the Content Versions Related List.

CC SOW FX2 03.02.16.1_Original_CC FX2 SOW_2016-03-02.docx Privately Shared Go to Content Detail Page Help for this Page

Download docx (102 KB) File Sharing Settings

Last Modified Today at 2:58 PM

Version 1
 Show all versions
 Show file report

Description
 Created from Attachment (CC SOW FX2 03.02.16.1_Original_CC FX2 SOW_2016-03-02.docx)

Document of Work (SOW)

The SOW is a document that describes the scope of work to be performed by the provider of the services. It is a contract between the provider and the customer. The SOW is a document that describes the scope of work to be performed by the provider of the services. It is a contract between the provider and the customer.

Customer Name: Partner Technologies
 Agreement Start Date: 3/2/2016
 Agreement End Date: 3/2/2016
 Total Agreement Value: \$500,000.00
 Service Level: SOW

DESCRIPTION:

The information on this page is for informational purposes only. It is not intended to be used as a contract. The information on this page is for informational purposes only. It is not intended to be used as a contract.

1. Include request for detailed description of the scope of work to be performed by the provider of the services. Specify when the request is made, and when the request is due. Specify when the request is made, and when the request is due.

2. Include a specific description of the requested services to be provided by the provider of the services. Specify when the request is made, and when the request is due.

3. Include request for detailed description of the scope of work to be performed by the provider of the services. Specify when the request is made, and when the request is due.

4. The objective of this contract is to describe the requested services to be provided by the provider of the services. It is a contract between the provider and the customer.

5. The provider of the services is responsible for providing the services to the customer. It is a contract between the provider and the customer.

Followers
 No followers.

Shared With
 AgreementSOW

Page 1 of 3

From this page you can download the document, view libraries the document is shared with, go to the **Content Detail** page to view more information or upload new versions. For more information on working with content, refer to Salesforce help on [Salesforce CRM Content](#).

Managing Templates

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

X-Author is a Microsoft add-in designed to work with Microsoft Word. It allows users to dynamically interact with Salesforce data and updates Word with two Apttus-specific ribbons. In a typical scenario where an agreement/proposal document is sent to an external party for negotiation, the external party makes changes to the document as part of the negotiation.

Template Administrators maintain and manage contract and clause templates. These templates contain merge fields, which pull the respective field values to create distributable documents the template is generated. Template Administrators can perform the following tasks:

- Create complex contract templates from existing Word documents or other contract templates kept in Salesforce
- Apply conditional clauses or text to display if the condition is met
- Insert smart fields enabling reconciliation with the Apttus agreement/proposal
- Insert clauses from clause libraries which get resolved during the generation of the contract agreement
- Translate contracts from one language to another

Note

Ensure that the API name of the smart fields you insert in your template do not end with *start* or *end*.

If the changes to the document involve data belonging to the agreement/proposal record, then the reconciliation provides the mechanism to ensure the values in the document and the agreement/proposal records are reconciled.

For details, see *Apttus X-Author Contracts User Guide*.

- [Setting up template object for Contract Management](#)
- [Securing Documents](#)
Word Trust Center/Protected View options can impact your ability to see generated documents and should be disabled before you begin using X-Author Contracts.
- **Agreement Clause**
Clauses have embedded merge fields contained within them that get auto populated during agreement creation time.
- **Agreement Clause Subcategories**
Subcategory picklists display values based on what was selected in the Category picklist. The picklists also now behave the same for both the Playbook and Create Section dialog, in that they both have Category and Subcategory drop-down lists.

- **Creating Offline Agreements**

You can create offline agreements directly in X-Author by taking an existing Word document that was created outside of Salesforce and has not previously been associated with an agreement.

- **Auto Publishing**

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.

- [Document Generation for Templates with Nested Clauses](#)

The Autopublishing features improve document generation performance, but some Contract Management customers choose to generate documents without using the Autopublishing features.

- [Query Template](#)

Using template filtering rules, you can set up user defined filters to narrow the list of templates that display for tasks that involve previewing or generating documents. For example, for agreement templates created for multiple regions, you should only be able to select templates for the region to which they belong. The template filter uses agreement fields and related child object fields to select the templates to display.

- **Template Datasource Filter**

Template Datasource Filter enables you to filter the records of various business objects in your Agreement document based upon the filter criteria.

- **Dynamic Document Assembly**

Dynamic Document Assembly enables you to preconfigure filter rules that drive a sequence of prescribed dynamic clause insertions in a generated document. This results in a complete and well-formed agreement using a combination of contract field values. These contract field values are expressed as a user-configured key that determine the desired contract clause content during document generation.

- [Setting Up Template Filtering Rules](#)

By setting up the template filtering rules, the Template selection page can be configured to setup user defined filters to narrow the list of Templates displayed to the user for Preview/Generate/Generate Supporting Document/Regenerate tasks. The template filter is setup by an administrator and allows agreement fields and related child object fields to be used in selecting the templates.

- **Agreement Term Exception**

An exception clause or term is a stipulated condition in your agreement that may need approval from management, to grant or prevent certain allowances to or from a particular group of users in your agreement. Contract Management enables you to associate such exception clauses or terms to your agreement document as a separate agreement term exception record.

About Agreement Phases

The contract process goes through typical sequences of events, or *phases*. The following phases encompass the various options for managing the Agreement life cycle:

- Amendment

- Renewal
- Termination
- Expire

For details, refer to [Apttus Status Categories and Statuses](#).

Amendment

User Permissions Needed

To amend an agreement:	Agreement: Create, Edit
------------------------	-------------------------

During the term of the agreement you may need to modify the contract. For example, the language or terms of the contract. The *Amend* action is used for this functionality. The Amend action creates a new version of the agreement record. The new, amended record shares the same base agreement number as the original with the decimal point incremented by one. All the data from the original version is copied into the new version. The new version can then go through the same agreement process as described above. On execution of the amendment, the status category of the original version of the agreement is changed to **Amended** from **In Effect**.

Renewal

User Permissions Needed

To renew an agreement:	Agreement: Create, Edit
------------------------	-------------------------

Towards the end of the term of the agreement, you may want to renew the agreement for a further period of time. In such a scenario, the Renew action would create a new version of the agreement. The agreement can then be executed after updating the term of the agreement. You can quickly identify contract renewal candidates, allowing plenty of time to act, and create new contract drafts based on the previous contract. You may refer [Clearing Cloned Agreement Fields Values](#) to understand how to control which fields to clone during renewal process.

Termination

User Permissions Needed

To terminate an agreement:	Agreement: Edit
----------------------------	-----------------

If you decide to terminate or end a contract, you can click on the Terminate action. The agreement status is changed to Terminated.

Expiration

User Permissions Needed	
To mark an agreement as expired:	Agreement: Edit

After the agreement term ends, use the Expire action to mark the agreement as expired.

Configuring Agreement Clause Categories and Subcategories

Clauses have embedded merge fields contained within them that get auto-populated during agreement creation time.

To organize agreement clauses, it may be useful to create categories and sub-categories. These can also be used for reporting purposes. The **Subcategory** pick-list displays values based on **Category** pick-list selection.

These picklists display when you perform the following actions:

- Creating new agreement clauses in Salesforce
- Using the Playbook in X-Author for templates and generated documents
- Creating new agreement and clause templates in X-Author
- Creating sections in a generated document

To set up a clause:

- [Match Agreement Clause and Template categories and subcategories.](#)
- [Associate categories and subcategories.](#)

Agreement Clause Subcategories

Subcategory picklists display values based on what was selected in the **Category** picklist. The picklists also now behave the same for both the Playbook and Create Section dialog, in that they both have Category and Subcategory drop-down lists.

Subcategories can be selected when you choose to save part of a document as an agreement clause in Author, as well as when you create a clause in Salesforce.

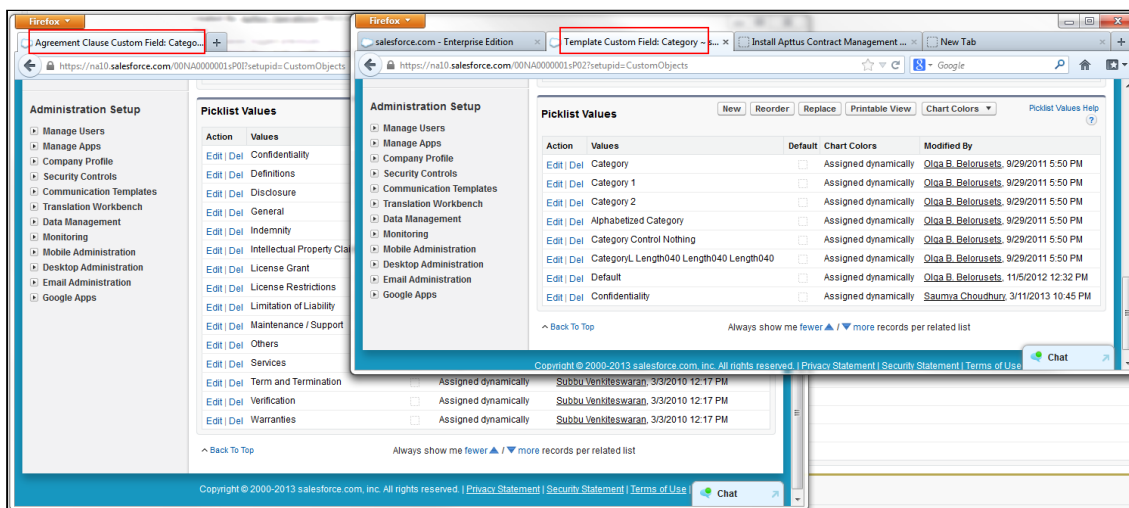
To maintain consistency, the **Category** and **Subcategory** values for the *Agreement Clause* custom object must match the **Category** and **Subcategory** values for the Template custom object. The Apttus__Category__c and Apttus__Subcategory__c API names refer to different objects though.

If the values do not match and you add an agreement clause to an agreement using the Playbook, an unexpected category and subcategory is added in Salesforce to the Agreement Clause related list's categories and subcategories.

To match Agreement Clause and Template Categories and Subcategories

The values of the category and subcategory fields for Agreement Clause and Template objects must match. You must sync the picklist values between the two objects and then ensure the same association of categories and subcategories.

1. Navigate to **Setup > Build > Create > Objects**, right-click **Agreement Clause** and open link in a new window.
2. Navigate to **Setup > Build > Create > Objects** and click **Template** to display the Template object page.
3. For both, **Agreement Clause** and **Template**, go to the Custom Fields & Relationships section and click **Category**.
Observe the values for both **Category** picklists. If the values are not the same, they should be modified so they match between the two objects.



- Return to the Custom Fields & Relationships section for both objects and click **Subcategory**. Similar to the previous step, modify mismatching picklist values so they are the same for both objects.

The categories and subcategories for the **Agreement Clause** and **Template** objects match.

You must associate the same categories and subcategories.

To Associate Categories and Subcategories

The **Agreement Clause** and **Template** objects require matching category and subcategory values.

- Navigate to **Setup > Build > Create > Objects > Agreement Clause** and click **Subcategory** to display the field details.
- Click **New** in the Picklist Values section.
- Enter all of the required picklist values for all of the categories and click **Save**.
- Click **Back to Agreement Clause** and then click **Category** to display the field details.
- Click **Edit** beside Subcategory in the Field Dependencies section.
- Double-click the sub-categories required for each Category column, when highlighted it indicates they will be associated with that category.

Category:	<u>Confidentiality</u>	<u>Definitions</u>	<u>Disclosure</u>
Subcategory:	Default Registered Confidential Organization Confidential Organization Internal Unclassified/Public <i>Category 1</i> <i>Category 2</i> <i>Category 3</i> <i>Category 4</i> <i>Category 5</i> <i>Fixed-Price</i> <i>Cost-Reimbursement</i> <i>Incentive</i> <i>Indefinite-Delivery</i>	Default <i>Registered Confidential</i> <i>Organization Confidential</i> <i>Organization Internal</i> <i>Unclassified/Public</i> <i>Category 1</i> <i>Category 2</i> <i>Category 3</i> <i>Category 4</i> <i>Category 5</i> Fixed-Price Cost-Reimbursement Incentive Indefinite-Delivery	Default <i>Registered Confidential</i> <i>Organization Confidential</i> <i>Organization Internal</i> <i>Unclassified/Public</i> Category 1 Category 2 Category 3 Category 4 Category 5 <i>Fixed-Price</i> <i>Cost-Reimbursement</i> <i>Incentive</i> <i>Indefinite-Delivery</i>

- Click **Preview** to ensure the categories are associated correctly.
- Click **Save**.

When you create an Agreement Clause in Salesforce or a section in X-Author, the subcategories created above will be available for selection. You should repeat this procedure for the **Template** object categories and subcategories to ensure they align with the **Agreement Clause** values.

Configuring Agreement Term Exception

An exception clause or term is a stipulated condition in your agreement that may need approval from management, to grant or prevent certain allowances to or from a particular group of users in your agreement. Contract Management enables you to associate such exception clauses or terms to your agreement document as a separate agreement term exception record.

For example, if your customer requires certain extended payment terms for an agreement, other than what is mentioned in your agreement document, you can associate such exception clause to your agreement as a term exception, named *Extended Payment Terms*.

To insert **Agreement term exception** in your agreement document, you must configure the following:

- [Creating an Admin Entry for Term Exception](#)
- [Creating a Term Exception](#)
- [Associating a Term Exception with a Clause](#)

After you follow the above mentioned procedures and generate an agreement document, the generated agreement document reflects the agreement term exception. You can also view the agreement term exceptions associated to your agreement record in the Agreement Term Exception related list.

You can also associate an approval process (Term Exception Approval) with the term exception record if your exception clause or term has to be approved by a higher authority before being inserted in your agreement document. For more information, refer *Apttus Advanced Approvals Admin Guide*.

Note

The approval process is triggered when you check-in a clause with a term exception associated to it.

Creating an Admin Entry for Term Exception

User Permissions Needed

To create a new admin entry or edit an existing entry:

Admin: Read, Create, Edit

1. Click  and search for **Admin**.
2. Click **New** to create a new admin entry.
3. In the **Name** field, type *APTS_EnableTermExceptionsInAuthor* and in the **Value** field, type *True*.
4. Click **Save**.

You have created an admin entry to enable term exceptions for your records. You must now create a term exception record to implement term exception in your documents.


Creating a Term Exception

User Permissions Needed

To create, edit an Agreement term exception:

Agreement Term Exception: Read, Create, Edit

Agreement: Read, Edit

1. Click  and search for **Term Exceptions**.
2. Click **New** to create a term exception record.
3. Enter details in one or more of the following fields, as required:

Option	Description
Is Active	This checkbox enables you to set the term exception record as active. By default, it is set to true.
Exception Type	None, Corporate, Other, Procurement, Sales. This indicates the type of exception record.

Option	Description
Approval Required	This checkbox indicates whether an approval process should be associated with this term exception record. By default, it is set to true.
Exception	This textbox indicates the title for which this term exception record is created. For example, if your customer requires a different clause for payment terms, you may enter <i>Extended Payment Terms</i> in this field.
Agreement Types	This is a multi-select picklist field. Selecting different values from this picklist enables your term exception record for multiple agreement record types. You may have to navigate to Setup > Create > Objects > Term Exception > Agreement Types picklist and add new values like NDA, MSA, and more to map the Term Exception > Agreement Types with your Agreement > Record Types .
Description	Type a description for your term exception record to give a brief idea about the usage of this record.

4. Click **Save**.

You have created a term exception record. You must associate your term exception record with a clause.

Associating a Term Exception with a Clause

- You must ensure that you have an existing term exception record in your Salesforce org.
 - You must also ensure that you have a clause record checked in using **X-Author Templates** in Microsoft Word.
1. Click the **Templates** tab and navigate to your existing clause record.
 2. Look for the **Term Exception** look up field.
 3. Use the look-up icon to search for your term exception and select it. You can also associate the term exception with a clause when you check-in your clause from **X-Author Templates** in Microsoft Word.
 4. Click **Save**.

You have associated a term exception record with a clause and can see the changes in the Sections/ Clauses related list under your term exception record. You can insert this term exception clause in your existing template and use it further for agreement document generation.


Configuring Dynamic Document Assembly

About Dynamic Document Assembly

Dynamic Document Assembly enables you to preconfigure filter rules that drive a sequence of prescribed dynamic **clause** or **attachment** insertions in a generated document. This results in a complete and well-formed agreement:

- **Clause** insertions use a combination of contract field values to drive document assembly rules. These contract field values are expressed as a user-configured key that determine the desired agreement or proposal clause content during document generation.
- **Attachment** insertions rely on configuration of document assembly rule components and operate at the line-item level. Document assembly component definitions refer to attachments on objects that are a lookup from the line item object. These component references and condition expressions defined in X-Author Contracts determine attachment content during document generation.

Dynamic Document Assembly Rulesets are enabled for the **Agreement** and **Quote/Proposal** objects.

 Support for the the *Agreement* 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). Support for the *Proposal* object at the Header (clause insertions) and *line-item level* (attachments) is only enabled for users of **Apttus Proposal Management November 2016** release or later (versions **8.104 (PM)**) and the above mentioned versions of the CLM Product suite.

Filter rules are enabled through the **Document Assembly Rulesets** tab and Apttus objects, for Rule Sets, Rules, and Components, which are maintained externally from templates. Rulesets can contain many rules, and each Rule can be applied to many Components, with each Component assigned to an attachment or clause template for insertion when the Rule filter values are found. Document Assembly Rulesets can be used in any template through the **Insert Dynamic Sections** option in X-Author. These Dynamic Sections in the template are the link to the associated Ruleset, and therefore to the prescribed content.

The Template object can be configured to display Related Lists identifying where a clause template has been used as a Ruleset component, or where the Template contains assigned dynamic sections (either clause or attachment).

i A note on Record Types: In the modeling of your system, it is recommended to make every effort to ensure that any Template Agreement Types that make use of dynamic segments also be included in the Document Assembly Ruleset object Record Types picklist. For example, if you have NDA templates that make use of dynamic segments, the "NDA" Agreement Type should be present in both the Template Object Agreement Types picklist and the Document Assembly Ruleset Record Types picklist. It is recommended to design your approach in this way, especially for Rulesets that do not make use of Document Assembly Rule filter criteria.

Dynamic Document Assembly Elements

The following elements comprise Dynamic Document Assembly.

Doc Assembly Ruleset

Dynamic Document Assembly uses the **Doc Assembly Ruleset** as the container object for the functionality as shown in the following figure:

The screenshot shows the Salesforce interface for a Doc Assembly Ruleset. The page title is "Doc Assembly Ruleset" and the specific ruleset is "AGRSet1 ALIs w-ClauseID_Comp". Navigation links include "Back to List: Doc Assembly Rulesets", "Customize Page", "Edit Layout", "Printable View", and "Help for this Page".

Doc Assembly Ruleset Detail

Buttons: Edit, Delete, Clone

Ruleset Name	AGRSet1 ALIs w-ClauseID_Comp	Owner	[User Avatar]
Sequence	401	Active	✓
Record Types	Nfeature Two	Description	+1 working Parent (Object/Field) component added (OKin8.337 tests with/without Packaged Child)
Business Object	Apttus__APTS_Agreement__c	Content Type	Clause
			chO-DAR AgrClause-01 wMF 2 MF-s LegalState/Province
Child Object	Apttus__AgreementLineItem__c	Parent Reference Field	Apttus__AgreementId__c
Created By	[User Avatar] 5/11/2016 11:40 PM	Last Modified By	[User Avatar] 5/14/2016 3:58 PM

Buttons: Edit, Delete, Clone

Doc Assembly Rules

Buttons: New Doc Assembly Rule, Doc Assembly Rules Help

Action	Rule Name	Sequence	Description	Agreement Category	Active
Edit Del	R1 AGRSet1 ALIs w-Clause	1			✓

Doc Assembly Ruleset is the main object that contains all of the sub-objects and components required for document assembly. This object contains fields, such as *Business Object* and *Record Types (A)*. These fields control which object record and which specific record types of that object can use the rules. There can be one or more *Doc Assembly Rules (B)* for each ruleset.

Doc Assembly Rules

Doc Assembly Rule

R1 AGRrSet1 ALIs w-Clause

Customize Page | Edit Layout | Printable View | Help for this Page

Back to List: Doc Assembly Rulesets

Components (2)

Doc Assembly Rule Detail

Edit Delete Clone

Rule Name R1 AGRrSet1 ALIs w-Clause Ruleset AGRrSet1 ALIs w-ClauseID Comp

Sequence 1

Description

Active ☒

Filter By

Agreement Category Sales

Created By Chris Castro, 5/16/2016 2:58 PM Last Modified By Chris Castro, 5/16/2016 2:58 PM

Proposal Category

rProp Segment

Components

New Doc Assembly Component Components Help

Action	Component Id	Sequence	Type	Component Type	Field Name	Attachment Id	Content	Insert Page Break	Content Field Type
Edit Del	AC-0000000033	1	Review Info	Clause			chQ-DAR AgrClause-01 wMF	<input type="checkbox"/>	
Edit Del	AC-0000000043	2	Footer	Parent (ObjectField)	Aptus__ProductId__c			<input type="checkbox"/>	

Doc Assembly Rules contain all of the components including all of the content that will be included in the document:

- For Doc Assembly Rules at the *Header-level*, only components that reference clause content can be used. These rules fire based on contract field values identified in Doc Assembly Rule Field Sets.
- For Doc Assembly Rules at the *Line-item* level, attachments components can be used (along with clause components, if necessary). The rules fire automatically as long as component attachments can be found, and are further filtered by expressions defined in the template document.

Document Assembly Components

Clause

Doc Assembly Component Edit

AC-0000000074

Save Save & New Cancel

Information

Component Id AC-0000000074 Rule CN DAR Group 1

Sequence 1

Type MSA Definitions

Content CN MSA Definitions

Save Save & New Cancel

Each Doc Assembly Component contains a reference to a single template or clause that has been created in X-Author. This provides the actual content that is inserted into the agreement document at generation time.

Attachment

Doc Assembly Component
AC-0000000043

[Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Back to List: Doc Assembly Rulesets](#)

Doc Assembly Component Detail [Edit](#) [Delete](#) [Clone](#)

Component Id	AC-0000000043	Rule	R1 AGRSet1 ALIs w-Clause
Sequence	2	Field Name	Apttus__ProductId__c
Type	Footer	Content Field Type	
Content		Insert Page Break	<input type="checkbox"/>
Component Type	Parent (Object/Field)	Attachment Id	
Created By		Last Modified By	

[Edit](#) [Delete](#) [Clone](#)

Each Doc Assembly Component contains a reference to one or more attachments (depending on the Component Type) on an object referenced by an Agreement Line Item or Proposal Line Item object record.


Dynamic Document Assembly Workflows

The configuration and workflow process for creating Dynamic Document Assembly Rulesets, Rules and Components is different depending on where the Ruleset focus brings Clause content or Attachments. Refer to the Workflow that best supports your individual use case. In the event that you intend to create Rulesets that bring both clauses and attachments, refer to the Clause Workflow for initial configuration, then the Attachment Workflow to enhance functionality.

- [Dynamic Document Assembly Workflow: Clauses](#)
The Apttus Contract Management package enables you to merge independent clause templates into a single Master Agreement or Proposal template using a set of predefined rules within a ruleset.
- [Dynamic Document Assembly Workflow: Attachments](#)
Merge independent attachments on lookup objects from Agreement Line Item or Proposal Line Items using a set of pre-defined rules within a ruleset.
- [Cloning Dynamic Document Assembly](#)
Learn how to clone Document Assembly Rulesets, Document Assembly Rules, and all the associated components.

Dynamic Document Assembly Workflow: Clauses

Using Dynamic Document Assembly, you can merge independent clause templates into a single Master Agreement template using a set of predefined rules within a ruleset.

 Support for the *Proposal* object at the Header (clause insertions) is only enabled for users of **Apttus Proposal Management November 2016** release or later (versions **8.104 (PM)** and **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.

Use the following workflow to configure and define Doc Assembly Rulesets, Rules and Components for Agreement and Proposal templates using dynamic segments to insert clauses:

Configuring Dynamic Document Assembly

- Create custom fields for an agreement using which an agreement will be filtered. For example if you want to filter agreements by language, create a custom field for language for an agreement.
- Create Document Assembly Field sets: The field sets comprise the fields used to filter an agreement. The field should have the same API name as that of the custom fields for the Agreement object.
- Specify the API name of the fieldset in Comply Custom Properties.
- Enable Document Assembly Rulesets for the Quote/Proposal object.

Creating Dynamic Document Assembly Rulesets

- Define a Doc Assembly Ruleset: You have to create a ruleset that comprises the rules using which an agreement is filtered.
- Define Doc Assembly Rules: Define a set of filter criteria by which an agreement is filtered and available. The filter by fields should have the same API name as the fields of the Agreement object. For example you want to filter all agreements having language as English. The Language custom field in the Agreement object has the API name as `Language_c`. The filter by criteria field for a Document rule should have the same API name `Language_c`.
- Specify Doc Components: If an Agreement satisfies the filter criteria, you can specify the doc components(templates) and the sequence in which they are included in the master agreement template.
- Navigate to X-Author and checkout an existing template or create a new blank template and check it in. Once the blank template is checked in successfully, insert a dynamic section in the template. For an existing template insert the dynamic section in the required location and specify the ruleset. The Dynamic section allows you to define the ruleset for which the template is applicable for an agreement. This blank template is used as the master agreement template.
- Once you click Generate or Preview, if the agreement satisfies the rules defined in the document ruleset, the corresponding master agreement template for that ruleset is shown. Select the master

agreement template and click Generate. All the components defined in the Document Rule set are inserted in the sequence by which they are defined.

i This page only includes instructions for configuring and create Dynamic Document Assembly Rulesets for Clause components. If you intend to create Rulesets that also include attachment components at the line item level, refer to [Dynamic Document Assembly Workflow: Attachments](#) for additional configuration.

Doc Assembly Rule Filter Logic

The following table shows the summary of system behavior based on various conditions:

Value in Agreement field	Value in Filter by field of Doc Assembly Rule	Match between the values of Agreement field and Filter by field	System evaluation
Has value	Has value	Yes	System will fire the Doc Assembly Rule and the corresponding template will be displayed for document generation or preview.
Has value	Null	No	System will skip the evaluation for this filter field and will fire the Doc Assembly Rule based on the match in other Rule filters.
Null	Has value	No	System does not fire the Doc Assembly Rule.

Creating a Document Assembly Fieldset

Complete *To create custom fields* so you have all of the fields you want to use in the fieldset available on the Doc Assembly Rule object.

1. From **Setup**, go to **Create > Objects > Doc Assembly Rule**.
2. From the **Fields Sets** Related List, click **New** and enter a mandatory **Field Set Label**, **Field Set Name**, and info on where it is used and click **Save**.
3. Drag and drop the desired fields onto the field set and click **Save**.
4. Repeat steps 2 and 3 to create a separate Static fieldset. The fields in the static field set will be a subset of the fields in the dynamic field set.

The field set object, with its field has been saved.

- You can now add the fields defined in the field sets to a specific page layout. To call out the static and dynamic field sets, create separate Static and Dynamic sections on the page layout and drag and drop the requisite fields accordingly.
- Go to **Develop > Custom Settings > Comply Custom Properties** and click **Manage** and then **Edit** for **Apttus__APTS_Agreement__c**. Enter the API name of the field set you created in the **Doc Assembly Rule FieldSet Name** field. Enter the API name of the static field set you created in the **Doc Assembly Static FieldSet Name**.

Note

If there is not an *Apttus__APTS_Agreement__c* entry, you should create one first and then enter the field set name.

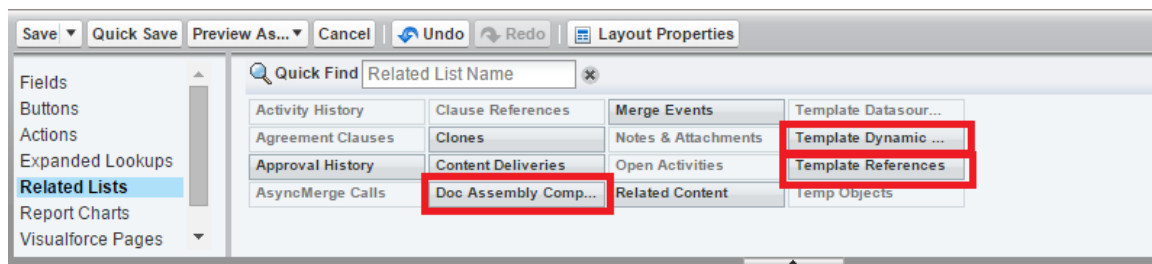
Populating a Doc Assembly Component Type picklist

- From **Setup**, go to **Create > Objects > Doc Assembly Component**.
- From **Custom Fields & Relationships**, click **Type**.
- From **Picklist Values**, click **New** and add the required type values and save them.

These values are now available from the *Type* picklist when creating a Doc Assembly Component.

Adding the Related Lists

- From **Setup**, go to **Create > Objects > Template**.
- From the **Page Layouts** section, click **Edit** beside the layout you want to add the Related List to.
- Select **Related Lists** and drag and drop the following Related Lists onto the page.
 - Doc Assembly Components:** When you create a **Doc Assembly Component** and use it in your template, this Related List will have a new record added to it.
 - Template Dynamic Sections:** When you add a dynamic section to a template using **Insert Dynamic Sections** ribbon from **X-Author Templates**, this Related List will have a new record added to it.
 - Template References:** When use a template as a doc assembly component using **Insert Dynamic Sections** ribbon from **X-Author Templates**, this Related List will have a new record added to it.



4. Click **Save**.

The Related Lists will now be displayed on that Template page layout.

Adding DAR for the Proposal Object

By default, a custom property is created for the Quote/Proposal object when you upgrade or install the Apttus Proposal Management package, but you still need to manually add the Quote/Proposal object to the picklist when creating a new Doc Assembly Ruleset.

1. From **Setup**, go to **Create > Objects > Doc Assembly Ruleset**.
2. Under Custom Fields & Relationships, click on the **Business Object** field label link.
3. Scroll to Picklist Values and click **New**.
4. Enter *Apttus_Proposal__Proposal__c* as a new Picklist option.

5. Click **Save**. The Proposal object is now available as an option when you are creating DAR Rulesets.

Creating Doc Assembly Rulesets

User Permissions Needed	
To create a Doc Assembly Ruleset:	<p>Doc Assembly Ruleset: Read, Create, Edit.</p> <p>Agreement: Read, Create, Edit.</p> <p>Template: Read, Create, Edit</p> <p>Doc Assembly Rule: Read</p> <p>Doc Assembly Component: Read</p>

- You must have created templates that you want to use as the *Content* of your *Doc Assembly Components*.
- You must ensure that you add the fields created in the fieldset in the page layout for **Doc Assembly Rule** by using *Edit Layout* option.

1. Go to the **Doc Assembly Rulesets** tab and click **New**.
2. Enter the following values for the ruleset:

Option	Description
Ruleset Name	Enter the name used to reference the ruleset in the template.
Sequence	Enter the order in which the ruleset will be evaluated, when you Preview or Generate an agreement document.
Business Object	Choose the Business Object context for the Ruleset. Select <i>Apttus__APTS_Agreement__c</i> for Agreements, or <i>Apttus_Proposal__Proposal__c</i> for Proposals.
Record Types	Choose one or more record types associated with the business object (Agreement or Proposal). To restrict the Ruleset to specific record types select them from the list and move them from <i>Available</i> to <i>Chosen</i> , otherwise leave the default of <i>All</i> .
Active	Select this checkbox to make the Ruleset available when you generate a document.
Description	Enter details about the Ruleset that describe its business purpose.

3. Once the settings are configured, click **Save** to display the Doc Assembly Ruleset record.
4. Click **New Doc Assembly Rule** and enter values for the following options:

Option	Description
Rule Name	Enter the name used to reference the Rule in the template.
Sequence	Enter the order in which the Rule will be evaluated, when you Preview or Generate an agreement document.
Description	Optional field to enter details about the rule.
Active	Enter details about the Rule in the context of your Ruleset.
Filter By	Choose values for fields in this section to control whether the rule will be applicable to the Agreement or Proposal, based on the filter criteria defined. If it matches the rule may be applied; however, if it doesn't the rule will be skipped.

5. Once the settings are configured, click **Save** to display the Doc Assembly Ruleset record.
6. Click **New Doc Assembly Component** and enter values for the following options:

Option	Description
Sequence	Enter the order in which the component is inserted in the master agreement template, when you Preview or Generate an agreement document.
Type	Choose the Doc Assembly Component Type. Type is a configurable field that is used to help indicate what the component is used for; however, it is only an indicator and does not have any impact on the generation process.
Content	Use the lookup to choose the clause template that will provide the content for the document. This is referenced when you <i>Insert Dynamic Section</i> in X-Author.


7. Click **Save**.

The components of active Rulesets and Rules can now be used when you insert dynamic sections into agreement templates.

To create new templates or edit existing templates and include Dynamic Sections in them, refer to Inserting Dynamic Segments in the *X-Author Contracts User Guide*.

Dynamic Document Assembly Workflow: Attachments

Using Dynamic Document Assembly, you can merge independent attachments from lookups (e.g., Products) to *Apttus line-item level* Objects (Agreement Line Items, Proposal Line Item) into a single Master Agreement template using a set of predefined Rules within a Ruleset.

 Support for the *Agreement* 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). Support for the *Proposal* object at the Header (clause insertions) and *line-item level* (attachments) is only enabled for users of **Apttus Proposal Management November 2016 release** or later (versions **8.104 (PM)** and the above mentioned versions of the CLM Product suite).

Use the following workflow to configure and define Doc Assembly Rulesets, Rules and Components for Agreement and Proposal templates containing dynamic segments to insert attachments:

Configuring Dynamic Document Assembly

- Specify the API name of the **Child Object Types** for the Apttus Agreement and/or Quote/Proposal objects in Comply Custom Properties.
- Populate the Doc Assembly Component Type Picklist.

- Add Attachments fields to the Doc Assembly Ruleset and Doc Assembly Component page layouts.
- Add Related Lists to the Template Object page layout.
- Enable Document Assembly Rulesets for the Quote/Proposal object (optional).

Creating Dynamic Document Assembly Rulesets

- Define a Doc Assembly Ruleset: Create a Ruleset that comprises the Rules that define the Components to be inserted in to the generated document.
- Define Doc Assembly Rules: Define a Rule to serve as a container for Doc Assembly Components that reference attachments on line item objects.
- Specify Doc Components: Define the doc components (attachments) and the sequence in which they are included in the master agreement or proposal template.
- Navigate to X-Author and checkout an existing template or create a new blank template and check it in. Once the blank template is checked in successfully, insert a dynamic section in the template. For an existing template, insert the dynamic section in the required location and specify the Ruleset. The Dynamic section allows you to define the Ruleset for which the template is applicable for an agreement. This blank template is used as the master agreement template.
- Once you click Generate or Preview, if the agreement satisfies the Rules defined in the document Ruleset, the corresponding master agreement template for that Ruleset is shown. Select the master agreement template and click Generate. All the components defined in the Document Ruleset are inserted in the sequence by which they are defined.

i This page only includes instructions for configuring and create Dynamic Document Assembly Rulesets for attachment components at the *line-item level*. If you intend to create Rulesets that also include Clause template components, refer to [Dynamic Document Assembly Workflow: Clauses](#) for additional configuration that requires Field Sets to filter identified clause components.

Configuring Dynamic Document Assembly Custom Properties

To enable support for Line Item attachments in Dynamic Document Assembly, you must create or modify existing Comply Custom Properties to identify the Child Objects of the Agreement and/or Proposal object that you want to include in your Rulesets.

1. Go to **Develop > Custom Settings > Comply Custom Properties**.
2. Click **Manage** to display Custom Properties for Agreements and Proposals.

Custom Setting Help for this Page ?

Comply Custom Properties

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

View: All ▼ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

Action	Name ↑
Edit Del	Apttus_Proposal_Proposal__c
Edit Del	Apttus_APTS_Agreement__c

- If the Properties displayed above appear in the list, continue to the next step. Otherwise, create the Custom Properties entries as shown above, then continue to complete the configuration.
- Click **Edit** next to **Apttus__APTS_Agreement__c** to display the Custom Properties information form.

Comply Custom Properties Edit Help for this Page ?

Provide values for the fields you created. This data is cached with the application.

Edit Comply Custom Properties Save Save & New Cancel

Comply Custom Properties Information ! = Required Information

Name ⓘ

Doc Assembly Rule Field Set Name ⓘ

Doc Assembly Rule Static Field Set Name

Child Object Types

- In the **Child Object Types** field, enter comma-separated values identifying the API name of the Child Objects you want to support in your Rulesets:
"Apttus__AgreementLineItem__c,Agreement_Product__c"
- Click **Save**.
- If you have the Apttus Proposal Management package installed and want to create Rulesets for the Proposal object, click **Edit** next to **Apttus_Proposal__Proposal__c**.

8. Enter the API name of the Proposal Line Item child object:
"Apttus_Proposal__Proposal_Line_Item__c"

Note

You do not need to include any "Doc Assembly Rule Field Set" properties unless you are planning to include Clause templates as components in your Rulesets. For instructions on configuring and creating Doc Assembly filter fields, refer to [Dynamic Document Assembly Workflow: Clauses](#).

Populating the Doc Assembly Component Type Picklist

Each defined Doc Assembly Component requires a "Type" to identify its purpose in the generated document. Follow these steps to populate the Doc Assembly Component Type picklist with desired values.

1. From **Setup**, go to **Create > Objects > Doc Assembly Component**.
2. From **Custom Fields & Relationships**, click **Type**.
3. From **Picklist Values**, click **New** and add the required type values and save them.

These values are now available from the *Type* picklist when creating a Doc Assembly Component.

Adding Context Fields to the Doc Assembly Ruleset Page Layout

In order to use line item objects as the context for a Doc Assembly Ruleset, you must add two (2) fields to the Doc Assembly Ruleset Page Layout.

1. From **Setup**, go to **Create > Objects > Doc Assembly Ruleset**.
2. From **Page Layouts**, click **Edit**.
3. From the Layout editor, drag and drop the **Child Object** and **Parent Reference Field** into the Information or System Information sections of the layout.

Doc Assembly Ruleset Detail

Standard Buttons: [Edit](#) [Delete](#) [Clone](#) [Sharing](#)

Custom Buttons:

Information (Header visible on edit only)

★ ● Ruleset Name	Sample Ruleset Name	Owner	Sample User
★ ● Sequence	21,712	Description	Sample Description
Business Object	Sample Business Object		
Record Types	Sample Record Types		
Active	<input checked="" type="checkbox"/>		

System Information (Header visible on edit only)

🔒 Created By	Sample User	🔒 Last Modified By	Sample User
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Custom Links (Header visible on edit only)

4. Click **Save**. Repeat this process for each Ruleset Layout you have created.

Adding Attachment Fields to the Doc Assembly Component Page Layout

In order to configure Doc Assembly Component for line item attachment support, you must add three (3) fields to the page layout.

1. From **Setup**, go to **Create > Objects > Doc Assembly Component**.
2. From **Page Layouts**, click **Edit**.
3. From the Layout editor, drag and drop the **Component Type**, **Field Name**, and **Attachment ID** fields into the Information section.

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Component Type	Field Name	Sequence
Section	Insert Page Break	Type
Blank Space	Last Modified By	Rule
Attachment Id	Created By	

Experience Actions

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Salesforce1 and Lightning Experience pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Doc Assembly Component Detail

Standard Buttons: Edit Delete Clone Custom Buttons:

Information (Header visible on edit only)

Component Id: GEN-2004-001234 Rule: [Sample Doc Assembly Rule](#)

Sequence: 22,053

Type: Sample Type

Content: [Sample Template](#)

System Information (Header visible on edit only)

Created By: [Sample User](#) Last Modified By: [Sample User](#)

Custom Links (Header visible on edit only)

- Click the configuration icon next to the **Content** field to display Field Properties.
- Click the **Required** check box to make the Content field no longer required. You must make this field optional because you may not include Clause template components in your Ruleset.

Doc Assembly Component Detail

Standard Buttons: Edit Delete Clone Custom Buttons:

Information (Header visible on edit only)

Component Id: GEN-2004-001234 Rule: [Sample Doc Assembly Rule](#)

Sequence: 1,934

Type: Sample Type

Content: [Sample Template](#)

System Information (Header visible on edit only)

Created By: [Sample User](#)

Custom Links (Header visible on edit only)

Field Properties

Read-Only Required

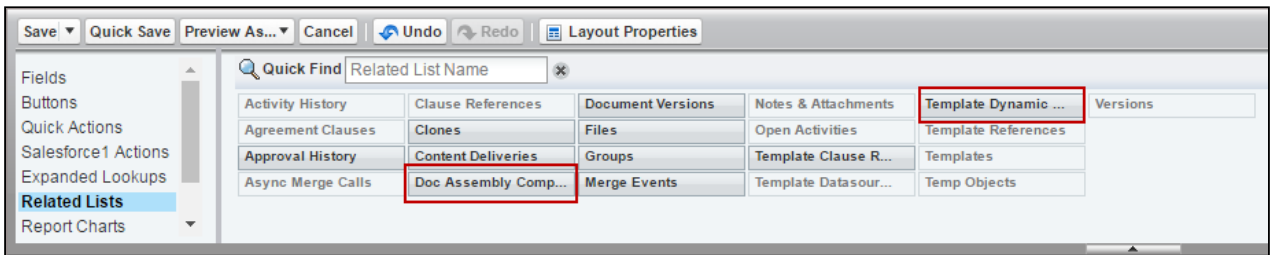
Content ☐ ☒

OK Cancel

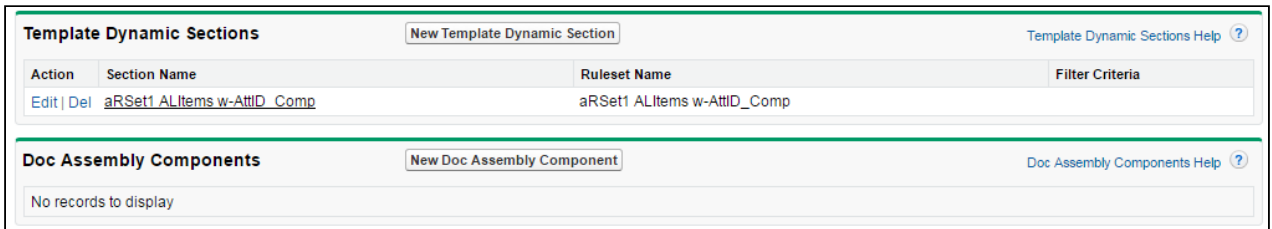
- Click **Save**.
- Repeat this process for each Ruleset Layout you have created.

Including the Related Lists

1. From **Setup**, go to **Create > Objects > Template**.
2. From the **Page Layouts** section, click **Edit** beside the layout you want to add the Related List to.
3. Select **Related Lists** and drag and drop the following Related Lists onto the page.
 - **Doc Assembly Components**: When you create a **Doc Assembly Component** and use it in your template, this Related List will have a new record added to it.
 - **Template Dynamic Sections**: When you add a dynamic section to a template using **Insert Dynamic Sections** ribbon from **X-Author Templates**, this Related List will have a new record added to it.



4. Click **Save**. The Related Lists are now displayed on that Template page layout.



Enabling DAR for the Proposal Object (Optional)

By default, a custom property is created for the Quote/Proposal object when you upgrade or install the Apttus Proposal Management package, but you still need to manually add the Quote/Proposal object to the picklist when creating a new Doc Assembly Ruleset.

1. From **Setup**, go to **Create > Objects > Doc Assembly Ruleset**.
2. Under Custom Fields & Relationships, click on the **Business Object** field label link.
3. Scroll to Picklist Values and click **New**.
4. Enter *Apttus_Proposal__Proposal__c* as a new Picklist option.

Add Picklist Values

Business Object

Help for this Page ?

Add one or more picklist values below. Each value should be on its own line.

Apttus_Proposal__Proposal__c

Save

Cancel

5. Click **Save**. The Proposal object is now available as an option when you are creating DAR Rulesets.

Creating Doc Assembly Rulesets

User Permissions Needed	
To create a Doc Assembly Ruleset:	<div>Doc Assembly Ruleset: Read, Create, Edit.</div> <div>Agreement: Read, Create, Edit.</div> <div>Template: Read, Create, Edit</div> <div>Doc Assembly Rule: Read</div> <div>Doc Assembly Component: Read</div>

1. Go to the **Doc Assembly Rulesets** tab and click **New**. The Doc Assembly Ruleset form is displayed.

Doc Assembly Ruleset Edit Help for this Page ?

New Doc Assembly Ruleset

Doc Assembly Ruleset Edit Save Save & New Cancel

Information ! = Required Information

Ruleset Name

Sequence

Owner

Description

Business Object

Record Types

Available: Corporate, Other, Procurement

Chosen: All

Active ☐

System Information

Child Object

Parent Reference Field

Save Save & New Cancel

2. Enter the following values for the Ruleset:

Option	Description
Ruleset Name	Enter the name used to reference the Ruleset in the template.
Sequence	Enter the order in which the Ruleset will be evaluated, when you Preview or Generate an agreement document.
Business Object	Choose the Business Object context for the Ruleset. Select <i>Apttus__APTS_Agreement__c</i> for Agreements, or <i>Apttus_Proposal__Proposal__c</i> for Proposals.
Record Types	Choose one or more record types associated with the business object (Agreement or Proposal). To restrict the Ruleset to specific record types select them from the list and move them from <i>Available</i> to <i>Chosen</i> , otherwise leave the default of <i>All</i> .
Active	Select this checkbox to make the Ruleset available when you generate a document.
Description	Enter details about the Ruleset that describe its business purpose.

Option	Description
Child Object	<p>Enter the child object API name of the specified Business Object to define as the Ruleset context. This will be a <i>line item</i> object and is restricted to the following Apttus objects;</p> <ul style="list-style-type: none"> • <i>Apttus__AgreementLineItem__c</i> • <i>Agreement_Product__c</i> • <i>Apttus_Proposal_Proposal_Line_Item__c</i> <p>These API names must also be represented in the Comply Custom Properties as described in the previous section on this page.</p>
Parent Reference Field	<p>Enter the API name of the field on the Child Object you specified that references the parent. For example, if your Child Object is Agreement Line Item enter <i>Apttus__AgreementId__c</i> as the Parent Reference field. This is the API name of the Custom Field on the Agreement Line Item object that references its parent: Agreement.</p>

After entering field information, your Ruleset will look something like the following.

The screenshot shows the 'Doc Assembly Ruleset Edit' interface for 'Ruleset Example 1'. The form is divided into two main sections: 'Information' and 'System Information'.

Information Section:

- Ruleset Name:** Ruleset Example 1
- Sequence:** 1
- Business Object:** Apttus__APTS_Agreement__c
- Record Types:** Available (Corporate, Other, Procurement) and Chosen (DARTest)
- Active:** Checked
- Description:** This is an example description for a DDA Ruleset that uses attachments.

System Information Section:

- Child Object:** Apttus__AgreementLineItem__c
- Parent Reference Field:** Apttus__AgreementId__c

Buttons at the top and bottom include 'Save', 'Save & New', and 'Cancel'. A legend indicates that a red exclamation mark icon represents 'Required Information'.

3. Click **Save** to display the Doc Assembly Ruleset record.

Creating Doc Assembly Rules

1. Click **New Doc Assembly Rule**. The New Doc Assembly Rule form is displayed.

Doc Assembly Rule Edit Save Save & New Cancel

Information Help for this Page = Required Information

Rule Name Ruleset Ruleset Example 1

Sequence

Description

Active ☒

Filter By

Agreement Category --None--

Save Save & New Cancel

2. Enter the following values for the Rule:

Option	Description
Rule Name	Enter the name used to reference the Rule in the template.
Sequence	Enter the order in which the Rule will be evaluated, when you Preview or Generate an agreement document.
Description	Enter details about the Rule in the context of your Ruleset.
Active	You must select this to make the Rule available for the Ruleset when you generate a document.
Filter By	Ignore fields in this section unless you are including a <i>Clause component</i> as part of your rule. Fields in this section control whether the Rule will be applicable to the Agreement, based on the filter criteria defined. If it matches the Rule may be applied; however, if it doesn't the Rule will be skipped. Note: If you are filtering the Rule using these values, you must have configured a Field Set as described in Dynamic Document Assembly Workflow: Clauses .

3. Click **Save** to display the Doc Assembly Ruleset record.

Creating Doc Assembly Components

1. Click **New Doc Assembly Component**. The New Doc Assembly Component form is displayed.

Doc Assembly Component Edit Save Save & New Cancel

Information Help for this Page = Required Information

Sequence

Type

Content

Component Type

Rule

Field Name

Attachment Id

Save Save & New Cancel

2. Enter the following values for the Component:

Option	Description
Sequence	Enter the order in which the component is inserted in the master agreement template, when you Preview or Generate an agreement document.
Type	Choose the Doc Assembly Component Type. Type is a configurable field that is used to help indicate what the component is used for; however, it is only an indicator and does not have any impact on the generation process.
Content	<i>Only applicable if the Component Type = Clause.</i> Use the lookup to choose the clause template that will provide the content for the document. This is referenced when you <i>Insert Dynamic Section</i> in X-Author.

Option	Description
Component Type	<p>Choose the Component Type to determine the specific content that is inserted into the generated document for this component. Component Types can be:</p> <p>Clause – use this Component Type when you want the inserted content to be the clause specified by the <i>Content</i> field.</p> <p>Attachment (Id) – use this Component Type when you want the inserted content to be an attachment with a specific Attachment ID into the generated document. The Attachment ID can be from any Header or Line Item-level object. Use the Attachment ID field to identify the specific Attachment ID.</p> <p>Attachment (Object/Field) – use this Component Type when you want the inserted content to be an attachment specified through a field on the context record or through one of its relationships. This can be a formula field that returns the Attachment ID as a text string, or a field relationship from the context object that holds an Attachment ID string. Use the Field Name field with this Component Type (see below).</p> <p>Parent (Object/Field) – use this Component Type when you want the inserted content to be an attachment residing in the Notes & Attachments related list of a lookup from the context object (e.g. an attachment on a Product lookup from Agreement Line Item). Use the Field Name field with this Component Type (see below). Note: This Component only brings the first attachment on the lookup record and is determined by <i>Last Modified Date</i>.</p>


Option	Description
Field Name	<p><i>Only applicable if the Component Type = Attachment (Object/Field) or Parent (Object/Field).</i> Enter the API Field Name that refers to an attachment on a line item through a field on the line item record, a Salesforce relationship, or a parent record.</p> <ul style="list-style-type: none"> • Attachment (Object/Field) – Field Name can refer to an attachment through a field on the context record (e.g. Agreement Line Item) or through a relationship. Examples: <ul style="list-style-type: none"> • <i>ProductId__r.ShortDescription__c</i>, where <i>ShortDescription__c</i> is a field on the Product that points to an attachment. • <i>ProductSpec__c</i> is a formula field on the Agreement Line Item object. The Attachment ID is pulled from the formula field value (the formula value can be a relationship, as above, or any other formula that returns text in the form of an Attachment ID). • Parent (Object/Field) – Field Name should be the API name of the Parent Reference field that points to the record where the attachment resides. For example, if the context object for the Ruleset is Agreement Line Item, then the parent reference field could be <i>Apttus__ProductId__c</i>
Attachment Id	<p><i>Only applicable if the Component Type = Attachment (Id).</i> Enter the Attachment ID of a specific attachment on any object.</p>

3. Click **Save**. Repeat these to create additional components to be used with the same Doc Assembly Rule.

The components of active Rulesets and Rules can now be used when you insert dynamic sections into agreement templates.

To create new templates or edit existing templates and include Dynamic Sections in them, refer to Inserting Dynamic Segments in the *X-Author Contracts User Guide*.

Cloning Dynamic Document Assembly

-  The instructions for cloning Document Assembly Rulesets, Rules and Components on this page only applies to Rulesets that contain clause components. Cloning for Rulesets that contain attachment components is planned for future releases.

With Dynamic Document Assembly, you can now clone Document Assembly Rulesets, Document Assembly Rules, and all the associated components.

Doc Assembly Rulesets can be cloned with all active rules and components. Similarly, a Doc Assembly Rule can be cloned with all components.

Note

The Apttus Clone action button overrides the standard Salesforce Clone action button. The new Clone action button redirects you to the Apttus *DocAssemblyRulesetClone* or *DocAssemblyRuleClone* Visualforce pages to clone the *Doc Assembly Ruleset* and *Doc Assembly Rule* respectively. In the previous releases, the Clone action button used to redirect you to the standard Salesforce Visualforce page.

Cloning Doc Assembly Ruleset

The newly cloned ruleset record requires that you must enter the mandatory sequence, enter a unique name and activate it (A).

Doc Assembly Ruleset Clone
Test Doc Assembly Ruleset Copy

Clone Cancel

New Ruleset Information

New Ruleset Name: Test Doc Assembly Rule

Sequence: 4

Business Object: Agreement

Record Types: Available: Corporate, Other, Procurement; Chosen: All

Description: Demo use.

Active: ☐

Update Rule Criteria

To update new rules during the clone operation, please provide new values for the rule criteria fields. To selectively update rules, you may provide the value to match in the Old Value column. The Match Rule is used to indicate whether an equality, inequality or unconditional update should be performed. If a match rule is not provided, the update would be skipped for the field.

Field	Match Rule	Old Value	New Value
Language	equal to	English	English
Division	not equal to	America	EMEA

Clone Cancel

The Update Rule Criteria (B) section contains the dynamic fields which the system identifies in the field sets.

One of the field in the Update Rule Criteria section is the **Match Rule** field, which updates the new value of a field and works as follows:

- If the field contains **equal to**, the Match Rule updates the new value of that field if the current value for that particular field matches the old value.
- If the field contains **not equal to**, the Match Rule updates the new value of that field if the current value for that particular field does not match the old value.
- If the field contains **any**, the Match Rule updates to the new value without checking the current value.

Cloning Doc Assembly Rule

The Clone button on the Doc Assembly Rule detail page clones the existing Doc Assembly Rule, generates a sequence, and then activates the newly cloned rule (A).

The screenshot shows the 'Doc Assembly Rule Clone' dialog box. The title bar reads 'Doc Assembly Rule Clone' and the subtitle is 'Test Doc Rule 1 Copy'. The dialog is divided into two main sections, A and B, both highlighted with red boxes.

Section A, 'New Rule Information', contains the following fields:

- Name:** Test Doc Rule 1 Copy
- Sequence:** 2
- Description:** Demo rule 1
- Active:** ☒

Section B, 'Update Rule Criteria', contains a table with the following data:

Field	New Value
Language	English
Division	America

Both sections have 'Clone' and 'Cancel' buttons at the bottom of the dialog.

The Update Rule Criteria (B) section allows you to enter a new value or select an existing value for each filter field.

Cloning Doc Assembly Component

The deep cloning of a component clones the current version and lets you select the content to place in the new component.

If you clone a clause template to replace an existing clause template with the Clone functionality of X- Author Contracts, while the original clause template is used as a component on the Doc Assembly Rule,

then the system will identify the UUID of the new clone template on the original cloned clause template record.

Template
NK_TestTemplate_3

Customize Page | Edit Layout | Printable View | Help for this Page

« Back to List: Templates

Open Activities (0) | Activity History (1) | Notes & Attachments (1) | Agreement Clauses (0) | AsyncMerge Calls (0) | Merge Events (0) | Temp Objects (0) | Template Datasource Filters (0) | Template Dynamic Sections (0) | Clause References (0) | Template References (0) | Doc Assembly Components (0) | Clones (0)

Template Detail

Name NK_TestTemplate_3 [Edit] [Delete] [Clone]

Owner Nathan Krishnan [Change]

Cloned From NK_TestTemplate

Cloned From Reference ef067dd5-a3f7-4eb0-95f9-fab3149f0de2

Term Exemption

Keywords

Guidance Lorem ipsum dolor sit amet, consectetur adipiscing elit. In et mauris ac dui imperdiet faucibus a nec metus. Maecenas orci lorem, sodales ut tincidunt a, tristique in ipsum. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae. Proin sed neque ut augue posuere mattis. Suspendisse vel augue arcu, eget pellentesque odio. Mauris vulputate rutrum tincidunt. Sed lorem enim, pharetra at

The fields, such as Cloned From and Cloned From Reference, on the Template detail page enable you to track the cloning information of the content in a component, which can be a clause or template. These fields are populated by X-Author Contracts when checking in a cloned template.

Configuring Offline Agreement Window

You can create offline agreements directly in X-Author by taking an existing Word document that was created outside of Salesforce and has not previously been associated with an agreement.

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 you generate a new agreement. The results are the same as creating an offline agreement from the Agreements tab in Salesforce.

There is a new Visualforce page that users must have access to and optionally you can change the fields that are displayed in the Create Offline Agreement window.

From **Administration Setup > Manage Users**, you must enable Visualforce Page Access for the page **Apttus.CreateOfflineAgreement**, for any user profiles or permission sets that control user's access to Apttus Author. You can accept the default Create Offline Agreement window fields or you can change which fields are included by configuring the Offline Agreement Field Set.

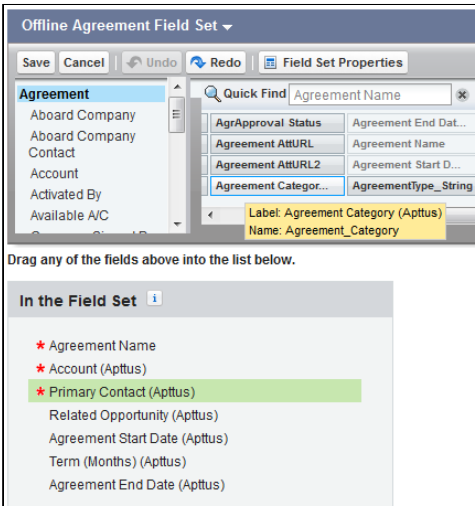
Agreement Name, Account, and Primary Contact can be removed from the field set, but when they are included they will be mandatory. You can make all other fields mandatory or optional.

The New Offline Agreement window is not designed to contain a large number of fields, but just key fields for initially creating the agreement.

Configuring Offline Agreement Window Fields

1. Go to **App Setup > Create > Objects > Agreement (Apttus Contract Management)**.

2. From the Field Sets section, click **Edit** for Offline Agreement Field Set.
The In the Field Set frame displays the current fields used for the Create Offline Agreement window. This is a mandatory field.
3. From the Agreement fields list, drag and drop the desired fields, select whether to make them mandatory and reorder them as necessary. Lookup fields cannot be used with Field Sets.



4. Click **Save**.

The selected fields are now included in the New Offline Agreement window.

Permissions to Create Offline Agreement

User Permissions Needed	
To create an offline agreement	Agreement: Create, Edit, Delete

1. Click the **Agreements** tab.
2. Select an agreement record type for the new agreement and click **Continue**.
3. Perform the following:
 - a. To select the file, type the path of the file or click **Browse** to select a document to attach to the agreement.
 - b. To create the offline agreement with the selected document attached to the agreement, click **Attach File**.

The agreement is added to the system, with the Word doc used to create the agreement available in the Notes & Attachments related list.

Agreement Number/Header Configuration

For both generating and checking in offline documents, a solution to inserting the type of agreement number is available. These changes can be made in the *Comply System Properties*. The configuration for automatically inserting header/footer data and the specified agreement number is as follows:

Note

Please understand the following logic for this feature.

- When the **Auto Insert Header Footer Data** system property is NOT checked (set to false), the header will be left blank.
- *If* the **Auto Insert Header Footer Data** system property is checked (set to true),
- *AND* the **Agreement Number Field For Imported Docs** is left empty (no value entered), then the header will be set to the internal Apttus agreement number value.
- *If* the **Auto Insert Header Footer Data** system property is checked (set to true),
- *AND* the **Agreement Number Field For Imported Docs** contains an API field name value, then the value of header will be set to that field's value.

Setting 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.


Note

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
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.

 The value of the latest timestamp for the footer is taken from the **User Account Timezone** field on Salesforce.

Configuring Import Offline Button

User Permissions Needed

To create an offline agreement:

Agreement: Create, Edit, Delete

Document Version: Create, Edit, Delete

Document Version Detail: Create, Edit, Delete

1. In Microsoft Word, select the **X-Author** ribbon and login.
2. Open the agreement document, currently kept outside of Salesforce, to be used to create the offline agreement.
3. Click **Check-In**.
4. Enter values for the mandatory fields.

Apttus Author - New Offline Agreement

New Offline Agreement Save Cancel

Information

Status	Request
Agreement Name	<input type="text"/>
Account	<input type="text"/>
Primary Contact	<input type="text"/>
Related Opportunity	<input type="text"/>
Agreement Start Date	<input type="text"/> [11/20/2013]
Term (Months)	<input type="text"/>
Agreement End Date	<input type="text"/> [11/20/2013]

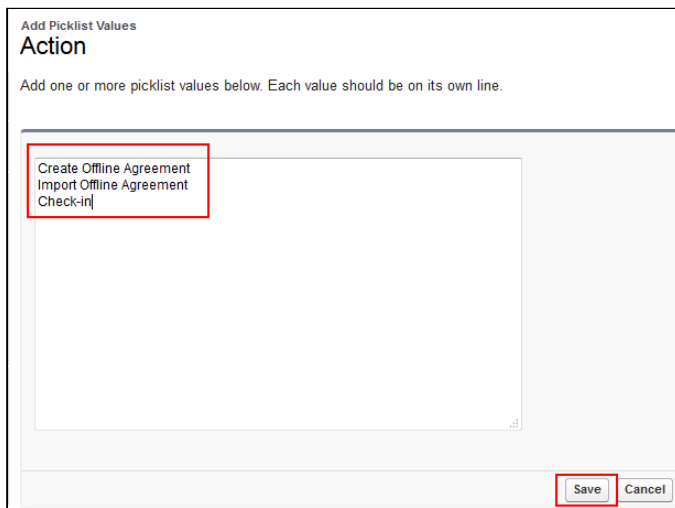
Save Cancel

5. 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.

Adding Document Info Type Field in an Agreement

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**.



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.

Document Info Type Included at Check-in

Document Info is a new value that gets applied to a checked in document, which describes the type of document. This value is applied to the document when it is checked in through X-Author.

Please note that this document info is only applied when using X-Author Contracts and can only be used after your system administrator has included the *Import Offline Agreement Actions* and the *Check-in Action* within your Apttus Contract Management environment.

Note

The Document Info field is located on the Merge Event Table.

The following screenshot indicates the picklist values displayed within the **Check-In** action in X-Author Contracts:

Picklist Values				New	Reorder	Replace	Printable View	CL
Action	Values	Default	Chart Colors					
Edit Del	Draft	<input type="checkbox"/>	Assigned dynamically					
Edit Del	Final	<input type="checkbox"/>	Assigned dynamically					
Edit Del	Clean	<input type="checkbox"/>	Assigned dynamically					
Edit Del	Redlines	<input type="checkbox"/>	Assigned dynamically					

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Configuring Template DataSource Filter

Template Datasource Filter enables you to filter the records of various business objects in your Agreement document based upon the filter criteria. It serves as a bridge between the Templates and Search Filters (Comply).

Template Datasource Filters				New Template Datasource Filter	Template Datasource Filters Help ?
Action	Filter Id	Business Object	Search Filter		
Edit Del	DF-000003	Apttus__AgreementLineItem__c	Net Price		
Edit Del	DF-000004	Apttus__AgreementLineItem__c	Charge Type		

Scenario: Define **Template Datasource Filter** in scenario when you want to filter Agreement Line Items in your agreement document based upon the filter criteria such as the records of a specific **Charge Type**, and the records having **Net Price** equal to 50.

To enable a filter on the various business objects in your document, define the following:

1. [Define custom objects for Search Filter \(Comply\)](#): It provides the list of custom objects upon which you can create a Search Filter (Comply).
2. [Create a Search Filter \(Comply\)](#): It provides the filtering criteria for the Template Datasource Filter.
3. [Create a Template Datasource Filter](#): It is applied to the Template on which the filter criteria is available.

The template which contains the Template Datasource Filter entry reflects the filtered records in the generated Agreement Document.

User Permissions Needed	
To create, edit or delete a search filter:	Search Filter (Comply): Read, Create, Edit, Delete Template: Read
To create, edit or delete a Template Datasource filter:	Template Datasource Filter: Read, Create, Edit, Delete Search Filter (Comply): Read Template: Read Agreement Term Exception: Read (Optional)

To define custom objects for Search Filter (Comply)

1. Navigate to **Setup > Create > Objects > Search Filter (Comply)**.
2. Click **Business Object**.

Custom Field Definition Detail [Edit] [Set Field-Level Security] [View Field Accessibility]

Field Information

Field Label	Business Object	Object Name	Search Filter (Comply)
Field Name	BusinessObject	Data Type	Picklist
Namespace Prefix	Apttus		
API Name	Apttus__BusinessObject__c		
Description	The business object which provides the context for the filter		
Help Text	The business object which provides the context for the filter		
Created By	Jharna Kundnani		6/17/2014 2:26 AM
Modified By	Jharna Kundnani		6/17/2014 2:26 AM

Package Information

Installed Package	Apttus Contract Management	Available in Versions	7.207 - Current
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Picklist Options

Controlling Field: [New]

Field Dependencies [New] [Field Dependencies Help ?](#)

No dependencies defined.

Validation Rules [New] [Validation Rules Help ?](#)

No validation rules defined.

Picklist Values [New] [Reorder] [Replace] [Printable View] [Chart Colors] [Picklist Values Help ?](#)

Action	Values	Default	Chart Colors	Modified By
Edit Del	Apttus__AgreementLineItem__c	<input type="checkbox"/>	Assigned dynamically	Jharna Kundnani 6/17/2014 2:26 AM
Edit Del	Apttus__Agreement_Term_Exception__c	<input type="checkbox"/>	Assigned dynamically	Jharna Kundnani 10/15/2014 5:25 AM


3. Go to the Picklist Values related list and click **New**.
4. Type the API names of custom objects, each on a different line.
If you want to add **Agreement Term Exception** custom object in the picklist value for **Search Filter (Comply)**, type `Apttus__Agreement_Term_Exception__c`.

Picklist Values				
New Reorder Replace Printable View Chart Colors				
Picklist Values Help				
Action	Values	Default	Chart Colors	Modified By
Edit Del	Apttus__AgreementLineItem__c	<input type="checkbox"/>	Assigned dynamically	Jharna Kundnani, 6/17/2014 2:26 AM
Edit Del	Apttus__Agreement_Term_Exception__c	<input type="checkbox"/>	Assigned dynamically	Jharna Kundnani, 10/15/2014 5:25 AM

5. Click **Save**.

The various custom objects appear in the drop-down list for Business Object. You can now create **Search Filter (Comply)**.

To create a Search Filter (Comply)

1. Click  and click **Search Filters (Comply)**.
2. Click **New** to create a new Search Filter (Comply).
3. Select the business object from the drop-down list and click **Next**.
4. Type a mandatory **Filter Name** and a description.
5. In the **Filter Criteria** section, select the fields and expressions you want to use to control which records will be filtered in your agreement document.
You can have a standard **AND** relationship between the expressions or use **Advanced Options** to the fields together in a more complex formula. The available fields are based on the *Business Object*.

New Search Filter (Comply)
Agreement Line Item (Step 2 of 2)

Step 2: Configure Filter [Previous](#) [Save](#) [Save & New](#) [Cancel](#)

Configure Filter ! = Required Information

Business Object: Agreement Line Item
Filter Name:
Description:

Filter Criteria ! = Required Information

Field	Operator	Value	
Charge Type	equal to	Subscription Fee	AND
--None--	--None--		AND -
--None--	--None--		AND -
--None--	--None--		AND -
--None--	--None--		AND -

[Advanced Options](#)

[Previous](#) [Save](#) [Save & New](#) [Cancel](#)

6. Click **Save**.

The Search Filter (Comply) is created to filter agreement line item records. You can now create a Template Datasource Filter.

To create a Template Datasource Filter

You must have a Search Filter (Comply) created for Agreement Line Item records.

1. On the Template detail page, navigate to the **Template Datasource Filters** related list and click **New Template Datasource Filter**.
2. Select a **Template** for this filter using the lookup icon.
3. Select a **Search Filter (Comply)** using the lookup icon.
4. Click **Save**.

A record is created under the Template Datasource Filters. You can now use this template to generate an agreement document and see the filtered agreement line item records in it.

Configuring Template Versioning

About 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:

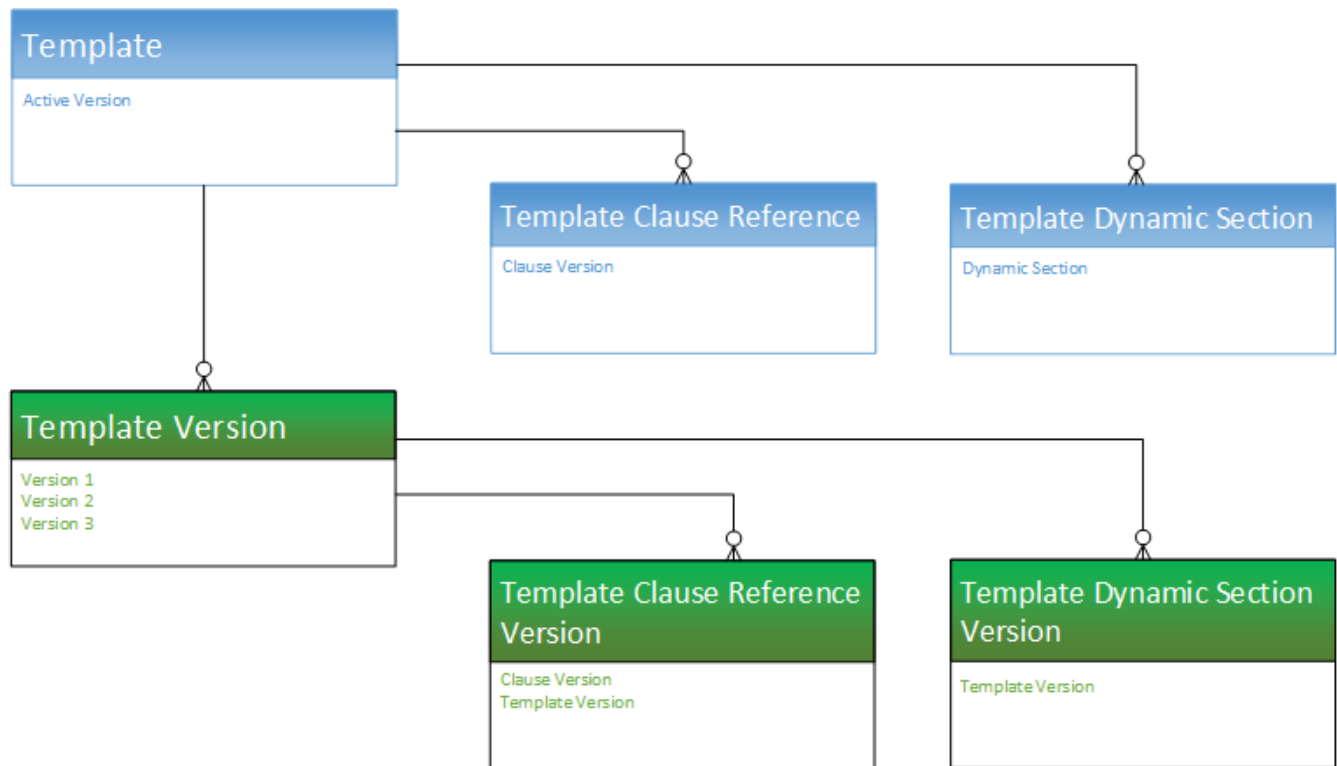
- Survey older contracts by viewing their associate template version to understand what was in the template at generation.
- Revert to previous template versions.
- Clone template versions to begin a new template lifecycle.
- Publish updated clauses and nested clauses across specific template versions.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

How Template Versioning Works

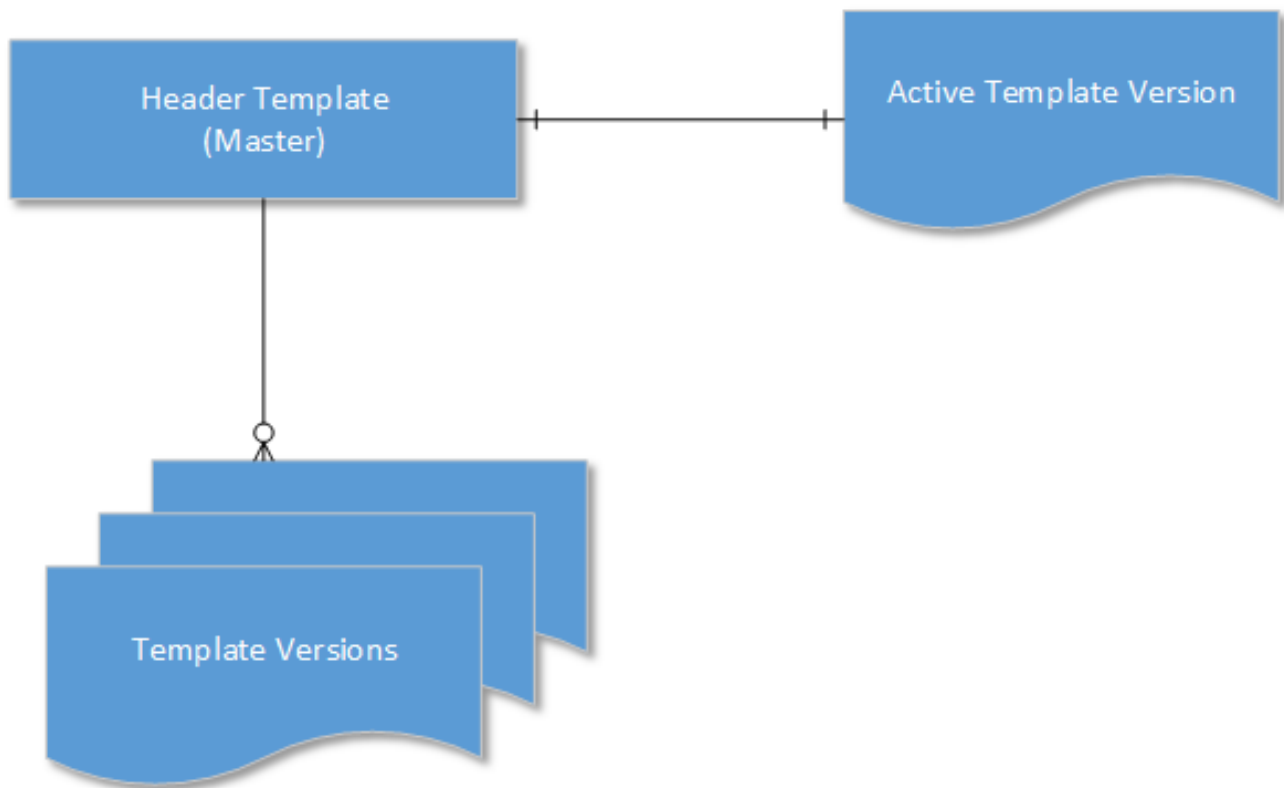
Each agreement or clause template in your org (with or without template versioning enabled) always consists of one template, and multiple child references to clauses and sections contained in that template. For every instance of that template, there is always only one template which can be considered 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.



What Template Versioning does is preserve the same template, we'll call it 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.

Enabling Template Versioning

Template Versioning is disabled by default in all orgs. If you want to enable it to allow template administrators to create and manage multiple versions of agreement and clause templates, you must make changes to your org.

The following steps are required:

- Enable Template Versioning in Comply System Properties
- Add the Versions Related List to the Template Layout.

The following steps are optional:

- Add "Activate Version" and "Active Version" Fields to the Template Layout.

Enabling Template Versioning

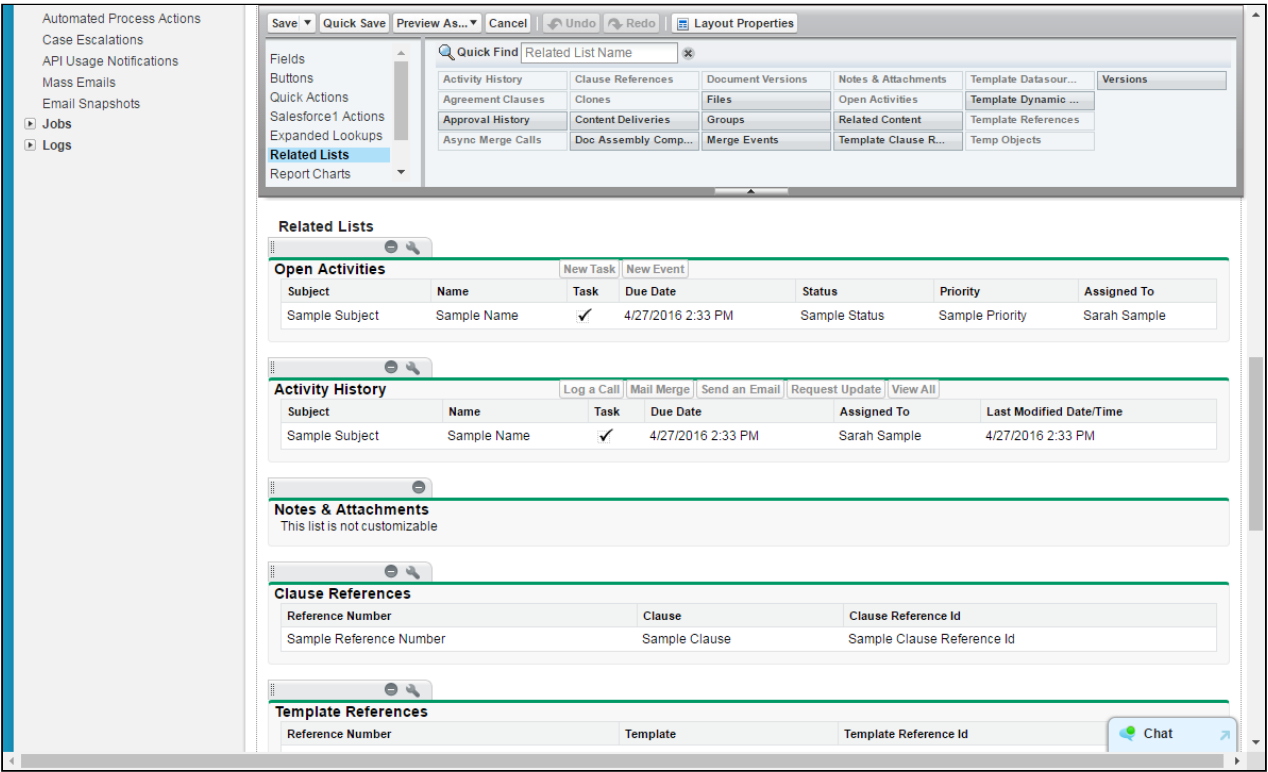
1. Go to **Setup > Develop > Custom Settings**.
2. Click **Manage** next to Comply System Properties.
3. Click **Edit** next to System Properties. The System Properties form is displayed.

The screenshot shows the 'Custom Settings' page in Salesforce. On the left is a navigation menu with options like 'Email Services', 'Lightning Components', 'Visualforce Pages', 'Platform Cache', 'S-Controls', 'Sites', 'Static Resources', 'Tools', 'Remote Access', 'External Data Sources', 'External Objects', 'Secure Agents', 'Secure Agent Clusters', and 'Schema Builder'. The main area displays the 'Comply System Properties' form. Fields include 'Footer Datetime Format For Imported Docs', 'Instance Url', 'Max Child Level', 'Merge Call Timeout Millis' (set to 60,000), 'Merge Webservice Endpoint' (set to https://mwsdev.aptus.net/cg), 'PDF Owner Password', 'Publish Author Events' (checked), 'Publish Merge Events' (checked), 'Use Agreement Locks for Versioning' (unchecked), 'Temp Email Template Inactive Hours', and 'Default Document Tags' (set to Sales, Legal, Q3). At the bottom, the 'Enable Template Versioning' checkbox is checked and highlighted with a red rectangular box.

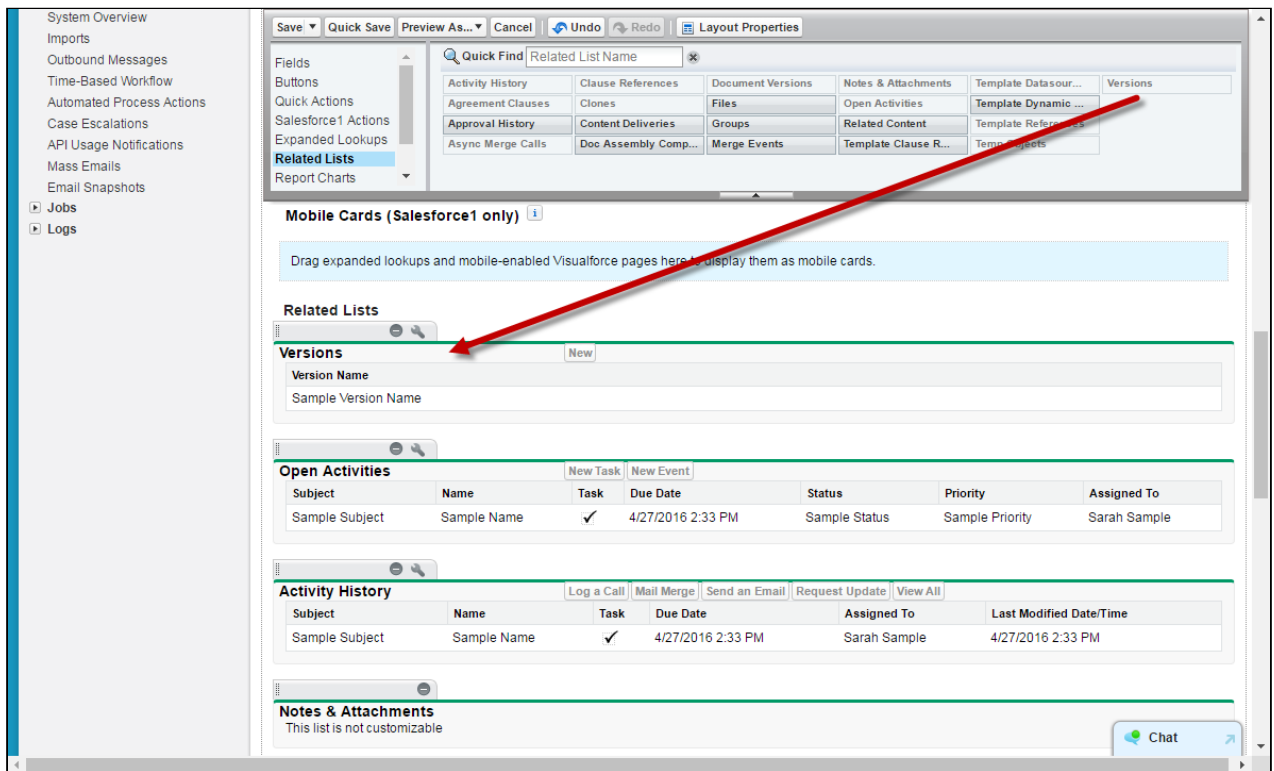
4. Check **Enable Template Versioning**.
5. Click **Save**. Template Versioning is now enabled in your org.

Adding the Version Related List to the Templates Layout

1. Follow standard Salesforce instructions for editing the Template object layout (e.g., click "Edit Layout" from the Template details page).
2. From the Template layout console, click on **Related Lists**.



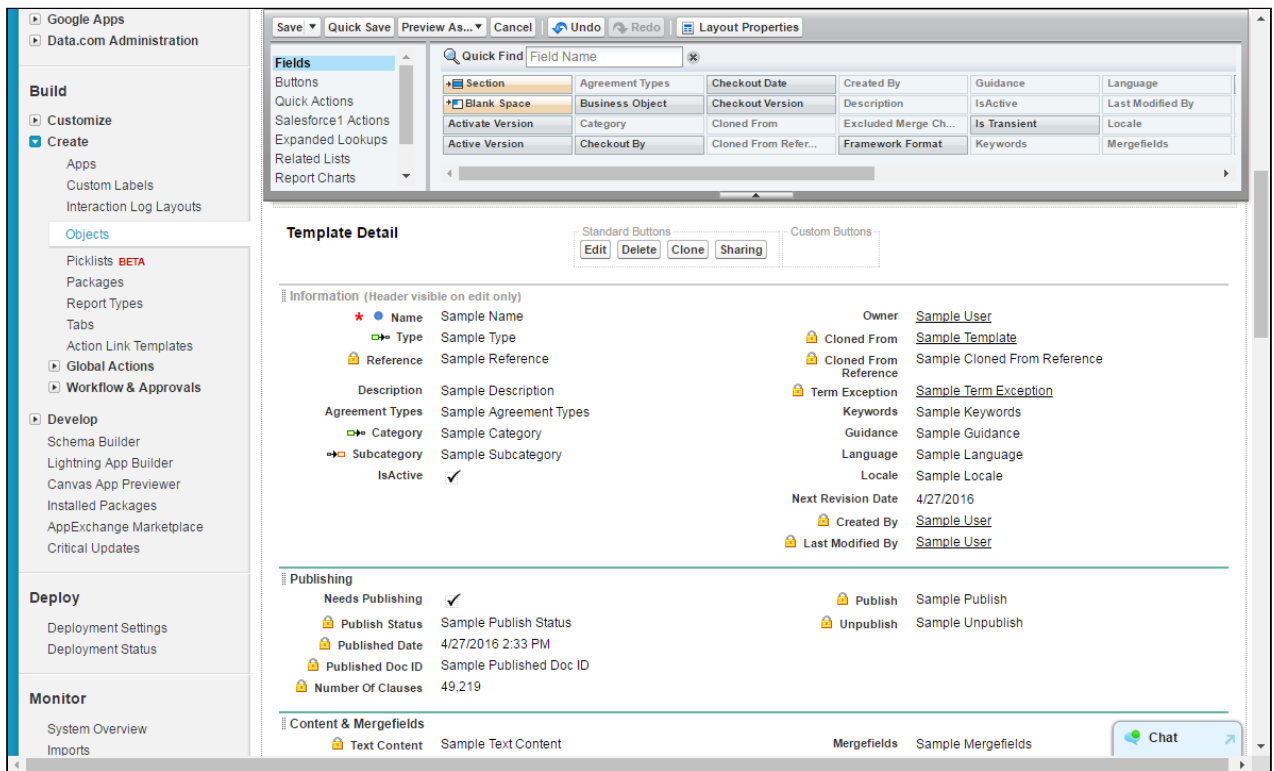
3. Drag the **Versions** Related List into your Template layout.



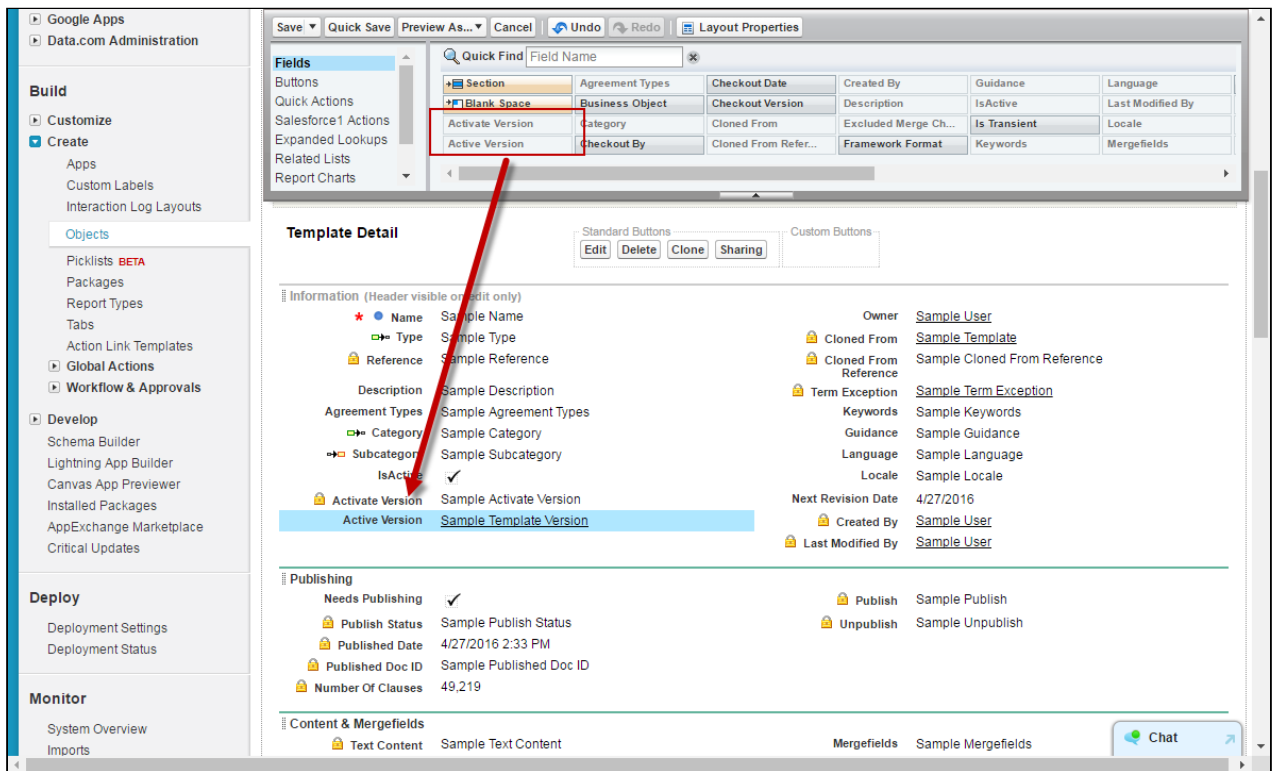
4. Click **Save**.

Adding Optional Activate fields to the Template layout

1. Follow standard Salesforce instructions for editing the Template object layout (e.g., click "Edit Layout" from the Template details page).
2. From the Template layout console, click on **Fields**.



3. Drag the **Activate Version** and **Active Version** fields into your Template layout.



4. Click **Save**.

Template Details should now display the active version of the current template record and provide an "Activate Version" button for activating templates from within Contract Management.

Template Detail		Edit	Delete	Clone
Name	CC FX2 SOW			
Type	Agreement	Cloned From		
Reference	1da1a3ba-cc1a-4ec6-93c9-b5d8210e734b	Cloned From Reference		
Description		Term Exception		
Agreement Types	SOW	Keywords		
Category	Default	Guidance		
Subcategory	Default	Language		
IsActive	<input checked="" type="checkbox"/>	Locale		
Activate Version	Activate Version	Next Revision Date		
Active Version	v3.00	Created By		
		Last Modified By		

Managing Template Versions

Managing Template Versions in X-Author Contracts

Apttus Template administrators primarily use X-Author Contracts to create, check-out, check-in and make changes to agreement and clause templates. With Template Versioning, this practice should not change, and it is recommended that most template-related tasks be completed using the X-Author contracts add-in for Microsoft Word. Using X-Author Contracts, you can:

- Create new templates
- Check-in new template versions
- Check-out template versions
- Clone template versions
- Activate template versions
- Publish template versions which contain nested clauses


For full step-by-step instruction on managing template versions using X-Author, refer to the *X-Author Contracts User Guide*.

Managing Template Versions in Contract Management

The following sections in this guide explain how to accomplish some of the above tasks in Contract Management, including:

Activating Template Versions

When you want to change the active version of an agreement or clause template, you can activate it from the template record in Contract Management.

 It is highly recommended that template versions be activated strictly from X-Author.

Prerequisites

Before you can activate a template version from the Template record:

- the "Activate Version" button must be [added to the Template Detail page in Salesforce](#).
- the template must be in an inactive state.

To activate a template version

1. Navigate to the **Templates** tab. View the current active template version in the "Active Version" field under Template Detail.

Template
CC FX2 SOW

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Versions \[4\]](#) | [Template Clause Reference Versions \(Clause\) \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[5+\]](#) | [Notes & Attachments \[1\]](#) | [Clause References \[3\]](#) | [Template References \[0\]](#) | [Agreement Clauses \[0\]](#) | [Template Datasource Filters \[0\]](#) | [Async Merge Calls \[2\]](#) | [Temp Objects \[0\]](#) | [Clones \[1\]](#) | [Document Versions \[5+\]](#)

Template Detail [Edit](#) [Delete](#) [Clone](#)

Framework Format	FX2	Owner	[User Avatar]
Name	CC FX2 SOW	Cloned From	
Type	Agreement	Cloned From Reference	
Reference	1da1a3ba-cc1a-4ec6-93c9-b5d8210e734b	Term Exception	
Description		Keywords	
Agreement Types	SOW	Guidance	
Category	Disclosure	Language	English
Subcategory	Category 1	Locale	English (United States)
IsActive	<input checked="" type="checkbox"/>	Next Revision Date	1/25/2016
Activate Version	Activate Version	Created By	[User Avatar]
Active Version	v4.00	Last Modified By	[User Avatar]

▼ Publishing

Needs Publishing	<input type="checkbox"/>	Publish	Publish
Publish Status	Published	Unpublish	
Published Date	4/27/2016 2:26 PM		
Published Doc ID			
Number Of Clauses	3		

2. Click **Activate Version**. The Activate page is displayed.

Activation

Version Modified By [\[User Avatar\]](#)

Last Modified After Last Modified Before

Template Versions

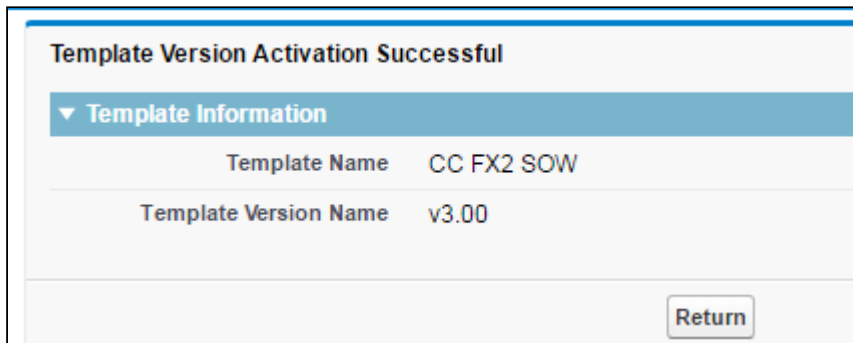
Page 1 of 1 << Previous Next >> Records per page 25

Action	Name	Version Name	Version Number	Comments
Activate	CC FX2 SOW	v3.00	3.00	This version is auto generated from the original template
Activate	CC FX2 SOW	v4.00	4.00	
Activate	CC FX2 SOW	v2.00	2.00	This version is auto generated from the original template
Activate	CC FX2 SOW	v1.00	1.00	This version is auto generated from the original template

3. Search for a template version using any of the following filters:

- Version number
- Modified by (User)
- Last modified after Date
- Last modified before Date

- Click **Activate** next to the version you want to activate. The following page is displayed on successful activation.



- i** When a template version is successfully activated, every template above it will be flagged as "Needs Publishing." For example, if you change the active version of a Payment Terms clause which is used in three templates, all three templates will be flagged. For information on publishing template versions, refer to [Publishing Template Versions](#).

Cloning Template Versions

- i** Hint: Click on an image to enlarge the view.

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.
- 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

- Go to the **Templates** tab to view the Template record.
- From the Template record details, click the Clone button.

Template
CC FX2 SOW

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) |

« [Back to List: Custom Object Definitions](#)

[Versions \[4\]](#) | [Template Clause Reference Versions \(Clause\) \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[5+\]](#) | [Notes & Attachments \[1\]](#) | [Clause References \[3\]](#) | [Template Agreement Clauses \[0\]](#) | [Template Datasource Filters \[0\]](#) | [Async Merge Calls \[2\]](#) | [Temp Objects \[0\]](#) | [Clones \[1\]](#) | [Document Versions \[5+\]](#)

Template Detail [Edit](#) [Delete](#) [Clone](#)

Framework Format	FX2	Cloned From	
Name	CC FX2 SOW	Cloned From Reference	
Type	Agreement	Term Exception	
Reference	1da1a3ba-cc1a-4ec6-93c9-b5d8210e734b	Keywords	
Description		Guidance	
Agreement Types	SOW	Language	English
Category	Disclosure	Locale	English (United States)
Subcategory	Category 1	Next Revision Date	1/25/2016
IsActive	<input checked="" type="checkbox"/>	Created By	Chris Castro, 1/25/2016 4:11 PM
Activate Version	Activate Version	Last Modified By	Chris Castro, 5/11/2016 12:30 PM
Active Version	v3.00		

- On the next screen, click **Continue**.
- Make changes as needed to Template header information.

Template Edit
CC FX2 SOW Copy

[Help for this Page](#)

Template Edit [Save](#) [Save & New](#) [Cancel](#)

Information ! = Required Information

Framework Format: FX2 Name: CC FX2 SOW Clone Type: Agreement Reference: 7deef6da-63b0-4810-aaf4-a9c Description: Agreement Types: Available: Default, NDA, SLA Chosen: SOW Category: Disclosure Subcategory: Category 1 IsActive: <input checked="" type="checkbox"/> Active Version:	Owner: Chris Castro Cloned From: CC FX2 SOW Cloned From Reference: 1da1a3ba-cc1a-4ec6-93c9-b5 Term Exception: Keywords: Guidance: Language: English Locale: English (United States) Next Revision Date: 1/25/2016 [5/11/2016]
--	---

5. Click **Save**. The Template record is cloned.

Template
CC FX2 SOW Clone

Customize Page | Edit Layout | Printable View | Help for this Page

« Back to List: Custom Settings

[Versions \[1\]](#) |
 [Template Clause Reference Versions \(Clause\) \[0\]](#) |
 [Open Activities \[0\]](#) |
 [Activity History \[2\]](#) |
 [Notes & Attachments \[1\]](#) |
 [Clause References \[3\]](#) |
 [Template References \[0\]](#) |
 [Agreement Clauses \[0\]](#) |
 [Template Datasource Filters \[0\]](#) |
 [Async Merge Calls \[0\]](#) |
 [Temp Objects \[0\]](#) |
 [Clones \[0\]](#) |
 [Document Versions \[0\]](#)

Template Detail [Edit](#) [Delete](#) [Clone](#)

Framework Format FX2 Owner

Name	CC FX2 SOW Clone	Cloned From	CC FX2 SOW
Type	Agreement	Cloned From Reference	1da1a3ba-cc1a-4ec6-93c9-b5d8210e734b
Reference	7deef8da-63b0-4810-aaf4-a966d35b6de0	Term Exception	
Description		Keywords	
Agreement Types	SOW	Guidance	
Category	Disclosure	Language	English
Subcategory	Category 1	Locale	English (United States)
IsActive	<input checked="" type="checkbox"/>	Next Revision Date	1/25/2016
Activate Version	Activate Version	Created By	
Active Version	v1.00	Last Modified By	

[Publishing](#)

[Content & Mergefields](#)

Versions [New Template Version](#) [Versions Help](#)

Action	Version Name
Edit Del	v1.00

The *Active Version* is set to 1.0 and the active version of the template document from the record that was cloned is attached to the cloned record in the **Notes & Attachments** section.

Notes & Attachments [New Note](#) [Attach File](#) [View All](#)

Active template document copied to cloned record

Action	Type	Title	Last modified
Edit View Del	Attachment	CC FX2 SOW.docx	5/11/2016 12:43 PM

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. Go to **Templates** tab to view the template record.
2. Go to **Versions** related list.
3. 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 [Edit] [Delete] [Clone]

▼ Publish Templates

Published Doc ID: [Field]
 Publish: [Publish]
 Unpublish: [Unpublish]
 Needs Publishing: [Needs Publishing]

Name: CLM-1891 Test A1
 Description: [Field]
 Agreement Types: Default; Corporate; Other
 Business Object: Apttus_APTS_Agreement__c
 Type: Agreement
 Category: Category
 Subcategory: Subcategory
 IsActive: ☒
 Framework Format: Pre FX2
 Activate Version: [Activate Version]
 Active Version: v3.00

Reference: 378963f8-9ecd-a454-70bb-b61079353464
 Owner: [User]
 Keywords: [Field]
 Guidance: [Field]
 Language: English
 Locale: English (United States)
 Next Revision Date: [Field]
 Created By: [User]
 Last Modified By: [User]
 Term Exception: [Field]

► Test Fields

► Content & Mergefields

[Edit] [Delete] [Clone]

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


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

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.

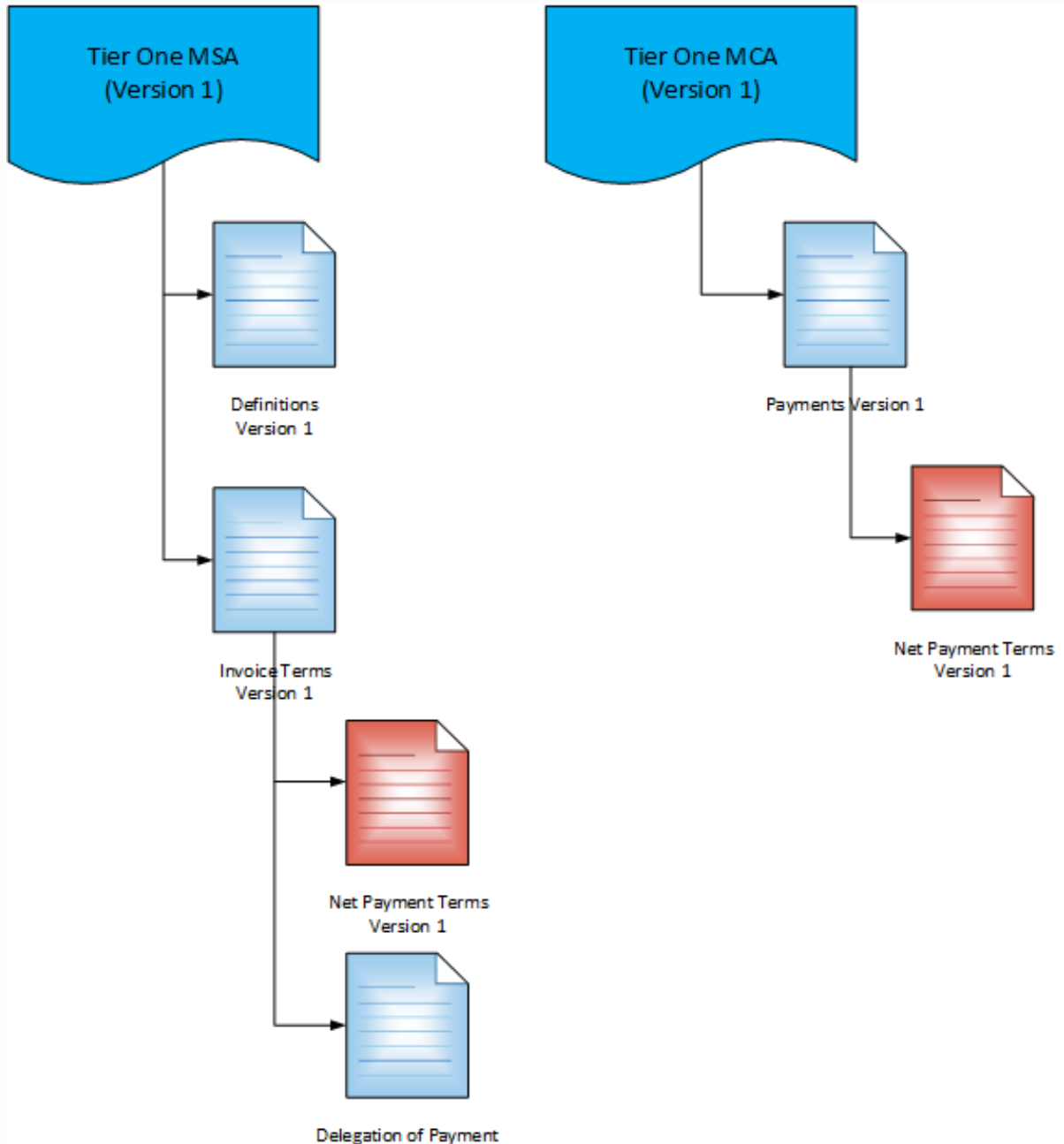
The process for both manually and automatically publishing templates in Contract Management is unchanged. Refer to [Publishing](#) for step-by-step instructions to publish your templates.

 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:

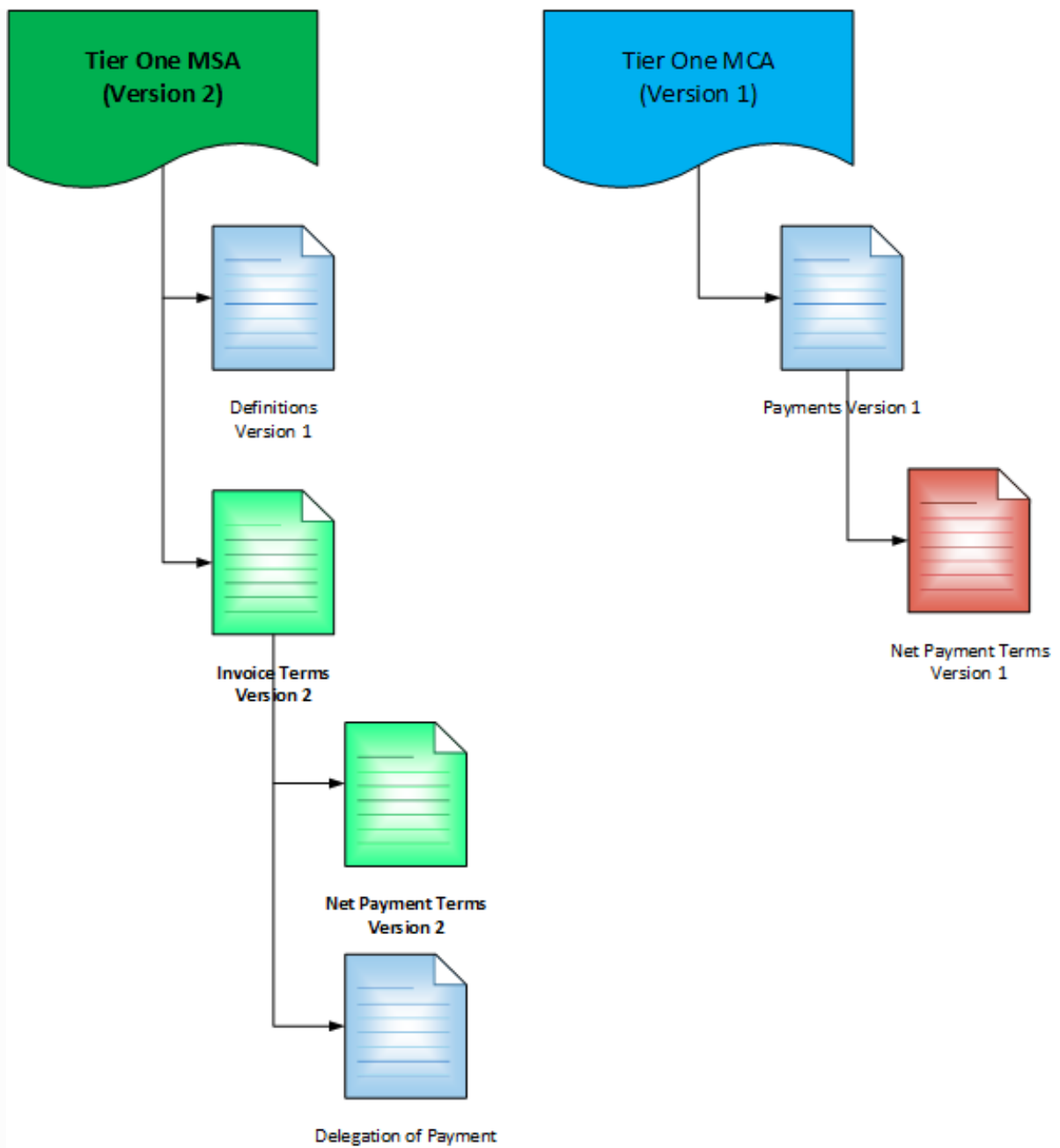
Use Case: MSA Payment Terms Publish Scenario

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.

Document Generation for Templates with Nested Clauses

The Autopublishing features improve document generation performance, but some Contract Management customers choose to generate documents without using the Autopublishing features.

The improvements to document generation resolve:

1. Merge fields from agreement child or grandchild objects
2. Merge fields within nested clauses

The improvements can be initiated in the new release version as follows:

- Using Migration Manager, which updates all of the content and mergefields in one process
- Using X-Author Contracts Check-out/-in functionality to update all mergefields as they are encountered
- Using Contract Management for generation of an agreement as it is initiated in Contract Management

Note

Please note that the document generation time performance benefits realized using Autopublishing in advance of document generation will not be available to those customers who choose to forego Autopublishing and just rely on the document generation action.

Publishing 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.

About Auto-Publishing

Auto publishing requires an apex scheduled job and then entering a username and password and selecting the *Enable Auto Publish* option on the *Publish Template* page 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. There are a number of new fields added to the Template object for this feature

that you may or may not want to add to the templates page layout when upgrading. With new installations, by default the publish fields will be included on the page layout.

Note

The fields are automatically updated by the actions you take in X-Author Contracts and Contract Management, so there is no need to display them for the functionality to work as expected. Including them may actually hinder the functionality. For instance, someone could manually uncheck the Needs Publishing flag for an updated template.

You may want the fields visible and editable for system admin users for troubleshooting and for testing in a sandbox org; however, for typically business users there is no need to display these fields.

The new fields are:

- **Needs Publishing** - this Check box field is automatically selected whenever the referenced clause of a template has been changed and a new version is checked in, since the template was last published. This serves as a flag, which will add the template to the list of templates to be auto-published.
- **Number of Clauses** - this Roll up Summary field indicates how many referenced clauses are associated with the template.
- **Published Date** - this Date/Time field indicates the last time the template was published.
- **Publish Status** - this Picklist field indicates the status of the template in relation to going through the publishing process. The available values are *Pending*, *Published*, and *Submitted*.
- **Published Doc ID** - This is a unique identifier field, cons assigned to the published template automatically after it is published. You can search for the details of the published template in Salesforce using this ID.

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

Note

From Contract Management and X-Author Contracts February 2015 release onwards, auto-publishing can be done from the X-Author Templates in Microsoft Word by clicking any of the following ribbons:

- Publish
- Check-In

Configuring Auto-Publishing

1. Go to **App Setup > Develop > Apex Classes** and click **Schedule Apex**.
2. Enter a **Job Name** and then click lookup icon for Apex Class and enter *TemplatePublishJobScheduler*.
3. Enter the **Frequency**, **Start Date**, **End Date**, and **Preferred Start Time**.
4. Click **Save**.

- Click **+** and select **Publish Template** to display the Publish Template page. It includes a list of templates that have changed or had their associated clauses change, resulting in their *Needs Publishing* flag being checked, are displayed.
- Enter the username and password details for the user who's credentials will be used to run the auto-publish, according to the schedule that was configured in the apex job in *Steps 1-4*.

Note

There is no validation for the user's password. If it is entered incorrectly the auto publish job will fail.

Publish Templates

Publish User Name: obelorusets@apttus.com. ee.test.sbox5

Publish User Credentials: [Masked Password]

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. If the publisher user name and credentials are not provided, the current user session will be used and the user should keep the session active until the batch operation is completed.

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 Name and Credentials in Salesforce.
- 3) Please follow the instructions provided to setup the Publish Template Job Scheduler. The Scheduler will monitor templates and queue them for publishing when necessary.

Templates

Name	Type	Description	Language	Locale	Number Of Clauses	Needs Publishing
rec-AA NumericFieldsRounding	Agreement	header fields	English	English (United States)	0	✓
rec-AA7.0.1231 DDR_LOI StandardTemplate1 DOCX	Agreement		English	English (United States)	0	✓

The auto-publish process stores the credentials in a custom setting in encrypted form. When the Apex batch job executes, the credentials are passed to the merge service similar to the process in manual publishing.

- Check the **Enable Auto Publish** option. This is all that is required, there is no Save button. All template records that have the *Needs Publishing* flag checked will be published. They do not need to be selected from the Templates list. All templates on the list will be published.

Once the auto publish has begun, the templates will have a publish status of *Submitted*, *Pending*, or *Completed* while they go through the process. The **Batch Jobs** list and a separate log file will indicate which templates were published successfully or not.

You can return to the scheduled apex job as required to change the timing and you can uncheck **Enable Auto-publish** on the Publish Templates page when you do not want to auto-publish.

To manually publish templates using the Publish Templates tab

1. Click **+** and select **Publish Template** and a list of templates that have changed or had their associated clauses change, resulting in their *Needs Publishing* flag being checked, are displayed.

Publish Templates Publish Abort Pending Clear Pending Refresh Return

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. If the publisher user name and credentials are not provided, the current user session will be used and the user should keep the session active until the batch operation is completed.

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.

Templates

Name	Type	Description	Language	Locale	Number Of Clauses	Needs Publishing	Publish Status	Published Date
<input type="checkbox"/> 100 main template	Agreement		English		1	<input checked="" type="checkbox"/>		
<input type="checkbox"/> main.Template_2 TESTs (Adobe)	Agreement		English	English (United States)	12	<input checked="" type="checkbox"/>		
<input type="checkbox"/> main.Template_3 TESTs (Adobe)	Agreement		English	English (United States)	12	<input checked="" type="checkbox"/>		

Publish Abort Pending Clear Pending Refresh Return

If you are going to manually publish a template it does not matter if the **Auto-publish** option is checked.

The manual template publish process does not store the credentials. The credentials are retained in memory and passed to the merge service which uses it to login and establish a session with Salesforce.

2. Select the templates you want to publish and click **Publish**.

The status for the template changes to *Submitted* and an entry is added to the Batch Jobs list for each selected template that is published.

Once the template is published the Batch Jobs list status will change to *Completed*.

If the job failed, the Batch Jobs list will provide a message you can use to troubleshoot.

If a job failed, you can try publishing the template again. If it published successfully, you can use the template with its updated clause references, for generating agreement documents.

Using Merge Service

Merge Service and the Contract Management package work together as follows, to auto publish templates.

- A username and password must be provided each time you publish, whether you are initiating an Auto (scheduled) or Manual run. The current session ID is not used, so the user may choose to log out during the process.
- Contract Management uses the AES-256 (Advanced Encryption Standard with a 256 bit key length) protocol.
- When the publish job is submitted, Contract Management calls Merge Service to initiate the publishing process.
- Merge Service does a complete cycle of publishing within each session. This includes fetching the template document and referenced clauses from Contract Management, in-lining the referenced clauses within the Template, and saving the published template document to the Contract Management template record.
- As each template publish cycle is completed, Contract Management updates the Auto publish job status regarding the template as completed, and initiates the next Merge Service template publish cycle. There is never any persistent data retained by Merge Service.
- Each template publish cycle is executed as a separate session with its own unique Session ID.
- When the last template has been published, Contract Management updates the job complete status.

Note

SSO does not work for auto publishing. The process requires specific login credentials for a user with access to publish documents.

Handling Auto Publishing Security Considerations

Merge Service is hosted in the Amazon EC2 cloud, where service instances may be brought online dynamically to handle demand loads. This means their IP address may change, which precludes the ability to add a static IP address to a whitelist and instead requires the use of a security token.

The template publish process is run through Merge Service, outside the customer's firewall. The initial service action is to call back into Salesforce to initiate the publish process and pull data from Salesforce. For this a mechanism is needed to initiate a Salesforce session by providing user credentials to the org, which include user name, password, and security token.

In a Single Sign On (SSO) environment, the user logs into the environment once and passes the token to other applications seamlessly. But in the SSO environment, the security token link is hidden, which then requires additional steps to get a security token for publishing. The SSO token is not available to jobs scheduled to run in the future. Both the current Manual and Auto publishing processes are treated in this way.

Security Handling Options

The typical solution for Salesforce integration jobs is to have a specific profile assigned to a small number of system administrator users, to carefully control who has access to the objects required to complete

tasks. So there are three possible ways to approach this security challenge if running a publishing job is desired:

- It is recommended that you create a specific API user profile, with the minimum privileges required to publish templates. Then create a specific API user and assign the profile to this user for all template publishing tasks. For more details, see this [Salesforce help topic](#).
- Another option is to enable *Two Factor Authentication* for the user profile, which makes the security token link available. After the security token is secured, the Two Factor Authentication may be turned off. The security token will remain valid until the password is changed.
- This additional option is suggested for those who do not want to use a Salesforce license, which is required for our recommended option. You can bypass auto publishing and use the current user session to manually publish the templates. This would be set up similarly to the method used by Salesforce for Workflow Outbound Messaging, that allows a remote web service to call back into Salesforce, as described in this [Salesforce help topic](#).

Query Template

Using template filtering rules, you can set up user defined filters to narrow the list of templates that display for tasks that involve previewing or generating documents. For example, for agreement templates created for multiple regions, you should only be able to select templates for the region to which they belong. The template filter uses agreement fields and related child object fields to select the templates to display.

User Permissions Needed	
To create, edit or delete a query template:	Query Template: Read, Create, Edit, Delete Agreement: Read Template: Read

To insert an amendment template

You can insert an Amendment Template in the available choice of templates while generating an agreement in the **state: In Amendment=In Amendment** status.

1. Create an Agreement type template to be used in amendment situations.
Use any keyword in the keywords field. For example, Amendment.

Template
TEST AMEND TEMP 2125

Customize Page | Edit Layout | Printable View | Help for this Page

Back to List: Custom Object Definitions

Template Detail

Edit Delete Clone

Name	TEST AMEND TEMP 2125	Owner	ANURAG KUMARIA [Change]
Description		Keywords	Amendment
Agreement Types	NEW TEST AGREEMENT	Guidance	
Category	Default	Language	English
Subcategory	Default	Locale	English (United States)
IsActive	<input checked="" type="checkbox"/>	Next Revision Date	
Published Doc ID		Created By	ANURAG KUMARIA, 6/13/2012 6:40 AM
Publish	<input type="button" value="Publish"/>	Last Modified By	ANURAG KUMARIA, 6/14/2012 2:13 AM
Unpublish			
Type	Agreement		

- Using the **Query Template** tab, create a Query Template.
- The Query Template has two Related Lists: **Qualifiers** and **Filters**.

Query Template
QT-0000

Customize Page | Edit Layout | Printable View | Help for this Page

Back to List: Custom Object Definitions

Query Template Detail

Edit Delete Clone

Query Template Name	QT-0000	Owner	ANURAG KUMARIA [Change]
Sequence	1	SOBJECT Type	Aptus__APTS_Template__c
Type	Agreement Template Filter		
Object	Agreement Template		
Description			
Active	<input checked="" type="checkbox"/>		
Created By	ANURAG KUMARIA, 5/9/2012 2:18 AM	Last Modified By	ANURAG KUMARIA, 5/9/2012 2:18 AM

Edit Delete Clone

Qualifiers

New Query Template Qualifier

Qualifiers Help

Action	Qualifier Name	Sequence	Object	SOBJECT Type	Field	Comparison Operator	Value	Relation Field
Edit Del	QTQ-00000000	1	Agreement	Aptus__APTS_Agreement__c	Aptus__Status__c	not equal to	In Amendment	

Filters

New Query Template Filter

Filters Help

Action	Filter Name	Sequence	Field	Comparison Operator	Value	Boolean Operator
Edit Del	QTF-00000001	1	Aptus__Keywords__c	not equal to	Amendment	AND

- Add a new Query Template Qualifier, provide the following information, and click **Save**.

Field	Value	Description
Sequence	1	<provide an integer value here. The number 1 is used as an example. In case you are using more than one Filter, then the same will be applied according to the sequence number>
Field	Apttus__Keywords__c	<API name of the field in the specified object>
Comparison Operator	not equal to	<select from the drop down list>
Value	Amendment	

The screenshot displays the 'Query Template Filter Detail' page for QTF-0000001. The interface includes a navigation bar at the top with links to Dashboards, Reports, Accounts, Contacts, Cycle Time Groups, Retention Policies, and Purge Agreements. Below the navigation bar, there's a header section with the QTF ID and a 'Back to List' link. The main content area shows the configuration details: Sequence (1), Field (Apttus__Keywords__c), Comparison Operator (not equal to), and Value (Amendment). There are also buttons for Edit, Delete, and Clone. On the right side, it shows the Boolean Operator (AND) and the user who created and last modified the template (ANURAG KUMARIA).

5. Generate an agreement, which is in the **state: In Amendment=In Amendment** state.

The desired Amendment template is displayed as one of the options along with other templates.

For more information on setting up Template filtering rules, refer to [To setup template filtering rules](#).

Use Case for Creating Query Template

This topic describes the use case for creating a query template.

i Standard Statement

This use case gives one example on, by creating query template filtering rules, System Administrators can define which templates display when previewing, generating or re-generating documents. You might use this functionality differently, depending on your business case.

This use case describes how you can filter templates while previewing, generating or re-generating documents by using query template filtering. For example, if agreement templates are created for multiple regions, a user should only be able to select templates appropriate for the region they belong to.

In this case, a Sales Representative can select NDA English and NDA Spanish templates for generating or regenerating an agreement. The user has to manually select which template they want to use.

Prerequisite:

The Query Template will look for a match between fields on the Agreement and Template records. The Agreement record contains a **Language** field with the possible values of English or Spanish, while the Template record contains a similar **Language** field. By comparing and finding a match between the **Language** field values on the Agreement record and Template records, the Query Template will present the appropriate template for document generation.

To create a query template, perform the following steps:

1. Select the **Query Templates** tab.
2. Click **New**.
3. On the **Query Template Edit** screen, enter 1 as **Sequence**.
4. Retain all other default values and **Save**.
5. Click **New Query Template Qualifier** from the **Qualifiers** related list.
6. Enter 1 as **Sequence**.
7. Retain Agreement as **Object**.
8. Type **RecordType.Name** for the **Field** value.
9. Retain **Comparison Operator** as **equal to**.
10. Type **NDA-yourinitials** in the value field. This must be an exact match to your record type label.
11. Retain **Apttus__APTS_Agreement__c** in the **SObject Type**.
12. Click **Save**. Click QT-#### (top right of page) to navigate back to your query template record.
13. Click **New Query Template Filter** from the **Filters** related list.
14. Enter 1 as **Sequence**.
15. Type (or copy) **Apttus__Language__c** for the **Field** value.
16. Retain **Comparison Operator** as **equal to**.
17. Type (or copy) **Apttus__APTS_Agreement__c.Language__c** in the **Value** field.
18. Click **Save**.

Result:

When a specific language is selected on the agreement record, the associated template is automatically used for document generation.

Next Step:

Similarly, you can create query template for other languages, to generate your agreement for a specific region.

Securing Documents

Word Trust Center/Protected View options can impact your ability to see generated 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 secure and control documents

- You must have a valid Salesforce (SFDC) account with an Apttus Contract Management license.
- Apttus X-Author Contracts must be installed on your local machine with an Apttus X-Author license.

Note

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.

1. Start Word and click **File > Options** to display the Word Options dialog.
2. Select the Trust Center sidebar option and then click Trust Center Settings.
3. Select the Protected View sidebar option and then clear the three Protected View 3.options.
4. Click **OK** for each of the two dialog boxes to complete the procedure.


Setting Up Template Filtering Rules

By setting up the template filtering rules, the Template selection page can be configured to setup user defined filters to narrow the list of Templates displayed to the user for Preview/Generate/Generate Supporting Document/Regenerate tasks. The template filter is setup by an administrator and allows agreement fields and related child object fields to be used in selecting the templates.

The template selection page for the agreement generation actions displays only the templates that are applicable for the agreement. For example:

For the Agreements of Type Other, show the templates that are defined for a region.

Setting Up Template Filtering Rules

1. Click  and click **Query Templates**.
2. Click **New**.
3. To create a query template sequence, enter the Sequence (numeric). If there is more than one query template defined for a template object then sequence is the order in which the query templates are applied.
4. Enter the description for the query template and click **Save**.
5. To create a qualifier, click **New Query Template Qualifier**. *Qualifier* is as a condition on the Agreement object.
6. Enter the Sequence. If there are several template qualifiers, then the qualifiers are applied in the order of the sequence number.
7. Enter the API name of the agreement Field. For example, **RecordType.Name**.
8. Select the Comparison Operator. For example, **equal to**.

9. Enter the Value. For example, **Other**.
10. Click **Save**.
11. To define Query template Filter, click the associated query template link next to the Query Template. The Query Template Details page is displayed.
12. Click **New Query Template Filter**.
13. Enter appropriate values in the Sequence, Field, Comparison Operator, and Value fields and click **Save**.

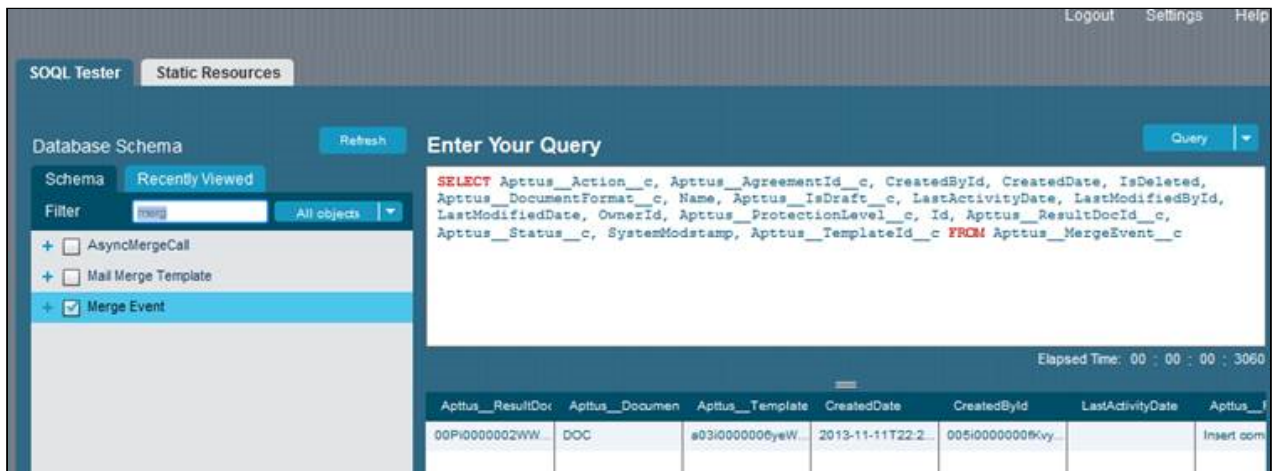
Getting the ID of a Template Used to Generate a Document

1. Go to **Setup > Build > Develop > Custom Settings > Comply System Properties > System Properties** and click **Edit**.
2. Select **Publish Merge Events**.

The screenshot shows the 'Comply System Properties Detail' page. At the top, there is a 'Back to List' link and an 'Edit' button. Below this is a table of system properties. The table has two columns: 'Name' and 'Admin User'. The 'Publish Merge Events' checkbox is highlighted with a red box and a checkmark.

Name	Admin User
Bypass Sharing	Contract Summary Template
Default Opportunity Agreement Owner	Email Template For Checkin Notification
Enable Multiple Checkout	Enable PDF Security
Enable Submit Merge Call	Enable Version Control
Instance Url	Max Child Level
Merge Call Timeout Millis	Merge Webservice Endpoint
PDF Owner Password	Publish Merge Events
Auto Sync With Opportunity	Sync Bundle Using Line Items
Sync Option Products	

3. After generate, select the rows in Merge Event based on agreement id & timing to get the template id.



4. Perform a query on the Template object and get the template information based on template id.

The template ID is received.

About Universal Unique IDs

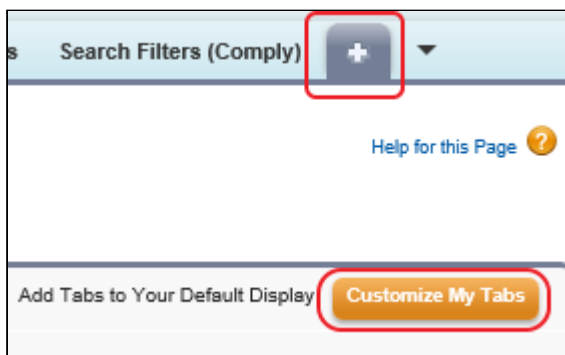
Universal unique identifier (UUID) fields of the agreement templates, clause templates, and term exceptions in Contract Management support the functionality available with the X-Author Migration Manager .

The UUIDs help provide the ability to update and migrate templates from one org to another. These IDs are unique and once an ID is assigned to a template or term exception object record, it cannot be changed.

To use the templates with the UUID field, you must have X-Author Contracts 7.0 or higher.

Setting up template object for Contract Management

1. Click + > Customize My Tabs.



2. Scroll down the available options and select **Templates**.
3. Click **Add**.

4. Click **Save**.

The Templates tab is added to the Contract Management application selection.

Configuring Obligation Management

Obligation management refers to email alerts and reminders that ensure internal and external obligations in connection to your agreements are properly fulfilled.

The Obligation Management stage ensures that deliverables must be met. This includes:

- Maximize contract value with fulfillment tracking
- Alerts linked to expirations, renewals, and key events, post-execution work flows
- Searching and reporting

Organizations typically set up common business rules that allow groups and users to receive email alerts 30, 60 and 90 days before agreements expire. Other rules can be configured based upon your needs. Check with your system administrator for more details. You can also set up tasks and events for specific agreements on a case-by-case basis. An example of another common business rule is a pricing change, where modifications to pricing and financial terms trigger a notification to interested parties.

New Task

The New Task feature is available within an Agreement Record and allows you to create a new task related to a specific agreement. Click **New Task** to enter key pieces of information that need to be tracked in connection with a date, event or milestone. The key fields are as follows:

- **Assigned to** – Allows you to identify the recipient. Use the lookup icon to identify this individual.
- **Subject** – A pre-defined list is available through a lookup icon and can be configured for your organization.
- **Status** – The status field is a drop down or picklist and provides visibility into whether the task has not been started, is in progress, has been completed, etc.
- **Comments** – Add any comments about the date, event or milestone that requires action.
- **Send Notification Email** – The send notification email is critical to ensure timely notification of relevant individuals and make sure the task is properly managed.

Once you have completed the New Task window, click Save to complete the process. Other options include **Save & New Task** or **Save & New Event** if you want to create another Task or Event.

New Event

The New Event process is the same as the New Task process *except* that instead of assigning a task to an individual, the event is logged and managed as an Event on the individual's Apttus and regular corporate email calendar. A status category is not included to manage whether the task has been completed or not, since for an event, status is not relevant.

Searching and Reporting

Apttus provides the default set of capabilities for searching, views, dashboards, and reporting. This is one of the key benefits from a Contract Management system. The ability to get the key information out, for example, dates, amounts and number of contracts to make business decisions is crucial. Modifying the search and reports is based on standard Salesforce functionality.

This includes the following topics:

About Search

Search enables all contracts to be retrieved via a keyword search that searches all the key elements, and is extremely easy to use.

Note

Global search and feed search are automatically enabled when Chatter is enabled. However, enabling Chatter disables sidebar search and advanced search.

This is a search functionality which enables you to quickly search for various items like Agreement, Templates, Accounts, Contacts, and so on.

You can further refine your search for specific objects by clicking on the Advanced Search link. You can search for records and tags using the following search options:

Sidebar Search	Advanced Search	Global Search
<ul style="list-style-type: none"> You can search a subset of Agreement objects and fields and use wildcards and filters to refine your search. Sidebar search depends on the following: <ul style="list-style-type: none"> Search options Sidebar search searches only a subset of records and fields. If the sidebar search drop-down list is available, you can limit your search to only tags or the records for a single object. If the sidebar search Limit to items I own check box is available, you can select this box to limit your search to records you own. Search Terms Searches are conducted as a phrase search and match terms in the exact sequence that they appear. For example, searching for agreement_1 returns items with agreement_1 in a single string. Wildcards and Operators 	<ul style="list-style-type: none"> Advanced Search allows more granularity, enabling you to search for <i>Exact Phrases</i> and against specific elements. For example, Agreements, Suppliers or Contacts. Use Advanced Search option in the sidebar to search a subset of objects in combination and more fields than sidebar search, including custom fields and long text fields such as descriptions, notes, and task and event comments. You can use wildcards, operators, and filters to refine your search. 	<ul style="list-style-type: none"> Global search finds more record types, including articles, documents, products, solutions, and Chatter feeds, files, groups, topics, and people. Global search also searches more field types, including custom fields and long text fields such as descriptions, notes, and task and event comments. Global search keeps track of which objects you use and how often you use them, and arranges the search results accordingly. Search results for the objects you use most frequently appear at the top of the list. If global search does not have enough information about which objects you use, you see results for all objects until it has more information. Contextual Feed Search

Sidebar Search	Advanced Search	Global Search
Use the * (asterisk) and ? (question mark) wildcards to refine results. Use * to match one or more characters, or ? to match a single character. An * is automatically appended to your search string. You cannot use operators to refine results in sidebar search.		Global search is helpful when you want to look for information in feeds posts and comments across the organization. Use feed search (feed search icon) to find information in a feed in a specific context. Click feed search magnifying glass above the feed to look for information in that feed. For example, use the feed search on a group's page to find information in that group. You can search for information in feeds on a user's profile, a record, in a public or private group (if you are a member), and on the Chatter and Home tabs. A contextual feed search is helpful when you want to confirm or check if something was once discussed in that specific feed. You can search for hashtag topics, mentions, and files posted in the feed, or refine your search using wildcards, operators, and quotation marks to match on exact phrases.

About Reports and Dashboards

Salesforce enables you to create reports and dashboards.

Reports

You can access the reports through the Reports Tab. Apttus provides standard reports based upon the most common reporting needs for Contract Management.

You can find contracts by the following parameters:

- Renewal date
- Value
- Stage
- Risk

The default reports included with Contract Management are:

Reports	Description
Agreement Expiration - This Quarter	Lists all agreements expiring in current fiscal quarter
Agreement Expiration - This Year	Lists all agreements expiring in current fiscal year
Agreement Search	Helps you easily find your agreements
Agreement Value by Type	Lists all agreements by the type along with contract value
Agreement Value Report	Lists all agreements by their contract value along with the account
Agreements by Account	Lists all agreements by the account name
Agreements by Stage	The present stage of agreements
Agreements of High Value due Renewal	Time when the high-value agreements are due for renewal
Agreement with Non-Standard Terms	Lists all non-standard Agreements
Contract Activity Report	Shows recent contract activity report
Contracts Expiring This Year by Value	Expiring contracts with values
Contracts with Non Standard Language	Lists all agreements containing non-standard language
High Risk Contracts	List highly risky agreements

You can create new reports by either starting from scratch or taking a report containing the desired results, modifying it, and changing the reports name using the Save As feature.

Salesforce delivers standard report folders containing reports for each record type. For example: Accounts, Opportunities, Leads, and more. These reports are used as a starting point for your organizations reporting efforts. Salesforce allows all users to run, customize, and create reports. For more information on setting up and managing reports within Apttus, see [salesforce.com](https://www.salesforce.com) information related to creating and customizing reports.

Apttus provides you a set of out-of-the-box reports. You may create new reports or customize existing reports. To modify an existing report, run the report and click **Customize**. For more information, see [Create a custom report](#).

Dashboards

Dashboards organize and present rich and enhanced information in a format that is easy to read and interpret. Dashboards give you a real-time snapshot of corporate metrics and key performance indicators. A dashboard is a group of different charts (or components) that graphically display your custom report data.

Dashboards help you identify trends, sort out quantities, and measure the impact of the activities.

Apttus provides dashboard views for the following three most common profiles:

1. Contract Performance Dashboard
2. Executive Dashboard
3. Legal Performance Dashboard

Apttus provides a robust Dashboard capability at your fingertips, adding an edge to your business solutions. Navigate to the Dashboards tab to customize the page by designating which dashboard type you would like to see from a list. For more information, see [Working with Dashboards](#).

Structure

A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. The components provide a snapshot of key metrics and performance indicators. A report returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access. A report type defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type. As an Administrator, you can control access to reports and dashboards by storing them in folders, which can be public, hidden, or shared.

Here's a typical representation of the relation between Report Type, Report and Dashboard. *Source: Visualforce.*

Unleashing Reports and Dashboards

The *Unleashing Reports and Dashboards* section provides you the basic concepts and an understanding to enable you to use data to create dashboards and reports.

Use the available facts to present the information important to you—from the big picture to the data point. Let us consider a few use cases that suggest what reports and dashboards can do for you and how you can take advantage of built-in tools to share the information with others. This section also introduces you to some cool features, like combination charts and custom table components, conditional highlighting, cross filters, buckets, and custom summary formulas.

You can also try hands on more advanced topics, such as merging multiple reports into joined reports and embedding report charts in record detail pages.

Cycle Time Reporting

The system does not provide the UI to select just fields for tracking time. You have to select a field and setup a dummy cycle time group. Once a group is setup for a field the system will start capturing duration every time the field value changes.

To access, go to the Cycle Time Group Tab. If tab does not exists, select the Admin tab and click the Cycle Time Group link.

Ensure the following Admin settings are created.

Name	Value
APTS_CycleTimeReportingEnabled	TRUE

Cycle Time Groups must be with the following details:

Field Label	Name	Description	From Value	To Value	Active
Status Category	Request to In Effect	This will measure time from request being created in the system, to the time it went to 'In Effect' status	Request	In Effect	✓
Status Category	Request to In Signatures	This will measure time it took from record being created in the system to status 'In Signatures'	Request	In Signatures	✓
Status Category	Request to In Authoring	This will measure time it took a user from creating Request to 'In Authoring' (Generating a contract)	Request	In Authoring	✓
Status Category	Authoring to Signatures	This will measure time it took from status 'In Authoring' to 'In Signatures'	In Authoring	In Signatures	✓

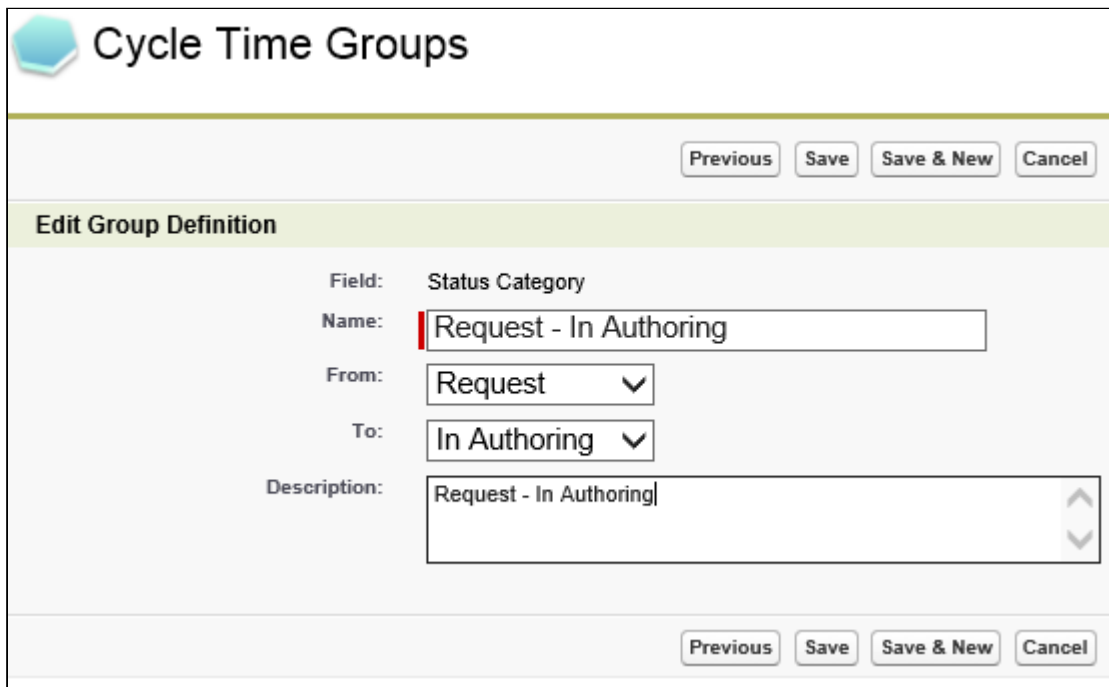
Status Category	Authoring to In Effect	This will measure time it took from 'In Authoring' (generating contract) to 'In Effect'	In Authoring	In Effect	✓
Status Category	Signatures to In Effect	This will measure time from 'In Signatures' to 'In Effect'	In Signatures	In Effect	✓

Note

Make sure all the groups are in the Active state.

To maintain Cycle Time Groups

1. Click **Cycle Time Group > New**.
2. Select the agreement field and click **Next**.
3. Enter **Name**, **From**, **To** and **Description** and click **Save**. Optionally, click **Save & New** to save the current groups and create a new group.



The screenshot shows the 'Cycle Time Groups' interface. At the top, there's a header with a blue icon and the text 'Cycle Time Groups'. Below the header, there are four buttons: 'Previous', 'Save', 'Save & New', and 'Cancel'. The main section is titled 'Edit Group Definition'. It contains the following fields:

- Field:** Status Category
- Name:** Request - In Authoring
- From:** Request (dropdown menu)
- To:** In Authoring (dropdown menu)
- Description:** Request - In Authoring (text area with up/down arrows)

At the bottom of the form, there are four buttons: 'Previous', 'Save', 'Save & New', and 'Cancel'.

To view, edit, activate, or delete Cycle Time Group

- Groups must be in the Active state for the system to start capturing time.
- Groups must be in the Inactive state, to be eligible for deletion.

1. On the Cycle Time Group tab, access the saved Cycle Time Group.
2. As required, use Edit, Delete or Activate options.

The screenshot shows the 'View Group Definition' for a Cycle Time Group. The group is named 'Request - In Authoring' and is currently inactive. The 'Field' is 'Status Category'. The 'From' is 'Request' and the 'To' is 'In Authoring'. The 'Description' is 'Request - In Authoring'. At the top right, there are three buttons: 'Edit', 'Delete', and 'Activate'. At the bottom right, there are also three buttons: 'Edit', 'Delete', and 'Activate'. Both sets of buttons are circled in red.

To view, edit, or deactivate Cycle Time Group

Deactivating a group deletes all existing summary (CycleTimeGroupData) data for the group. Also, if this happens to be the last active group for the field, then the system deletes all detail (CycleTimeFieldData) data also for the field.

Groups must be in the Active state.

1. On the Cycle Time Group tab, access the saved Cycle Time Group.
2. As required, use Edit, or Deactivate options.

The screenshot shows the 'View Group Definition' for a Cycle Time Group. The group is named 'Request - In Authoring' and is currently active. The 'Field' is 'Status Category'. The 'From' is 'Request' and the 'To' is 'In Authoring'. The 'Description' is 'Request - In Authoring'. At the top right, there are two buttons: 'Edit' and 'Deactivate'. At the bottom right, there are also two buttons: 'Edit' and 'Deactivate'. Both sets of buttons are circled in red.

Managing Cycle Time Report Definitions

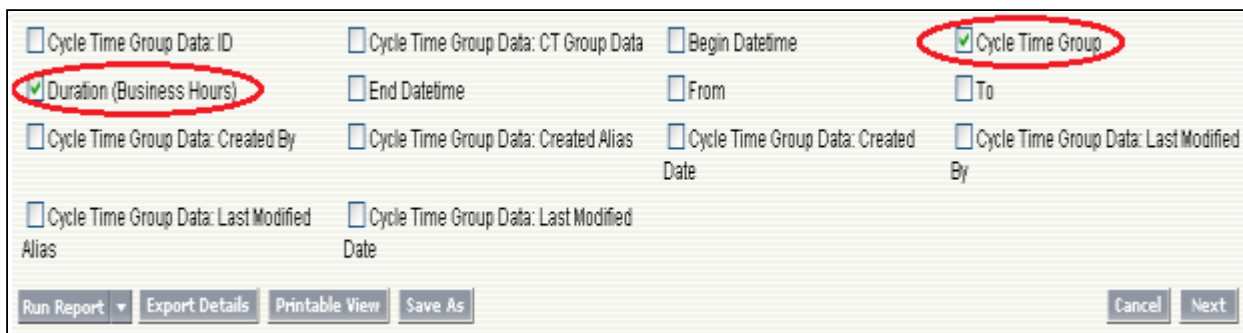
You can define Cycle Time Report using the two options- **Using Summary Data** or **Using Detail Data**.

Using Summary Data

Select Agreements with Cycle Time Group Data object to define reports.

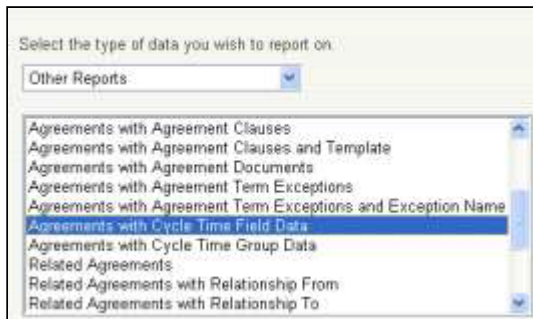


Also, select Cycle Time Group and Duration fields.



Using Detail Data

Select Agreement with Cycle Time Field Data object to define reports.



Also, select Cycle Time Field and Duration fields.

Excluding work-in-progress Records

Keep the following filter criteria for all of the reports:

Field	Operator	Value	
Duration (Hours)	greater than	0	AND
Cycle Time Field	equals	Apttus__Status__c	AND

Searching and Reporting Agreement Explorer Reports

Understanding Agreement Explorer Report Types

Agreement Explorer is a powerful search and reporting feature that allows you to search for records in the Agreement object through the use of configurable and reusable search reports. This feature complements standard reporting views to satisfy the demands of many Apttus customers who require more powerful, specific search results and related exports to Excel to satisfy their business needs. Agreement Explorer expands your access to agreements by providing reusable searches with configurable field sets and filtered lists for multiple contexts associated with agreements. You can use these reports to discover and expose record lists for agreement searches, the hierarchies of agreements and accounts, and a combination of account hierarchies and the individual account's related agreement hierarchies. Users can create published lists of available reports, which can then be complemented by users creating and saving their own public or private ad-hoc reports. The resulting reports can be exported to Excel.

Understanding Agreement Explorer Report Types

The key to understanding how to create and use Agreement Explorer reports effectively is to understand the application types assigned to each report. When you create an Agreement Explorer report as an administrator, you are required to define the context (type). The type determines the list of records and hierarchy displayed in the results available to the user. There are three types available for reports:

Report Type	Report Location	Description
Agreement Search	Agreement Explorer Tab	Returns a filtered list of agreement records. For example, return all the agreements filtered by Status Category and Status. These results do NOT display Agreement Hierarchy.
Agreement	Agreement Record, Agreement Explorer Tab	Returns a filtered, hierarchical list of agreements with the current record highlighted. Records in this list represent a hierarchy of parent and child agreements with the current record as context.
Agreement Hierarchy by Account(s)	Agreement Record, Account Record, Agreement Explorer tab	Returns a filtered, hierarchical list of agreements associated with one or more chosen account records. Records in this list represent a hierarchy of parent and child agreements for all specified accounts.

For more detailed information on how to run, use and maintain Agreement Explorer reports, please refer to Agreement Explorer section in the *Contract Management User Guide*.



Migrating Attachments To Files

Attachments to Files Migration feature enables you to convert all the documents, which are available as **Attachments** format, to the **File** format. You can either convert a single Attachment or bulk Attachments type to the File type.

Migration process consists of the following two tasks:

1. Converting Attachments to File
2. Deleting Converted Attachments

Prerequisites

For converting attachments to files and deleting attachments, ensure you have met the following requirements:

- The migration tool is installed.



Note

For more information on installing a free package application to do bulk conversions of attachments to Salesforce Files, refer to the [Magic Mover Help](#) page.

- The following latest versions are installed:
 - Contract Management
 - DocuSign/EchoSign
 - XAC
 - ContentSearch
- One unmanaged trigger is manually created on the target org.

To create the trigger, use the following script:

```

1  /**
2   * Apttus Contract Management
3   * AttachmentMigrationTrigger
4   * Apttus Trigger, To be created before start of migration of Attachment to
   files. It can be removed after migration
5   *
6   * @2018 Apttus Inc. All rights reserved.
7   */
8  trigger AttachmentMigrationTrigger on Attachment (before update) {
9
10     // Trigger body
11     if (Trigger.isBefore && Trigger.isUpdate) {
12         Map<ID,string> mapDocumentVersionDetail = new Map<Id,string>();
13         // check criteria and update
14         for (Attachment attSO : Trigger.new) {
15             if(attSO.Name.startsWith('[') && attSO.Name.indexOf(']') != -1) {
16                 string fileid = attSO.Name.substring(1,
17 attSO.Name.indexOf(']'));
18
19                 //validate if id is apended in the name
20                 fileid = String.escapeSingleQuotes(fileid);
21                 if((fileid.length() == 15 || fileid.length() == 18) &&
22 Pattern.matches('^'[a-zA-Z0-9]*$', fileid)) {
23                     //check if parent id is of type DocumentVersionDetail__c
24                     if(attSO.ParentId !=null &&
25 attSO.ParentId.getSObjectType().getDescribe().getName().contains(
26 'Apttus__DocumentVersionDetail__c')) {
27                         //update the documentversiondetail's contentid
28                         mapDocumentVersionDetail.put(attSO.ParentId, fileid);
29                     }
30                 }
31             }
32         }
33         //update the contentid
34         if(mapDocumentVersionDetail != null &&
35 mapDocumentVersionDetail.size() > 0){
36             List<Apttus__DocumentVersionDetail__c> lstDocumentVersionDetail =
37 [select id, Apttus__ContentId__c from Apttus__DocumentVersionDetail__c where
38 id in :mapDocumentVersionDetail.keySet()];
39             for(Apttus__DocumentVersionDetail__c docdetailSO :
40 lstDocumentVersionDetail){
41                 docdetailSO.Apttus__ContentId__c =
42 mapDocumentVersionDetail.get(docdetailSO.Id);
43             }
44
45             //update the records
46             if(lstDocumentVersionDetail != null &&
47 lstDocumentVersionDetail.size()>0){
48                 update lstDocumentVersionDetail;

```

```

39         }
40     }
41 }
42 }
```

Key Points To Remember

You must remember the following key points, before starting the migration:

- The current implementation does not support user-level flag **Files Enable**. It is the Org wide flag.
- The current version does not support **Template** in files, it should be in **Attachments**.
- **Attachment Migration trigger** needs to be created before running the Migration Tool.



Note

After **Files** are migrated, you cannot switch back to the **Attachment** mode.

Converting Attachments to Files

This feature enables you to convert documents, which are saved as attachments, to files.

Restrictions

The migration process has the following limitations:

- You can convert only 2,00,000 attachments per day per Production Org.
- If you are an existing customer, you can start using this feature only after upgrading to the Contract Management new release version and before selecting the **Enable File** setting.
- Time to complete migration depends on the number of attachments getting converted to files.
- If the number of agreements is greater than 2,00,000, then migration and downtime should be planned accordingly.

To convert attachments to files

1. Go to the [Salesforce.com](https://salesforce.com) App Menu and select **Attachments and Notes migrator**.
2. Click **Attachments to Files**. The Attachments to Files page appears.

Figure: Attachments to Files Page

The screenshot shows the Salesforce 'Attachments to Files' conversion interface. At the top, a navigation bar includes links for Home, Attachments to Files (highlighted with a red box), Notes Conversion, Update Page Layouts, Files, Latest Files & Notes, and Attachments. Below the navigation bar, there are filters for 'Show items created between' (4/2/2018 and 5/4/2018) and 'Filter by object:' (SFGA__Text_Ad__c). The main section is titled 'Public and Private Attachments to Convert' with an information icon and a 'Convert' button. It contains instructions on how to convert attachments, including a 'Convert' button. At the bottom, there is a radio button selection for 'Bulk conversion by object type (recommended)'.

Home Attachments to Files Notes Conversion Update Page Layouts Files Latest Files & Notes Attachments

Show items created between 4/2/2018 and 5/4/2018

Filter by object: SFGA__Text_Ad__c

Public and Private Attachments to Convert [i](#) [Convert](#)

Convert your public and private attachments as a bulk process or individually.

Test the conversion on a small number of records using **Convert by related record ID** or **Convert by attachment ID**. When you are ready to convert your attachments in batches based on the parent object type, use **Bulk conversion by object type**.

Daily limits for the number of documents and versions apply to attachments conversions. If you exceed the daily limit, you can't create notes or files in your org until the next day. [See Salesforce Files Limits](#)

☒ Bulk conversion by object type (recommended)

3. Select the required object from the **Filter by object** drop-down list as shown in the below figure.
Figure: Filter by object

Home Attachments to Files Notes Conversion Update Page Layouts Files Latest Files & Notes Attachment

Show items created between 4/2/2018 and 5/4/2018

Filter by object: SFGA__Text_Ad__c

Public and Private Attachments to Convert ⓘ Convert

Convert your public and private attachments as a bulk process or individually.

Test the conversion on a small number of records using **Convert by related record ID** or **Convert by attachment ID**. When you are ready to convert your attachments in batches based on the parent object type, use **Bulk conversion by object type**.

Daily limits for the number of documents and versions apply to attachments conversions. If you exceed the daily limit, you can't create notes or files in your org until the next day. [See Salesforce Files Limits](#)

☒ Bulk conversion by object type (recommended)
☐ Convert by related record ID To enter multiple IDs, enter each ID on a new line or separate the IDs with commas.
☐ Convert by attachment ID
 To enter multiple IDs, enter each ID on a new line or separate the IDs with commas.

Date 4/10/2018 to 5/10/2018

4. Select the **Bulk conversion by object type** radio button, as shown in the below image, from the **Public and Private Attachments to Convert** section.

Note

Do not select Apttus__APTS_Template__C and Apttus__TemplateVersion__C as the current version does not support template in files.

Figure: Bulk Conversion

☒ Bulk conversion by object type (recommended)
☐ Convert by related record ID To enter multiple IDs, enter each ID on a new line or separate the IDs with commas.
☐ Convert by attachment ID
 To enter multiple IDs, enter each ID on a new line or separate the IDs with commas.

Date 4/10/2018 to 5/10/2018

<input type="checkbox"/> OBJECT	QUANTITY	APPROX SIZE (MB)	TO CONVERT
<input checked="" type="checkbox"/> Apttus__APTS_Agreement__c	93	10	<input type="text" value="93"/>
<input type="checkbox"/> Apttus__APTS_Template__c	11	1	<input type="text" value="11"/>
<input type="checkbox"/> Apttus__TemplateVersion__c	18	1	<input type="text" value="18"/>
<input checked="" type="checkbox"/> Apttus__TempObject__c	1	1	<input type="text" value="1"/>
<input checked="" type="checkbox"/> Apttus__WizardRuntimeInput__c	4	1	<input type="text" value="4"/>
<input checked="" type="checkbox"/> echosign_dev1__SIGN_Agreement__c	121	9	<input type="text" value="121"/>

[Previous](#) [Next](#)

Total to convert: 248

You can also convert attachments to files by selecting the followings:

Convert by related record ID	You can convert attachments using Record ID . Users can enter multiple IDs separated by commas or each ID in a separate line.
Convert by attachment ID	You can convert attachments using Attachment ID . Users can enter multiple IDs separated by commas or each ID in a separate line.

Note

You can filter attachments created in a specific time period using **Show items created between, by Created Date, and by Last Modified Date** options

5. Click **Convert**.

Figure: Convert

[Home](#) [Attachments to Files](#) [Notes Conversion](#) [Update Page Layouts](#) [Files](#) [Latest Files & Notes](#) [Attachment](#)

Show items created between and

Filter by object:

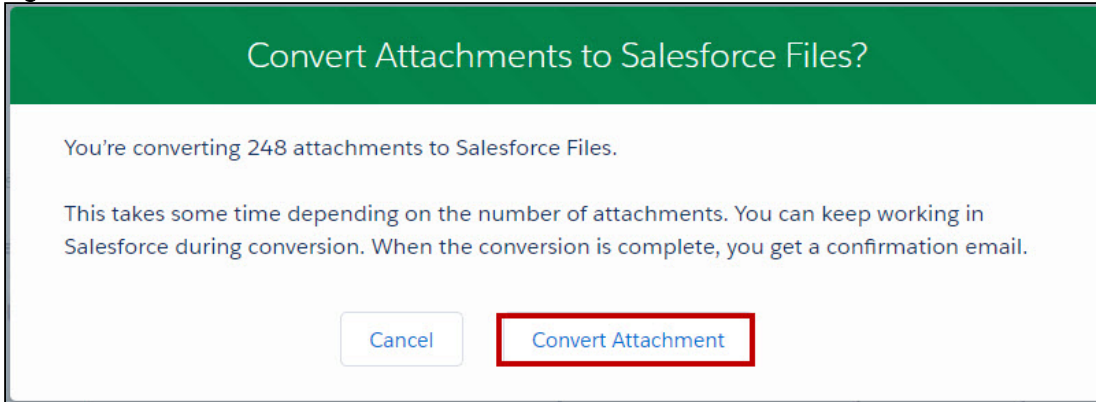
Public and Private Attachments to Convert [i](#)

Convert

Convert your public and private attachments as a bulk process or individually.

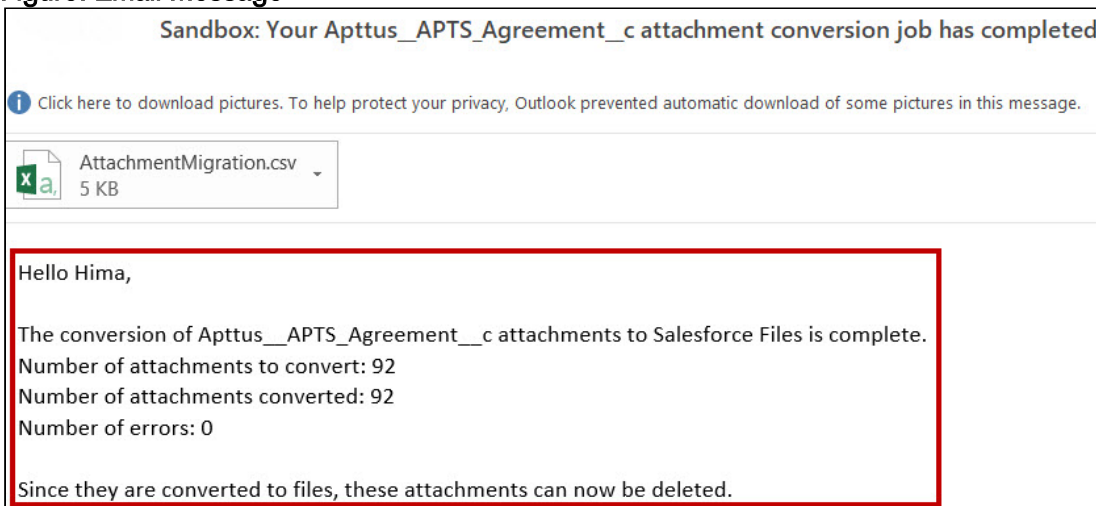
A pop-up appears displaying the below message as shown in the below figure.

Figure: Convert Attachment



6. Click **Convert Attachment** to convert the attachments or click **Cancel** to cancel the conversion.
7. After attachments are converted to files, you will get an email which displays a message as highlighted in the below figure.

Figure: Email Message



The conversion of attachments to files is completed.

Deleting Attachments

Delete attachments option enables you to delete the attachments which are converted to files.

To delete attachments

1. Go to the [Salesforce.com](https://salesforce.com) App Menu and select **Attachments and Notes migrator**.
2. Click **Attachments to Files**. The Attachments to Files page appears.

Figure: Attachments to Files Page

Home **Attachments to Files** Notes Conversion Update Page Layouts Files Latest Files & Notes Attachments Configuration

Show items created between 4/2/2018 and 5/4/2018

Filter by object: SFGA__Text_Ad__c

Public and Private Attachments to Convert [Convert](#)

Convert your public and private attachments as a bulk process or individually.

Test the conversion on a small number of records using **Convert by related record ID** or **Convert by attachment ID**. When you are ready to convert your attachments in batches based on the parent object type, use **Bulk conversion by object type**.

Daily limits for the number of documents and versions apply to attachments conversions. If you exceed the daily limit, you can't create notes or files in your org until the next day. [See Salesforce Files Limits](#)

☒ Bulk conversion by object type (recommended)

Converted Public and Private Attachments

These attachments are now available in your org as Salesforce Files. Delete these converted attachments to free up storage space. After you delete converted attachments, you can't recover them.

Total attachments: 256

Converted attachments: 106

Unconverted attachments: 150

OBJECT	QUANTITY	APPROX SIZE (MB)
Apttus__APTS_Agreement__c	92	10

3. Click **Refresh** in the **Converted Public and Private Attachments** section, as shown in the below figure.

Converted Public and Private Attachments [Refresh](#)

These attachments are now available in your org as Salesforce Files. Delete these converted attachments to free up storage space. After you delete converted attachments, you can't recover them.

Date 4/11/2018 to 5/11/2018

Total attachments: 256

Converted attachments(can be deleted): 106

Unconverted attachments: 150

OBJECT	QUANTITY	APPROX SIZE (MB)
Apttus__APTS_Agreement__c	92	10

4. Converted attachments appear with details as shown in the below figure.
- Figure: Converted Attachments with Details**

Converted Public and Private Attachments Refresh

These attachments are now available in your org as Salesforce Files. Delete these converted attachments to free up storage space. After you delete converted attachments, you can't recover them.

Date 4/11/2018 to 5/11/2018

Total attachments: 256

Converted attachments(can be deleted): 106

Unconverted attachments: 150

OBJECT	QUANTITY	APPROX SIZE (MB)	
Apttus__APTS_Agreement__c	92	10	

- Click **Delete** icon to delete the attachments.
- A pop-up appears displaying a message given in the below figure.

Figure: Delete Converted Attachments

Delete converted attachments?

You're deleting all converted attachments for Apttus__APTS_Agreement__c.

Cancel Delete

- Click **Delete** to delete converted attachments or click **Cancel** to cancel it. Your selected attachments are deleted.

Note
Ensure **Enable File** setting is selected after the migration process is completed.

Configuring Agreement Document Protection

About Document Protection

The document protection has following three phases:

- **Enabling Document Protection**

To enable document protection, you must first create a custom object record. A custom object record stores information that is unique and important to you and your organization. For example, your organization may use a custom object called *Quotes* to store data for your company's sales quotes.

- **Defining Protection Password**

Create a custom object record to define password protection for your document.

- **Setting Up Agreement Protection**

To restrict what specific profiles can and cannot do with generated documents, you can protect it either by making it read-only or enabling track changes to capture any updates on the generated document. For example, specify a Sales User who can generate or re-generate a document but when editing or forwarding it to a customer, track changes are enabled.

User Permissions Needed	
To enable document protection:	Admin: Create, Edit
To create an agreement protection:	Agreement Protection: Create, Edit

Enabling Document Protection

To enable document protection, you must first create a custom object record. A custom object record stores information that is unique and important to you and your organization. For example, your organization may use a custom object called *Quotes* to store data for your company's sales quotes.

To enable document protection

1. Click **+** and click **Admin**.
2. Click **New** and type *APTS_Protection* in the name field.
3. In the **Value** field, enter *1* and click **Save**.

A new custom object record *APTS_Protection* is created. After you have created a new custom object record, you can automatically associate the new custom object with another record if your administrator has defined relationships to other types of records.

- i** When using Agreement Document Protection, inserting a clause via the Playbook will not be tracked as a redline in the document. However, when the document is checked in and reconciled, the added clause will be tracked via the Agreement Clauses related list.

Defining Protection Password

Create a custom object record to define password protection for your document.

To define protection password

1. Click **+** and click **Admin**.
2. Click **New** and type *APTS_Password* in the **Name** field.
3. In the **Value** field, enter the password that you want to set to protect the document and click **Save**.

A new *APTS_Password* custom object record is created with the password that you entered as its value.

Setting Up Agreement Protection

To restrict what specific profiles can and cannot do with generated documents, you can protect it either by making it read-only or enabling track changes to capture any updates on the generated document.

For example, specify a Sales User who can generate or re-generate a document but when editing or forwarding it to a customer, track changes are enabled.

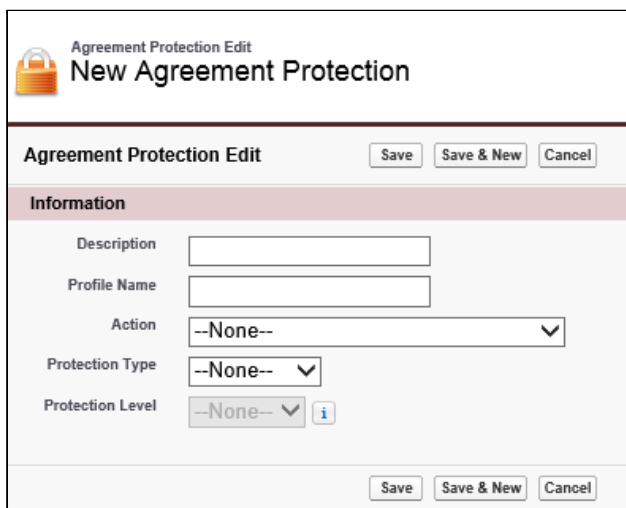
When the protection levels are setup at for different actions, the document is protected according to the protection type and the specified level.

Note

To enable Agreement Protection, ensure that you set up the Admin entries for *APTS_Protection* and *APTS_Password* prior to defining the Agreement Protection.

To setup agreement protection

1. Click **+** and click **Agreement Protection**.
2. Click **New**.



Agreement Protection Edit
New Agreement Protection

Agreement Protection Edit Save Save & New Cancel

Information

Description

Profile Name

Action --None-- ▼

Protection Type --None-- ▼

Protection Level --None-- ▼ i

Save Save & New Cancel

3. Enter **Description** and **Profile Name**.
4. Select an Action from the picklist.
5. Select one of the following protection types:
 - **Ignore:** With this option, protection settings can be by-passed.
 - **Prompt:** With this option, protection level can be selected at the generation time.
 - **Automatic:** With this option, protection level has to be selected at the configuration time. You can define protection level for the Automatic option. Following are the protection levels for the Automatic protection type:
 - Full access: This option provides complete access to a user's profile to perform the selected action.
 - Insert comments and tracked changes only: This option allows a user's profile to insert comments in the agreement document along with tracking the changes made by any other user.
 - Insert comments only: This option allows a user's profile to insert only comments in the agreement document.
 - Fill in form fields only: This option allows a user's profile to only fill in the form fields inside the agreement document.
 - Read only: This option gives only the read access to the user of the entered
 - **Unprotect:** With this option for the selected action, the password protected document can be unprotected for certain actions, provided the password is same as the one set in the admin object properties.

Note

This option is not available for Generate/Regenerate actions.

6. Click **Save**.

Use Case for Setting Up Agreement Document Protection

This topic describes the use case for setting up an agreement document protection.

Standard Statement

This use case gives one example on how to set up protection level for a document and restrict action levels of a specific user. You might use this functionality differently, depending on your business case.

This use case describes how to set up protection level for a document and restrict action levels of a specific user. For example, the **Read Only** protection level provides read-only access, while the **Insert Comments and Track Changes Only** level captures modifications made in the document generated by a specific user.

In this case, a System Administrator can specify that a user with the Sales profile is allowed full document access when generating or re-generating a document, but **Track Changes** is enabled when the user sends a document for review.

Prerequisites:

System Administrator must apply the appropriate settings before enabling the Agreement Protection; protection should be turned **on** and an unlock password must be created.

To set up protection or restrict access to your document, please perform the following steps:

1. Select the **Agreement Protection** tab.
Agreement Protection page is displayed.
2. Click **New**.
Agreement Protection Edit page is displayed.
3. Enter a description in the **Description** field.
4. Enter profile name in the **Profile Name** field.
5. Select an action from the **Action** drop-down list.
6. Select Automatic from the **Protection Type** drop-down list.
7. Select **Insert comments and tracked changes only** in the Protection Level picklist.
8. Click **Save**.

Result:

You have enabled Track Changes for the generated Word document, which cannot be disabled by a user who will edit the agreement document unless the user enters the Unlock password which is set by the Administrator.


About Contract Document Versioning

Understanding Document Versions

Contract Document Versioning enhances existing version control by introducing a solution framework of document versioning at the Agreement record level. Without Contract Document Versioning, all agreement documents are included in the Notes & Attachments related list, requiring that the agreement owner or other parties determine the proper document version or versions for review, signature, finalization and activation. Document Versioning adds two new child objects with relationships to the Agreement object:

Document Version (child object to Agreement) and **Document Version Detail** (child object to Document Version).

With Document Versioning enabled for your organization, rather than all the documents being attached to an agreement's Notes & Attachments Related List, each major version of a document is instead populated in the Document Versions Related list, with individual version information tracked using Document Version Details.

 To take advantage of the full functionality of Contract Document Versioning, your organization should also be using X-Author for Contracts.

Understanding Document Versions

Contract Document Versioning divides the version of an Agreement document into three parts: Major, Minor and Revision. Each version of an agreement document is represented as a period-delimited numeric value in the Document Version Details object (e.g., "1.0.0"). Version values are numerically incremented as various actions are taken on the document by different users. The following table describes each version type represented by the version value and how it is created.

Version Type	Document Action	User Role	Example Value
Major	<p>A major version type is created every time a user:</p> <ul style="list-style-type: none"> Generates a document. Regenerates a document. Creates an Offline document. Imports an Offline document. Generates a supporting document. Checks in a Clean document or a document without Redlines. Checks in a document as Final. <p>A MAJOR version can be either a new document instance or an incremented version of a pre-existing document. For further explanation, see New Document Versus Incremented Version</p>	Contract Requestor / Owner	1.0.0 2.0.0 3.0.0
Minor (Negotiator)	<p>A minor version is created every time a Negotiator makes changes to the document and checks it in using X-Author for Contracts with the following exceptions:</p> <ul style="list-style-type: none"> The Negotiator checks in the document as Clean or Final (creates a MAJOR version). The Negotiator checks in a document on behalf of a Reviewer (creates a REVISION—see below). 	Negotiator	1.1.0 2.1.0 1.2.0
Revision (Reviewer)	<p>A revision is created every time a document is returned by a reviewer to the Negotiator. The document is either returned by the reviewer as an email attachment and checked in using the <i>X-Author Contracts for Outlook</i> plug-in, or checked in on their behalf by the Negotiator (for both internal and external reviewers) using <i>X-Author Contracts for Word</i>. See the X-Author Contracts User Guide for more information on Send for Review using X-Author.</p>	Reviewer	1.0.1 2.0.2

To enable Contract Document Versioning for your organization, refer to [Enabling Contract Document Versioning](#).

To learn how to work with Contract Document Versioning, refer to **Contract Document Versioning** section in the *Contract Management User Guide*.

Enabling Contract Document Versioning

To enable Contract Document Versioning for your org, consider the following implementation options:

- [Enable Comply System Properties for Versioning](#)
- [Add Version-Related Merge Event Actions](#)
- [Add the Document Version Related List to Agreement Layouts](#)
- [Add the Document Version to Document Naming Convention](#)

To enable Contract Document Versioning for select agreements or based on conditions (without applying versioning globally):

- [Add the Version Aware field to Agreement Layouts](#)
- [Add Workflow Rules to make Agreements Version Aware](#) (optional)

To configure Comply System Properties for Versioning

Use Comply System Properties settings to enable Contract Document Versioning for agreements in your Org.

1. Navigate to Setup > Develop > Custom Settings.
2. Click on the **Manage** link next to Comply System Properties.

Click **Edit** to edit System Properties. The System Properties form is displayed.

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Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
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- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Connect **BETA**
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize
- Create
- Develop
 - Apex Classes
 - Apex Triggers
 - Apex Test Execution
 - API
 - Components
 - Custom Permissions
- Custom Settings
- Email Services
- Lightning Components
- Pages
- S-Controls
- Sites
- Static Resources
- Tools
- Remote Access
- External Data Sources
- External Objects
- Secure Agents
- Schema Builder
- Lightning App Builder **New!**

Edit Comply System Properties

Comply System Properties Information

Name

System Properties

Admin User

Agreement Number Field For Imported Docs

Allow PDF Selection Override

Allow Private Selection Override

Allow Reconcile Selection Override

Api User Key (DEPRECATED)

Auto Enable PDF For Final Docs

Auto Enable Private Indicator

Auto Enable Reconciliation

Auto Insert Header Footer Data

Bypass Sharing

Contract Summary Template

Default Opportunity Agreement Owner

Document Naming Convention

Document Structure FX2 For Imported Docs

Document Versioning Naming Convention (D

Email Template For Checkin Notification

Enable Clause Approvals

Enable Document Versioning

Enable Merge Call Debug

Enable Multiple Checkout

Enable PDF Security

Enable Submit Merge Call

Enable Version Control

Footer Datetime Format For Imported Docs

Instance Url

Max Child Level

Merge Call Timeout Millis

Merge Webservice Endpoint

PDF Owner Password


Publish Author Events

Publish Merge Events

Use Agreement Locks for Versioning

Configure the System Properties described in the following table.

#	Property	Description
1	Enable Version Control	Check this box to enforce a check-in/check-out policy for agreement documents. This setting must be enabled when "Enable Document Versioning" is checked. Note: This property existed in CLM versions prior to 8, so this property may already be enabled.
2	Enable Document Versioning	<p>Check this box to enable Document Versioning. <i>All new agreement records created in your org will use Document Versioning after this setting is enabled.</i> Enable Version Control must be enabled for Document Versioning to work properly.</p> <p>Enabling Document Versioning changes the value of the Version Aware Agreement field to TRUE for all new agreements after the property is activated. The Version Aware field is a flag that tells Apttus Contract Management to use Document Versioning for a specific record.</p> <p>Important Note: It is recommended that once a record is flagged as Version Aware, you do not disable this field, as versioning will become undefined for the agreement record in question. Instead, ensure that records which should not use Document Versioning do not have the field enabled when they are created (see the section on Workflow Rules below.)</p> <p>To enable/disable Document Versioning for specific Agreement records, see To add the Version Aware field to Agreement Layouts.</p>
3	Use Agreement Locks for Versioning	<p>Check this box to use Agreement locks for versioning instead of document-level locking:</p> <ul style="list-style-type: none"> • If enabled, all agreement documents are locked (by the user checking out) when <i>any one of them</i> is checked out. • If disabled, only checked out documents are locked (by the user checking out)—any other agreement documents which have not yet been checked out can be checked out for editing.

#	Property	Description
4	Document Naming Convention	<p>Specify a value to apply a custom naming convention for all agreement documents at generation, check-in and signature events.</p> <p>The following attributes permitted when formulating a document naming convention are:</p> <ul style="list-style-type: none"> • %checkintype% • %action% • %templatename% • %user% • %timestamp% • %version% • Agreement attributes such as %:Name%. Note: any variable prefixed by ':' represents a field on the Agreement object. <p>If the property contains a null value (i.e., if left blank), the current default naming convention will be used: %:Name%_%action%_%templatename%_%timestamp%</p> <p>Example agreement document name using the default naming convention: <i>SOW_Regenerated_SOW ABC_2015-08-07</i></p>
5	Document Structure FX2 For Imported Docs	<p>Check this box to make document structure FX2 format for all Offline documents (created or imported). If not checked, all offline documents are created in the "pre-existing" format.</p> <div> <p> This property only applies to Offline agreements created from the Agreement or user Home page links in Salesforce. The format of Offline agreements created using X-Author for Contracts will still depend on user-input from X-Author.</p> </div>

To add document version in document naming convention

You can append the document version to the document name by leveraging the %version% attribute of the document naming convention property. To configure this:

1. Navigate to Setup> Develop> Custom Settings> and click **Manage** link next to **Comply System Properties**.
2. Click **Edit**.
3. Configure the document naming convention field value as:
%:Name%_%templatename%_%timestamp%_%version%
4. Click **Save**.

An example agreement document name using above setting would be: *Apttus NDA_NDA_2017-05-14_1.0.0*. Here the '1.0.0' appended at the end refers to the document version.

i If you have configured %version% attribute in the Document Naming Convention property but the Enable Document Versioning property is disabled, the agreement document name shall contain an empty string in place of the version attribute.

For example- If you have configured Document Naming Convention field as %:Name%_%templatename%_%timestamp%_%version%, but you have disabled Enable Document Versioning property, the generated sample agreement name shall be Apttus NDA_NDA_2017-05-14.

i To trim the third decimal and number from the document version attribute in the Document Naming Convention property, select **Trim Document Version** checkbox in Document Version Properties. For more details on Trim Document Version, refer to [Document Version Properties](#).

To add Version-Related Merge Event Actions

For Document Versioning to work properly, the picklist values for the Merge Event Action must be updated.

1. Navigate to Setup > Create > Objects > Merge Event.
2. Go to the **Action** Custom Field.
3. Add the following two values to the picklist:
 - Check Out
 - Revert Check Out

After adding values, your Merge Action picklist should appear as shown in the following image:

Picklist Values	
Action	Values
Edit Del	Preview
Edit Del	Generate
Edit Del	Generate Supporting Document
Edit Del	Regenerate
Edit Del	Check Out
Edit Del	Revert Check Out
Edit Del	Check In
Edit Del	Create Offline Agreement
Edit Del	Import Offline Agreement

To add the Document Version Related List to Agreement Layouts

To view Document Version details for your agreement documents, the **Document Version** Related List must be added to your Agreement Page Layouts. To add the Related List to your page layouts, refer to Salesforce documentation for [Edit Page Layouts for Custom Objects](#).

i The Document Version Related List is included in the default Agreement Layout included with the Apttus Contract Management package.

To add the Version Aware field to Agreement Layouts

The **Version Aware** field is a flag that tells Apttus Contract Management if a specific record is using Document Versioning. When the Comply System Property **Enable Document Versioning** is enabled, the value of the Version Aware field is set to TRUE for all new agreements org-wide at the time of record creation. You can add the Version Aware flag to your Agreement layouts as a field which allows agreement editors to turn Document Versioning on or off for a specific agreement record.

Important Note: It is recommended that once a record is flagged as Version Aware, you do not disable this field, as versioning will become undefined for the agreement record in question. Instead, ensure that records which should not use Document Versioning do not have the field enabled when they are created (see the section on [Workflow Rules](#) below.)

To add this field to your custom Agreement layout, refer to Salesforce documentation for [Edit Page Layouts for Custom Objects](#).

i The Version Aware field is included in the default Agreement Layout included with the Apttus Contract Management package.

To make Agreements Version Aware using Workflow Rules

You can create one or more Workflow Rules to set the Version Aware flag value in certain records based on the value of other record fields.

1. Create a new **Workflow Rule** for Document Versioning. See the section on [About Workflow](#) for assistance with setting up a Workflow Rule in Salesforce.
2. Specify your Workflow Rule Action as a "Field Update" (the rule will update the Version Aware field).
3. Use **Apttus__APTS_Agreement__c.Apttus__VersionAware__c** as the field value in your rule.

Example: Enable Version Aware Field for all Statement of Work (SOW) Agreements

Scenario: Your organization has decided not to enable Contract Document Versioning globally. However, you do want all new SOW agreements to be Version Aware.

Solution: Create a new Workflow Rule as detailed above.

1. Define your criteria as "Agreement: Record Type equals SOW."

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	Agreement: Record Type EQUALS SOW
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

2. Specify your Workflow Rule Action to make the Version Aware flag *true* when the criteria are met.

Field Update Edit Save Save & New Cancel

Identification

Name

Unique Name [i](#)

Description

Object Agreement

Field to Update Agreement: Version Aware

Field Data Type Checkbox

Re-evaluate Workflow Rules after Field Change ☐ [i](#)

Specify New Field Value

Checkbox Options

☒ True

☐ False

Save Save & New Cancel

3. Validate your rule. When you create a new SOW, the Version Aware field should be checked.

Example: Disable Version Aware Field for Renewal of Non-Version Aware Agreements

Scenario: Your organization has decided to enable Contract Document Versioning globally. As versioning will only apply to new agreements going forward, you have many agreements that are not Version Aware. By default, when an agreement is renewed and Document Versioning is enabled, the renewed agreement is automatically made Version Aware. You would prefer non-Version Aware documents remain non-Version Aware upon renewal.

Solution: Create a new Workflow Rule as detailed above.

1. Define your criteria as "Agreement: Version Number GREATER than 0."

Specify the workflow actions that will be triggered when the rule criteria are met. See an example	
Rule Criteria	Agreement: Version Number GREATER THAN 0
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

2. Specify your Workflow Rule Action to make the Version Aware flag *false* when the criteria are met.

Field Update Edit
Save Save & New Cancel

Identification

Name

Unique Name [i](#)

Description

Object Agreement

Field to Update Agreement Version Aware

Field Data Type Checkbox

Re-evaluate Workflow Rules after Field Change ☐ [i](#)

Specify New Field Value

Checkbox Options

☐ True

☒ False

Save Save & New Cancel

3. Validate your rule. When you renew an agreement, the Version Aware field should NOT be checked.

Configuring Document Finder

Document Finder helps your contract managers, salespersons and legal teams to easily filter and find agreement documents directly from an agreement record. Follow the instructions on this page to set up Document Finder for use with your agreements.

Enable Contract Document Versioning

To use keywords/tags defined in your org or created from check-in actions in X-Author Contracts requires Contract Document Versioning be enabled. When you are working with version aware records, you can take full advantage of search by keywords/tags and by document versions.

To learn how to enable Contract Document Versioning, refer to [Enabling Contract Document Versioning](#).

Add Document Finder Visualforce Page to User Profiles

To grant Document Finder access to a user, you must add the Visualforce Page to the list of Enabled Visualforce Pages on their corresponding User Profile.

1. Go to **Setup > Administer > Manage Users > Profiles**.
2. Click on the Profile corresponding to the user who needs access.
3. Click **Edit** under Enabled Visualforce Page Access.

Enabled Visualforce Page Access	
Edit	
Visualforce Page Name	AppExchange Package Name
Apttus.AgreementActivate	Apttus Contract Management
Apttus.AgreementAmend	Apttus Contract Management
Apttus.AgreementAmendSave	Apttus Contract Management
Apttus.AgreementAmendSaveNew	Apttus Contract Management
Apttus.AgreementCancel	Apttus Contract Management
Apttus.AgreementClauseDiff	Apttus Contract Management
Apttus.AgreementClone	Apttus Contract Management
Apttus.AgreementCloneSave	Apttus Contract Management
Apttus.AgreementCloneSaveNew	Apttus Contract Management
Apttus.AgreementExpire	Apttus Contract Management
Apttus.AgreementMergeFields	Apttus Contract Management

4. Add *Apttus.DocumentFinder* to the list of Enabled Visualforce Pages.

Enable Visualforce Page Access

[Save](#)
[Cancel](#)

Available Visualforce Pages

- AnswersHome
- Apttus.AgreementActionCondition
- Apttus.AgreementExplorerEdit
- Apttus.AgreementExplorerExport
- Apttus.AgreementExplorerResults
- Apttus.AuthorWebLaunch
- Apttus.WizardComponentLibraryView
- Apttus.WizardDesignEdit
- Apttus.WizardDesignView
- Apttus.WizardInputControlView
- Apttus.WizardRuntimeView
- Apttus.WizardStepView
- Apttus_Content.PublishContent
- BandwidthExceeded

Add

Remove

Enabled Visualforce Pages

- Apttus.SelectTemplate
- Apttus.SendEmail
- Apttus.SendForReviewStatus
- Apttus.SendInternalReview
- Apttus.SendToOtherPartyPostProcess
- Apttus.ServerInfo
- Apttus.TemplateClone
- Apttus.TemplateCloneSave
- Apttus.TemplateCloneSaveNew
- Apttus.TemplatePublish
- Apttus.TemplateUnpublish
- Apttus.Wizard
- Apttus.WizardModeler
- Apttus.DocumentFinder**

5. Click **Save**.

- i** You can do this more quickly for multiple profiles by going to **Setup > Build > Develop > Visualforce Pages** and changing the **Security** for the Document Finder Visualforce page.

Add Document Finder to the Agreement Layout

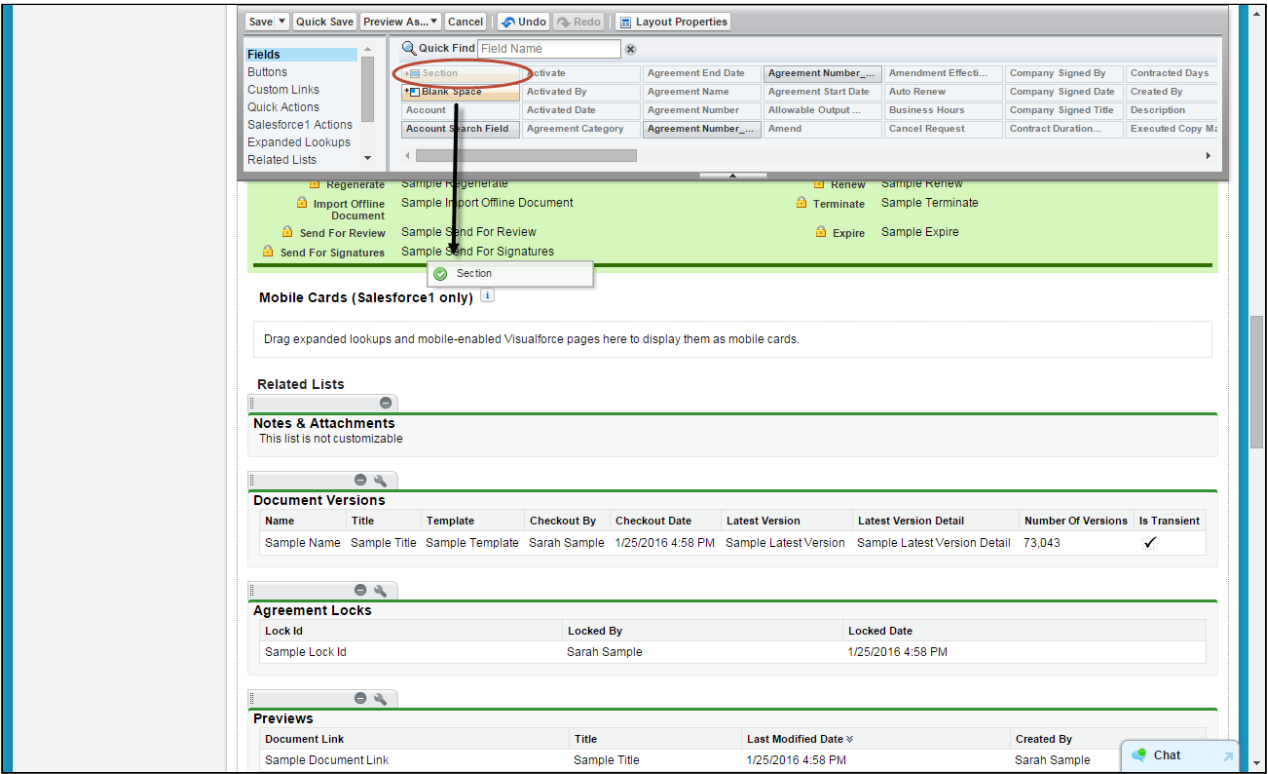
As Document Finder is a custom Visualforce page, it must be added to the Agreement layout inside of a section.

1. Go to **Setup > Create > Objects > Agreements**.
2. Hover over **Page Layouts** and click **Edit** next to the layout you want to modify. In this example, we will modify the Agreement layout page for the SOW record type.

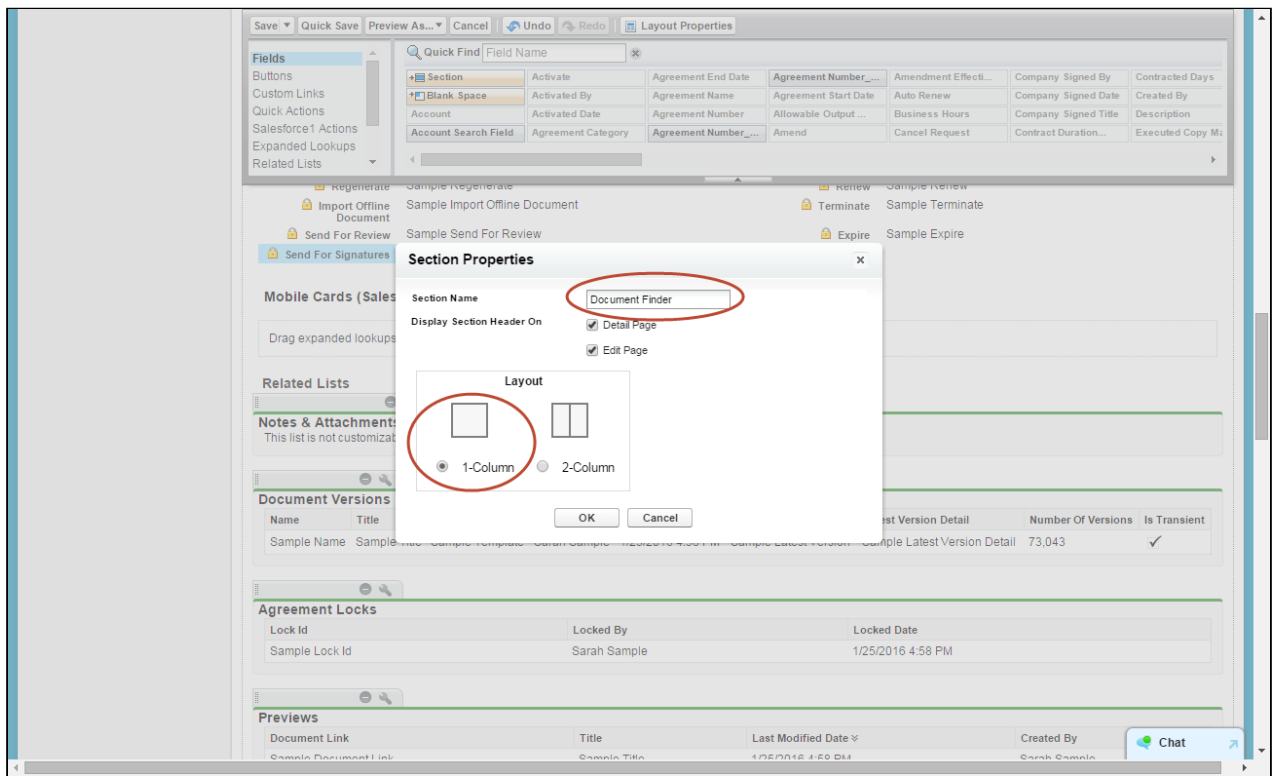
The screenshot shows the Salesforce Setup interface for the 'Agreement (Managed)' custom object. The 'Page Layouts' section is expanded, displaying a table of layouts. The 'SOW' layout is highlighted with a red circle.

Action	Page Layout Name	Installed Package	Created By	Modified By
Edit Del	Agreement Layout	Apttus Contract Management	admin@apptus.com	10/22/2015 3:13 PM
Edit Del	MSA		admin@apptus.com	1/25/2016 12:06 PM
Edit Del	NDA		admin@apptus.com	10/22/2015 3:13 PM
Edit Del	SOW		admin@apptus.com	1/25/2016 12:13 PM

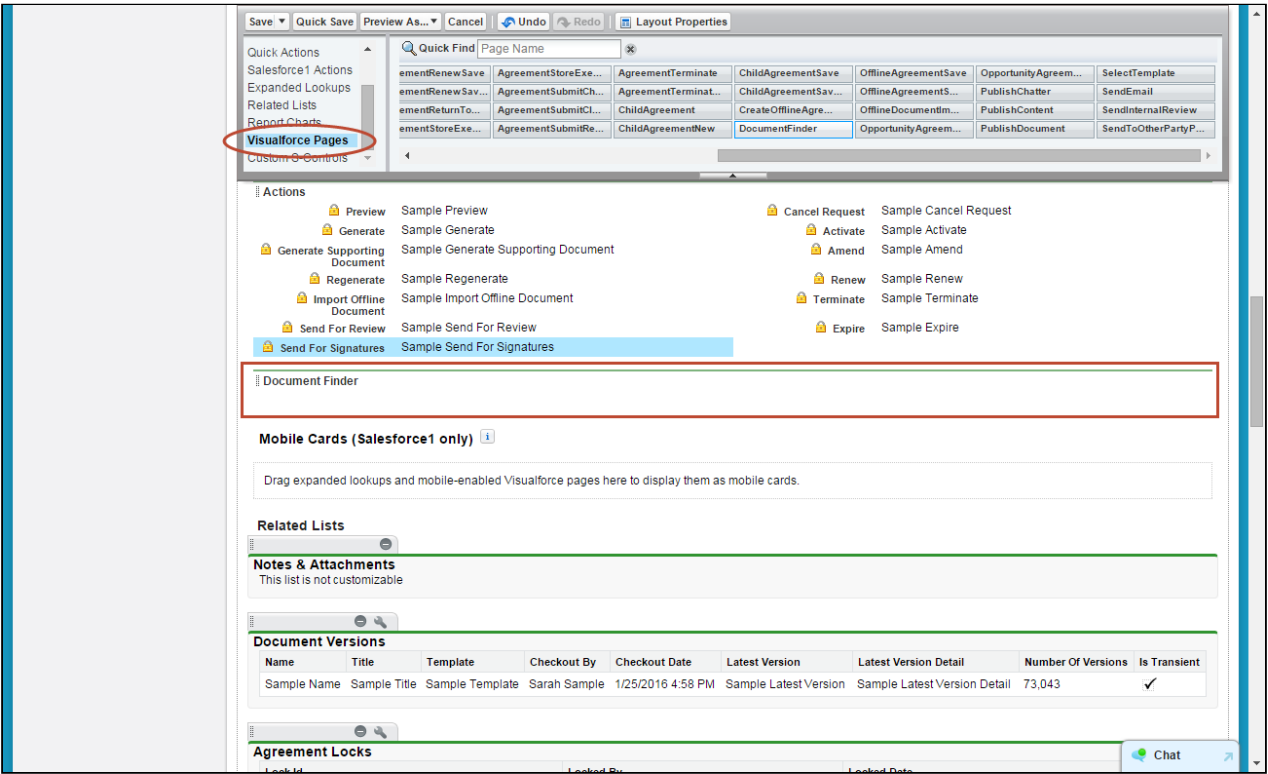
3. Click-and-drag the **Section** field to the area below the Actions section of the Agreement Layout.



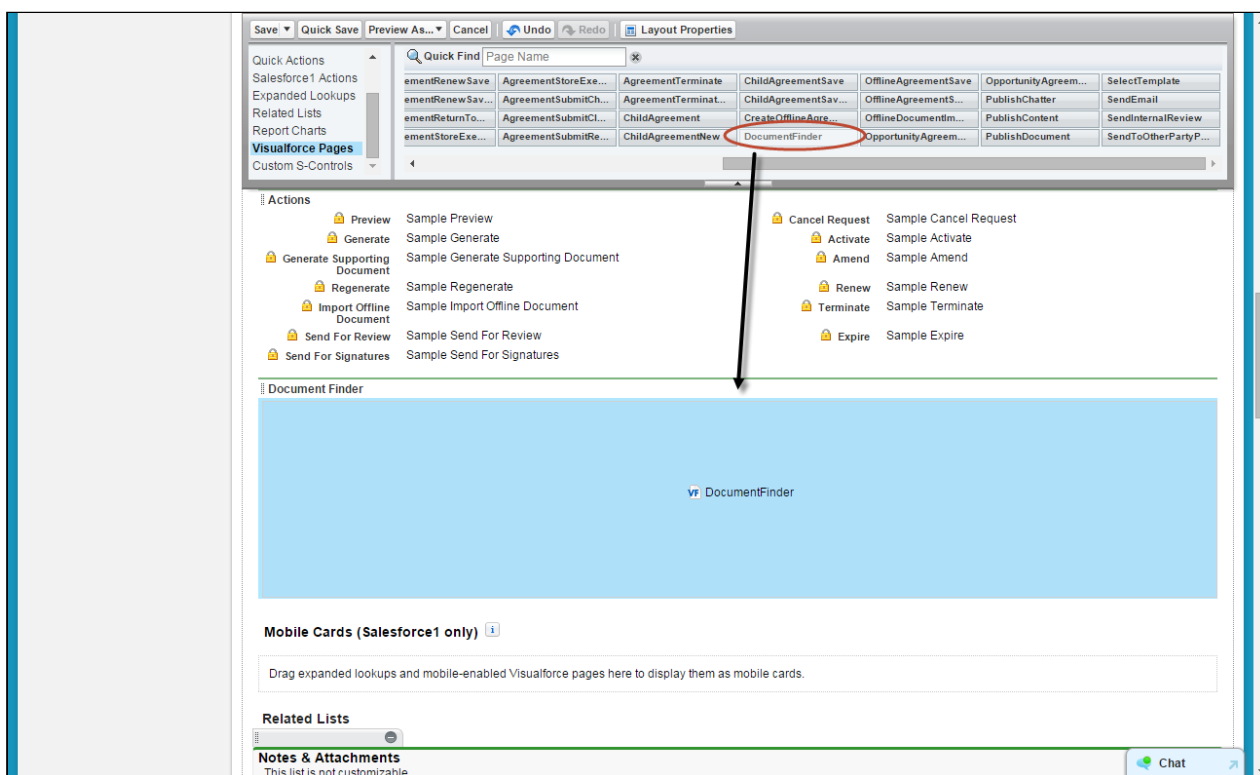
4. Enter "Document Finder" as the **Section Name** and choose a **1-Column** layout.



5. Click **OK**. The Document Finder section is created.
6. From the Layout Designer menu, choose **Visualforce Pages**.



7. Click-and-drag the **Document Finder** Visualforce Page onto the section you just created.



8. Click **Save** to save the Agreement page layout.
9. Repeat these steps for all Agreement layouts that will use Document Finder.

(Optional) Configure Default Tags

You can configure the Comply System Property **Default Document Tags** to define a set of comma-separated tags which will be automatically available to users who perform a search in Document Finder. X-author users can also choose from the same set of tags at document check-in, applying any of these default tags to an agreement document as part of the check-in process.

To configure the Default Document Tags system property:

1. Go to **Setup > Develop > Custom Settings**.
2. Click **Manage** next to Comply System Settings.
3. Click **Edit** next to System Properties.
4. Enter your desired default tags as comma-separated values for the **Default Document Tags** system property.

The screenshot shows the 'Custom Settings' page in Salesforce. On the left is a sidebar with various settings categories. The main area is titled 'Enable Version Control' and contains several configuration fields. The 'Default Document Tags' field at the bottom is circled in red and contains the text 'Sales, Legal, Q3'.

Setting	Value
Enable Version Control	<input checked="" type="checkbox"/>
Footer Datetime Format For Imported Docs	
Instance Url	
Max Child Level	
Merge Call Timeout Millis	60,000
Merge Webservice Endpoint	https://mwsdev.apptus.net/cg
PDF Owner Password	
Publish Author Events	<input checked="" type="checkbox"/>
Publish Merge Events	<input checked="" type="checkbox"/>
Use Agreement Locks for Versioning	<input type="checkbox"/>
Temp Email Template Inactive Hours	
Default Document Tags	Sales, Legal, Q3

5. Click **Save** to update the system with your default tags. Now, when you place your cursor into the Document Name/Keywords search in Document Finder, you can choose from a list of default tags defined by the property.

The screenshot shows the 'Document Finder' interface. At the top, there are filters for 'All Versions', 'All Document States', and 'All Document Owners'. Below these is a search bar labeled 'Search for Document Name/Keywords'. A dropdown menu is open from this search bar, showing a list of tags: 'Sales', 'Legal', and 'Q3'. This list is circled in red. Below the search bar is a table of documents.

Document Name/Keywords	Template Name	Version	Document State	Last Modified By ID	Last Modified Date	Owner
AD Sales SOW 1.25.16.2_Redlines_CC FX2 SOW_2016-01-27.docx	Inclusion of Provisions	1.0.0	Draft		1/27/2016 3:41 PM	
AD Sales SOW 1.25.16.2_Regenerated_CC FX2 SOW_2016-01-25.docx	CC FX2 SOW	3.1.0			1/25/2016 4:44 PM	
AD Sales SOW 1.25.16.2_Regenerated_CC FX2 SOW_2016-01-25.docx	CC FX2 SOW	3.0.0	Draft		1/25/2016 4:39 PM	
AD Sales SOW 1.25.16.2_Regenerated_CC FX2 SOW_2016-01-25.docx	CC FX2 SOW	2.0.0	Draft		1/25/2016 4:35 PM	
AD Sales SOW 1.25.16.2_Original_CC FX2 SOW_2016-01-25.docx	CC FX2 SOW	1.0.0	Draft		1/25/2016 4:35 PM	

X-Auther users can also make use of these tags during check-in. Refer to the *X-Auther Contracts User Guide* for more information.

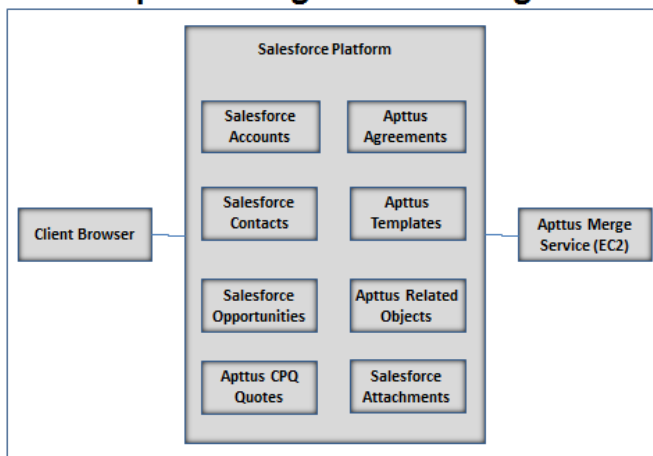
Document Generation Capabilities

The capabilities of Document Generation, or *DocGen*, are made completely visible in Contract Management. We have extended document generation beyond the *Agreement* and *Quote/Proposal* object to cover the standard Salesforce objects and custom objects.

The Apttus CLM Suite uses the following components in the generation of documents:

- **Apttus Contract Management application is 100% native on the Salesforce platform** – Includes custom objects, tabs, Apex classes and Visual force pages on the Salesforce platform.
- **Apttus Merge Web Service hosted on Amazon EC2 (Elastic Compute Cloud) stacks** – A stateless service which includes .NET components for generating Word and PDF documents using data from Salesforce. No data is persistent in this component.
- **Apttus X-Author for Contracts Add-in to Microsoft Word** – A .NET-based add-in to Microsoft Word used for creating and managing merge templates and for generating and managing contract documents throughout the negotiation stage of the cycle.

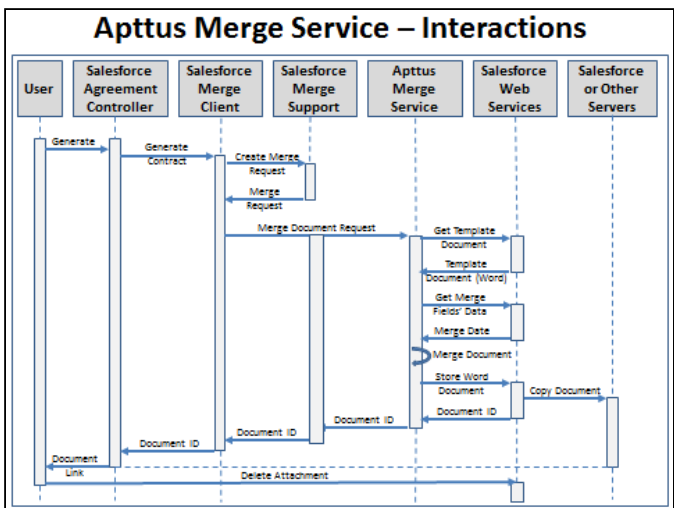
Apttus Merge Service – Logic



The following steps are performed during the document generation process:

1. The document generation process is initiated when you use the Apttus Contract Management application in the following scenarios.
 - Select the document attributes, such as output format, protection type, and a template (including defined structured data fields in clauses with terms and conditions).
 - Click Generate for the supported objects. To view the list of supported objects, refer [Document Generation Features List](#).
2. The Apttus Contract Management application uses Apex code in Salesforce to make an HTTPS Web Service call to the Apttus Merge Service endpoint using the REST API .
3. The Apex controller passes to the Apttus Merge Service the current user's session ID and the endpoint server URL obtained using the `{!$Api.Session_ID}` and `{!$Api.Partner_Server_URL_250}` Visualforce variables.

4. No logging occurs on the Apttus Merge Service which would capture the information, such as SessionId or agreement details, moving through the Merge Service.
5. The Apttus Merge Service uses the session ID and endpoint server URL to establish a session with Salesforce. The mechanism is similar to Salesforce Workflow Outbound Messaging, allowing session information to be passed for a callback.
6. The Apttus Merge Service retrieves from the Apttus Contract Management application the contract object record's user-selected Microsoft Word template and the data for the merge fields embedded in the template.
7. The Apttus Merge Service merges the data and produces the contract document in the user-selected format: DOC, RTF, DOCX, or PDF.
8. The generated contract document is stored in Salesforce as an attachment to the agreement record.
9. Errors encountered in the document generation process are displayed to the user from the contract management application in Salesforce, where you initiated the generation command for the document.
10. All details are removed from the Amazon EC2 web servers when the document generation process has been completed. No data is stored in the Apttus Merge Service since all data is stored only in Salesforce.



Document Generation Features List

The following table includes a list of functions that are related to document generation, or "DocGen". Each column in this table represents either the Agreement, Quote/Proposal, standard Salesforce, and Custom objects. While every function is completely supported for the Agreement object, there are limitations for the Quote/Proposal, standard Salesforce, and Custom objects.

This list is a representation of all document generation features by Object Type.

The following list is a representation of the notation used:

- X = supported out of the box
- NSP = not supported
- CSP - Comply System Properties
- PSP - Proposal System Properties

Note

The table below provides the required setup, if there is a necessary configuration for a document generation feature. In order to see what you must configure for a particular object, the configuration settings are noted under that corresponding object in the table.

For example, to use the *Merge Service Endpoint* feature for document generation on a custom object, you must configure *Remote Site - Salesforce Admin Setting* and *CSP Endpoint*.

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
1	<p>Merge Webservice Endpoint Setup Steps:</p> <ol style="list-style-type: none"> 1. Salesforce Admin setting: Remote Site Settings > ApttusMergeServer 2. Comply System Properties > Merge Webservice Endpoint 3. Proposal System Properties > Merge Webservice Endpoint <p>For more information, refer Appendix B > Custom Settings > Proposal System Properties in <i>CPQ Admin Guide</i>.</p> <p>*Admin - for backward compatibility</p>	Setup 1 & 2	Setup 1 & 3	Setup 1 & 2	Setup 1 & 2

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
2	<p>Controlling Merge Call Time-out (default 60 secs) Setup Steps:</p> <ol style="list-style-type: none"> 1. Comply System Properties > Merge Call Timeout Millis 2. Proposal System Properties > Merge Call Timeout Millis <p>For more information, refer Appendix B > Custom Settings > Proposal System Properties in <i>CPQ Admin Guide</i>.</p> <p>*Admin - for backward compatibility</p> <p>Max 60,000; Recommended 30,000</p>	Setup 1	Setup 2	Setup 1	Setup1
3	<p>Publish Merge Events Comply System Property > Publish Merge Events</p>	X	NSP	NSP	NSP
4	<p>Generation Document from Record Generate Action button setup:</p> <ol style="list-style-type: none"> 1. Create action formula field on the Object, and then add it to the layout. Refer to Generating on a Custom Object. 	X	X	Setup 1	Setup 1

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
5	<p>Generation PDF Security Setup steps:</p> <p>1a. Select Comply System Properties > Enable PDF Security</p> <p>1b. Enter a password value for Comply System Properties > PDF Owner Password</p> <p>1c. Create/Modify <i>APTS_ComplyConfig</i> Admin object for PDF security defaults (optional)</p> <p>See Enabling PDF Security for Agreement Documents for details.</p> <p>2a. Proposal System Properties > Enable PDF Security</p> <p>2b. Proposal System Properties > PDF Owner Password</p> <p>2c. Create/Modify <i>APTS_ProposalConfig</i> Admin object for PDF security defaults (optional)</p> <p>See Enabling PDF Security on Generated Quote/Proposal Document in <i>CPQ Admin Guide</i>.</p>	Setup 1 (a,b,c)	Setup 2 (a,b,c)	Setup 1 (a,b, c)	Setup 1 (a,b,c)

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
6	<p>Generation Word Document Protection Setup steps:</p> <ol style="list-style-type: none"> 1. Create Admin > APTS_Protection 2. Create Admin > APTS_Password 3. Create Agreement Protection table entries for the following pairs: <p>User Profile / Preview</p> <p>User Profile / Generate</p> <p>User Profile / Regenerate</p> <p>User Profile / Generate Supporting Document</p>	Setup 1, 2, & 3	NSP	NSP	NSP
7	<p>Versioning Word Document Protection Setup steps:</p> <ol style="list-style-type: none"> 1. Create Admin > APTS_Protection 2. Create Admin > APTS_Password 3. Create Agreement Protection table entries for the following pairs: <p>User Profile / Save Initial Version</p> <p>User Profile / Save External Version</p> <p>User Profile / Save Final Version</p>	Setup 1,2, & 3	Setup 1,2, & 3	Setup 1,2, & 3	Setup 1,2, & 3

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
8	<p>Async Mode of Merge Setup steps:</p> <ol style="list-style-type: none"> 1. Create Admin > APTS_AsyncMergeCall 2. Create Admin > APTS_AsyncMergeEmail <p>Calls over 60 seconds are processed.</p> <p>*Custom objects with related lists are not supported</p>	Setup 1 & 2	Setup 1 & 2	*Setup 1 & 2	*Setup 1 & 2
9	<p>Template setup for default system filtering on Generate and other Template functionality from X-Author Contracts Setup steps:</p> <ol style="list-style-type: none"> 1. Agreement Object > Record Types picklist values 2. Template Object > Agreement Type picklist values 3. Template Object > Business Object picklist values <p>*Template Object setup - For internal use only</p>	<ol style="list-style-type: none"> 1. X 2. Add Object record types Values 3. X 	<ol style="list-style-type: none"> 1. X 2. Add Object record types Values 3. X 	<ol style="list-style-type: none"> 1. Add Object Value 2. Add Object record Types Values 3. X 	<ol style="list-style-type: none"> 1. Add Object Value 2. Add Object record types Values 3. Add API name of Custom Business Object

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
10	Auto Enabling Checking In for Final version in PDF format Setup steps: <ul style="list-style-type: none"> • Comply System Properties > Auto Enable PDF Final Docs • Comply System Properties > Allow PDF Select Override 	X	NSP	NSP	NSP
11	Auto Enable Reconciliation Setup steps: <ul style="list-style-type: none"> • Comply System Properties > Auto Enable Reconciliation • Comply System Properties > Allow Reconcile Override 	X	NSP	NSP	NSP
12	Header / Footer Stamp Setup steps: <ul style="list-style-type: none"> • Comply System Properties > Auto Insert Header Footer • Comply System Properties > Agreement Number Field For Imported Docs • Comply System Properties > Footer Datetime Format For Imported Docs 	X	NSP	NSP	NSP

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
1 3	Enabling Term Exceptions in Author <ul style="list-style-type: none"> Create Admin > EnableTermException sInAuthor * Available for all Template types (valid association with TE - only for Agreement Clause Template)	X	NSP	NSP	NSP
1 4	Create New Template & Check-In Template Setup #9 required prior	X	X	X	X
1 5	Check-out Template Setup #9 required prior	X	X	X	X
1 6	Clone Template Setup #9 required prior	X	X	X	X
1 7	Template Playbook: default Search, Select, Insert Clause inline or as a reference Setup #9 required prior	X	X	X	X
1 8	Insert Merge Fields for corresponding Objects <ul style="list-style-type: none"> - Header - Lookups - Related - In Section - Related - In Table Setup #9 required prior	X	X	X	X

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
19	Insert Smart Merge Fields for corresponding Objects - Header - Lookups - Related - In Section - Related - In Table Setup #9 required prior	X	NSP	NSP	NSP
20	Document Assembly Rules Insert Dynamic Sections in X-Author for Contracts *Available for Agreement object only	X	NSP	NSP	NSP
21	Filtered Rows Apply Filter in X-Author	X	X	X	X
22	Conditional Content Make Conditional in X-Author for Contracts	X	X	X	X
23	Auto-publish	X	X	X	X
24	Generate. Output Format and add Watermark Support DOC, DOCX, PDF, RTF	X	X	X	X

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
25	Support Controlled Preferences for Output Format and Watermark *pairs: Record Type / User Profile 1. Agreement Output Format Tab 2. Proposal Output Format Tab	X	X	NSP	NSP
26	Check-in Third Party Document. Import Offline - Create record and attach	X	NSP	NSP	NSP
27	Check-in Third Party Document. Import Offline - Attach to existing record	X	NSP	NSP	NSP
28	Check-in Document, attachment of the record - With Redlines - Without Redlines - Final to be Signed - Watermark - Naming Override	X	NSP	NSP	NSP
29	Check-out Document, attachment of the record	X	NSP	NSP	NSP
30	Compare Documents, attachments of the record	X	NSP	NSP	NSP
31	Locking Refresh Lock	X	NSP	NSP	NSP

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
3 2	Create Section Save selection as Agreement Clause	X	NSP	NSP	NSP
3 3	Playbook: Insert Clause into the Document on the records	X	NSP	NSP	NSP
3 4	Reconcile Documents - Highlight Smart Fields - Reconciliation of the values	X	NSP	NSP	NSP
3 5	Tag Smart Fields	X	NSP	NSP	NSP
3 6	Update Document from Salesforce	X	NSP	NSP	NSP
3 7	Multi-currency support by the products of the system 1. Merge - Comply - Proposals 2. X-Author Contracts *Functionality related to Smart Field: Reconciliation, Tagging currency fields is affected	1. X 2. X	NSP	NSP	NSP
3 8	Chatter with Record Setup steps: 1. Select Enable Chatter Feeds for the object	Setup 1	NSP	NSP	NSP

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
	Admin > AutoContentSearchable *for activation only	X			
	eSignature support	X	NSP	NSP	NSP
	- EchoSign	X	NSP	NSP	NSP
	- DocuSign	X	NSP	NSP	NSP

Generating on a Custom Object

Apttus Contract Management provides a solution for configuring document generation on Custom Objects. Configuration for this feature creates a slightly different flow than for Agreements and utilizes a separate Visualforce page and class to facilitate document generation. Follow the steps in this section to configure your custom object for document generation. On this page we use the Custom Object "Invoice" in our examples.

Setting up Template: Object Type

Before you can generate on any object, it must first be associated with the Template object.

1. Go to **Setup > Create > Objects**
2. Click on the link for the **Template** object.
3. Under "Custom Fields & Relationships", click on **Type**.
4. Under "Picklist Value Set", click **New**.
5. Enter the label name of the custom business object you want to associate with the template (e.g., "Invoice").

- Click **Save**. On the next page, check the picklist values to verify your entries were saved.

Picklist Value Set	
Action	Values
Edit Del	Agreement
Edit Del	Clause
Edit Del	Proposal
Edit Del	Section
Edit Del	Supporting Document
Edit Del	Invoice
Edit Del	Invoice Statement

Setting up Template: Agreement Type

The next step requires you to create record types for your custom object.

- Go to **Setup > Create > Objects**.
- Click on the link for the **Template** object.
- Under "Custom Fields & Relationships", click on **Agreement Types**.
- Under "Picklist Value Set", click **New**.
- Enter record types for your custom object templates, with each entry on a separate line. In this example, we will create 3 record types for Invoice: Pro Forma, Credit Memo, and Debit Memo.
- Click **Save**. On the next page, check the picklist values to verify your entries were saved.

Picklist Value Set	
Action	Values
Edit Del	NDA
Edit Del	MSA
Edit Del	Proposal
Edit Del	RFP
Edit Del	NDA -Instructor
Edit Del	Pro Forma
Edit Del	Credit Memo
Edit Del	Debit Memo

Setting up Template: Business Object

Complete template setup by finalizing the association of your custom object with the template.

1. Go to **Setup > Create > Objects**.
2. Click on the link for the **Template** object.
3. Under "Custom Fields & Relationships", click on **Business Object**.
4. Under "Picklist Value Set", click **New**.
5. Enter the API name of your custom object as a new picklist entry. (e.g., "Invoice__c")
6. Click **Save**. On the next page, check the picklist values to verify your entries were saved.

Picklist Value Set	
Action	Values
Edit Del	Apttus__APTS_Agreement__c
Edit Del	Apttus_Proposal__Proposal__c
Edit Del	Invoice__c

7. Next, create associations between your new Business Object and template Types using dependent picklists. Go back to the **Template** object and click on the **Type** field.
8. Under "Field Dependencies," click **Edit** next to the "Business Object" dependent field.

Field Dependencies			New
Action	Dependent Field		Data Type
Edit Del	Business Object		Picklist

9. Create a dependency between the Template Type for your custom object and the Business Object you defined in Step 5. Click on the Business Object API name in the list under your custom object type and click **Include Values**. In the below example, "Invoice__c" is included in the "Invoice" dependent picklist.

Click button to include or exclude selected values from the dependent picklist:

Showing Columns: 6 - 7 (of 7) < Previous Next > View All Go to		
Type:	<u>Invoice</u>	<u>Invoice Statement</u>
Business Object:	Apttus__APTS_Agreement__c	Apttus__APTS_Agreement__c
	Apttus__Proposal__Proposal__c	Apttus__Proposal__Proposal__c
	<u>Invoice__c</u>	Invoice__c

Showing Columns: 6 - 7 (of 7) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist:

10. If you intend to define clauses to use in your custom object templates, you also need to add your custom business object to the Clause dependent picklist. Click on the Business Object API name in the list under "Clause" and click **Include Values**. In the below example, "Invoice__c" is included in the "Clause" dependent picklist.

Click button to include or exclude selected values from the dependent picklist:

Showing Columns: 1 - 5 (of 7) < Previous Next > View All Go to					
Type:	<u>Agreement</u>	<u>Clause</u>	<u>Proposal</u>	<u>Section</u>	<u>Supporting Document</u>
Business Object:	Apttus__APTS_Agreement__c	Apttus__APTS_Agreement__c	Apttus__APTS_Agreement__c	Apttus__APTS_Agreement__c	Apttus__APTS_Agreement__c
	Apttus__Proposal__Proposal__c	Apttus__Proposal__Proposal__c	Apttus__Proposal__Proposal__c	Apttus__Proposal__Proposal__c	Apttus__Proposal__Proposal__c
	Invoice__c	<u>Invoice__c</u>	Invoice__c	Invoice__c	Invoice__c

Showing Columns: 1 - 5 (of 7) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist:

11. Click **Save** to save your dependencies.

Setting up Custom Object: Generate Action

The final step required to configure your custom object for document generation is to create the field or button on your custom object and add it to the object layout. Custom objects use a specific Visualforce page and controller class for generating documents. Pay attention to the format in the steps below. In the following example, a custom "Generate" field is created for the Invoice object. You can also make this a button or a link if you want—the action is controlled by a formula in every case.

1. Go to **Setup > Create > Object > Your Custom Object**. (In this example, we are using "Invoice")
2. Under "Custom Fields & Relationships," click **New**.
3. For "Data Type," select **Formula**. Click **Next**.
4. Enter the label you want to use for your Generate action ("Generate Invoice" is used here). For "Formula Return Type," choose **Text**. Click **Next**.

Invoice
New Custom Field

Help for this Page ?

Step 2. Choose output type Step 2 of 5

Previous Next Cancel

Field Label Field Name [i](#)

Formula Return Type

☐ None Selected Select one of the data types below.

☐ Checkbox Calculate a boolean value.
Example: `TODAY() > CloseDate`

☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost__c`

☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

☐ Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

☐ Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius__c + 32`

☐ Percent Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount__c) / Amount`

☒ Text Create a text string, for example, by concatenating other text fields.
Example: `Full Name = LastName & ", " & FirstName`

Previous Next Cancel

5. Enter the formula for your custom Generate action. In your formula, define the template type as the label for your custom object (e.g., "Invoice"). Be sure to check your syntax. The following is an example:

```
HYPERLINK("/apex/Apttus__DocumentGenerate?id="&Id &
"&action=Generate_Document&templateType=Invoice", IMAGE("/resource/
Apttus__Button_Generate", "Generate"), "_self")
```

Invoice
New Custom Field

Step 3. Enter formula Step 3 of 5

Enter your formula and click Check Syntax to validate your formula. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Full Name = LastName & ", " & FirstName` [More Examples...](#)

Simple Formula | **Advanced Formula**

Select Field Type: **Invoice** | Insert Field: **-- Insert Merge Field --** | Insert Operator: **-- Insert Operator --**

Generate Invoice (Text) =

`HYPERLINK("/apex/Apttus__DocumentGenerate?id=%Id & %action=Generate_Document&templateType=Invoice",
IMAGE("/resource/Apttus__Button_Generate", "Generate"), "_self")`

Quick Tips

- [Getting Started](#)
- [Operators & Functions](#)

Click **Next** when you are satisfied with your formula.

- On the next page, specify field-level security for profiles to use the Generate action. Click **Next**.
- Specify which page layouts should include this field. You can always add the field to new layouts as you need to in the future.
- Click **Save**. You are finished!

Creating Templates for your Custom Object

Follow the same instructions found in the *Contract Management Administrator Guide* and *X-Author Contracts User Guide* to create and check-in your custom object templates for document generation. Remember that Rules and Document Protection are not supported for any object other than Agreements. The Generate flow for your custom objects will have a single step and resemble the page displayed in the below image.


Agreement Document Output Formats

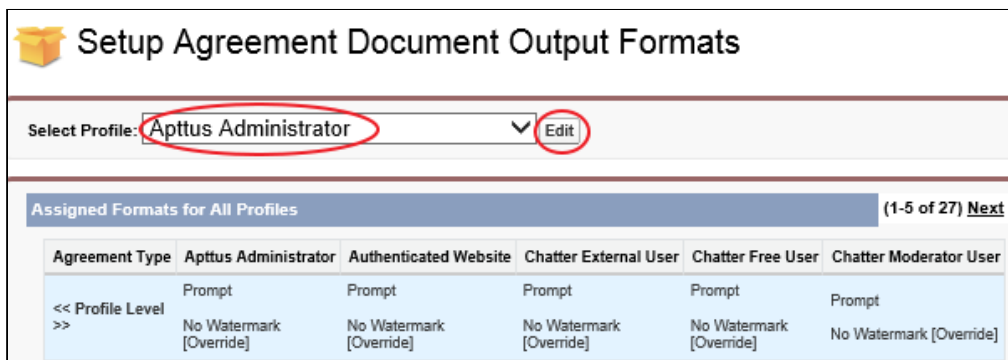
Documents are often setup to allow you the option of specifying a document output format upon generation. In some cases, you may want to restrict these options.

You can setup company-wide default formats to be used for generating document, at User Profile and Agreement Type levels. Along with specifying the format, one can also indicate whether the end user can override the default format. This is indicated by the Allow Override check box shown in the setup UI. Supported formats are: DOC, DOCX, PDF, RTF. If you select Prompt option, you will be prompted to select a format at the time of document generation/preview.

Setting Up an Agreement Output Format

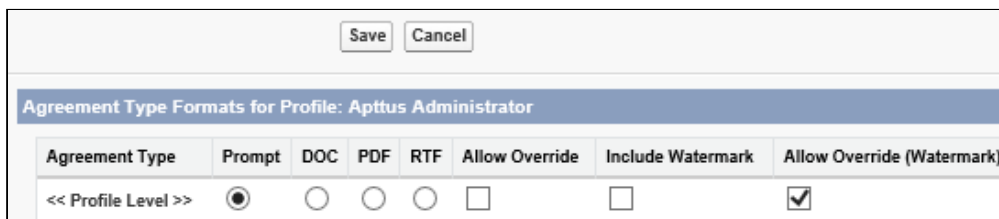
You must have the Apttus Administrator profile.

1. Click  and click Agreement Document Output Formats.
2. Select a profile and click Edit. For example, Apttus Administrator.




Assigned Formats for All Profiles (1-5 of 27) Next					
Agreement Type	Apttus Administrator	Authenticated Website	Chatter External User	Chatter Free User	Chatter Moderator User
<< Profile Level >>	Prompt	Prompt	Prompt	Prompt	Prompt
	No Watermark [Override]	No Watermark [Override]	No Watermark [Override]	No Watermark [Override]	No Watermark [Override]

3. For agreement type, select the required output format option.



Agreement Type	Prompt	DOC	PDF	RTF	Allow Override	Include Watermark	Allow Override (Watermark)
<< Profile Level >>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

 When you select the document format and any of the other settings at the <<Profile Level>>, it is saved as the setting for any record type where you select Prompt. The setting at <<Profile Level>> does not override record types where a specific format is selected as default.

4. To add or remove a watermark, select or clear Allow Override (Watermark).
5. Click Save.

You have configured the output-controlling parameters to generate an agreement document in a required format.

Use Case for Setting Up Document Output Format

This topic describes the use case for setting up document output format.

Standard Statement

This use case gives one example on how to set up default document output format for publishing your agreement. You might use this functionality differently, depending on your business case.

This use case describes how to set up default document output format which fulfills users' specific needs. In this case, a System Administrator configures the default document output format settings which allow users to automatically generate an agreement in the desired output format. In addition, **Allowable Output Formats** option, allows users to select a different format if necessary.

Pre-requisite:

You must have the System Administrator profile access permission.

To set up output formats for your agreement, perform the following steps:

1. Select the **Agreement Document Output Formats** tab.
Setup **Agreement Document Output Formats** page is displayed.
2. Select **System Administrator** from the Select Profile drop-down list.
3. Click **Edit**.
4. Select **PDF** radio button, if you want pdf for the output document in the **Agreement Type Formats for Profile: System Administrator** section.
Supported formats are PDF, DOC, DOCX, and RTF.
5. Click **Save**.

Result:

Your agreement record will display PDF by default when you preview, generated, and re-generate the document.

Next Step:

Similarly, you can set up other types of Agreement Document Output Formats based on your specific need.

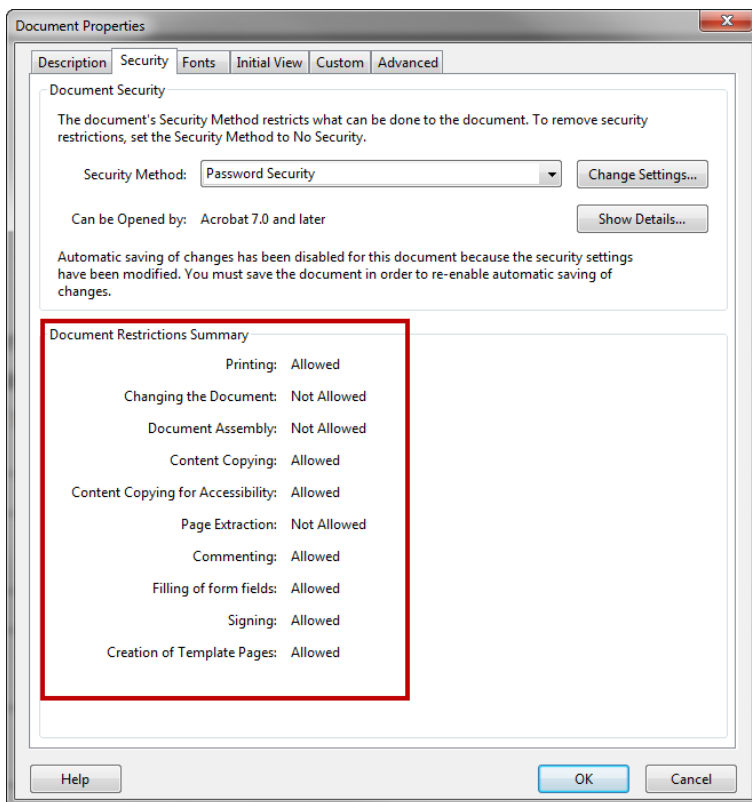
PDF Security for Agreement Documents

Apttus uses [Agreement Document Protection](#) to help you protect your documents when they are generated in Microsoft Word format, but when you need to generate a PDF you may also wish to restrict editing. Fortunately, you can use a combination of Comply System and Admin properties to finely control restriction for agreement documents generated in PDF format.

Note: PDF Security cannot be enabled for PDFs created during check-in from X-Author. The following instructions only apply to *generated* PDFs,

Understanding PDF Security


When you enforce security on a PDF document, you typically have the option of enabling or disabling certain restrictions. To view the set of possible restrictions for a PDF from Acrobat Reader, go to **File > Properties**. You can view the current restrictions under "Document Restrictions Summary."



You can control the following document restrictions for PDFs generated in Apttus Contract Management:

- Printing
- Changing the document
- Content Copying
- Document Assembly

- Commenting
- Filling of form fields

 All generated PDFs user 128-bit AES encryption.

Enabling PDF Security for Generated Agreement Documents

1. Go to **Setup > Develop > Custom Settings**.
2. Click **Manage** next to *Comply System Properties*
3. Click **Edit** next to *System Properties* and do the following:
 - a. Select **Enable PDF Security**.
 - b. Enter a desired value for **PDF Owner Password**.
 - c. Click **Save**.

All generated PDFs will now have security enabled. Consult the following table to understand which restrictions are enforced with this setting.

Restriction	Description	Enable PDF Security Default
Printing	Allows user to print the document.	True
Changing the Document	Allows the user to edit the document (edit pictures and text).	False
Content Copying	Allows the user to copy text and graphics from the document.	True
Document Assembly	Allows the user to assemble the document	False
Commenting	Allows user to add comments.	True
Filling of form fields	User can fill in form fields	True

About Workflow

- **Creating New Workflow Rule**

Workflow rules give you the ability to enforce key business processes easily without needing to write any code. You can automate your organization's standard processes by configuring workflow rules.

- **Validating Workflows**

After creating a new workflow rule, you must validate the workflow. Once validated, you will receive a confirmation email.

Creating New Workflow Rule

Workflow rules give you the ability to enforce key business processes easily without needing to write any code. You can automate your organization's standard processes by configuring workflow rules.

To create new rules, refer to the following standard Salesforce Help:

1. [Selecting the Agreement object to which the workflow rule applies](#)
2. [Configuring the workflow rule settings and criteria](#)
3. [Configuring the workflow actions](#)
4. [Activating the workflow rule](#)

Watch a demo: [Creating a new workflow rule](#).

Automating the Process Through Workflow Rules

In this fast-paced world time is money for your organization. You can save time by automating the processes by configuring workflow. Also, you can help make operations more efficient with standardized internal procedures and automated business processes.

To automatically perform the procedures and processes, you must do settings based on your workflow requirements.

Design workflow actions, and then configure workflow rules, and approval processes that determine the conditions under which actions are executed.

Workflow is a series of activities that automates the following types of actions:

Actions	Description
Tasks	A task is a type of workflow action by which you can determine the details of an assignment given to a specified user by a workflow rule or approval process. Create tasks and then associate them with the workflow rules or approval processes that will trigger them. When a workflow rule or approval process meets the business conditions that you set up, any tasks associated with it are assigned to designated users with the Subject, Status, Priority, and Due Date of the workflow task.
Email Alerts	Email alerts are emails generated by a workflow rule or approval process and sent to intended recipients whenever specific business actions trigger the workflow rule or approval process. Email alerts contain the standard text and list of recipients for an email. It is recommended that you specify an email template for email alerts.
Field Updates	Field updates are actions associated with workflow rules or approval processes. With Field updates, you can automatically specify a field value.
Outbound Messages	Outbound messages send a secure configurable API message in XML format to a designated listener. For example, automatically initiate the reimbursement process for an approved expense report by triggering an outbound API message to an external HR system.

Creating a workflow task

1. Click **Create > Workflow & Approvals > Tasks**.
2. Click **New Task**.
3. Select a record type and click **Next**.

Note

You can associate Task with workflow rules or approval processes for the same object type.

4. Perform the following steps to configure the task:
 - a. Select an **Assignee**.
 - b. Enter a subject for the task.
 - c. Enter a **Unique Name**.
 - d. Specify a due date, status, and priority.
 - e. Check **Notify Assignee** to send an email notification when the task is assigned.
 - f. Check **Protected Component** to mark the task as protected.
 - g. Enter any comments to add to the task.
 - h. Click **Save**.

Creating email alerts

1. Click **CreateWorkflow & ApprovalsEmail Alerts**.
2. Click **New Email Alert**.
3. Perform the following steps to configure the email alert:
 - a. Enter a Description.
 - b. Enter a Unique Name.
 - c. Select the Object for the email alert.

Note

This is used when you generate merge field values for email templates with workflow rules and approval processes. Also, you can define the recipients of this email alert using contact and user lookup fields that are relevant to that object.

- d. Choose an email template from the lookup.
- e. If required, select the **Protected Component** check box to mark the alert as protected if it is part of a Managed - Released package.
- f. From the Recipient Type list, select who all (type of users) should get your email alerts.
- g. From the Available Recipients list, select the recipients who should receive this email alert in the Available Recipients list and click Add to include in the Selected Recipients list.
- h. Enter up to five additional email addresses.
- i. Use the From Email Address field to the email address of the default workflow user.

Note

Selecting Make this address the default From email address for this object's email alerts overrides the From Email Address for all email alerts associated with that object.

- j. Click **Save**.

Defining field updates

1. Click **CreateWorkflow & Approvals Field Updates**.
2. Click **New Field Updates**.
3. Perform the following steps to configure the field update and complete the workflow:
 - a. Enter a **Name** and **Unique Name** for this field update.
 - b. Type the Description for the field that you need to update.
 - c. Select the object for the associated field to update and click **Next**.
 - d. To re-evaluate the workflow rules on the selected object after the field update is done, select the **Re-evaluate Workflow Rules After Field Change** check box.
 - e. Under the Specify New Field Value section, select an appropriate options from the list of available options based on the Field to Update selection.
 - f. Click **Save**.

Validating Workflows

After creating a new workflow rule, you must validate the workflow. Once validated, you will receive a confirmation email.

To validate a workflow

1. Navigate to the **Agreements** tab and click **New**.
2. Select a record type for the new agreement and click **Continue**.
3. Type a mandatory **Agreement Name** and enter a mandatory **Account**.
4. From **Select Category**, select *In Effect*. Based on your selection from the **Select Category**, the **Status** pick list is auto-populated.
5. From **Status**, select *Activated*.
6. Click **Save**.

This saves the edited values and triggers the workflow. If your email is set for the Owner of the agreement type, you will receive an email.

Retention Policies

A retention policy determines the length of time a record must be stored. Generally, organizations will apply retention policies to all records sharing certain characteristics. These characteristics can include, but are not limited to, record type, region and owner.

The following sections describe how to create Retention Policies for your agreement records and how to configure record purges based on your business needs:

- **Retention Policies**

The Retention Policy object contains the policy details. The policy specifications are contained in an XML format and maintained using a Visualforce page. The policy header information is maintained using a standard Salesforce page. For details on the Retention Policy XML schema, refer [Apttus Retention Policy Schema](#).

- **Retention Date**

The retention date calculation is done periodically using a batch apex class. The batch apex sequences through all the active retention policies, select applicable business objects using the filters, compute the retention date and update the object.

- **Record Retention Authorized Users**

You can use the RecordRetentionUsers public group to identify the users who are recipients of the purge notification report and authorized to selectively purge records.

- **Purge Notification**

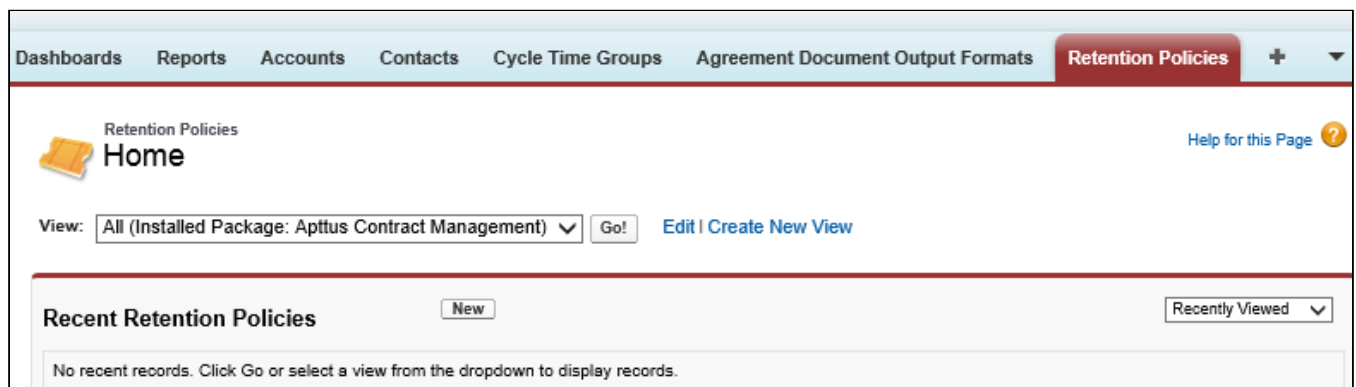
You can schedule a report to run periodically to identify records eligible for purging. The retention date field in the agreement provides the selection criteria. A sample report is provided which can use be used as the basis for creating the report.

- **Purge Agreements**

The Purge Agreements Visualforce page allows the authorized user to search records eligible to be purged based on the retention date combined with other filter criteria. It also provides a scrollable record set to view.

Creating Retention Policies

The Retention Policy object contains the policy details. The policy specifications are contained in an XML format and maintained using a Visualforce page. The policy header information is maintained using a standard Salesforce page. For details on the Retention Policy XML schema, refer to [Apttus Retention Policy Schema](#).



A Retention Policy contains several fields (see table), which store information about the policy specifications to support agreements and business objects.

Field Name	Description	Values/Notes
Policy Name	Policy name	Required – user entered
Description	Description of the policy	
Business Object	Indicates the business object governed by the policy	Required – Apttus__APTS_Agreement__c
Policy Spec	The policy specification	Maintained by a VF page
Sequence	The policy sequence	Required
Active	Indicates whether the policy is active	Inactive policies are ignored. This is selected by default

The policy specification is maintained using a Visualforce page. The policy header fields such as Name, Description, Sequence, Active indicator and so on, can be maintained using a standard Salesforce page.

To create a retention policy

User Permissions Needed	
To create and edit retention policies:	Retention Policy: Create, Edit. Agreement: Edit.

1. Click **Retention Policies > New**.

2. Enter details in one or more required fields and click **Save**. Optionally, you can click **Save & New** to save and create new retention policy.

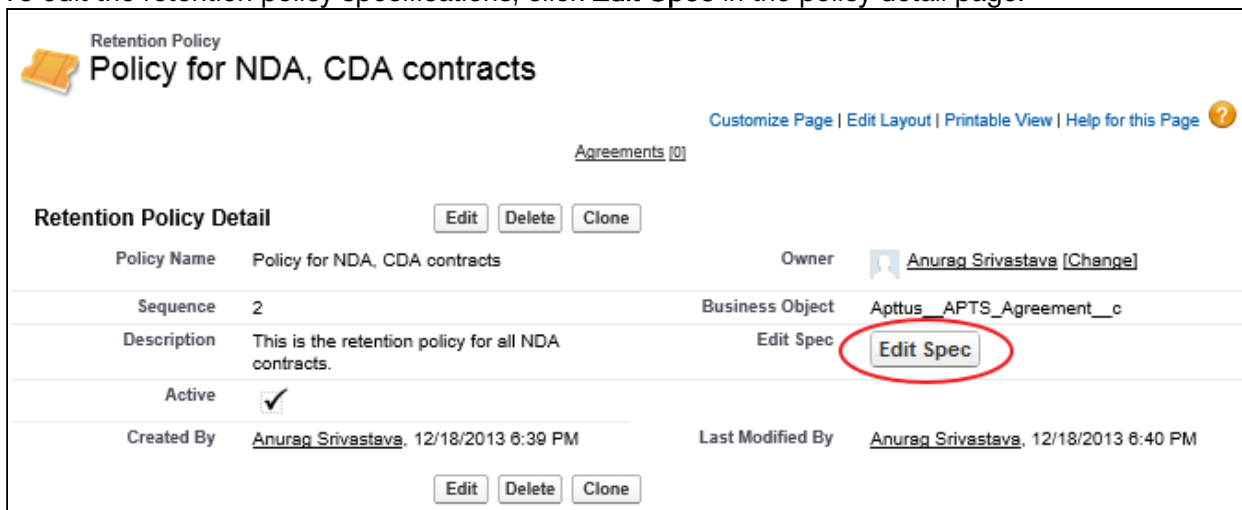
Name	Policy for NDA, CDA contracts
Sequence	2
Business Object	APTS_Agreement__c

A retention policy is created and added to the Recent Retention Policies list.

To edit a retention policy

A retention policy must have been already created.

1. Click **Retention Policies** and select the policy which you need to edit by clicking on the policy name link.
2. To edit the retention policy specifications, click **Edit Spec** in the policy detail page.



Retention Policy
Policy for NDA, CDA contracts

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) ?

[Agreements](#) [0]

Retention Policy Detail [Edit](#) [Delete](#) [Clone](#)

Policy Name	Policy for NDA, CDA contracts	Owner	Anurag Srivastava [Change]
Sequence	2	Business Object	Apttus__APTS_Agreement__c
Description	This is the retention policy for all NDA contracts.	Edit Spec	Edit Spec
Active	<input checked="" type="checkbox"/>		
Created By	Anurag Srivastava , 12/18/2013 6:39 PM	Last Modified By	Anurag Srivastava , 12/18/2013 6:40 PM

[Edit](#) [Delete](#) [Clone](#)

3. Set filters and rules and click **Ok**.

Edit Policy Specification [Ok] [Cancel]

Filter | = Required Information

Field	Operator	Value	
Record Type	in	NDA,CDA	AND
Status	in	Activated,Terminated,Cancelled	AND Del

[Advanced Options](#)

Rule

Retain Forever ☐

Period Years

After Date

[Ok] [Cancel]

i The *RetentionPolicyEdit* Visualforce page enables the filter creation and a rule according to the [Apttus Retention Policy Schema](#).

Calculating Retention Date

The retention date calculation is done periodically using a batch apex class. The batch apex sequences through all the active retention policies, select applicable business objects using the filters, compute the retention date and update the object.

An activity history record is written to the agreement with the policy information. The process terminates on two conditions- when either there are no more business objects to process, or all the policies have been applied. The process is scheduled using the *RetentionDateCalcJobScheduler* Apex scheduler class. Due to governor limits, each policy processes a maximum of 5000 records during each invocation.

To calculate a retention date

A Retention Policy must have been created.

1. Click **Setup > Develop > Apex Classes > Schedule Apex**.
2. Enter the following information to configure the job parameters.

Job Name	Retention Calc Job
Apex Class	RetentionDateCalcJobScheduler
Frequency	<p><as appropriate>.</p> <p>Specify how often the Apex class is to run:</p> <ul style="list-style-type: none"> • For Weekly—specify one or more days of the week the job is to run (such as Monday and Wednesday). • For Monthly—specify either the date the job is to run or the day (such as the second Saturday of every month.)

3. Specify the start and end dates for the Apex scheduled class. If you specify a single day, the job only runs once.
4. Specify a preferred start time. The exact time the job starts depends on service availability.
5. Click **Save**.

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

Save Cancel

Job Name Retention Date Calc

Apex Class RetentionDateCalcJobScheduler

Schedule Apex Execution

Frequency ☐ Weekly ☒ Monthly

On day 1 of every month

On the 1st Sunday of every month

Start 6/11/2010 [6/11/2010]

End 7/11/2010 [6/11/2010]

Preferred Start Time 6:00 PM

Exact start time will depend on job queue activity.

Save Cancel

- After you have done the job of calculating a retention date, you can monitor the progress of the job on the [All Scheduled Jobs](#) page.
- Once the job has completed, you can see specifics about the job (such as whether it passed or failed, how long it took to process, the number of records process, and so on) on the [Apex Jobs](#) page.

Recording Retention Authorized Users

You can use the RecordRetentionUsers public group to identify the users who are recipients of the purge notification report and authorized to selectively purge records.

Specify the members of the sharing group below. To set the group membership, you can add individual users, other groups, and roles.

New Public Group

Group Name: **RecordRetentionUsers**

Grant Access Using Hierarchies: ☒

Search: Users for: Find

Available Members		Selected Members
User: Contract Operations		User: Ashish Singh
User: Demo User2		User: Greg Sidkal
User: Demo User3		User: James Solomon
User: Demo User4		User: CM OneApp
User: Demo User5		User: Nathan Krishnan
User: Demo User6	Add	
	Remove	

Save Cancel

Sending Purge Notification

You can schedule a report to run periodically to identify records eligible for purging. The retention date field in the agreement provides the selection criteria. A sample report is provided which can be used as the basis for creating the report.

The report can be emailed to Record Retention Authorized Users to allow them to selectively purge records.

User Permissions Needed to Build a Report

To create, edit, and delete reports

Create and Customize Reports

User Permissions Needed to Build a Report

	AND
	Report Builder

To send purge notification, perform the following:

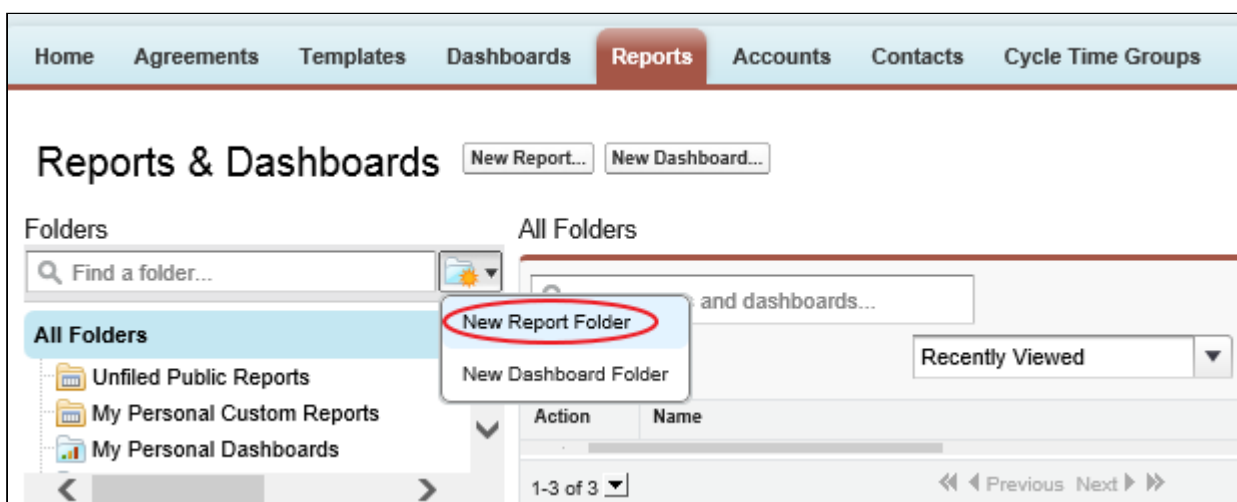
- Create a public folder to hold the purge notification report
- Create a new report using the report builder
- Edit report properties and save the report
- Schedule the report and send notification

Creating a Public Folder

User Permissions Needed

To create, edit, or delete public document folders:	"Manage Public Documents"
To create, edit, and delete public email template folders:	"Manage Public Templates"
To create, edit, and delete public report folders:	"Manage Public Reports"
To create, edit, and delete public dashboard folders:	"Manage Dashboards" AND "View All Data"

1. Go to the **Reports** tab.
2. Click **New Report Folder**.



3. Enter a **Report Folder Label**. For example, Record Retention Report.
4. The **Folder Unique Name** is entered automatically when you type the folder label. If you have the Customize Application permission, enter a unique name to be used by the API and managed packages.
5. Choose a **Public Folder Access** option. Select read/write if you want users to be able to change the folder contents. A read-only folder can be visible to users but they can't change its contents.
6. Select an unfiled report, dashboard, or template and click **Add** to store it in the new folder. Skip this step for document folders.
7. Choose a folder visibility option.
8. Choose **Public Groups** from the Search drop-down list.

Note

When you share a folder with a group, managers of the group members have no access to the folder unless those managers are also members of the group.

9. If the Available for Sharing list does not immediately display the desired value, enter search criteria and click **Find**.
10. Select the desired value from the Available for Sharing list and click **Add** to move the value to the Shared To list.
11. Click **Save**.

Report Folder Label: Record Retention Rep
 Folder Unique Name: Record_Retention_Re
 Public Folder Access: Read Only

Unfiled Public Reports

- Sample Report: Leads by Lead Source
- Sample Report: Login Leaderboard
- Sample Report: Login Wall of Shame
- Sample Report: Month to Date Trending
- Sample Report: Open Cases By Priority
- Sample Report: Open Deals
- Sample Report: Pipeline By Close Month
- Sample Report: Pipeline History
- Sample Report: Sales Leaderboard
- Sample Report: Sales Pipeline by Stage
- Sample Report: Solutions Added
- Sample Report: Top Accounts
- Sample Report: Users Logged In
- Sample Reports: Leads by Status

Reports in this Folder

--None--

☐ This folder is accessible by all users, including portal users
☐ This folder is accessible by all users, except for portal users
☐ This folder is hidden from all users
☒ This folder is accessible only by the following users:

Search: Public Groups for: Find

Available for Sharing

- All Customer Portal Users
- All Internal Users

Shared To

Group: RecordRetentionUsers

Note: A red arrow points to the folder name 'Record Retention Rep' with the text 'Public Folder for Retention Notification reports'.

A folder is created. You can create a new report using Report Builder.

Creating a New Report Using the Report Builder

1. On the Reports tab, select the report type and click **Create**.
2. Enter the Filters and Fields details as:

Report Type: Custom Object
 Unsaved Report

Save Save As Close Run Report

Fields

- Status Category
- Submit For Changes
- Submit Request
- Submit Request Mode
- Subtype
- Term (Months)
- Terminate
- Termination Date
- Termination Notice Days
- Termination Notice Issue Date
- Total Agreement Value
- Version (OBSOLETE)
- Version Number
- Workflow Trigger Generated

Filters

View: My agreements

Time Frame

Columns: Retention Date Duration: Current FQ Start Date: 4/1/2010 End Date: 6/30/2010

Preview

Agreement Number	Agreement: Agreement Name	Agreement: Record Type	Account	Agreement Start Date	Agreement End Date	Status	Activated Date	Retention Date
Grand Totals (0 records)								

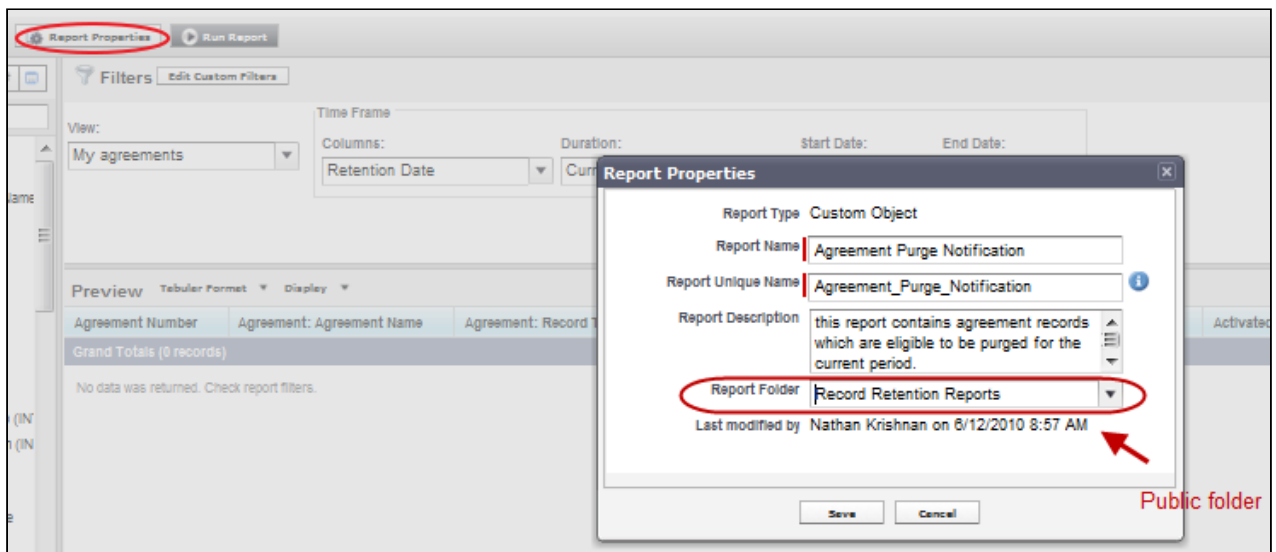
Note: A red arrow points to the Time Frame section with the label 'Criteria'. A blue arrow points to the Preview table with the label 'Columns'.

3. Add, reorder, and remove columns, summary fields, formulas, groupings, and blocks to customize and preview your report. Change the report format and display options, or add a chart. The preview shows only a limited number of records. Run the report to see all your results.

You have created report fields and filters, and previewed your report with some of the data. You can edit report properties.

Editing Report Properties

1. On the Reports tab, select the report and click **Edit**.
2. Click the **Report Properties** tab.
3. Edit the report properties and click **Save**.



A report is edited and saved. You can also schedule the report.

Scheduling a Report

You must have the Schedule Reports permission to schedule reports.

1. On the Reports tab, click an existing report name.
2. From the Run Report drop-down, click **Schedule Future Runs**. If you're creating a new report, you are asked to save the report with a name and in a folder before scheduling.



3. On the Schedule Report page, specify a Running User who has access to the folder where the report is stored.

Note

- If the running user becomes inactive, the report is not run. The system administrator receives an email notification to either activate the user, delete the report schedule, or change the running user to an active one in the scheduled report.
- The access level of the running user determines what other users, including portal users, see when they receive the scheduled report run results. You need the “View All Data” permission to specify a running user other than yourself.

4. Select an email setting:

Select	To
To me	Send the report to your email address specified on your user profile.
To me and/or others	Email the report to additional users.

You can send reports only to email addresses included on Salesforce user records. When portal users receive emailed reports, they see the same data as the running user set in the report schedule. If you have information you'd rather not share, schedule the report to run with a portal user as the running user.

Note

Portal users receive report and dashboard refresh email notifications when the Allow Reports and Dashboards to Be Sent to Portal Users option is enabled.

5. Set the frequency, duration, and time for running the report.
 - In the Frequency field, select Daily, Weekly, or Monthly and then refine the frequency criteria.
 - Using the Start and End fields, specify the dates during which you want to schedule the report. To enter the current date, click the link showing the date.
 - Next to Preferred Start Time, click **Find available options** to choose a start time.

Your preferred start time might not be available if other users have already selected that time to schedule a report.

6. Click **Save Report Schedule**. You can choose the following:

Choose	To
Save report modifications with this schedule	Save both the report schedule and changes you made to the report.
Discard report modifications	Save the schedule only. Changes you made to the report are discarded.

Report recipients can click the report name in emailed reports to log in to Salesforce and view the report directly.

A report is scheduled to run every Friday at midnight, and its results are emailed to a selected group and user.

The screenshot shows the 'Schedule Report' dialog box in Salesforce. It includes fields for 'Running User', 'Email Report' options, a search for 'Public Groups', a 'Send Email To' list with 'User: Admin User' and 'All Internal Users', 'Frequency' settings (Daily, Weekly, Monthly), a 'Recurs every week on' calendar with 'Friday' selected, 'Start' and 'End' date pickers, a 'Preferred Start Time' dropdown, and 'Save Changes' options. Red lines with numbered boxes (1-5) point to specific elements: 1 points to the 'Running User' field, 2 points to the 'Send Email To' list, 3 points to the 'Friday' selection in the weekly recurrence list, 4 points to the 'Start' date field, and 5 points to the 'Discard report modifications' radio button.

1. All users, including portal users, viewing the scheduled report see the report data that Running User's access level allows.
2. Report run results are set to be emailed to a public user group called All Internal Users and the admin user.
3. The report is scheduled to run every Friday.
4. The report run is scheduled to start on the current date.
5. The schedule is saved without saving prior changes made to the report.

About Purge Agreements

The Purge Agreements Visualforce page allows the authorized user to search records eligible to be purged based on the retention date combined with other filter criteria. It also provides a scrollable record set to view.

Purge Agreements [Purge] [Return]

Search Filter

Retention Date: 8/15/2010 [8/15/2010]

Record Type: --None--

Limit Rows: 1000

[Go!]

Records

	Agreement Number	Agreement Name	Account	Record Type	Status
<input checked="" type="checkbox"/>	00000587.0	NK TestRR_1	Burlington Textiles Corp of America	Other	
<input checked="" type="checkbox"/>	00000596.0	NK TestRR_10	Burlington Textiles Corp of America	Other	Request
<input checked="" type="checkbox"/>	00000597.0	NK TestRR_11	Burlington Textiles Corp of America	Other	Request
<input checked="" type="checkbox"/>	00000598.0	NK TestRR_12	Burlington Textiles Corp of America	Other	Request
<input checked="" type="checkbox"/>	00000599.0	NK TestRR_13	Burlington Textiles Corp of America	Other	Request
<input checked="" type="checkbox"/>	00000600.0	NK TestRR_14	Burlington Textiles Corp of America	Other	Request
<input checked="" type="checkbox"/>	00000601.0	NK TestRR_15	Burlington Textiles Corp of America	Other	Request
<input checked="" type="checkbox"/>	00000602.0	NK TestRR_16	Burlington Textiles Corp of America	Other	Request
<input checked="" type="checkbox"/>	00000603.0	NK TestRR_17	Burlington Textiles Corp of America	Other	Request

To access the page, click + and select Purge Agreements.

Agreement Explorer Reports

Understanding Agreement Explorer Report Types

Agreement Explorer is a powerful search and reporting feature that allows you to search for records in the Agreement object through the use of configurable and reusable search reports. This feature complements standard reporting views to satisfy the demands of many Apttus customers who require more powerful, specific search results and related exports to Excel to satisfy their business needs. Agreement Explorer expands your access to agreements by providing reusable searches with configurable field sets and filtered lists for multiple contexts associated with agreements. You can use these reports to discover and expose record lists for agreement searches, the hierarchies of agreements and accounts, and a combination of account hierarchies and the individual account's related agreement hierarchies. Users can create published lists of available reports, which can then be complemented by users creating and saving their own public or private ad-hoc reports. The resulting reports can be exported to Excel.

Understanding Agreement Explorer Report Types

The key to understanding how to create and use Agreement Explorer reports effectively is to understand the application types assigned to each report. When you create an Agreement Explorer report as an administrator, you are required to define the context (type). The type determines the list of records and hierarchy displayed in the results available to the user. There are three types available for reports:

Report Type	Report Location	Description
Agreement Search	Agreement Explorer Tab	Returns a filtered list of agreement records. For example, return all the agreements filtered by Status Category and Status. These results do NOT display Agreement Hierarchy.
Agreement	Agreement Record, Agreement Explorer Tab	Returns a filtered, hierarchical list of agreements with the current record highlighted. Records in this list represent a hierarchy of parent and child agreements with the current record as context.
Agreement Hierarchy by Account(s)	Agreement Record, Account Record, Agreement Explorer tab	Returns a filtered, hierarchical list of agreements associated with one or more chosen account records. Records in this list represent a hierarchy of parent and child agreements for all specified accounts.

For more detailed information on how to run, use and maintain Agreement Explorer reports, please refer to Agreement Explorer section in the *Contract Management User Guide*.

Adding Agreement Explorer Buttons to Page Layouts

To enable default Agreement Explorer reports to be run from Agreement or Account records, an administrator must add custom buttons to the Agreement and Account object page layouts. Users and administrators use these custom buttons to run existing reports or to create "ad hoc" reports as required.

The following custom buttons must be added to their respective layouts:

1. Add two (2) buttons to the Agreements page (Agreement Page Layout):
 - a. **View Agreement Hierarchy**
 - b. **View Hierarchy for Account**
2. Add one (1) button to the Accounts page (Account Page Layout): **View Hierarchy for Account**

All custom buttons are already provided with installation of the Apttus Contract Management package. For information on how to add Custom Links and/or Buttons to object page layouts, please refer to Salesforce documentation on [Customizing Page Layouts](#) and [Customizing Search Layouts](#).

Contract Wizard

Use the Apttus Contract Wizard to design and deploy custom user-friendly Wizards based on **Accounts, Opportunities, Quotes/Proposals, Agreements** and other **custom Salesforce objects**. These Wizards are intended to be used by your sales representatives, purchasing agents, HR managers and other users to quickly create their own records by entering responses to criteria-based inputs that follow a logical series of steps. Wizards can also be used to collect data from customers to be posted to internal systems or for other business use.

As an administrator, the wizards you create are stored as Wizard Designs. Wizard Designs are comprised of a series of Inputs and Steps, governed by rules that determine the flow and resultant values of the Wizard.

The Contract Wizard is comprised of three tabs:

- **Wizard Designs:** Use this tab to create new Wizard designs or edit existing Wizard designs. You assemble Wizards using the Wizard Designer tool, adding **Inputs** and **Steps** from the Wizard Component Library or creating instances for use with specific designs. You can design rules for your Inputs based on criteria or values from other Inputs, configure the flow for your Steps by creating and organizing Wizard Steps rules, and preview Steps and Inputs as needed while finalizing the Wizard Design. When you are finished with a design, you can activate it for use from the Wizards tab.

The screenshot displays the 'Wizard Designer' interface for creating a 'Basic Agreement' wizard. The interface is divided into several sections:

- Wizard Settings:** Includes fields for Design Name, Description, Keywords, Category (Default), and Sub Category (Default).
- Wizard Step Rules:** Includes fields for Wizard Title, Context (set to --None--), Label (set to --None--), Start Step (set to --None--), and Review Options (with a checkbox for 'Allow in-progress review').
- Steps in Wizard:** A list of steps currently in the wizard, including 'Submit' and 'Abort', both marked as 'Configured by Rule'. A warning message states: 'No Steps in Wizard. Drag steps over from library.' A 'New Step' button is located at the bottom right of this section.
- Steps Library:** A searchable list of available steps, including 'Contract Field Details', 'Contract Sale Items', 'Enter Line Items', 'Select Business Activity', 'Select Business Function', 'Select Customer Account', 'Service Plan Recommendation', and 'Service Plan Selection'.

At the top right of the interface are 'Cancel' and 'Save and Exit' buttons. An 'Activate Wizard' button is located in the top right corner of the main design area.

- **Wizard Component Library:** Use this tab to create reusable **Inputs** and **Steps** for your Wizard Designs. Separate, searchable libraries for both Inputs and Steps can be created and maintained. Metadata on Inputs and Steps in the library allow you to categorize and keep track of when Inputs and Steps are created or modified.

APTUS
Configure - Quote - Contract

Search... Search

Home Wizard Designs **Wizard Component Library** Wizards +

Wizard Component Library
Home

Steps New Step Search...

Actions	Step Name	Description	Keywords	Category	Subcategory	Owner	Last Modified Date
Edit Del	Contract Details	Use this step to get additional contract details for an agreement record.		Default	Default		11/18/2015 3:27 PM
Edit Del	Create Business Details	In this step the user will enter their business details.		Default	Default		11/17/2015 2:42 PM
Edit Del	Initial Agreement Step	This is the first step for creating an agreement.	Agreement	Default	Default		11/16/2015 12:02 PM
Edit Del	Select Business Activity	Use this step to allow a user to select business activity.		Default	Default		11/18/2015 3:04 PM
Edit Del	Select Business Function	Select Business Function step for Agreement creation.		Default	Default		11/18/2015 3:14 PM
Edit Del	Select Customer Account	Use this step when a customer needs to choose an account.		Default	Default		11/18/2015 3:09 PM
Edit Del	Step						11/17/2015 2:52 PM

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Input Controls New Input Control Search...

Actions	Control Name	Description	Keywords	Category	Subcategory	Owner	Last Modified Date
Edit Del	Agreement End Date	Agreement end date wizard input field.	agreement end date term	Default	Default		11/16/2015 2:27 PM
Edit Del	Agreement Start Date	A wizard input field version of agreement start date.	agreement start date term	Default	Default		11/16/2015 2:25 PM
Edit Del	Billing Address			Default	Default		11/17/2015 1:58 PM
Edit Del	Business Activity			Default	Default		11/18/2015 11:31 AM
Edit Del	Business Function	Allows user to select business function for record.		Default	Default		11/18/2015 3:02 PM
Edit Del	Customer Account	Allows user to specify customer account.		Default	Default		11/18/2015 3:09 PM
Edit Del	Initial Agreement Question	This is the first question to be used for any agreement creation wizard first step.	agreement	Default	Default		11/16/2015 11:46 AM
Edit Del	MSSA	Asks if there is a Master Sales & Service Agreement		Default	Default		11/18/2015 3:22 PM
Edit Del	MSSA Contract Number	Allows the user to specify a MSSA Contract Number for an agreement		Default	Default		11/18/2015 3:25 PM
Edit Del	Transaction Type			Default	Default		11/18/2015 11:32 AM

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- **Wizards:** Use this tab to run Wizards created from the Wizard Designer. Your end-users will be able to easily search and select from Wizard designs to create well-formed records. Wizards are presented to users in a questionnaire style, allowing them to view and preview their progress with sidebar navigation and a review summary, returning to previous Inputs and Steps to make changes or corrections. Users can also use the tab to resume completion of in-progress Wizards or review completed or aborted Wizards.

APTUS
Configure - Quote - Contract

Search... Search

Home Wizard Designs Wizard Component Library Wizards +

Wizards Home

Create New Wizard From Design

Wizard Design Create Basic Agreement ▼ Go

Action	Wizard Name	Status	Wizard Design	Owner	Last Modified Date
Continue	Agreement Wizard 1	In Progress	Agreement Wizard 1	[User Icon]	11/16/2015 11:58 AM
Review	Agreement Wizard 1	Submitted	Agreement Wizard 1	[User Icon]	11/16/2015 11:58 AM
Review	Basic New Agreement	Submitted	Basic New Agreement	[User Icon]	11/17/2015 12:09 PM
Review	Basic New Agreement	Submitted	Basic New Agreement	[User Icon]	11/16/2015 2:49 PM
Continue	Basic New Agreement	In Progress	Basic New Agreement	[User Icon]	11/17/2015 12:08 PM
Review	Create Basic Agreement	Aborted	Create Basic Agreement	[User Icon]	11/19/2015 6:31 PM

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Getting Started with the Wizard Designer

A Wizard Design can be as complex or simple as required, allowing your users to create a basic records or populate second and third-level items conditionally based on input or step rules.

A Wizard Design is comprised of the following key components:

- **Inputs** – Input are the primary wizard component of any wizard. They are the questions and instructions that you provide to the end users of the wizard at runtime. The values received from the end user are stored as Inputs. For example, you might create an input that requires users to select options from a picklist, such as a Business Function or Agreement Start and End dates. Inputs are reusable, so you can use them in as many steps as you want to.
- **Steps** – Inputs are placed in Steps in the desired sequence for runtime use. Steps will also contain rules which are used to designate the navigation flow, the object and submission actions, which are determined and executed based on the end user responses at runtime.
- **Step Input Rules** – These rules allow you to configure rules and expressions for your Inputs at Wizard runtime. Input rule types can be configured to enable/disable or show/hide Inputs, or to conditionally determine the focus object of the Wizard (e.g., Agreement) or conditionally determine the record type for the focus object's record to be created (e.g., SOW, NDA, MSA, etc.), or to set the value of one input based on the value of other inputs.
- **Wizard Step Rules** – These rules control the flow of Wizard steps at runtime. You can create "GoTo" rules for your steps which determine step order in the Wizard based on runtime user responses. The rules you create can be assigned as default for individual steps and can be made conditional based on expressions you create for each rule, using values from Inputs to determine whether or not rules are fired for any given step.

The following sections describe the Wizard design process, from initial settings to input and steps, including guidance on how to create your own Inputs and Steps during design and how to use and maintain the Wizard Component Library. The Agreement object is used as the focus object in most Wizard examples, but the same instructions can be used to create a Wizard based on **Account**, **Opportunity** or any custom Salesforce object.

Creating a New Wizard Design


The following sections describe the Wizard Design process. The process is comprised of several steps:

- [Configure Wizard Settings and Add Steps](#)
- [Create Steps for the Wizard](#) (optional)
- [Configure Step Input Rules](#)
- [Configure Wizard Design Step Rules](#)
- [Activate the Wizard](#)

Configuring Wizard Settings

The first step in designing a Wizard is to define the basic settings for your Wizard, including the name, description and other search properties, as well as the **Context** (for one Object or All Objects) and the **Start Step**.

In this step you also define the Static Resource location and CSS file for any branding and/or banner logo you want to add to your Wizard (see the table below). For information on how to add static resources to your Salesforce org, refer to Salesforce documentation on [Using Static Resources](#). Any Static Resource used with the Contract Wizard must contain all files in an **application/zip** format.

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

To configure Wizard Settings

1. From the Salesforce application menu, choose **Apttus Contract Wizard**. The application displays the Home tab and three tabs unique to the Contract Wizard: Wizards, Wizard Designs and Wizard Component Library.
2. Navigate to the **Wizard Designs** tab (click **+** and add the tab if it does not already exist).
3. Click **New Wizard Design** to open a new Wizard Design form displaying fields for Wizard Settings.

APTUS Wizard Designer [Cancel] [Save And Exit]

Enter Wizard Name [Activate]

Wizard Settings | Wizard Step Rules

Design Name
Enter name to proceed

Banner Statement

Description

Keywords

Category
Default

Subcategory
--None--

Context Type
All

Context Object
-- None --

Static Resource

CSS Filename

DataSource Callback

Submit Page Options
☐ Allow Review Edit

Steps in Wizard
Drag steps from library or create new.
Submit Configured by Rule
Abort Configured by Rule

Steps Library
Search Wizard Steps

- Contract Details
- Create Business Details
- Define Sales Item Types
- Sales Line Item Details
- Select Business Activity
- Select Business Function
- Select Customer Account

[New Step]

4. Enter the following search properties into the form:

Setting	Description
Design Name	Enter a name for your Wizard Design. This name can be internal but is used in the runtime banner for the Wizard steps when the user is interacting with the Wizard if Banner Statement (below) is not defined. Note: You cannot add any steps to your Wizard Design until you choose a Design Name.
Banner Statement	Enter a Banner Statement to display at Wizard runtime when the user is interacting with the Wizard. If left blank, the Wizard Design Name will be used instead.
Description	Enter a description for your Wizard Design which describes its intended use (for example, "Use this Wizard to create MSA Agreements for Acme.")
Keywords	Enter a list of keywords which can be used to search for this Wizard Design.
Category	Choose an option from a drop-down list of pre-defined Wizard Categories (define picklist values on the Wizard Design object).
Sub Category	Choose an option from a drop-down list of pre-defined Wizard Sub Categories (define picklist values on the Wizard Design object).

Setting	Description
Context Type	Define whether your Wizard Design context will apply to All objects or a specific Object .
Context Object	Choose the specific context Object for your Wizard. This option is only available if you specified "Object" for Context Type. (e.g., "Agreement")
Static Resource Name	<p>Enter the static resource name where your banner logo (must be named logo.png), foreground images (for branding of any steps) and your CSS file reside. Banner height is 50 pixels. The CSS file you provide can override any style present in the runtime wizard—the margin-left of the Title/Breadcrumbs in the banner can be modified to allow for more breathing room from where the logo is placed. How to create your static resource:</p> <ol style="list-style-type: none"> 1) Place all images and .css files inside a single folder and compress them into a ZIP. 2) Go to Salesforce Setup and enter "Static Resources" into the Quick Search box. 3) Create a new <i>Public</i> Static Resource and upload the ZIP file.
CSS File Name	The name of the CSS file located in the static resource (e.g., "style.css").
DataSource Callback	Enter the name of the Callback Resource that will store values to pre-populate runtime input responses when this design is used to create a new Wizard. This resource holds the implementation class name for the callback interface. The interface contains a <code>getData()</code> method and returns a JSON string to pre-populate fields in the Wizard.
Allow Review Edit	Select this checkbox to enable the Wizard runtime user to edit steps during the Wizard review prior to submission.


i When you determine a specific **Context Object** for a Wizard Design, the available steps listed in the **Steps Library** to the right of the form will be refreshed. Only Steps which match the Object type you selected will be displayed for use.

5. Drag-and-drop a step from the Steps Library to the **Steps in Wizard** pane. If you do not see your Step listed, use the type-ahead feature in the Search box to locate the step you want to use.

i You cannot add steps to a Wizard unless the Design Name has been entered.

6. You can take the following actions on steps you have added:
 - Hover over a step in the list and click **Edit** to edit the step settings and inputs for *this wizard design only*.
 - Hover over a step in the list and click **Delete** to remove a step from the Wizard.

- Click and drag steps in the Steps in Wizard pane to reorder them. If you have a more complex flow to your wizard, click on **Wizard Step Rules** to configure condition-based rules for your steps (see [Configuring Wizard Step Rules](#)).

 The **Submit** and **Abort** steps system-provided and are always included in every Wizard design and cannot be modified, removed or reordered. Condition expressions can be defined to go to either step as part of a rule.

7. Add more steps from the Step Library as described in the general sequence you want them to appear in the Wizard.
8. If you do not find the correct step in the library and need to create a new one for your wizard, see [Creating Steps from the Wizard Designer](#).
9. Click **Save And Exit** to save your changes or click **Cancel** to discard the Wizard and return to the Wizard Designs tab.

Creating Steps from the Wizard Designer

Steps are used to designate the actions that occur when end-users use the Wizard. Steps use common elements, like actions and rules, to define the flow of your Wizard. Each step represents a screen in the wizard runtime.

If the step you want to use in a Wizard design does not exist in the Steps Library, you can create one and use it with your Wizard from the Wizard Designer. Steps created in this way can be saved for use in the current Wizard design only.

To create a new Step from a Wizard design

1. From the Wizard Designer, click on **New Step**. (Note: Your Wizard design must have a Design name before you can create a new step.)

APTUS Wizard Designer [Cancel] [Save And Exit]

CC Business Wizard [Activate]

Wizard Settings | Wizard Step Rules

Design Name
CC Business Wizard

Description
Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.

Keywords
CC Business

Category
Business

Subcategory
All

Banner Statement
Your Business Wizard at Work

Context Type
Object

Context Object
Agreement

Static Resource

CSS Filename

DataSource Callback

Submit Page Options
☐ Allow Review Edit

Steps in Wizard
Drag steps from library or create new.

Submit	Configured by Rule
Abort	Configured by Rule

[New Step]

The Step Settings form is displayed.

APTUS Wizard Designer [Cancel] [Save and Use in Wizard]

CC Business Wizard > Enter Step Name

Step Settings | Input Rules | Step Preview

Step Name
Enter name to proceed

Description

Keywords

Category
--None--

Subcategory
--None--

Banner Statement

Runtime Help Text

Context Type
--None--

Context Object
-- None --

Input Group Option
--None--

Image Filename

Inputs
Drag inputs from library or create new.


[New Input]

2. Enter the following properties into the form:

Step Setting	Description
Step Name	Enter a name for your Step. This name can be internal but is used in the runtime banner when the user is interacting with the Wizard if Banner Statement (below) is not defined. Note: You cannot add any inputs to your step until you choose a Step Name
Banner Statement	Enter a Banner Statement to display at Wizard runtime when the user is interacting with the Wizard. If left blank, the Step Name will be used instead.
Description	Enter a description for your step which describes its intended use (for example, "Define business details in this step.")
Keywords	Enter a list of keywords which can be used to search for this step.
Category	Choose an option from a drop-down list of pre-defined Step Categories (define picklist values on the Wizard Step object).
Sub Category	Choose an option from a drop-down list of pre-defined Step Sub Categories (define picklist values on the Wizard Step object).
Runtime Help Text	Enter text to display when the user clicks the help icon at the top of the Step page.
Context Type	Define whether your Step will apply to All objects or a specific Object .
Context Object	Choose the specific context Object for your Step. This option is only available if you specified "Object" for Context Type. (e.g., "Agreement")
Input Group Option	<p>Select an option from the drop-down list to choose how Inputs will be displayed in the Step (as groups):</p> <p>None – Select this option to display all Inputs for the step in the sequence listed in the Inputs pane.</p> <p>Repeatable – Select this option to allow the end user to add multiple records for selected Inputs in list format. User can click the Add Item button to add additional values for the same group of Inputs (e.g., multiple Addresses).</p> <p>Table Layout – Select this option to allow the end user to add multiple records for selected inputs in tabular format. User can click the Add Item button to add additional values for the same group of Inputs (e.g. Agreement Line Item Products, Quantity, List Price, etc.)</p>

Step Setting	Description
Image Filename	<p>Filename of the image located in the Static Resource (defined in Wizard Settings) to display in this step to the right of the input controls. For information on setting up the Static Resource, refer to Configuring Wizard Settings.</p> <p>Note: You can only add images to steps created within a specific Wizard design. You cannot add images to steps created from the Component Library.</p>

3. Drag-and-drop an Input from the Inputs Library to the **Inputs** pane. If you do not see your Input listed, use the type-ahead feature in the Search box to locate the Input you want to use.

 You cannot add inputs to a step unless the Step Name has been entered.

4. You can take the following actions on Inputs you have added:
Add more inputs from the Inputs Library in the sequence you want them to appear in the step.
 - Hover over an Input in the list and click **Edit** to edit the input settings for this step only.
 - Hover over an Input in the list and click **Delete** to remove an Input from the step.
 - Click and drag Inputs in the Inputs pane to reorder them.
5. If you do not find the correct input in the library and need to create a new one to use in your step, see [Creating Inputs from the Wizard Designer](#).
6. To create rules which govern inputs for the current step, click on **Input Rules** (see [Configuring Step Input Rules from the Wizard Designer](#)).
7. Click **Save And Use in Wizard** to save your changes or click **Cancel** to discard changes and return to the Wizard Design form.

Creating Inputs from the Wizard Designer

Input controls are the primary components of any wizard. They are the questions and instructions that you provide to the end users of your wizard. For example, you might create an input control that requires users to select picklist options, such as Business Function or Agreement Start and End dates. Input controls are reusable, so you can use them in as many steps as you want to.

If an Input you want to use in a step does not exist in the Inputs Library, you can create one and use it with your step. Inputs created in this way can be saved for use in the current Wizard design only.

To create a new Input from a Step

1. From the Step Settings form, click **New Input**.

APTUS Wizard Designer [Cancel] [Save and Use in Wizard]

CC Business Wizard > **Select Business Function**

Step Settings | Input Rules | Step Preview

Step Name:

Banner Statement:

Description:

Runtime Help Text:

Keywords:

Context Type:

Category:

Context Object:

Subcategory:

Input Group Option:

Image Filename:

Inputs:

New Input

The Input Settings page is displayed.

APTUS Wizard Designer [Cancel] [Save and Use in Step]

CC Business Wizard > Select Business Function > **Enter Input Name**

Input Settings | Preview

Control Name:

Question/Instruction:

Description:

Runtime Help Text:

Keywords:

Runtime Input: ☐ Allow Comments and Attachments

Category:

☐ Required

Subcategory:


☐ Read Only

Field Class:

Input Control:

2. Enter the following properties into the form:

Input Setting	Description
Control Name	Enter a name for your Input.
Question/Instruction	Enter a question or instruction which the end user will see in the runtime wizard.
Description	Enter a description for the input which describes its intended use (for example, "Use this Wizard to create MSA Agreements for Acme.")
Keywords	Enter a list of keywords which can be used to search for this Input.
Category	Choose an option from a drop-down list of pre-defined Input Categories (define picklist values on the Wizard Input Control object).
Sub Category	Choose an option from a drop-down list of pre-defined Input Sub Categories (define picklist values on the Wizard Input Control object).
Runtime Help Text	Enter text to display when the user hovers over the help icon next to the question/instruction.
Runtime Input	Determine how the end user can interact with this Input at wizard runtime:

Input Setting	Description
	<p>Allow Comments and Attachments – Select this check box to enable the end user to add comments and/or attachments in addition to the input control value. Comments are entered into a text area field and are limited to 500 characters. There is no limit to the number of files a user can attach. For an example of how this looks in the Wizard, see Running Wizards.</p> <div data-bbox="651 531 1456 1066" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p> How Comments and Attachments are used in the Wizard</p> <p>For any type of Wizard, all runtime comments and attachments are saved in the Wizard Runtime Input instance record under Notes & Attachments. You can make use of these comments and attachments through your own implementations.</p> <p>If you design a Wizard to create a record, comments and attachments are copied to the Notes & Attachments list only if the corresponding input uses an Object for the same object created by the record (e.g., Input defined as 'Field Class = Object Field,' 'Object = Agreement' when the Wizard creates as Agreement record). Notes containing comments are named after the Object Field for which they were entered (e.g., "Account Notes," or "Agreement Risk Rating Notes").</p> </div> <p>Required – Select this check box if a value is required for the input. An end user will not be able to complete the current step without entering a value for this input.</p> <p>Read Only – Select this check box if you plan to have the input value set by Step Input rules <i>in all cases</i>. The end user will not be able to change the value of this input.</p>

Input Setting	Description
Field Class	<p>The Field Class defines the type of response you expect for the input.</p> <ul style="list-style-type: none"> • Wizard Input Field – Use this field class when you want the response to indirectly set other Wizard values. Wizard input fields values are only used to affect the value or state of other input controls using Step Input Rules. When you choose this field class, you must specify one of the following data types: <ul style="list-style-type: none"> • Checkbox • Date • Number • Picklist • Picklist Radio Button • Multi Picklist • Text • Text Area <p>If you choose to make the Wizard Input field a Picklist type, you must also enter valid values to be used as input responses.</p> <ul style="list-style-type: none"> • Object Field – Use this field class when you want the response to directly set a field value on the Salesforce object which is created from the Wizard (e.g., the "Agreement Start Date" field on the Agreement object). Use the drop-down list under Input Control to choose the Object Name, then choose the Field Name based on the object chosen.

- When you are finished creating your Input, click on the **Preview** tab to show how the input will appear at Wizard runtime.

The screenshot shows the APTUS Wizard Designer interface. At the top, there's a header with the APTUS logo and the text 'Wizard Designer'. To the right of the header are two buttons: 'Cancel' and 'Save and Use in Step'. Below the header, there's a breadcrumb trail: 'CC Business Wizard > Select Business Function > Agreement Start Date'. Underneath the breadcrumb, there are two tabs: 'Input Settings' and 'Preview', with 'Preview' being the active tab. The main content area shows a preview of the input field. It starts with the text 'Enter a start date for your Sales contract.' followed by a date input field. The date '4/20/2016' is entered in the field and is highlighted with a blue border.

- Click **Input Settings** to return to the Input form.
- Click **Save and Use in Step** to save your new Input or **Cancel** to discard changes and return to the Step Settings form. The new Input is added to the list displayed in the Inputs pane for your step.

The screenshot shows the APTUS Wizard Designer interface. The title bar includes the APTUS logo and the text 'Wizard Designer'. On the right, there are 'Cancel' and 'Save and Use in Wizard' buttons. The main content area is titled 'CC Business Wizard > Select Business Function'. Below this, there are three tabs: 'Step Settings', 'Input Rules', and 'Step Preview'. The 'Step Settings' tab is active. It contains several fields and dropdowns for configuring the step:

- Step Name:** 'Select Business Function' (highlighted with a red vertical bar).
- Description:** 'Use this step to select business function for a sales contract.'
- Keywords:** (empty text field).
- Category:** 'Default' (dropdown menu).
- Subcategory:** 'Default' (dropdown menu).
- Banner Statement:** 'Identify Your Business Function'.
- Runtime Help Text:** 'Choose an option from the list.'
- Context Type:** 'All' (dropdown menu).
- Context Object:** '-- None --' (dropdown menu).
- Input Group Option:** '--None--' (dropdown menu).
- Image Filename:** (empty text field).
- Inputs:** A list of inputs on the right side, with 'Agreement Start Date' highlighted by a red circle. A 'New Input' button is located below the list.

Configuring Step Input Rules from the Wizard Designer

Step Input Rules allow you to configure rules and expressions for your Inputs at Wizard runtime. These rules apply to Inputs which are part of the same step, and generally trigger based on user interaction with the Wizard. Input rule types can be configured to:

- *Enable* or *Disable* Inputs
- *Show* or *Hide* Inputs
- Determine the Focus Object of the Wizard (e.g., Agreement)
- Determine the Record type for the focus object's record to be created (e.g., SOW, NDA, MSA, etc.)
- Set the value of one input based on the value(s) of other inputs.
- Set the value of a custom field based on the value(s) of inputs in the same step.

i If you are creating a Wizard Design which will create an object record you must include at least one Determine Focus Object and one Determine Record Type rule for each object to be determined.

To configure Input Rules for a Step

1. From the Step Settings form, click on the **Input Rules** tab. A graphic representation of the list of inputs for the step is displayed.

Inputs are displayed in the sequence you defined in Step Settings. Each input is displayed on the page with each input rule listed below the name of the input.

2. To create a new rule for an input, click on the **+** icon next to an input name or hover over the list of rules and click **New**. A dialog is displayed for defining the input rule.

3. Choose a rule type to use from the **Rule** drop-down list.

Rule For: Determine Transaction Type ✖

Rule

-- None --
 -- None --
 Determine Focus Object
 Determine Record Type
 Enable This Control
 Disable This Control
 Show This Control
 Hide This Control
 Set This Control Value
 Set Custom Value

Rule Type	Description
Determine Focus Object	<p>Use this rule to allow the user to determine the focus object for the runtime record to be created (e.g., Agreement object). Note: If this rule is used, there must also be a Determine Record Type rule used to create a record from the Wizard <i>if record types have been defined for the object</i>.</p> <p>Important: When using this rule, make sure to select the Rule Type before the Object to avoid configuration errors.</p>
Determine Record Type	<p>Use this rule to allow the user to determine the record type for the focus object's record to be created (e.g., SOW, MSA, NDA for Agreement). Note: If this rule is used, there must also be a Determine Focus Object rule used to create a record from the Wizard.</p>
Enable This Control	<p>Use this rule to allow the user to edit the field value for this input. This is the default setting for an input in a step. You can use this as a rule to conditionally enable the input if a previous input rule caused it to be disabled.</p>
Disable This Control	<p>Use this rule if you want to prevent the user from editing this input's value. You can use this rule to conditionally make an input read-only.</p>
Show This Control	<p>Use this rule to show the field value for this input at runtime. This is the default setting for an input in a step. You can use this rule to conditionally show the input if a previous input rule caused it to be hidden.</p>
Hide This Control	<p>Use this rule to hide the field value for this input at runtime. You can use this rule conditionally to allow different inputs to be exposed within a step based on previous responses in the step.</p>

Rule Type	Description
Set This Control Value	Use this rule to set the field value for this input based on the response values of one or more other inputs in the same step.

4. To make your rule conditional, click **Add Another Rule** to add a condition to your rule type.

Rule For: Transaction Type

Rule

Determine Focus Object Agreement

1. -- Select Input Control -- -- Operator -- -- Value --

Advanced Expression 1

[Add Another Rule](#)

Save Cancel

Note: If you choose not to add conditions to your rule type, the Input rule you create will always trigger regardless of other rules in the step.

5. Use the drop-down menus to build a condition expression:
- Choose an input from the list of inputs in the current step
 - Choose an operator for the expression which is specific to the chosen input's data type
 - Choose a value for the expression which defines the condition

Rule For: Transaction Type

Rule

Determine Focus Object Agreement

1. Business Activity equals

-- Value --
-- Value --
Sales Contract
Sales Quote
Sales Order

Advanced Expression 1

[Add Another Rule](#)

Save Cancel

6. Add more conditions as necessary to complete the rule. By default, all expressions use **AND** logic, meaning all conditions are required for the rule to execute. You can use the Advanced Expression field 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).

Rule For: Transaction Type

Rule

Determine Focus Object Agreement

1. Business Activity equals Sales Contract

2. Transaction Type equals Create

Advanced Expression 1 AND 2

[Add Another Rule](#)

Save Cancel

There is no limit to the number of conditions you can create for a single input rule.

- Click **Save** to save your new input rule or **Cancel** to discard rule changes. The step inputs graphic changes to reflect the newly-created rule.

APTUS Wizard Designer Cancel Save and Use in Wizard

Agreement Wizard Acme > Select Business Activity

Step Settings Input Rules Step Preview

Business Activity +

No custom rules set for this input

Transaction Type +

2.1 Determine Focus Object Agreement Edit Delete

- From the Input Rules tab you can:
 - Click the **+** icon to create another rule for an input.
 - Click **Edit** next to an existing input rule to make changes.
 - Click **Delete** next to an existing input rule to delete the rule.
 - Click **Step Settings** to return to the step and create or add more inputs or save the step.

Previewing Wizard Steps from the Wizard Designer

You can preview what a step will look like at runtime from Step Settings. To preview the step, click on the **Step Preview** tab. The page displays a preview of the step you are building:

The screenshot shows the 'Step Preview' tab for a wizard step titled '#. Select Business Activity'. The breadcrumb is 'Agreement Wizard Acme > Select Business Activity'. There are three tabs: 'Step Settings', 'Input Rules', and 'Step Preview' (which is active). In the top right, there is an 'Input Group Option' dropdown menu set to '--None--'. The main content area contains two questions: 'What type of business activity do you wish to work with?' with a dropdown menu showing 'Sales Contract', and 'What type of transaction do you wish to perform?' with a dropdown menu showing 'Create'.

The Step Preview renders a representation of the step in the Wizard at runtime. You can interact with the preview to an extent—it does not show or demonstrate any conditional input rules you have defined. For example, if you disable a control based on another input's value and choose that value, the input in question will not be disabled within the preview.

i The Step Name will always be preceded by a # symbol, which is a placeholder for the assigned step number at runtime (dependent on the sequence of steps in the Wizard).

You can also preview how the step will look when you choose an Input Group Option. Use the drop-down menu in the upper-right-hand corner of the preview page to switch between Input Group views. For example, the above preview rendered in a table layout would look as follows.

The screenshot shows the 'Step Preview' tab for a wizard step titled '#. Enter The Sales Line Item Details'. The breadcrumb is 'A - Business Wizard 1 > Sales Line Item Details'. There are three tabs: 'Step Settings', 'Input Rules', and 'Step Preview' (which is active). In the top right, there is an 'Input Group Option' dropdown menu set to 'Table Layout'. The main content area displays a table with four columns: 'Product', 'Quantity', 'Unit List Price', and 'Net Price'. Each column has an input field. Below the table is a button labeled 'Add Item'.

Product	Quantity	Unit List Price	Net Price
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Note that if you change the Input Group Option in the Step Preview, the option gets changed on the Step Settings form as well. Save the step again after making more changes.

Configuring Wizard Step Rules

Wizard Step Rules control the flow of Wizard steps at runtime. You can create "Go to" rules for your steps which determine step order in the Wizard based on runtime user responses. The rules you create can be assigned as default for individual steps and can be made conditional based on expressions you create for each rule, using values from Inputs to determine whether or not rules are fired for any given step.

Much like Step Input Rules, Wizard Step Rules for any given Wizard are displayed as a graphical representation of the Wizard flow. As you add steps to your Wizard and configure **Go to** rules, the flow of the Wizard changes and is visually represented to give you an accurate snapshot of Wizard flow.

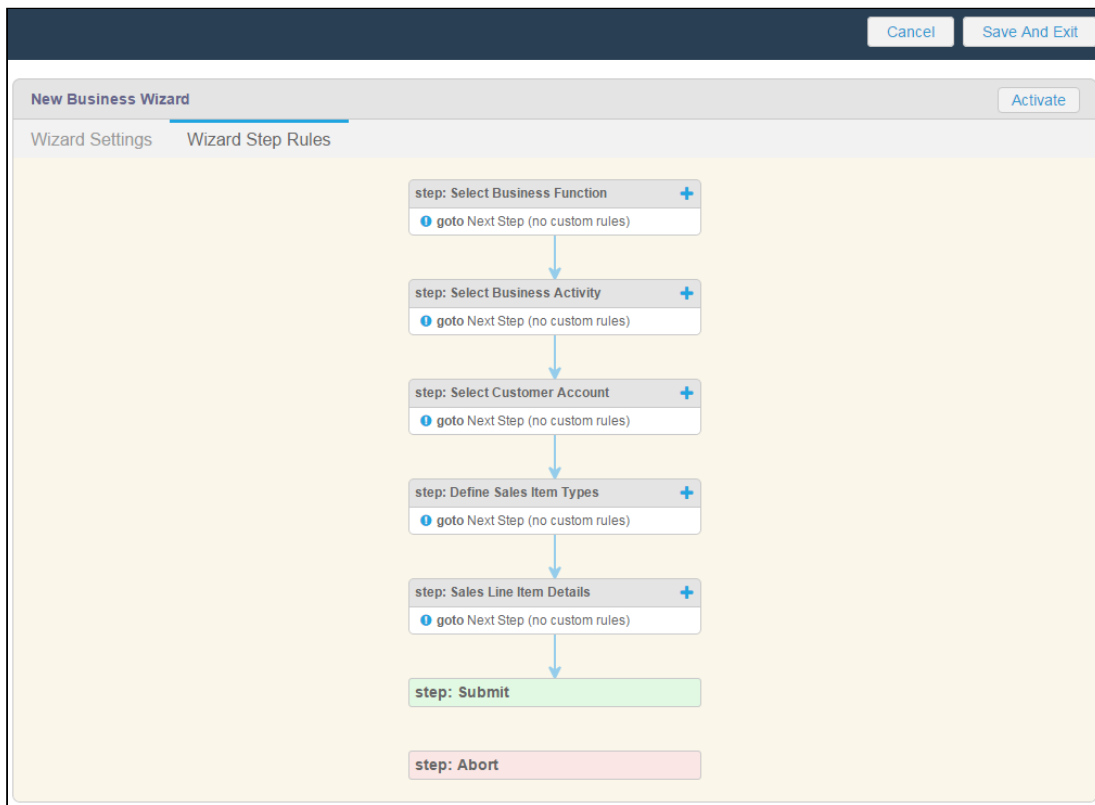
To configure Wizard Step Rules, you must have already added steps to the Wizard Design.

To configure Wizard Step Rules

1. From the Wizard Designer Settings page, click on the **Wizard Step Rules** tab.

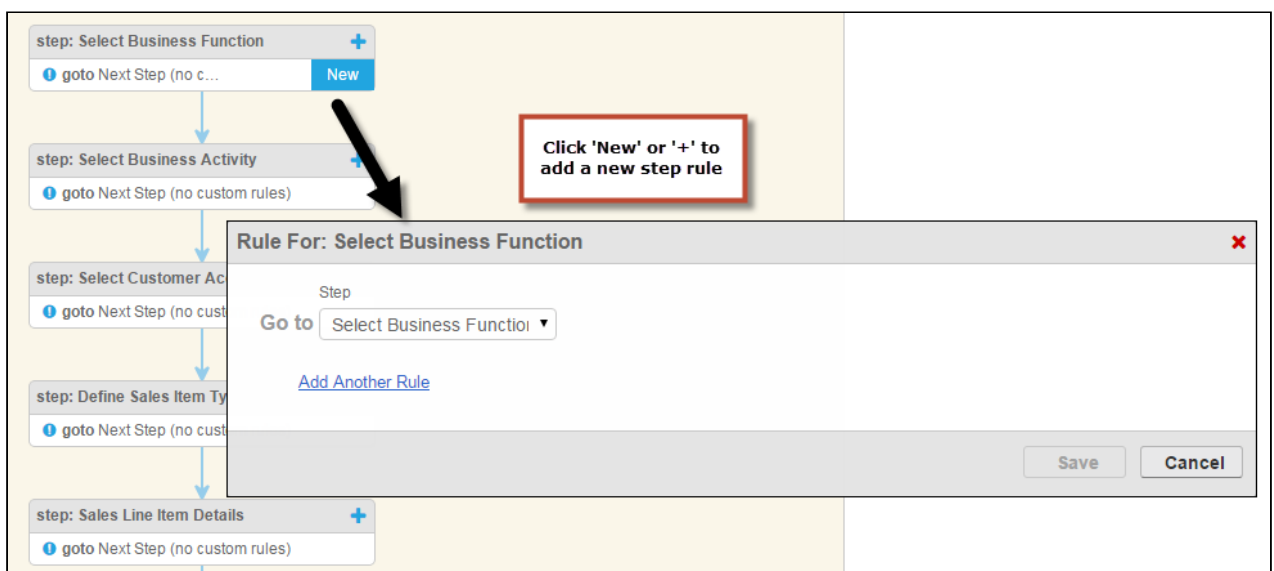
The screenshot shows the 'Wizard Designer' interface. At the top, there are 'Cancel' and 'Save And Exit' buttons. Below the header, the 'New Business Wizard' section is visible. The 'Wizard Settings' tab is selected, and the 'Wizard Step Rules' tab is highlighted with a red circle. The 'Wizard Settings' tab contains fields for Design Name, Description, Keywords, Category, Subcategory, Banner Statement, Context Type, Context Object, and Submit Page Options. The 'Wizard Step Rules' tab displays a graphical representation of the wizard flow, showing steps like 'Select Business Function', 'Select Business Activity', 'Select Customer Account', 'Define Sales Item Types', 'Sales Line Item Details', 'Submit', and 'Abort'. The 'Submit' and 'Abort' steps are marked as 'Configured by Rule'. A 'New Step' button is located at the bottom right of the flow diagram.

The Wizard Step Rules tab displays a graphical representation of your current Wizard, with all steps and any current rules shown as a flow from the first step to the Submit step.



By default, steps flow in the Wizard based on their listed sequence in Wizard Settings, with the Go to rule defined as "Next Step (no custom rules)."

- Click on the **+** icon next to the step name or hover over the list of rules and click **New**. A dialog is displayed for defining the step rule.



3. Choose a Go to Step rule from **Step** drop-down list.

Rule For: Select Business Function

Step

Go to

Select Business Function

Ad

Select Business Function

Select Business Activity

Select Customer Account

Define Sales Item Types

Sales Line Item Details

Submit

Abort

Save

Cancel

Go to Step Rule	Description
Go to <i>Step Name</i>	Use this rule to define a specific step as the next step in the Wizard flow. For example, for the Select Business Function step rule, you could choose "Select Business Activity."

Go to Step Rule	Description
Go to Submit	<p>Use this rule to make this step the last step in the Wizard. The Next button in Wizard runtime will be replaced with the Submit button. When Submit is clicked, the user is taken to the Wizard acknowledgement screen (or review page) and the Wizard is marked submitted (see Running Wizards for more information). Optionally, you can configure a URL to take an action upon Submit. Form your URL in one of two ways:</p> <ul style="list-style-type: none"> • If your Wizard creates a record as a result of submission (i.e. one of your inputs determines the focus Object AND Record Type), you can configure the URL to: <ul style="list-style-type: none"> • take the user to the default Salesforce record page for the record created (e.g., "%Agreement%"). • take the user to a page name with parameters (e.g., Submit Request Mode for an Agreement "Apttus__AgreementSubmitRequest?id=%Agreement%") • If your Wizard does not create a record but is simply posting information collected as the user interacts with the Wizard (for example, as a survey), use a REST URL for POST. The user is taken to the Wizard acknowledgement screen. <p>Note: Any URL entered for a Go to Submit rule must be relative, starting with the page name. For example, if you want to redirect the user to the agreement, use "%Agreement%" as the URL. The Object name between the % symbols represents the <i>Label</i>, not the API name.</p> <p>If there is NO URL specified for Go to Submit and the Wizard creates a record, by default the user will be taken to the Salesforce page for the newly-created record.</p>
Go to Abort	<p>Use this rule to Abort the runtime Wizard from this step. In most cases, a rule will conditionally trigger this Go to Step as it will not make sense to always have a step lead to Abort. As with the Go to Submit rule, you can optionally add a URL to another Salesforce page to Go to Abort, which will redirect the user to that page after they abort the Wizard. The URL enter for a Go to Abort rule must be relative, starting with page name.</p>

4. To make your Go to rule conditional, click **Add Another Rule** to add a condition to your rule type.

Rule For: Select Business Function

Step

Go to **Select Business Activity**

1. -- Select Input Control -

Advanced Expression 1

[Add Another Rule](#)

Save Cancel

5. Use the drop-down menus to build a condition expression:
- Choose an input from the list of inputs which are a part of the current step.
 - Choose an operator for the expression which is specific to the chosen input's data type.
 - Choose a value for the expression which defines the condition.

Rule For: Select Business Function

Step

Go to **Select Business Activity**

1. Business Function equals -- Value --

Advanced Expression 1

[Add Another Rule](#)

Save Cancel

6. Add more conditions as necessary to complete the rule. By default, all expressions use AND logic, meaning all conditions are required for the rule to execute. You can use the Advanced Expression field 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).

Rule For: Select Business Activity ✕

Step

Go to Select Customer Accour ▼

1. Business Activity ▼ equals ▼ Sales Contract ▼ ✕

2. Transaction Type ▼ equals ▼ Create ▼ ✕

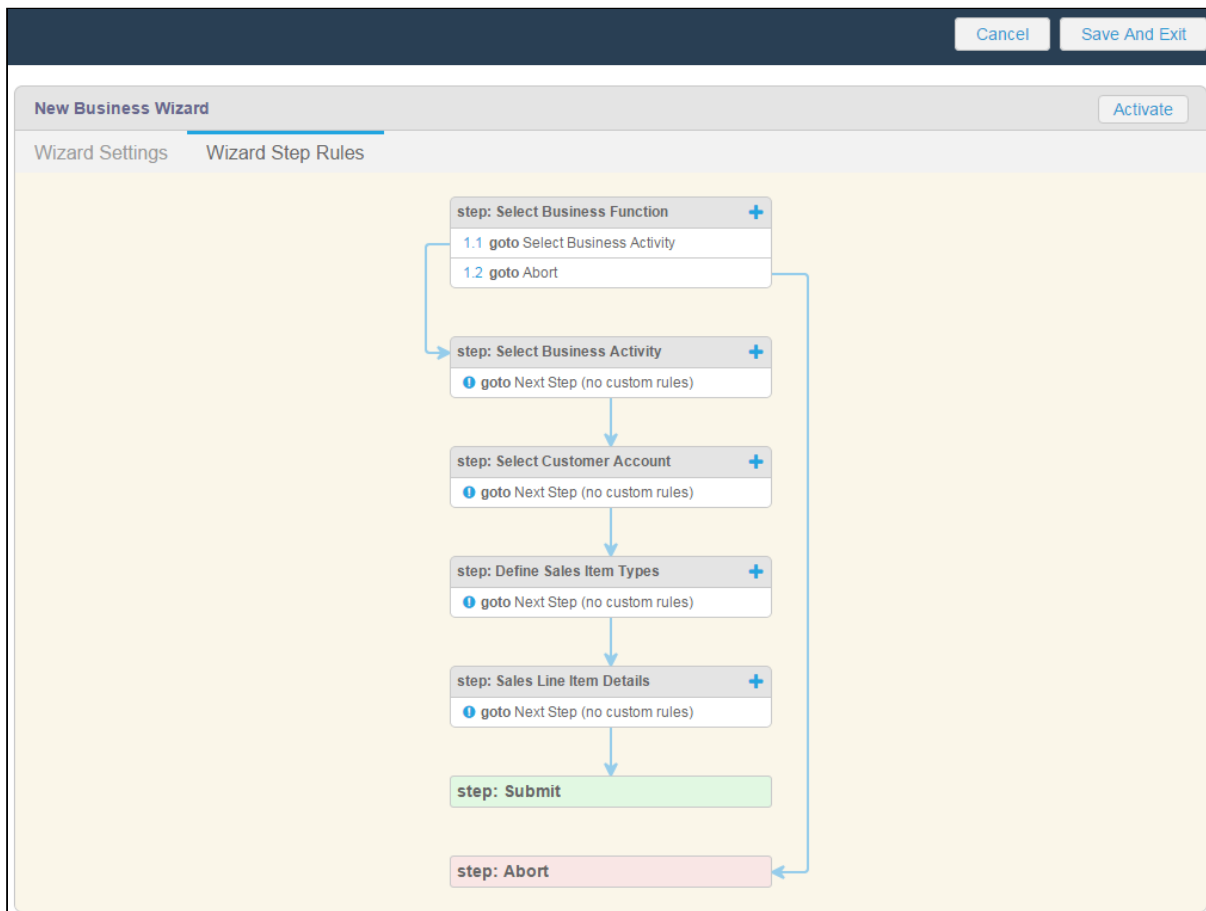
Advanced Expression 1 AND 2

[Add Another Rule](#)

Save Cancel

ⓘ There is no limit to the number of conditions you can create for a single step rule.

7. Click Save to save your new step rule. The graphic changes to reflect the new flow based on the rule you have created. In the below example, a rule was configured to conditionally go to step 2 and a second rule was configured to conditionally abort the wizard.



8. From the Wizard Step Rules tab you can:

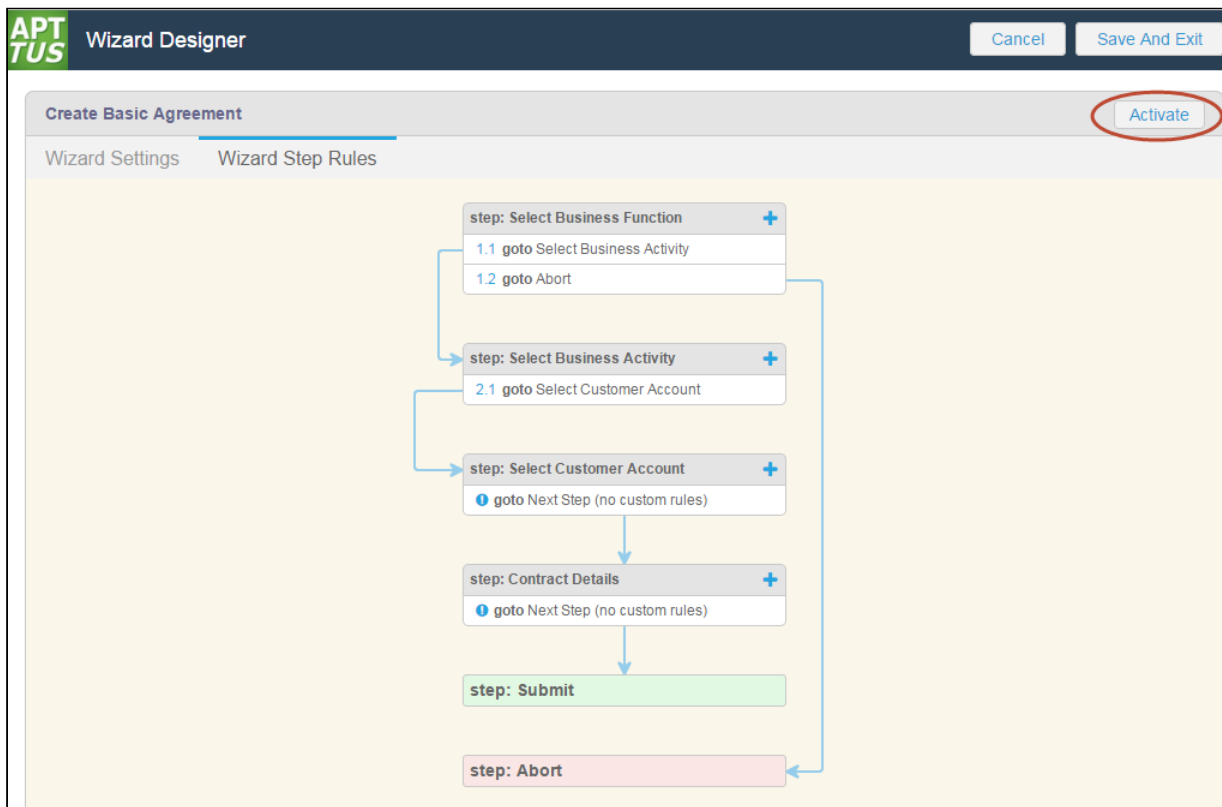
- Click the **+** icon to create another step rule.
- Click **Edit** next to an existing step rule to make changes.
- Click **Delete** next to an existing step rule to delete the rule.
- Click **Wizard Settings** to return to the Wizard.

Activating a Wizard Design

When you are finished adding Steps, Inputs and creating Step and Input rules for your Wizard (along with any other settings), you can **activate** your Wizard design to make it available to users from the Wizards tab. You can also activate a Wizard design which has been [previously deactivated](#).

You can activate your Wizard Design from two locations within the Configurable Wizard:

- from the **Wizard Step Rules** tab.

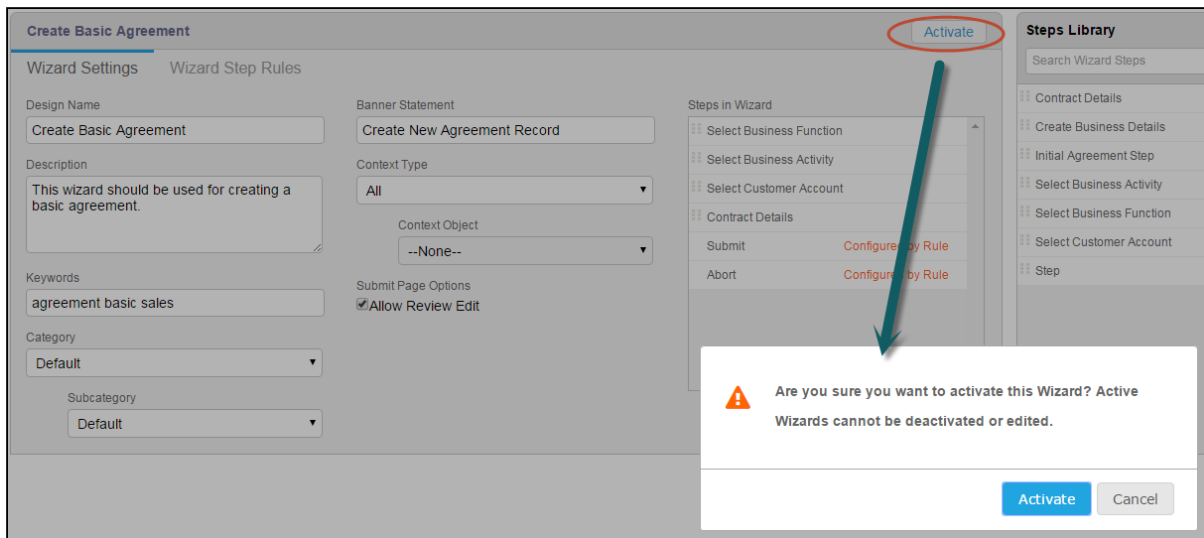


- from the **Wizard Settings** page.

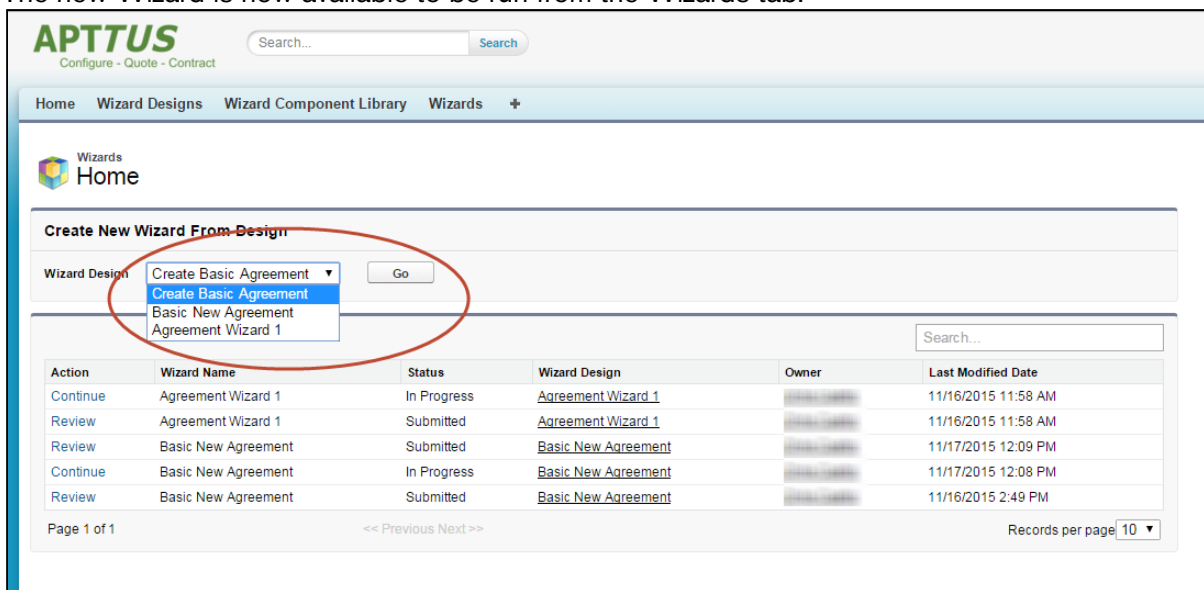
To activate a Wizard Design

1. Navigate to the Wizard Designer **Wizard Settings** page or **Wizard Step Rules** tab.

- Click **Activate**. A pop-up dialog is displayed to confirm activation.



- Click **Activate** to activate your Wizard or click **Cancel** to return to the Wizard to make more edits. The new Wizard is now available to be run from the Wizards tab.



Reviewing a Wizard Design following Activation

After the Wizard is activated, the Activate button changes to **Activated**.

To review the Wizard design, go to the **Wizard Designs** tab and click **Edit** next to the Wizard design.

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Search... Search

Home Wizard Designs Wizard Component Library Wizards +

Wizard Designs Home Help for this Page

Wizard Designs New Wizard Design Search...

Actions	Design Name	Description	Keywords	Category	Subcategory	Owner	Last Modified Date	Status
Edit Del	A - Business Wizard 1	Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.	CN Basic 1	Default			2/18/2016 11:27 AM	Draft
Edit Del	Agreement Creation Wizard 1	Create an agreement record.	agreement	Default	Default		2/10/2016 1:10 PM	Activated
Edit Del	Agreement Wizard 1	Wizard for creating an agreement record		Default	Default		2/18/2016 11:27 AM	Draft
Edit Del	Agreement Wizard 2			Default			2/18/2016 11:27 AM	Draft
Edit Del	Agreement Wizard Acme	Create a new agreement record using this wizard.		Default	Default		2/18/2016 11:27 AM	Draft
Edit Del	Basic New Agreement			Default			2/18/2016 11:27 AM	Draft
Edit Del	Basic New Agreement	Use this Wizard to create a new agreement record.	agreement nda msa sow	Default	Default		2/18/2016 11:27 AM	Draft
Edit Retire	Business Wizard 2	Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.	CC Basic Business	Business	All		2/8/2016 5:52 PM	Deactivated
Edit Del	Business Wizard Release	Use this Wizard to create a Primary Sales Contract.	Business Sales Contract Agreement	Default	Default		2/18/2016 11:27 AM	Draft
Edit Del	Create Basic Agreement	This wizard should be used for creating a basic agreement.	agreement basic sales	Default	Default		2/18/2016 11:27 AM	Draft

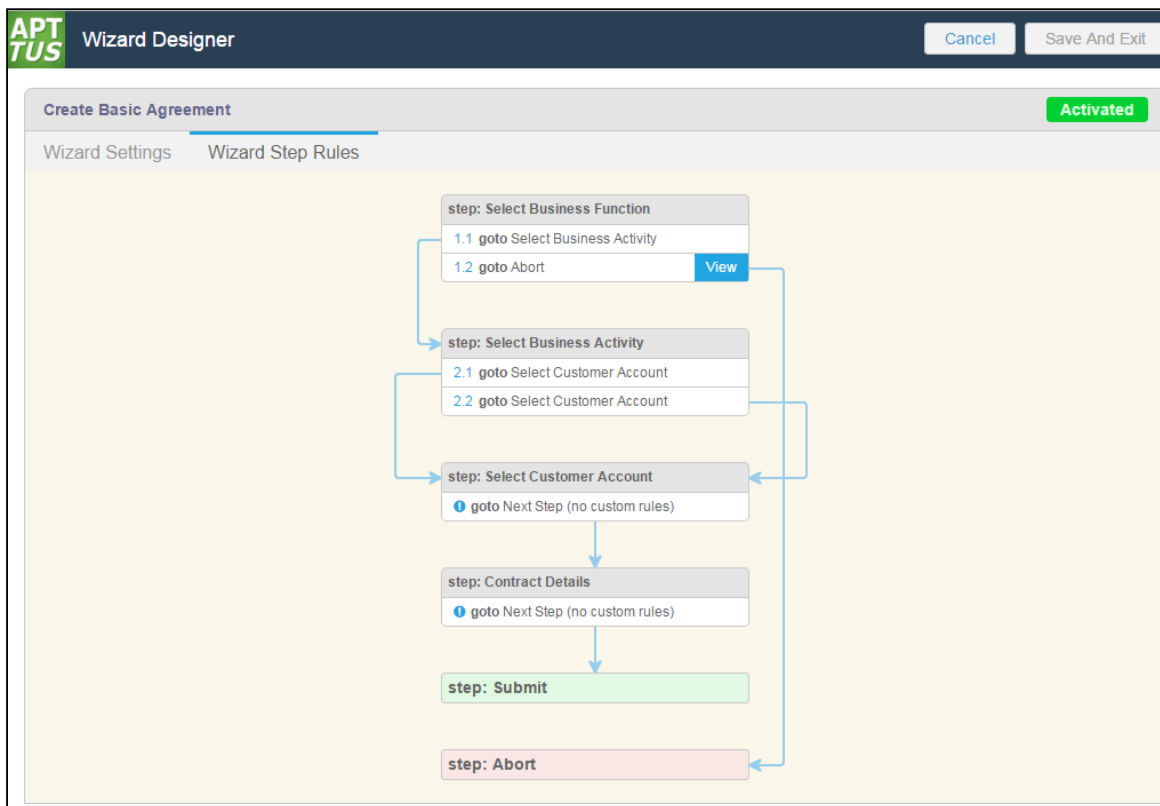
Page 1 of 3 << Previous Next >> Records per page: 10

You can explore the Wizard, but you cannot make any further edits once it has been activated. You can take the following actions to review the design:

- From the Wizard Design or Step Settings you can hover over a step or input and click **View** to view the Step or Input Settings.

The screenshot shows the 'Wizard Designer' interface for 'Create Basic Agreement'. The 'Wizard Settings' tab is active. The 'Design Name' is 'Create Basic Agreement'. The 'Banner Statement' is 'Create New Agreement Record'. The 'Context Type' is 'All'. The 'Context Object' is '--None--'. The 'Keywords' are 'agreement basic sales'. The 'Category' is 'Default'. The 'Subcategory' is 'Default'. The 'Submit Page Options' include 'Allow Review Edit'. The 'Steps in Wizard' list on the right includes: 'Select Business Function' (with a 'View' button), 'Select Business Activity', 'Select Customer Account', 'Contract Details', 'Submit' (Configured by Rule), and 'Abort' (Configured by Rule). A 'New Step' button is at the bottom right.

- From Wizard Step Rules you can hover over a rule to view rule details.



- Similarly, from Step Input rules you can hover over an input rule to view rule details.

The screenshot shows the APTTUS Wizard Designer interface. The top header is dark blue with the APTTUS logo on the left and 'Wizard Designer' in the center. On the right of the header are two buttons: 'Cancel' and 'Save and Use in Wizard'. Below the header, a breadcrumb trail reads 'Create Basic Agreement > Select Business Activity'. Underneath is a tabbed interface with three tabs: 'Step Settings', 'Input Rules' (which is selected and highlighted with a blue underline), and 'Step Preview'. The main content area has a light yellow background. It contains two input rule sections. The first section is titled 'Business Activity' and shows a message with an information icon: 'No custom rules set for this input'. The second section is titled 'Transaction Type' and shows a rule entry: '2.1 Determine Focus Object Agreement' with a blue 'View' button to its right.

Deactivating a Wizard Design

You can **Deactivate** an active Wizard design when you do not want any new runtime Wizards to be initiated by users for that particular design. Deactivating a Wizard changes its state to "Deactivated," from which state the Wizard can either be re-activated or [retired](#).

To deactivate a Wizard Design

1. Go to the **Wizard Designs** tab.
2. Click **Edit** next to the active Wizard design you want to deactivate.

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Search... Search

Home Wizard Designs Wizard Component Library Wizards +

Wizard Designs Home Help for this Page ?

Wizard Designs New Wizard Design Search...

Actions	Design Name	Description	Keywords	Category	Subcategory	Owner	Last Modified Date	Status
Edit Del	A - Business Wizard 1	Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.	CN Basic 1	Default			2/18/2016 11:27 AM	Draft
Edit Del	Agreement Creation Wizard 1	Create an agreement record.	agreement	Default	Default		2/10/2016 1:10 PM	Activated
Edit Del	Agreement Wizard 1	Wizard for creating an agreement record		Default	Default		2/18/2016 11:27 AM	Draft
Edit Del	Agreement Wizard 2			Default			2/18/2016 11:27 AM	Draft
Edit Del	Agreement Wizard Acme	Create a new agreement record using this wizard.		Default	Default		2/18/2016 11:27 AM	Draft
Edit Del	Basic New Agreement			Default			2/18/2016 11:27 AM	Draft
Edit Del	Basic New Agreement	Use this Wizard to create a new agreement record.	agreement nda msa sow	Default	Default		2/18/2016 11:27 AM	Draft
Edit Retire	Business Wizard 2	Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.	CC Basic Business	Business	All		2/8/2016 5:52 PM	Deactivated
Edit Del	Business Wizard Release	Use this Wizard to create a Primary Sales Contract.	Business Sales Contract Agreement	Default	Default		2/18/2016 11:27 AM	Draft
Edit Del	Create Basic Agreement	This wizard should be used for creating a basic agreement.	agreement basic sales	Default	Default		2/18/2016 11:27 AM	Draft

Page 1 of 3 << Previous Next >> Records per page 10

3. Click **Deactivate Wizard** on the Wizard Properties screen.

The screenshot shows the 'APTUS Wizard Designer' window. At the top, there are 'Cancel' and 'Save And Exit' buttons. Below the title bar, the wizard is titled 'Agreement Creation Wizard 1'. A red circle highlights a green 'Deactivate' button in the top right corner. The main area is divided into two tabs: 'Wizard Settings' (selected) and 'Wizard Step Rules'. Under 'Wizard Settings', there are several fields: 'Design Name' (Agreement Creation Wizard 1), 'Banner Statement' (Create New Agreement), 'Description' (Create an agreement record.), 'Context Type' (Object), 'Context Object' (Agreement), 'Keywords' (agreement), 'Static Resource', 'Category' (Default), 'CSS Filename', 'Subcategory' (Default), and 'Submit Page Options' (checked 'Allow Review Edit'). On the right, the 'Steps in Wizard' section shows a list of steps: 'Initial Agreement Step', 'Submit' (Configured by Rule), and 'Abort' (Configured by Rule). A 'New Step' button is at the bottom right of this section.

- Click **OK** to confirm deactivation of the Wizard design. The Wizard design changes from Activated to Deactivated state.

i If you deactivate a Wizard design, any in-progress Wizards which have already been initiated by users will remain in-progress. These wizards can be completed as normal but no new wizards using the deactivated design can be initiated.

After a Wizard design has been deactivated, you can take the following actions from the Wizard Designs tab:

- click **Edit** to review or reactivate the Wizard design.
- click **Retire** to [retire](#) the Wizard design.

Retiring a Wizard Design

You can **Retire** a Wizard design which has been deactivated when you no longer want any Wizards initiated from that design to be run by a user. When a Wizard design is retired, users can no longer initiate the Wizard or continue in-progress Wizards associated with that design from the Wizards tab.

To retire a Wizard Design

1. Go to the **Wizard Designs** tab.
2. Click **Retire** next to the Wizard design you want to retire.

The screenshot shows the APTTUS interface with the 'Wizard Designs' tab selected. The page displays a table of wizard designs. The 'Retire' link for the 'Agreement Creation Wizard 1' is circled in red.

Actions	Design Name	Description	Keywords	Category	Subcategory	Owner	Last Modified Date	Status
Edit Del	A - Business Wizard 1	Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.	CN Basic 1	Default			2/18/2016 11:27 AM	Draft
Edit Retire	Agreement Creation Wizard 1	Create an agreement record.	agreement	Default	Default		2/18/2016 11:54 AM	Deactivated
Edit Del	Agreement Wizard 1	Wizard for creating an agreement record		Default	Default		2/18/2016 11:27 AM	Draft
Edit Del	Agreement Wizard 2			Default			2/18/2016 11:27 AM	Draft
Edit Del	Agreement Wizard Acme	Create a new agreement record using this wizard.		Default	Default		2/18/2016 11:27 AM	Draft
Edit Del	Basic New Agreement			Default			2/18/2016 11:27 AM	Draft
Edit Del	Basic New Agreement	Use this Wizard to create a new agreement record.	agreement nda msa sow	Default	Default		2/18/2016 11:27 AM	Draft
Edit Retire	Business Wizard 2	Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.	CC Basic Business	Business	All		2/8/2016 5:52 PM	Deactivated
Edit Del	Business Wizard Release	Use this Wizard to create a Primary Sales Contract.	Business Sales Contract Agreement	Default	Default		2/18/2016 11:27 AM	Draft
Edit Del	Create Basic Agreement	This wizard should be used for creating a basic agreement.	agreement basic sales	Default	Default		2/18/2016 11:27 AM	Draft

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3. Click **Retire** to confirm retirement of the Wizard design.

The screenshot shows the APTTUS interface with the 'Wizard Designs' tab selected. A confirmation alert is displayed over the table, asking 'Do you really want to retire this design?'. The alert has 'Retire' and 'Cancel' buttons. The table below shows various wizard designs with their respective actions, names, descriptions, keywords, categories, subcategories, owners, last modified dates, and statuses.

Actions	Design Name	Description	Keywords	Category	Subcategory	Owner	Last Modified Date	Status
Edit Del	A - Business Wizard 1	Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.	CN Basic 1	Default			2/18/2016 11:27 AM	Draft
Edit Retire	Agreement Creation Wizard 1	Create					2/18/2016 11:54 AM	Deactivated
Edit Del	Agreement Wizard 1	Wizard					2/18/2016 11:27 AM	Draft
Edit Del	Agreement Wizard 2						2/18/2016 11:27 AM	Draft
Edit Del	Agreement Wizard Acme	Create					2/18/2016 11:27 AM	Draft
Edit Del	Basic New Agreement			Default			2/18/2016 11:27 AM	Draft
Edit Del	Basic New Agreement	Use this Wizard to create a new agreement record.	agreement nda msa sow	Default	Default		2/18/2016 11:27 AM	Draft
Edit Retire	Business Wizard 2	Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.	CC Basic Business	Business	All		2/8/2016 5:52 PM	Deactivated
Edit Del	Business Wizard Release	Use this Wizard to create a Primary Sales Contract.	Business Sales Contract Agreement	Default	Default		2/18/2016 11:27 AM	Draft
Edit Del	Create Basic Agreement	This wizard should be used for creating a basic agreement.	agreement basic sales	Default	Default		2/18/2016 11:27 AM	Draft

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After a Wizard design has been retired, its State is displayed on the Wizard Design tab as "Retired." Click **Edit** next to the Wizard design to open the Wizard designer. You can review the retired Wizard design but cannot make any edits.

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Search... Search

Chris Castro Setup Help Apttus Configurable Wizard

Home Wizard Designs Wizard Component Library Wizards +

Wizard Designs Home Help for this Page

Wizard Designs New Wizard Design Search...

Actions	Design Name	Description	Keywords	Category	Subcategory	Owner	Last Modified Date	Status
Edit Del	A - Business Wizard 1	Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.	CN Basic 1	Default		Chris Castro	2/18/2016 11:27 AM	Draft
Edit	Agreement Creation Wizard 1	Create an agreement record.	agreement	Default	Default	Chris Castro	2/18/2016 11:59 AM	Retired
Edit Del	Agreement Wizard 1	Wizard for creating an agreement record		Default	Default	Chris Castro	2/18/2016 11:27 AM	Draft
Edit Del	Agreement Wizard 2			Default		Chris Castro	2/18/2016 11:27 AM	Draft
Edit Del	Agreement Wizard Acme	Create a new agreement record using this wizard.		Default	Default	Chris Castro	2/18/2016 11:27 AM	Draft
Edit Del	Basic New Agreement			Default		Chris Castro	2/18/2016 11:27 AM	Draft
Edit Del	Basic New Agreement	Use this Wizard to create a new agreement record.	agreement nda msa sow	Default	Default	Chris Castro	2/18/2016 11:27 AM	Draft
Edit Retire	Business Wizard 2	Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.	CC Basic Business	Business	All	Chris Castro	2/8/2016 5:52 PM	Deactivated
Edit Del	Business Wizard Release	Use this Wizard to create a Primary Sales Contract.	Business Sales Contract Agreement	Default	Default	Chris Castro	2/18/2016 11:27 AM	Draft
Edit Del	Create Basic Agreement	This wizard should be used for creating a basic agreement.	agreement basic sales	Default	Default	Chris Castro	2/18/2016 11:27 AM	Draft

Page 1 of 3 << Previous Next >> Records per page: 10

Cloning a Wizard Design

For auditing purposes and to prevent errors with any in-progress Wizards, you can only deactivate or retire an active Wizard design. To edit and repurpose a Wizard design, clone the Wizard design and edit the copy. You can also clone a draft Wizard design if you choose.

To clone a Wizard Design

1. Go to the **Wizard Design** tab.
2. Under the Actions column, click the **Clone** link next to the design you want to clone.
3. In the Clone Wizard Design form, enter a unique design name for the new wizard in the **Wizard Design Name** field.
4. Click outside the field then click **Clone**. The new Wizard design is created and displayed in the Wizard Design list on a new line with Status = Draft. All information is copied from the cloned Wizard.

Wizard Designs						
				New Wizard Design		Search..
Actions	Design Name	Description	Status	Keywords	Category	Subcategory
Edit Clone	Agreement Wizard 1		Activated		Default	Default
Edit Clone	Business Survey 1		Activated		Default	
Edit Clone	CC Business Wizard	Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.	Activated	CC Business	Business	All
Edit Clone Del	New Business Wizard	Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.	Draft	CC Business	Business	All
Edit Clone	Sample Agreement Wizard	Use this Wizard to create an agreement record.	Activated		Default	Default

Using the Wizard Component Library

The Configurable Wizard offers a tab from which you can manage libraries of both Steps and Inputs. When you create a step or input from a Wizard Design, that step or input is available to that *specific wizard design only*. In many cases, you will want to create steps or inputs which can be used by more than one Wizard. Use the **Wizard Component Library** to create reusable steps and inputs.

The Wizard Component Library is comprised of two tables: **Steps** and **Input Controls**.

APTTUS
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Search...

Home Wizard Designs **Wizard Component Library** Wizards +

Wizard Component Library
Home

Steps Search...

Actions	Step Name	Description	Keywords	Category	Subcategory	Owner	Last Modified Date
Edit Del	Contract Details	Use this step to get additional contract details for an agreement record.		Default	Default		11/18/2015 3:27 PM
Edit Del	Create Business Details	In this step the user will enter their business details.		Default	Default		11/17/2015 2:42 PM
Edit Del	Initial Agreement Step	This is the first step for creating an agreement.	Agreement	Default	Default		11/16/2015 12:02 PM
Edit Del	Select Business Activity	Use this step to allow a user to select business activity.		Default	Default		11/18/2015 3:04 PM
Edit Del	Select Business Function	Select Business Function step for Agreement creation.		Default	Default		11/18/2015 3:14 PM
Edit Del	Select Customer Account	Use this step when a customer needs to choose an account.		Default	Default		11/18/2015 3:09 PM
Edit Del	Step						11/17/2015 2:52 PM

Page 1 of 1 << Previous Next >> Records per page: 10 ▼

Input Controls Search...

Actions	Control Name	Description	Keywords	Category	Subcategory	Owner	Last Modified Date
Edit Del	Agreement End Date	Agreement end date wizard input field.	agreement end date term	Default	Default		11/16/2015 2:27 PM
Edit Del	Agreement Start Date	A wizard input field version of agreement start date.	agreement start date term	Default	Default		11/16/2015 2:25 PM
Edit Del	Billing Address			Default	Default		11/17/2015 1:58 PM
Edit Del	Business Activity			Default	Default		11/18/2015 11:31 AM
Edit Del	Business Function	Allows user to select business function for record.		Default	Default		11/18/2015 3:02 PM
Edit Del	Customer Account	Allows user to specify customer account.		Default	Default		11/18/2015 3:09 PM
Edit Del	Initial Agreement Question	This is the first question to be used for any agreement creation wizard first step.	agreement	Default	Default		11/16/2015 11:46 AM
Edit Del	MSSA	Asks if there is a Master Sales & Service Agreement		Default	Default		11/18/2015 3:22 PM
Edit Del	MSSA Contract Number	Allows the user to specify a MSSA Contract Number for an agreement		Default	Default		11/18/2015 3:25 PM
Edit Del	Transaction Type			Default	Default		11/18/2015 11:32 AM

Page 1 of 1 << Previous Next >> Records per page: 10 ▼

Information displayed in table columns comes directly from Input or Step Setting details.

You can take the following actions on tables in the Wizard Component Library:

Action	Description
New Step	Click New Step to create a new step in the Steps Library. See Creating Steps for more information.
New Input Control	Click New Input Control to create a new input in the Inputs Library. See Creating Inputs for more information.

Action	Description
Edit	Edit an existing step or input. Edited steps and inputs will only apply to newly-created Wizard Designs and do not affect steps or inputs for existing Wizard Designs.
Delete	Delete an existing step or input. Deleted steps and inputs will only apply to newly-created Wizard Designs and do not affect steps or inputs for existing Wizard Designs.
Search	Use the type-ahead feature to narrow the list of displayed inputs or steps you want to edit, delete or view.

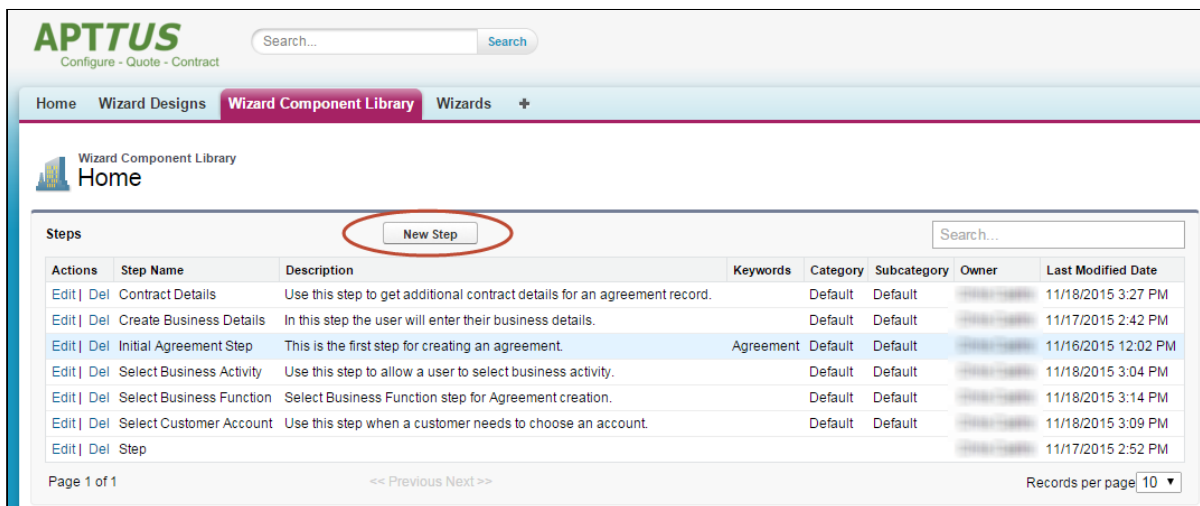
Creating Steps

Steps are used to designate the actions that occur when end-users use the Wizard. Steps use common elements, like actions and rules, to define the flow of your Wizard. Each step represents a screen in the wizard runtime.

When you create a new step in the Wizard Component Library and save it, it becomes available for use in Wizard Designs which match the Context Type and Object specified when you define it (if any). Please note that any modifications to the step from within a Wizard Design will not affect the properties of a step saved in the library.

To create a new Step from the Wizard Component Library

1. From the Wizard Component Library, click on **New Step**.



The Step Settings form is displayed.

The screenshot shows the APTUS Wizard Designer interface. The 'Step Settings' tab is selected, displaying various configuration fields for a step. The 'Inputs' section on the right lists available inputs from a library, such as 'Agreement End Date' and 'MSSA Contract Number'. The 'Step Name' field contains the placeholder text 'Enter name to proceed'.

2. Enter the following properties into the form:

Step Setting	Description
Step Name	Enter a name for your Step. This name can be internal but is used in the runtime banner when the user is interacting with the Wizard if Banner Statement (below) is not defined. Note: You cannot add any inputs to your step until you choose a Step Name.
Banner Statement	Enter a Banner Statement to display at Wizard runtime when the user is interacting with the Wizard. If left blank, the Step Name will be used instead.
Description	Enter a description for your step which describes its intended use (for example, "Define business details in this step.")
Keywords	Enter a list of keywords which can be used to search for this step.
Category	Choose an option from a drop-down list of pre-defined Step Categories (define picklist values on the Wizard Step object).
Sub Category	Choose an option from a drop-down list of pre-defined Step Sub Categories (define picklist values on the Wizard Step object).
Runtime Help Text	Enter text to display when the user clicks the help icon at the top of the Step page.
Context Type	Define whether your Step will apply to All objects or a specific Object .

Step Setting	Description
Context Object	Choose the specific context Object for your Step. This option is only available if you specified "Object" for Context Type. (e.g., "Agreement")
Input Group Option	<p>Select an option from the drop-down list to choose how Inputs will be displayed in the Step (as groups):</p> <ul style="list-style-type: none"> • None – Select this option to display all Inputs for the step in the sequence listed in the Inputs pane. • Repeatable – Select this option to allow the end user to add multiple records for selected Inputs in list format. User can click the Add Item button to add additional values for the same group of Inputs (e.g., multiple Addresses). • Table Layout – Select this option to allow the end user to add multiple records for selected inputs in tabular format. User can click the Add Item button to add additional values for the same group of Inputs (e.g. Agreement Line Item Products, Quantity, List Price, etc.)

3. Drag-and-drop an Input from the Inputs Library to the **Inputs** pane. If you do not see your Input listed, use the type-ahead feature in the Search box to locate the Input you want to use.

 You cannot add inputs to a step unless the Step Name has been entered.

4. You can take the following actions on Inputs you have added:
Add more inputs from the Inputs Library in the sequence you want them to appear in the step.
 - Hover over an Input in the list and click **Edit** to edit the input settings for this step only.
 - Hover over an Input in the list and click **Delete** to remove an Input from the step.
 - Click and drag Inputs in the Inputs pane to reorder them.
5. If you do not find the correct input in the library and need to create a new one to use in your step, see [Creating Inputs from the Wizard Designer](#).
6. To create rules which govern inputs for the current step, click on **Input Rules** (see [Configuring Step Input Rules from the Wizard Designer](#)).
7. Click **Save** to save your changes or click **Cancel** to discard changes and return to the Wizard Design form. The new step is now available from the Wizard Component Library.

Creating Inputs

Input controls are the primary components of any wizard. They are the questions and instructions that you provide to the end users of your wizard. For example, you might create an input control that requires users to select picklist options, such as Business Function or Agreement Start and End dates. Input controls are reusable, so you can use them in as many steps as you want to.

Please note that any modifications to the input from within a Wizard Design will not affect the properties of an input saved in the library.

To create a new Input from the Wizard Component Library

1. From the Wizard Component Library, click **New Input Control**.

The screenshot shows the APTTUS Wizard Component Library interface. The top navigation bar includes 'Home', 'Wizard Designs', 'Wizard Component Library' (selected), and 'Wizards'. The 'Steps' section contains a table with columns: Actions, Step Name, Description, Keywords, Category, Subcategory, Owner, and Last Modified Date. Below the 'Steps' section, the 'Input Controls' section is visible, and the 'New Input Control' button is circled in red.

Actions	Step Name	Description	Keywords	Category	Subcategory	Owner	Last Modified Date
Edit Del	Contract Details	Use this step to get additional contract details for an agreement record.		Default	Default		11/18/2015 3:27 PM
Edit Del	Create Business Details	In this step the user will enter their business details.		Default	Default		11/17/2015 2:42 PM
Edit Del	Initial Agreement Step	This is the first step for creating an agreement.	Agreement	Default	Default		11/16/2015 12:02 PM
Edit Del	Select Business Activity	Use this step to allow a user to select business activity.		Default	Default		11/18/2015 3:04 PM
Edit Del	Select Business Function	Select Business Function step for Agreement creation.		Default	Default		11/18/2015 3:14 PM
Edit Del	Select Customer Account	Use this step when a customer needs to choose an account.		Default	Default		11/18/2015 3:09 PM
Edit Del	Step						11/17/2015 2:52 PM

Actions	Control Name	Description	Keywords	Category	Subcategory	Owner	Last Modified Date
Edit Del	Agreement End Date	Agreement end date wizard input field.	agreement end date term	Default	Default		11/16/2015 2:27 PM
Edit Del	Agreement Start Date	A wizard input field version of agreement start date.	agreement start date term	Default	Default		11/16/2015 2:25 PM
Edit Del	Billing Address			Default	Default		11/17/2015 1:58 PM
Edit Del	Business Activity			Default	Default		11/18/2015 11:31 AM
Edit Del	Business Function	Allows user to select business function for record.		Default	Default		11/18/2015 3:02 PM

The Input Settings page is displayed.

2. Enter the following properties into the form:

Input Setting	Description
Control Name	Enter a name for your Input.
Question/Instruction	Enter a question or instruction which the end user will see in the runtime wizard.
Description	Enter a description for the input which describes its intended use (for example, "Use this Wizard to create MSA Agreements for Acme.")
Keywords	Enter a list of keywords which can be used to search for this Input.
Category	Choose an option from a drop-down list of pre-defined Input Categories (define picklist values on the Wizard Input Control object).
Sub Category	Choose an option from a drop-down list of pre-defined Input Sub Categories (define picklist values on the Wizard Input Control object).
Runtime Help Text	Enter text to display when the user hovers over the help icon next to the question/instruction.

Input Setting	Description
Runtime Input	<p>Determine how the end user can interact with this Input at wizard runtime:</p> <p>Allow Comments and Attachments – Select this check box to enable the end user to add comments and/or attachments in addition to the input control value. Comments are entered into a text area field and are limited to 500 characters. There is no limit to the number of files a user can attach.</p> <p>Required – Select this check box if a value is required for the input. An end user will not be able to complete the current step without entering a value for this input.</p> <p>Read Only – Select this check box if you plan to have the input value set by Step Input Rules in all cases. The end user will not be able to change the value of this input.</p>
Field Class	<p>The Field Class defines the type of response you expect for the input.</p> <ul style="list-style-type: none"> • Wizard Input Field – Use this field class when you want the response to indirectly set other Wizard values. Wizard input fields values are only used to affect the value or state of other input controls using Step Input Rules. When you choose this field class, you must specify one of the following data types: <ul style="list-style-type: none"> • Checkbox • Date • Number • Picklist • Picklist Radio Button • Multi Picklist • Text • Text Area <p>If you choose to make the Wizard Input field a Picklist type, you must also enter valid values to be used as input responses.</p> • Object Field – Use this field class when you want the response to directly set a field value on the Salesforce object which is created from the Wizard (e.g., the "Agreement Start Date" field on the Agreement object). Use the drop-down list under Input Control to choose the Object Name, then choose the Field Name based on the object chosen.


- When you are finished creating your Input, click on the **Preview** tab to show how the input will appear at Wizard runtime.

The screenshot shows the APTUS Wizard Designer interface. At the top, there's a dark blue header with the APTUS logo and the text 'Wizard Designer'. On the right of the header are 'Cancel' and 'Save' buttons. Below the header, there's a tabbed interface with two tabs: 'Input Settings' and 'Preview'. The 'Preview' tab is currently selected. The main area shows a preview of the input field. It has a title 'Enter a start date for your sales contract.' followed by a question mark icon. Below the title is a text input field with a red vertical bar on the left and the placeholder text 'mm/dd/yyyy'.

4. Click **Input Settings** to return to the Input form.
5. Click **Save** to save your new Input or **Cancel** to discard changes and return to the Wizard Component Library.

Running Wizards

Running a Wizard

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

The **Contract Wizard** application allows you to run Wizards created by administrators. Wizards are custom, user-friendly step-by-step questionnaires that allow you to create records based on any standard or custom Salesforce object (Agreements, Accounts, Proposals, Leads, etc.). Using a Wizard, you can quickly create your own records by entering responses to criteria-based inputs that follow a logical series of steps. You can easily search and select from Wizard designs to create well-formed records, and if enabled, you can preview your responses prior to submission, returning to previous Inputs and Steps to make changes or corrections.

To run a Wizard

1. From the Salesforce application menu, choose **Apttus Contract Wizard**. The application displays the Home tab and the **Wizards** tab (you will see additional tabs if you have permissions to create Wizards).

APTUS
Configure - Quote - Contract

Search... Search

Home Wizards +

Wizards Home

Create New Wizard From Design

Wizard Design: Create Basic Agreement Go

Search...

Action	Wizard Name	Status	Wizard Design	Owner	Last Modified Date
Continue	Agreement Wizard 1	In Progress	Agreement Wizard 1	[User Name]	11/16/2015 11:58 AM
Review	Agreement Wizard 1	Submitted	Agreement Wizard 1	[User Name]	11/16/2015 11:58 AM
Review	Basic New Agreement	Submitted	Basic New Agreement	[User Name]	11/17/2015 12:09 PM
Review	Basic New Agreement	Submitted	Basic New Agreement	[User Name]	11/16/2015 2:49 PM
Continue	Basic New Agreement	In Progress	Basic New Agreement	[User Name]	11/17/2015 12:08 PM
Review	Create Basic Agreement	Aborted	Create Basic Agreement	[User Name]	11/19/2015 6:31 PM

Page 1 of 1 << Previous Next >> Records per page: 10

- Choose a Wizard to run from the drop-down list of designs and click **Go**. Note: Wizards associated with deactivated or retired Wizard designs will not be available in this list.

APTUS
Configure - Quote - Contract

Search... Search

Home Wizard Designs Wizard Component Library Wizards +

Wizards Home


Create New Wizard From Design

Wizard Design: Create Sales Contract Go

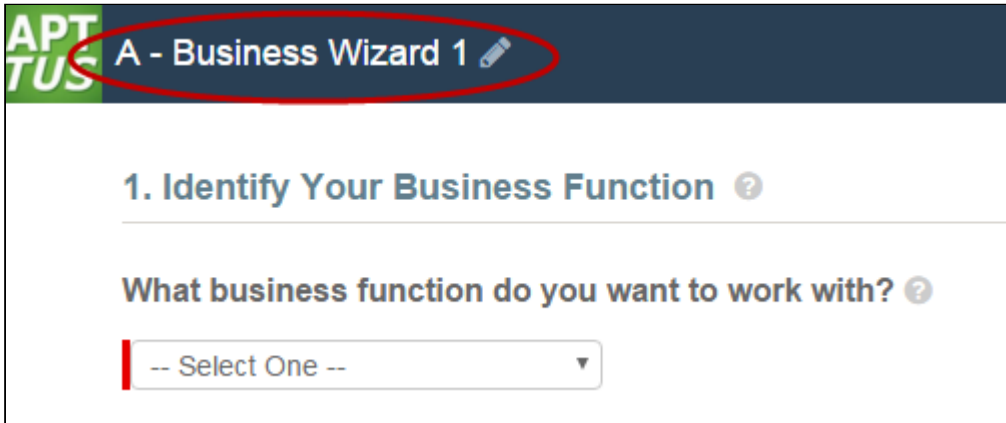
Search...

Action	Wizard Name	Status	Wizard Design	Owner	Last Modified Date
Continue	Create Sales Contract	In Progress	Create Sales Contract	[User Name]	11/19/2015 8:00 PM
Review	Create Basic Agreement	Aborted	Create Basic Agreement	[User Name]	11/19/2015 6:31 PM
Review	Basic New Agreement	Submitted	Basic New Agreement	[User Name]	11/17/2015 12:09 PM
Continue	Basic New Agreement	In Progress	Basic New Agreement	[User Name]	11/17/2015 12:08 PM
Review	Basic New Agreement	Submitted	Basic New Agreement	[User Name]	11/16/2015 2:49 PM
Continue	Agreement Wizard 1	In Progress	Agreement Wizard 1	[User Name]	11/16/2015 11:58 AM
Review	Agreement Wizard 1	Submitted	Agreement Wizard 1	[User Name]	11/16/2015 11:58 AM

Page 1 of 1 << Previous Next >> Records per page: 10

-  Ensure that you have not blocked pop-ups in your browser because new Wizards are always launched in a separate tab.

3. **(Optional)** Click the pencil icon in the banner to give your Wizard a unique name, so you can differentiate it from other Wizards you run using the same Wizard design.



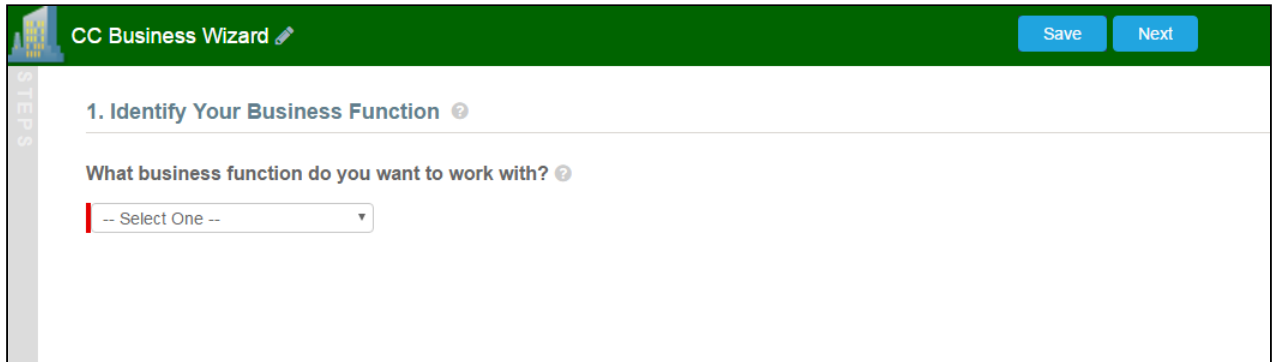
The screenshot shows the top banner of a wizard interface. On the left is the 'APTUS' logo. To its right, the text 'A - Business Wizard 1' is displayed in white on a dark blue background, followed by a small pencil icon. A red circle is drawn around the pencil icon. Below the banner, the main content area has a light gray background. It features the heading '1. Identify Your Business Function' with a question mark icon. Below this is the question 'What business function do you want to work with?' also with a question mark icon. At the bottom is a dropdown menu with the text '-- Select One --' and a downward arrow.

The new name for your Wizard is shown in the list of In Progress and Submitted Wizards on the Wizards tab.

Create New Wizard From Design			
Wizard Design		A - Business Wizard 1 ▼	Go
Action	Wizard Name	Status	Wizard Design
Continue	My First Sales Contract	In Progress	A - Business Wizard 1
Continue	Wizard Survey Demo	In Progress	Wizard Survey Demo
Continue	Wizard Survey Demo	In Progress	Wizard Survey Demo
Continue	Wizard Survey Demo	In Progress	Wizard Survey Demo
Review	Wizard NotesAttachments Demo	Submitted	Wizard NotesAttachments Demo
Continue	Wizard Customization Demo	In Progress	Wizard Customization Demo

4. Move through the steps of the Wizard, choosing values for the fields in each step. Click Next when you are finished with a step to move to the next step. Click Back to return to the previous step. Click Save to save the data on the current wizard page.

⚠ You must fill in all the required fields on the current wizard page before clicking Save; otherwise, the Wizard will throw validation error message.



CC Business Wizard [Save] [Next]

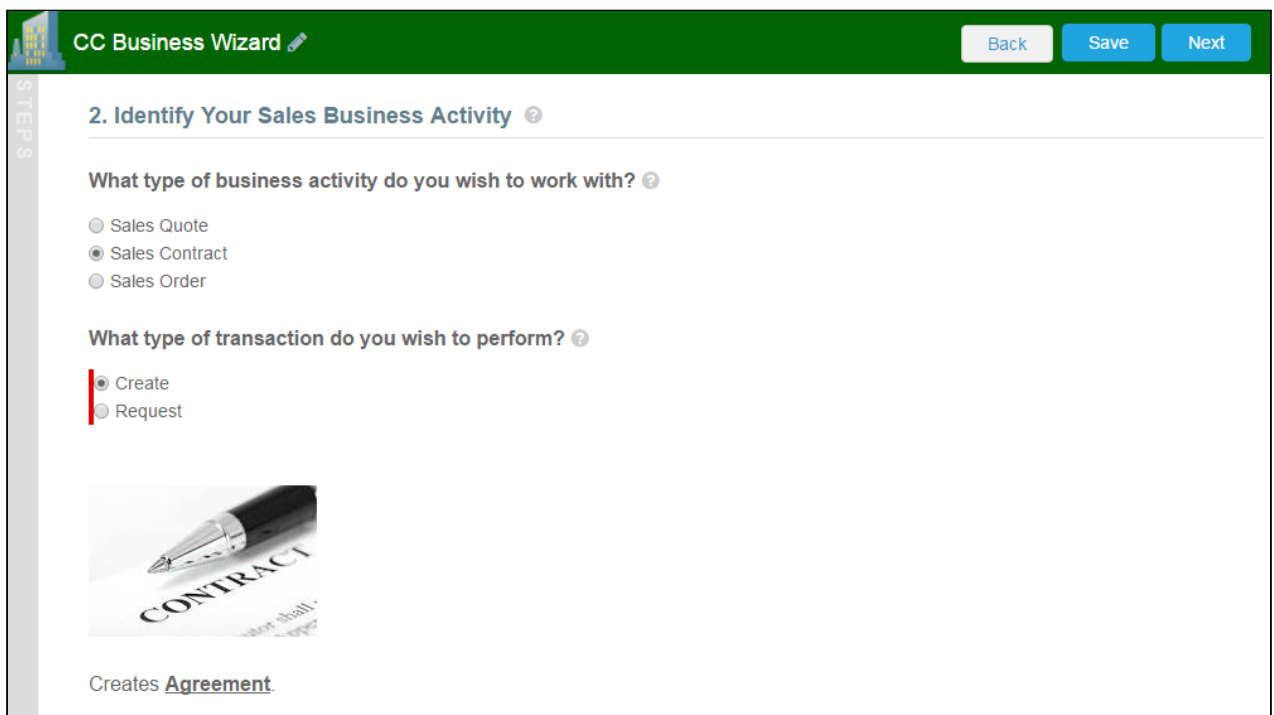
STEPS

1. Identify Your Business Function

What business function do you want to work with?

-- Select One --

When you choose options (or a combination of options) that result in the creation of an object record, the Object name or Record Type will be displayed immediately upon choosing the option(s). For example, in the following step, when you choose "Sales Contract" as the business activity and "Create" as the transaction type, the Wizard evaluates a condition that determines that an Agreement record will be created when the Wizard is submitted.



CC Business Wizard [Back] [Save] [Next]

STEPS


2. Identify Your Sales Business Activity

What type of business activity do you wish to work with?

☐ Sales Quote
☒ Sales Contract
☐ Sales Order

What type of transaction do you wish to perform?

☒ Create
☐ Request

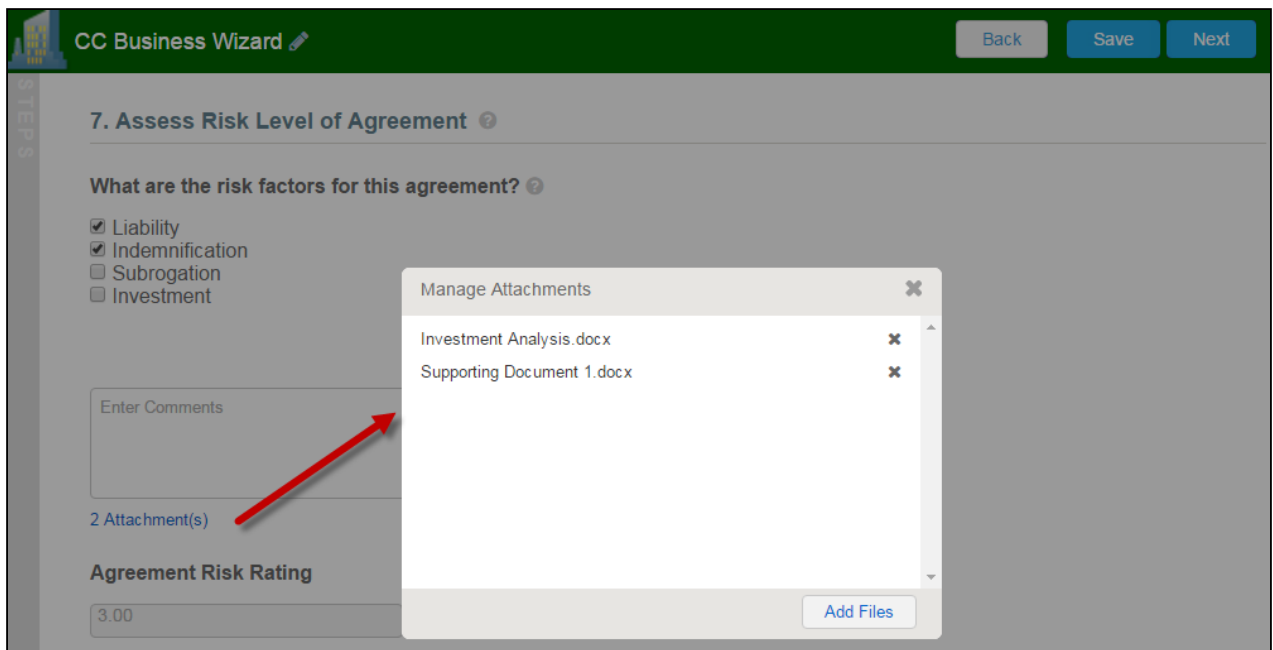


Creates Agreement

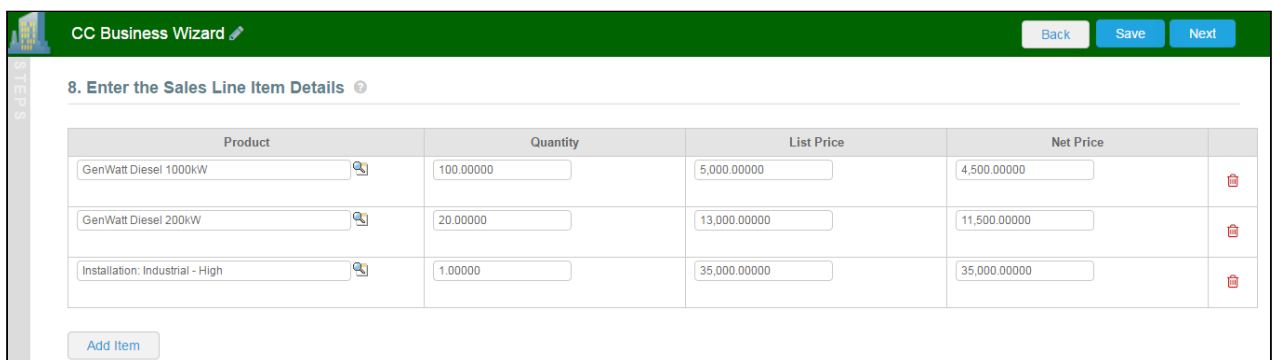
- Some Wizard steps may include the option to add comments and/or attachments in addition to providing traditional responses. You can add comments in the text area provided (500 character

limit), and/or click **Attach Files** to attach files to the Wizard step. When you use the Wizard to create a record, the attached files are added to the Notes & Attachments Related List of the new record along with the recorded comments. To add an attachment:

- Click the **Attachment(s)** link below the Comments box. The Manage Attachments window is displayed.
- Click **Add Files**. Browse for a file on your machine and add it as an attachment. The attachment uploads to the Wizard and displays in the Manage Attachments window.
- Repeat the previous step for each attachment you want to add. Close the window when you are finished adding attachments.



- Click **Add Item** when there is a repeatable field in the Wizard. These fields are used when you need to enter multiple values as certain responses, for example when you are adding multiple business addresses, or product line items and prices to a Sales Contract, as shown in the example below.



7. Closing the Wizard automatically saves your progress in the Wizard up to the current step. You can continue where you left off from the **Wizards** tab (see [Working with the Wizards Tab](#)).
8. When you have answered the final question in the Wizard and clicked **Next**, the page will display a Review of all steps you have completed.

CC Business Wizard [Back] [Submit]

Review the Information.

Identify Your Business Function [Edit]
 What business function do you want to work with? Sales

Identify Your Sales Business Activity [Edit]
 What type of business activity do you wish to work with? Sales Contract
 What type of transaction do you wish to perform? Create

Identify Your Customer Account [Edit]
 What is the customer account? Partner Technologies
 Please check if there already a Master agreement for this account. ☒

Provide Contract Details [Edit]
 What is the Master Agreement's Number? a0161000006llce
 What is the date the agreement term will start? 2016-04-22 00:00:00
 What is the date the agreement term will end? 2017-04-30 00:00:00

Identify Your Desired Types of Sales Items [Edit]
 What is to be sold in this sales contract? All
 What is the type of sales contract you want to create? Full Contract

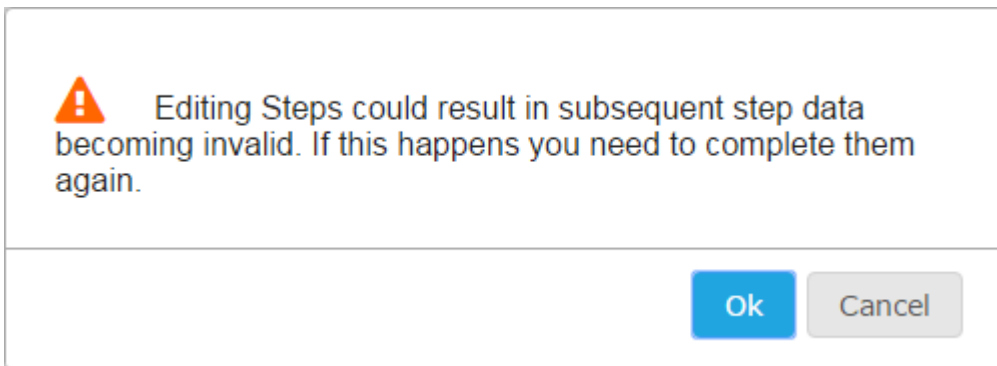
Define Your Preferred Service Level [Edit]
 Do you wish to extend the level of services beyond the base level? Standard Service Level
 This is the service level which we will provide based on your preferences. Standard

Assess Risk Level of Agreement [Edit]
 What are the risk factors for this agreement? Liability:Indemnification
 See attached papers for risk assessment action items.
 Attachment(s)
 Agreement Risk Rating 3

Enter the Sales Line Item Details [Edit]

Product	Quantity	List Price	Net Price
GenWatt Diesel 1000kW	100.00000	\$5,000.00000	\$4,500.00000

9. Click **Edit** to change your answers for any steps in the Wizard. A dialog is displayed warning that you may have to repeat steps of the Wizard that you previously completed depending on edits you make.



10. Click **OK** to edit the step or **Cancel** to return to the Review page.

11. When you are satisfied with your responses, click **Submit**.

Depending on the design of the Wizard, one or more of the following will occur:

- A record of the type determined by your inputs within the Wizard will be created (e.g., a Sales Agreement record).
- You will be redirected to the record details page of the record just created by the Wizard.
- You will be redirected to another page in Salesforce.
- You will remain on the Review page and the Wizard will be shown as **Submitted** (in this case data from the Wizard has usually been submitted for purposes other than creating a record).

APT TUS A - Business Wizard 1 Submitted

Following Information was submitted in this Wizard.

Identify Your Business Function

What business function do you want to work with? **Sales**

Identify Your Sales Business Activity

What type of business activity do you wish to work with? **Sales Contract**
What type of transaction do you wish to perform? **Create**

Identify Your Customer Account

What is the customer account? **Partner Technologies**
Please check here if there is already a Master Agreement for this Account. ☒

Provide Contract Details

What is the Master Agreement's Number? **AD_Sales_SOW 1.29.16.1**
What is the date the agreement term will start? **2016-02-18 00:00:00**
What is the date the agreement term will end? **2017-02-28 00:00:00**

Identify Your Desired Types of Sales Items

What is to be sold in this sales contract? **All**
What is the type of sales contract you want to create? **Full Contract**

Define Your Preferred Service Level

Do you wish to extend the level of services beyond the base level? **Extended Service Level**
How many days of service coverage do you want? **6 days - ext 1**
Enter your desired hours of coverage. **12 Hours - 8 am to 8 pm Eastern**
What is the maximum expected initial response time for your service cases? **08 Hours**
What is the maximum time in coverage days for the solution to be provided? **06 days**
This is the service level which we will provide based on your preferences. **Premier**

Enter the Sales Line Item Details

Product	Quantity	List Price	Net Price
GenWatt Diesel 1000KW	10.00000	\$5,000.00000	\$4,500.00000
GenWatt Diesel 200KW	20.00000	\$2,500.00000	\$2,000.00000
Installation: Industrial - Medium	1.00000	\$25,000.00000	\$20,000.00000

12. Return to the **Wizards** tab. The Wizard you created and executed now shows its **Status** as Submitted in the list of Wizards.

Wizard Design A - Business Wizard 1 Go					
<input type="text" value="Search..."/>					
Action	Wizard Name	Status	Wizard Design	Owner	Last Modified Date
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	[User Name]	2/18/2016 3:54 PM
Continue	Your Business Wizard At Work	In Progress	A - Business Wizard 1	[User Name]	2/18/2016 3:43 PM
Continue	Wizard Survey Demo	In Progress	Wizard Survey Demo	[User Name]	2/17/2016 11:18 AM
Continue	Wizard Survey Demo	In Progress	Wizard Survey Demo	[User Name]	2/17/2016 11:18 AM
Continue	Wizard Survey Demo	In Progress	Wizard Survey Demo	[User Name]	2/17/2016 11:15 AM
Review	Wizard NotesAttachments Demo	Submitted	Wizard NotesAttachments Demo	[User Name]	2/17/2016 11:12 AM
Continue	Wizard Customization Demo	In Progress	Wizard Customization Demo	[User Name]	2/17/2016 11:07 AM
Continue	Wizard Customization Demo	In Progress	Wizard Customization Demo	[User Name]	2/17/2016 9:48 AM
Continue	Wizard NotesAttachments Demo	In Progress	Wizard NotesAttachments Demo	[User Name]	2/10/2016 11:40 AM
Continue	Wizard NotesAttachments Demo	In Progress	Wizard NotesAttachments Demo	[User Name]	2/10/2016 11:35 AM
Page 1 of 1 << Previous Next >> Records per page 10					

Working with the Wizards Tab

You can take several actions from the Wizards tab in addition to creating and running new Wizards:

To search for Wizards

Perform a type-ahead **Search** to locate an In Progress, Submitted or Aborted Wizard in the table.

The screenshot shows the APTTUS Wizard Component Library interface. At the top, there is a search bar with the text "Search..." and a "Search" button. Below the search bar, there is a navigation menu with links: Home, Wizard Designs, Wizard Component Library, and Wizards. The "Wizards" link is selected, and the page title is "Wizards Home".

Below the navigation menu, there is a section titled "Create New Wizard From Design". It contains a "Wizard Design" dropdown menu with "Test Hide Show" selected, and a "Go" button. A red callout box points to the search bar with the text: "Enter search terms to display a list of matching Wizards".

Below the "Go" button, there is a table of wizards. The table has the following columns: Action, Wizard Name, Status, Wizard Design, Owner, and Last Modified Date. The table contains 12 rows of data. The first row is highlighted in blue.

Action	Wizard Name	Status	Wizard Design	Owner	Last Modified Date
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Charles Nelson	11/24/2015 3:03 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:44 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Review	A - Business Wizard 1	Aborted	A - Business Wizard 1	Charles Nelson	11/24/2015 12:45 PM
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Ramananda Ramachandra	11/23/2015 1:36 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/23/2015 10:32 AM
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Ramananda Ramachandra	11/23/2015 9:29 AM
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Ramananda Ramachandra	11/23/2015 9:26 AM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Ramananda Ramachandra	11/22/2015 10:14 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/20/2015 6:24 PM

At the bottom of the table, there is a pagination bar showing "Page 1 of 7", navigation links "<< Previous Next >>", and a "Records per page" dropdown menu set to "10".

To continue an In Progress Wizard

Pick up where you left off to complete an In Progress Wizard.

1. Navigate to the Wizard using the type-ahead feature or page navigation.
2. Click **Continue** under the Action column. The Wizard opens in a new tab at the current step.

The screenshot shows a table of Business Wizards. The 'Continue' action for the first wizard is circled in red, with an arrow pointing to a modal window titled 'Your Business Wizard At Work'. The modal window displays '7. Enter The Sales Line Item Details' with fields for Product, quantity, list price, and net price, along with an 'Add Item' button and 'Back'/'Next' navigation options.

Action	Wizard Name	Status	Wizard Design	Owner	Last Modified Date
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Charles Nelson	11/24/2015 3:03 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:44 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Review	A - Business Wizard 1	Aborted			
Continue	A - Business Wizard 1	In Progress			
Review	A - Business Wizard 1	Submitted			
Continue	A - Business Wizard 1	In Progress			
Continue	A - Business Wizard 1	In Progress			
Review	A - Business Wizard 1	Submitted			
Review	A - Business Wizard 1	Submitted			

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Note: If "No Action" is available for a Wizard in the list, it means that the Wizard design associated with the runtime Wizard has been retired by your administrator. You can neither initiate nor continue Wizards associated with retired designs.

To review a completed Wizard

You can revisit the Review page for a Submitted or Aborted Wizard once it is complete.

1. Navigate to the Wizard using the type-ahead feature or page navigation
2. Click **Review** under the Action column. The Wizard opens in a new tab and displays the Review page (you can no longer edit any steps).

The screenshot shows the same table of Business Wizards. The 'Review' action for the first wizard is circled in red, with an arrow pointing to a modal window titled 'Your Business Wizard At Work'. The modal window displays 'Following Information was submitted in this Wizard.' with sections for 'Identify Your Business Function' (Purchasing), 'Identify Your Sales Business Activity' (Sales Contract), and 'Identify Your Customer Account' (Create).

Action	Wizard Name	Status	Wizard Design	Owner	Last Modified Date
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Charles Nelson	11/24/2015 3:03 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:44 PM
Review	A - Business Wizard 1	Submitted			
Review	A - Business Wizard 1	Aborted			
Continue	A - Business Wizard 1	In Progress			
Review	A - Business Wizard 1	Submitted			
Continue	A - Business Wizard 1	In Progress			
Continue	A - Business Wizard 1	In Progress			
Review	A - Business Wizard 1	Submitted			
Review	A - Business Wizard 1	Submitted			

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Tracking Wizard Activity from a Record


When a Wizard results in the creation of an Object record (such as an Agreement), a note is automatically added to the **Notes & Attachments** Related List of the created record identifying which Wizard originated the record.

For example, an Agreement record has been created from a Wizard.



1. From the Agreement record page, scroll to **Notes & Attachments**.

Notes & Attachments			
		New Note	Attach File
		View All	
Action	Type	Title	Last Modified
Edit Del	Note	A - Business Wizard 1 Notes	11/24/2015 2:44 PM

2. Click on the Note **Title** to view Note details.



A - Business Wizard 1 Notes

Note Detail
[Edit](#)
[Delete](#)

Note Owner	
Related To	a01A000000NV53
Private	<input type="checkbox"/>
Title	A - Business Wizard 1 Notes
Body	This record was created from Wizard A - Business Wizard 1, Runtime a0wA00000075VwKIAU
Created By	 11/24/2015 2:44 PM

[Edit](#)
[Delete](#)

In the **Body** description, note the **Wizard** name that created the record.

 The Notes & Attachments Related List must be added to the record layout to view the Wizard notes.

Using the Preview Sidebar

To provide more flexibility when running Wizards, a Wizard user can access the **Preview Sidebar**, which tracks the Wizard as steps are completed. The Wizard user can use the Preview Sidebar to navigate to other steps in the Wizard freely. Use the Preview Sidebar to:

- Preview a future step in the Wizard.
- Track overall completion progress.
- Return to a previous step in the Wizard to complete responses or correct a mistake.
- View a full preview of all completed responses.


To use the Preview Sidebar

1. Launch a new Wizard from the **Wizards** tab. The runtime Wizard is displayed with the Preview Sidebar in collapsed view.
2. Click on the sidebar to expand it. You will see one of two possible views:
 - If you are running a linear, step-by-step Wizard with no conditionally-shown steps, you will be able to see and navigate to any step in the Wizard.

The screenshot shows the 'New Business Wizard' interface. The title bar is green with the text 'New Business Wizard' and a 'Next' button. A sidebar on the left lists the following steps: 'Select Business Function', 'Select Sales Business Account', 'Customer Account', 'Provide Contract Details', 'Define Sales Item Types', 'Determine Service Level', 'Determine Risk Level', 'Sales Line Items', and 'Preview'. The main content area displays the first step, '1. Identify Your Business Function', with a question 'What business function do you want to work with?' and a dropdown menu currently set to 'Sales'.

- If the Wizard you are running contains any conditional steps, you will only see the current step and the "Preview" step. The preview sidebar will display additional steps as you complete the current step and conditions are satisfied to include the other steps in the Wizard.

The screenshot shows the 'CC Business Wizard' interface. The top navigation bar is green and contains the text 'CC Business Wizard' and a 'Next' button. On the left, there is a sidebar with three sections: 'Steps' (with an 'X' icon), 'Select Business Function', and 'Preview'. The main content area is titled '1. Identify Your Business Function' and contains the question 'What business function do you want to work with?'. Below this is a dropdown menu with the text '-- Select One --'.

 You can click on the X in the upper-right-hand corner of the sidebar at any time to collapse it.

3. Click on any step in the preview sidebar to preview it. **Important Note:** if you attempt to view a future step but the current step contains any required fields, you cannot preview that step until you have completed the required fields in the current step.

The screenshot shows the 'New Business Wizard' interface. At the top, there's a green header with 'New Business Wizard' and 'Back' and 'Next' buttons. A sidebar on the left lists steps: 'Steps', 'Select Business Function', 'Select Sales Business Activity', 'Customer Account', 'Provide Contract Details', 'Define Sales Item Types', 'Determine Service Level', 'Determine Risk Level', 'Sales Line Items', and 'Preview'. The main content area is titled '2. Identify Your Sales Business Activity'. It contains two sections: 'What type of business activity do you wish to work with?' with radio buttons for 'Sales Quote', 'Sales Contract', and 'Sales Order'; and 'What type of transaction do you wish to perform?' with radio buttons for 'Create' and 'Request'. The 'Request' option is selected. A red error message at the top says: 'Error: What type of transaction do you wish to perform?: Validation Error: Value is required.' A red arrow points from a text box that says 'must complete required field before moving to any other step' to the 'Request' radio button. Below the radio buttons is an image of a pen signing a 'CONTRACT'.

4. Click on **Preview** at any time to go to the Review screen where you can review all visible steps in the Wizard, including any completed responses. The Preview screen only reflects steps that are present in the sidebar. No conditional steps will be shown unless the conditions that trigger them are satisfied.
5. Click **Back** to return to the last step you worked with.

Example: Configuring a Sales Contract Wizard

The following section describes an example process for an Agreement record-creation Wizard. This Wizard will take the user through the process of creating an Agreement record with a Sales Contract record type. This example demonstrates the use of Wizard Step rules and Step Input rules to **Determine Focus Object** and **Determine Record Type** for the record, in addition to showing how to conditionally **Hide**, **Disable** and **Set** input controls based on values entered by the user. Understanding these processes will improve your ability to create your own unique Wizard designs.

Note: The example provided here does assume the some steps and inputs have already been created and are part of the Wizard Component Library. Similarly, all details of the example Wizard design are not included—only specific portions of the design process are called out to demonstrate how features function within the Wizard.

The objective of the Wizard design used as an example on this page is to easily aid users in performing a variety of basic business functions, one of which happens to be creating an Agreement of record type Sales Contract. Additional logic could be built into both the Steps and Inputs to create other outcomes, including posting information to a URL or creating different types of records. Here is an example of the completed Wizard Design (hint: click the image to enlarge the view):

A - Business Wizard 1 Activated

Wizard Settings **Wizard Step Rules**

Design Name
A - Business Wizard 1

Description
Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.

Keywords
CN Basic 1

Category
Basic business

Subcategory
All

Banner Statement
Your Business Wizard At Work

Context Type
All

Context Object
--None--

Submit Page Options
☒ Allow Review Edit

Steps in Wizard

- Select Business Function
- Select Sales Business Activity
- Select Customer Account
- Enter Primary Contract Details
- Define Sales Item Types
- Determine Service Level
- Sales Line Item Details
- Submit Configured by Rule
- Abort Configured by Rule

New Step

Example: Wizard Step Rule #1

This first example demonstrates how you can create more than one rule for a single step which determines how the Wizard will flow based on conditions.

In our example design, the first step in the Wizard is **Select Business Function**.

The screenshot shows the 'APTUS Wizard Designer' interface. The title bar includes 'APTUS Wizard Designer', 'Cancel', and 'Save And Exit' buttons. The main content area is titled 'A - Business Wizard 1' and has an 'Activate' button. It is divided into two tabs: 'Wizard Settings' and 'Wizard Step Rules'. The 'Wizard Settings' tab is active, showing various configuration fields:

- Design Name:** A - Business Wizard 1
- Description:** Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.
- Keywords:** CN Basic 1
- Category:** Default
- Subcategory:** --None--
- Banner Statement:** Your Business Wizard At Work
- Context Type:** All
- Context Object:** --None--
- Static Resource:** (empty field)
- CSS Filename:** (empty field)
- Submit Page Options:** ☒ Allow Review Edit
- Steps in Wizard:** A list of steps including 'Select Business Function' (highlighted with a red circle), 'Select Sales Business Activity', 'Select Customer Account', 'Provide Contract Details', 'Define Sales Item Types', 'Determine Service Level', 'Sales Line Items', 'Submit' (Configured by Rule), and 'Abort' (Configured by Rule).
- Buttons:** 'New Step' and 'Activate'.

The Select Business Function step was created directly from the Wizard design form and contains one Input Control which prompts the user during Wizard runtime to choose a business function for their task.

The screenshot shows the runtime interface of the wizard, titled 'APTUS Your Business Wizard At Work' with a 'Next' button. The first step is '1. Identify Your Business Function'. The question is 'What business function do you want to work with?'. Below the question is a dropdown menu with the following options:

- Sales
- Select One --
- Sales (highlighted)
- Purchasing
- Human Resources
- Admin
- Partner Admin

The Step Rule for this example will determine whether or not the user can continue with the Wizard. If the user chooses "Sales" and clicks **Next** the Wizard should continue to the next step. However, if the user chooses any other option, the Wizard prompts the user to **Abort**.

Create Step Rules

Because of this, two **Go to Step** rules must be created:

- **Go to Select Business Activity** if the Input value *is equal* to "Sales."
- **Go to Abort** if the Input value *does not equal* "Sales."

From the **Wizard Step Rules** tab, two rules are created under the **Select Business Function** step.

A - Business Wizard 1

Wizard Settings Wizard Step Rules

step: Select Business Function +

goto Next Step (no c... **New**

Rule #1: Go to Next Step

Rule For: Select Business Function ✕

Step

Go to Select Sales Business A ▼

1. Business Function ▼ equals ▼ Sales ▼ 🗑️

Advanced Expression 1

[Add Another Rule](#)

Save **Cancel**

A Go to Step rule is defined to **Go to Select Business Activity** when a user chooses **Sales** from the **Business Function** input (see above).

Rule #2: Go to Abort

Rule For: Select Business Function ✕

Step

Go to

1.

✕

Advanced Expression

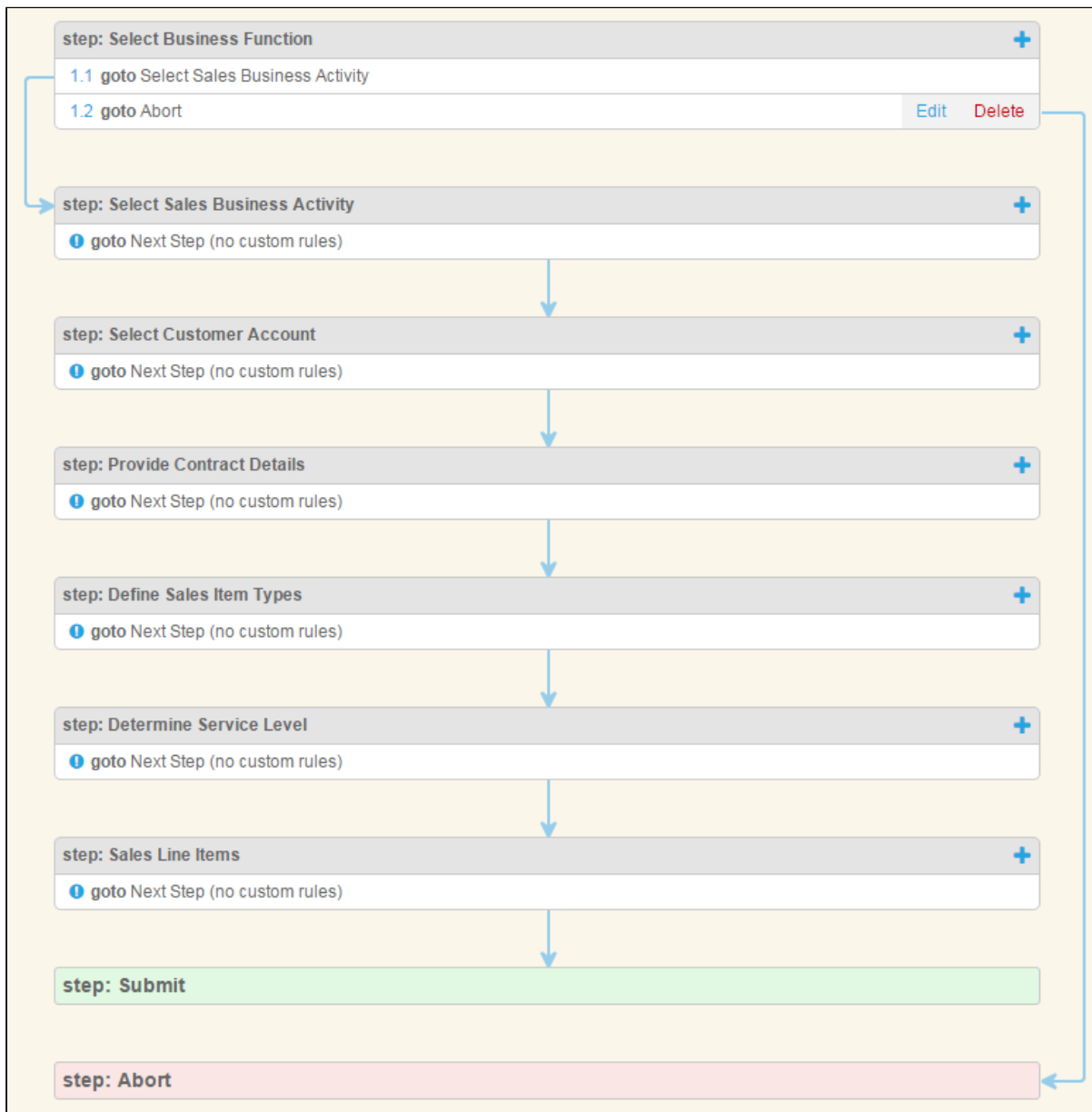
[Add Another Rule](#)

Save

Cancel

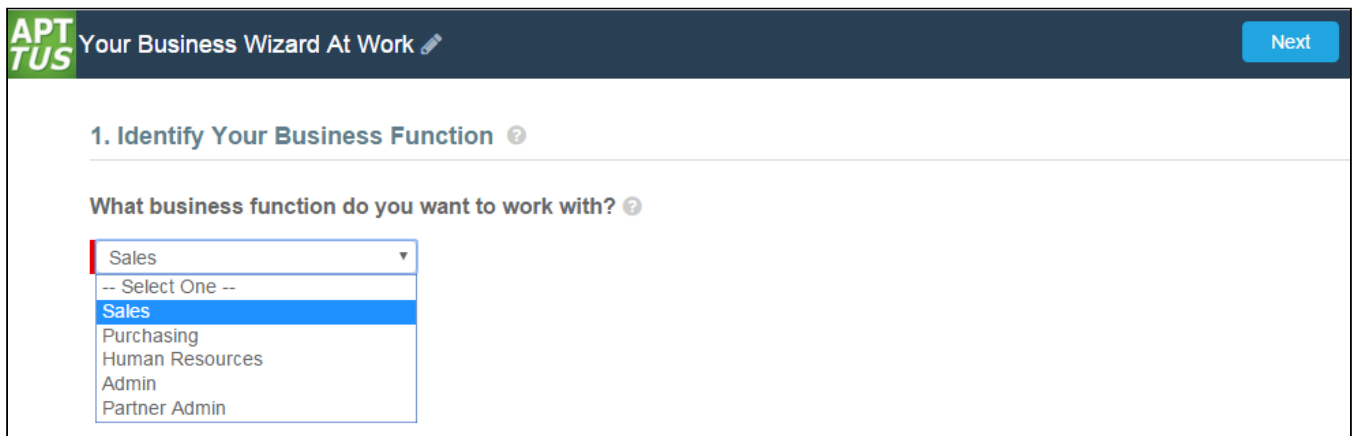
Another Go to Step rules is defined to **Go to Abort** when a user chooses any other option than **Sales** from the **Business Function** input.


After both rules have been created, they are graphically represented on the Wizard Step Rules tab. Arrows indicate to which step the user is directed when the rule resolves to true. Rule #1 takes the user to the next step, whereas Rule #2 takes the user to Abort.





How it looks in the Wizard

When a user runs the Wizard, the step prompts the user to choose which business function they want to work in.



APTUS Your Business Wizard At Work  [Next](#)

1. Identify Your Business Function 

What business function do you want to work with? 

-- Select One --

 Sales

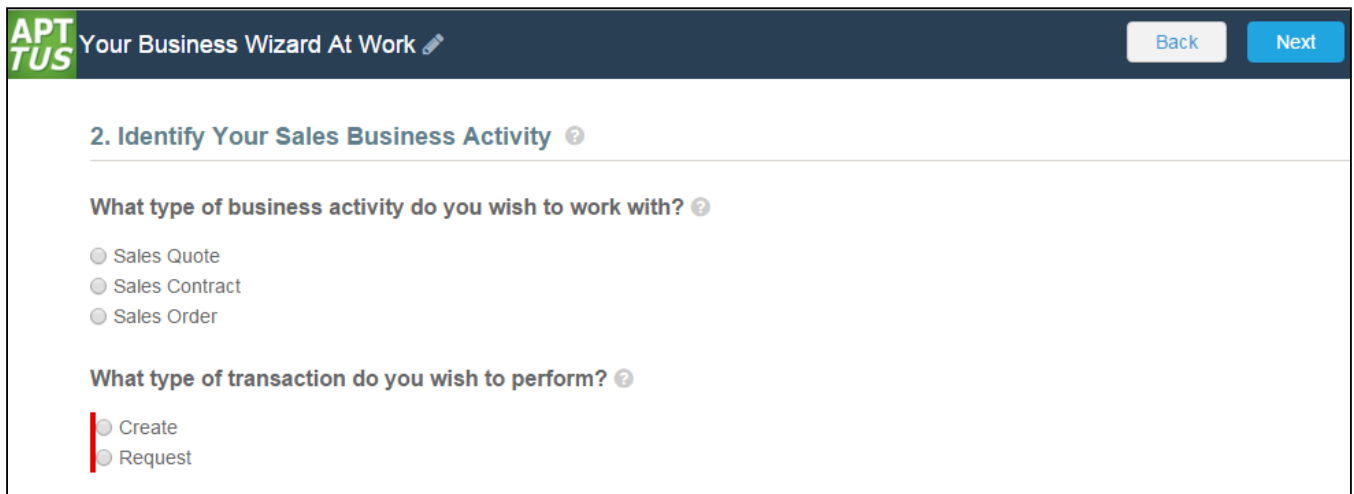
 Purchasing


 Human Resources


 Admin


 Partner Admin

If the user chooses **Sales** and clicks **Next**, the step from Rule #1 is displayed next.



APTUS Your Business Wizard At Work  [Back](#) [Next](#)


2. Identify Your Sales Business Activity 

What type of business activity do you wish to work with? 

☐ Sales Quote

☐ Sales Contract

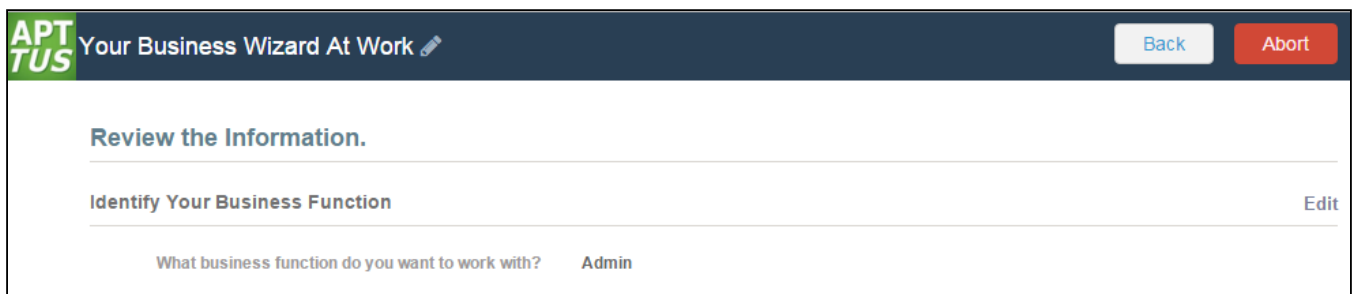
☐ Sales Order


What type of transaction do you wish to perform? 

☒ Create

☐ Request

If the user makes a different choice and clicks **Next**, the Wizard displays an acknowledgement page, displaying all completed steps and their inputs. The user clicks **Abort** to abort the Wizard or **Back** to return to the previous step or **Edit** to return to a specific step and choose a different option.



APTUS Your Business Wizard At Work  [Back](#) [Abort](#)

Review the Information.

Identify Your Business Function [Edit](#)

What business function do you want to work with? Admin

Example: Step Input Rule #1 (Determine Focus Object)

The following example demonstrates an Input Rule for determining the focus object for your runtime Wizard. In this example, inputs entered by the user will determine the focus object of the record to be created (Agreement).

To determine a focus object for the Wizard requires an input rule be created for a specific step in the Wizard. In this example, this rule is created for the second step, **Select Sales Business Activity**.

Create Input Rule

The **Select Sales Business Activity** step is used to determine if the Wizard will be used to create an Agreement record. The responses to two Inputs, **Determine Business Activity** and **Determine Transaction Type** serve as criteria to determine if the focus object of the record to be created will be Agreement.

The screenshot shows the APTUS Wizard Designer interface. The top bar includes the APTUS logo, the text 'Wizard Designer', and buttons for 'Cancel' and 'Save and Use in Wizard'. The main area is titled 'A - Business Wizard 1 > Select Sales Business Activity'. Below this, there are tabs for 'Step Settings', 'Input Rules', and 'Step Preview'. The 'Step Settings' tab is active, showing various configuration fields:

- Step Name:** Select Sales Business Activity
- Description:** Allow the user to identify the sales activity.
- Keywords:** (empty field)
- Category:** Default
- Subcategory:** Default
- Banner Statement:** Identify Your Sales Business Activity
- Runtime Help Text:** Identify the desired type of business activity you wish to pursue.
- Context Type:** Object
- Context Object:** Agreement
- Input Group Option:** --None--
- Image Filename:** (empty field)

On the right side, there is a section titled 'Inputs' containing a list of input rules: 'Determine Business Activity' and 'Determine Transaction Type'. These two inputs are circled in red. A 'New Input' button is located at the bottom right of the 'Inputs' section.

Because responses to both inputs will determine the focus object, an Input rule must be created for the second input control, **Determine Transaction Type**.

A - Business Wizard 1 > Select Business Activity

Step Settings Input Rules Step Preview

Determine Business Activity +
No custom rules set for this input

Determine Transaction Type +
No custom rules set for this input **New**

Rule: Determine Focus Object

Rule For: Determine Transaction Type

Rule
Determine Focus Object Agreement

1. Determine Business Activity equals Sales Contract

2. Determine Transaction Type equals Create

Advanced Expression 1 AND 2

[Add Another Rule](#)

Save Cancel

The **Determine Focus Object** rule is defined using two separate expressions. The focus object will resolve to Agreement if:

- **Determine Business Activity** equals "Sales Contract" AND;
- **Determine Transaction Type** equals "Create"

An Advanced Expression is used which specifies both expressions must resolve to true for the rule to be satisfied. Any other combination of responses to the inputs in this step will not result in Agreement being determined as the focus object.

After the rule is defined, the rule type and focus object are displayed on the Input Rules page for easy reference.

A - Business Wizard 1 > Select Business Activity

Step Settings Input Rules Step Preview

Determine Business Activity +


❗ No custom rules set for this input

Determine Transaction Type +

2.1 Determine Focus Object Agreement

How it looks in the Wizard

When a user reaches this step in the Wizard, they are prompted to enter a response to both questions.

APTUS A - Business Wizard 1  Back Next

2. Identify Your Sales Business Activity ?

What type of business activity do you wish to work with? ?

☐ Sales Quote
☐ Sales Contract
☐ Sales Order

What type of transaction do you wish to perform? ?

☒ Create
☐ Request

When the user chooses the proper responses to satisfy the input rule, the object being created by the Wizard is displayed at the bottom of the page.

APT TUS A - Business Wizard 1 Back Next

2. Identify Your Sales Business Activity ?

What type of business activity do you wish to work with? ?

- ☐ Sales Quote
- ☒ Sales Contract
- ☐ Sales Order

What type of transaction do you wish to perform? ?

- ☒ Create
- ☐ Request

Creates **Agreement.**

Because a focus object has been determined, the Wizard will now create an Agreement record when the final step of the Wizard is submitted. However, in the case of this example, record type have been determined for the Agreement object, so a **Determine Record Type** rule must also be created. This will be covered in the next example.

Example: Step Input Rule #2 (Determine Record Type)

The following example demonstrates an Input rule for determining the record type of the already determine focus object for your runtime Wizard. In this example, inputs entered by the user will determine the record type to be used for the record to be created (Primary Sales Contract).

To determine a record type for the Wizard requires an input rule be created for a specific step in the Wizard. In this example, this rule is created for the fifth step, **Define Sales Item Types**.

Create Input Rule

The **Define Sales Item Types** step is used to determine the Record Type for the Agreement record to be created. The responses to two Inputs, **Sales Offering Types** and **Determine Agreement Scope** serve as criteria to determine if the record type of the record to be created will be **Primary Sales Contract**.

APTUS Wizard Designer [Cancel] [Save and Use in Wizard]

A - Business Wizard 1 > Define Sales Item Types

Step Settings | Input Rules | Step Preview

Step Name
Define Sales Item Types

Description
Allows the user to identify the types of sales items to be considered

Keywords
[Empty]

Category
Default

Subcategory
Default

Banner Statement
Identify Your Desired Types of Sales Items

Runtime Help Text
Identify the types of items in this sale

Context Type
--None--

Context Object
--None--

Input Group Option
--None--

Image Filename
[Empty]

Inputs

- Sales Offering Types
- Determine Agreement Scope**

[New Input]

Because responses to both inputs will determine the record type, an input rule must be created for the last input in the step, in this case **Determine Agreement Scope**.

A - Business Wizard 1 > Define Sales Item Types

Step Settings | **Input Rules** | Step Preview

Sales Offering Types +

ⓘ No custom rules set for this input

Determine Agreement Scope +

ⓘ No custom rules set for this input

New

Rule: Determine Record Type

Rule For: Determine Agreement Scope ✕

Rule

Determine Record Type Agreement SOW

1. Sales Offering Types equals All ✕
2. Determine Agreement Scope equals Full Contract ✕

Advanced Expression 1 AND 2

[Add Another Rule](#)

Save **Cancel**

The **Determine Record Type** rule is defined using two separate expressions. The record will resolve to Agreement if:

- **Sales Offering Types** equals "All" AND;
- **Determine Agreement Scope** equals "Full Contract"

An Advanced Expression is used which specifies both expressions must resolve to true for the rule to be satisfied. Any other combination of responses to the inputs in this step will not result in "SOW" being determined as the record type.

After the rule is defined, the rule type and record type are displayed on the Input Rules page for easy reference.

A - Business Wizard 1 > Define Sales Item Types

Step Settings **Input Rules** Step Preview

Sales Offering Types +

i No custom rules set for this input

Determine Agreement Scope +

2.1 Determine Record Type Agreement SOW

How it looks in the Wizard

When a user reaches this step in the Wizard, they are prompted to enter a response to each question.

When the user chooses the proper responses to satisfy the input rule, the record type being specified by the Wizard is displayed at the bottom of the page.

Now that a Record Type has been determined by the Wizard, when the Wizard is submitted, an Agreement record of the type Primary Sales Contract will be created.

Example: Step Input Rule #3 (Modify Controls)

The following example demonstrates how you can modify the behavior and value of input controls for a step using the input rules **Hide This Control** and **Set This Control Value**. In this example, the user is defining the service level to be used in the contract. If the user chooses one option of a certain input,

several inputs in the step will be hidden (Hide This Control). Similarly, depending on the combination of responses entered by the user for multiple inputs, the final value of one input will change (Set This Control Value).

Create Input Rules: Hide This Control

In this example, several input rules are defined for the **Determine Service Level** step.

APTUS Wizard Designer

A - Business Wizard 1 > Determine Service Level

Step Settings | Input Rules | Step Preview

Step Name: Determine Service Level

Description: Allows the user to define the sales service level components

Keywords: CC Biz Sales Service

Category: Default

Subcategory: Default

Banner Statement: Define Your Preferred Service Level

Runtime Help Text: Establish the expected levels of service

Context Type: All

Context Object: --None--

Input Group Option: --None--

Image Filename:

Inputs:

- Extend Service Coverage
- Service Days
- Hours Service Coverage
- Response Service Coverage
- Solution Service Coverage
- Service Level Provided

[New Input](#)

The **Extend Service Coverage** input will be used as the criteria in expressions for rules defined on other inputs to determine whether or not those input controls are hidden.

Do you wish to extend the level of services beyond the base level?

☒ Standard Service Level

☐ Extended Service Level

If **Standard Service Level** is chosen, the only input shown will be **Service Level Provided** (the value of this input will also be determined by this choice using a Set This Control value, which is described later on this page).

If **Extended Service Level** is chosen, all inputs will be shown.

Because all input controls for a step are shown by default, an input rule must be created for each input which could be hidden.

Input Control	Rule
Extend Service Coverage	No custom rules set for this input
Service Days	2.1 Hide This Control
Hours Service Coverage	3.1 Hide This Control
Response Service Coverage	4.1 Hide This Control
Solution Service Coverage	5.1 Hide This Control
Service Level Provided	No custom rules set for this input

Rule: Hide This Control

Rule For: Service Days

Rule: Hide This Control

1. Extend Service Coverage not equal to Extended Service Level

Advanced Expression: 1

[Add Another Rule](#)

Save Cancel

The **Hide This Control** rule is defined using a single expression. If **Extend Service Coverage** is not equal to **Extended Service Level**, then the **Service Days** input control will be hidden. Another way to define this rule could be if **Extend Service Coverage** equals **Standard Service Level**.

This rule is repeated for the inputs **Hours Service Coverage**, **Response Service Coverage** and **Solution Service Coverage**.

How it looks in the Wizard

When a user reaches this step in the Wizard, the first input prompts them to choose either **Standard Service Level** or **Extended Service Level**.

The screenshot shows a web interface for a wizard titled "A - Business Wizard 1". At the top right are "Back" and "Next" buttons. The main heading is "6. Define Your Preferred Service Level". The first question is "Do you wish to extend the level of services beyond the base level?". It has two radio button options: "Standard Service Level" (selected) and "Extended Service Level". The second question is "How many days of service coverage do you want?", with radio button options "6 days - ext 1" and "7 days - ext 2". The third question is "Enter your desired hours of coverage.", followed by a dropdown menu showing "-- Select One --". The fourth question is "What is the maximum expected initial response time for your service cases?", with radio button options "04 Hours" and "08 Hours". The fifth question is "What is the maximum time in coverage days for the solution to be provided?", followed by a dropdown menu showing "-- Select One --". At the bottom, there is a summary statement: "This is the service level which we will provide based on your preferences.", followed by a grey rectangular box.

When the user chooses **Extended Service Level**, all remaining inputs remain on the page. When the user chooses **Standard Service Level**, all inputs but the final input are hidden because of the **Hide This Control** rules which were defined.

APTUS A - Business Wizard 1 Back Next

6. Define Your Preferred Service Level ?

Do you wish to extend the level of services beyond the base level? ?

- ☒ Standard Service Level
- ☐ Extended Service Level

This is the service level which we will provide based on your preferences. ?

Standard

Create Input Rules: Set This Control Value

In this example, multiple input rules are created for a single input control. The combination of user-selected responses to several inputs in the step will set the value of the **Service Level Provided** input.

A - Business Wizard 1 > Determine Service Level

Step Settings **Input Rules** Step Preview

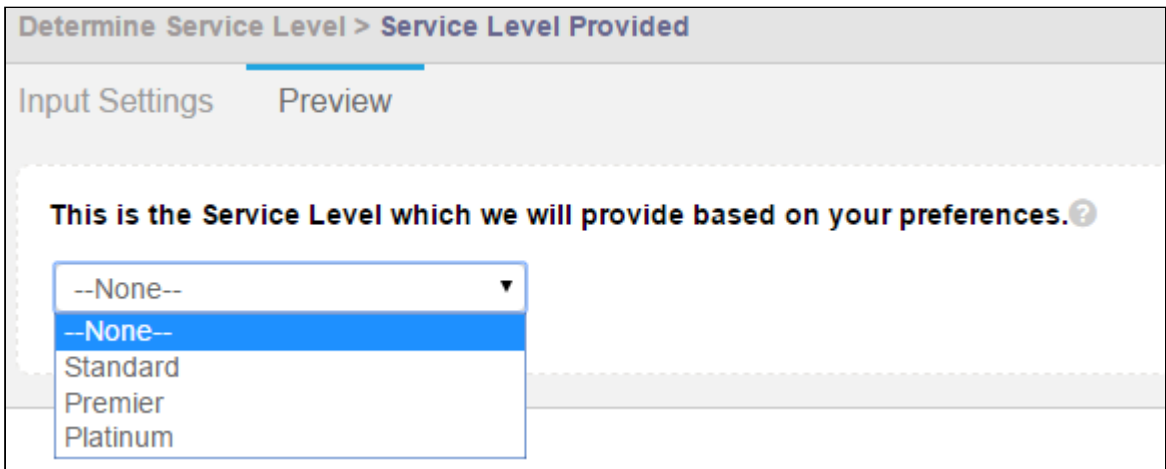
- Extend Service Coverage +
No custom rules set for this input
- Service Days +
2.1 Hide This Control
- Hours Service Coverage +
3.1 Hide This Control
- Response Service Coverage +
4.1 Hide This Control
- Solution Service Coverage +
5.1 Hide This Control
- Service Level Provided +**
 - 6.1 Set This Control Value
 - 6.2 Set This Control Value
 - 6.3 Set This Control Value

It is recommended that when you create a rule which will set the value of an input in a step, the input being set should be set to Read Only (when it is originally defined). Alternatively, you can create a **Disable This Control** rule and set criteria which will change the input to read only during Wizard runtime.

Rule: Set This Control

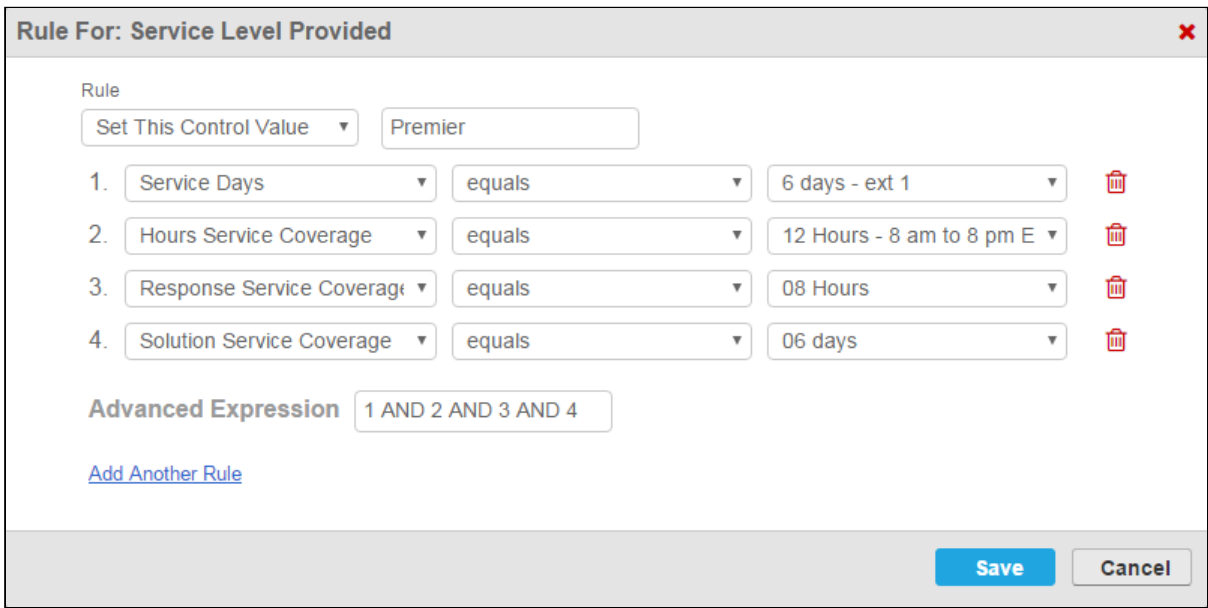
Service Level Provided is an input control defined using an object field. This field is a picklist on the Agreement record with three possible values:

- Standard
- Premier
- Platinum



The objective in this example is to create a rule which will resolve to each of the three possible values based on the responses given by the user during this step. So three rules must be created.

The first rule for **Service Level Provided** defines the criteria for setting the Service Level Provided to "Premier." To accomplish this, a **Set This Control Value** rule is created.



In the above example, each input listed in the rule must satisfy the exact criteria specified for the value of Service Level Provided to be set to "Premier" (note the Advanced Expression "1 AND 2 AND 3 AND 4").

i Note that the value of "Premier" is entered manually when the rule is configured but must match one of the options in the Object Field defined when the input was created.

Two more rules are created in turn to set the control value to Standard or Platinum.

How it looks in the Wizard

When a user reaches this step in the Wizard, they are prompted to provide responses to all questions. Note that the last input, which corresponds to the **Service Level Provided** input, is blank and read only.

APTUS A - Business Wizard 1 Back Next

6. Define Your Preferred Service Level ?

Do you wish to extend the level of services beyond the base level? ?

☒ Standard Service Level
☐ Extended Service Level

How many days of service coverage do you want? ?

☐ 6 days - ext 1
☐ 7 days - ext 2

Enter your desired hours of coverage. ?

-- Select One --

What is the maximum expected initial response time for your service cases? ?

☐ 04 Hours
☐ 08 Hours

What is the maximum time in coverage days for the solution to be provided? ?

-- Select One --

This is the service level which we will provide based on your preferences. ?

The user responds to questions in the step, matching those of the expression described above. The Service Level is defined and displayed in the field below the last input.

APT TUS A - Business Wizard 1 Back Next

6. Define Your Preferred Service Level ?

Do you wish to extend the level of services beyond the base level? ?

☒ Standard Service Level
☐ Extended Service Level

How many days of service coverage do you want? ?

☒ 6 days - ext 1
☐ 7 days - ext 2

Enter your desired hours of coverage. ?

12 Hours - 8 am to 8 pm Eastern ▼

What is the maximum expected initial response time for your service cases? ?

☒ 04 Hours
☐ 08 Hours

What is the maximum time in coverage days for the solution to be provided? ?

06 days ▼

This is the service level which we will provide based on your preferences. ?

Premier

You can see all the **Hide This Control** and **Set This Control Value** rules for this step resolve to true when the user chooses "Standard Service Level" as the first response.

APT TUS A - Business Wizard 1 Back Next

6. Define Your Preferred Service Level ?

Do you wish to extend the level of services beyond the base level? ?

☒ Standard Service Level
☐ Extended Service Level

This is the service level which we will provide based on your preferences. ?

Standard

Example: Wizard Step Rule #2

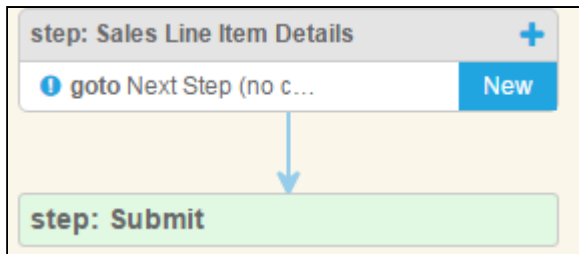
The final example for this wizard demonstrates one of the options for creating a step rule which determines the action(s) taken when a user clicks **Submit** following the last step of a Wizard.

In this example, the Wizard designer not only wants an Agreement record of type Primary Sales Contract created, but also wants the record to be created using **Submit Request** Agreement rules defined for this Agreement type.

Create Step Rule

To accomplish this, a **Go to Submit** rule must be specified for the last step in the Wizard.

From the **Wizard Step Rules** tab, a new rule is created under the **Sales Line Item Details** step.



Rule: Go to Submit


The screenshot shows the 'Rule For: Sales Line Item Details' dialog box. The 'Step' dropdown is set to 'Go to' and the 'Submit' option is selected. The URL field contains 'AgreementSubmitRequest?id=%Agreement%'. The dialog has 'Save' and 'Cancel' buttons.

The **Go to Submit rule** is defined with a specific *relative* URL: "AgreementSubmitRequest?id=%Agreement%"

When the user clicks **Submit** from the review page of the Wizard, the Agreement Primary Sales Contract will be created in Submit Request Mode. The %Agreement% is entered here so that the user is redirected to the newly-created record as the request is submitted.

How it looks in the Wizard

When a user has finished the last step of the Wizard, clicking **Next** takes the user to the Wizard Review page.


A - Business Wizard 1

[Back](#)
[Submit](#)

Review the Information.

Identify Your Business Function [Edit](#)

What business function do you want to work with? **Sales**

Identify Your Sales Business Activity [Edit](#)

What type of business activity do you wish to work with? **Sales Contract**
 What type of transaction do you wish to perform? **Create**

Identify Your Customer Account [Edit](#)

What is the customer account? [Partner Technologies](#)
 Please check here if there is already a Master Agreement for this Account. ☒

Provide Contract Details [Edit](#)

What is the Master Agreement's Number? [AD Sales VA 02.01.16](#)
 What is the date the agreement term will start? **2016-02-18 00:00:00**
 What is the date the agreement term will end? **2017-02-28 00:00:00**

Identify Your Desired Types of Sales Items [Edit](#)

What is to be sold in this sales contract? **All**
 What is the type of sales contract you want to create? **Full Contract**

Define Your Preferred Service Level [Edit](#)

Do you wish to extend the level of services beyond the base level? **Extended Service Level**
 How many days of service coverage do you want? **6 days - ext 1**
 Enter your desired hours of coverage. **12 Hours - 8 am to 8 pm Eastern**
 What is the maximum expected initial response time for your service cases? **08 Hours**
 What is the maximum time in coverage days for the solution to be provided? **06 days**
 This is the service level which we will provide based on your preferences. **Premier**

Enter the Sales Line Item Details [Edit](#)

Product	Quantity	List Price	Net Price
GenWatt Diesel 1000kW	10.00000	\$5,000.00000	\$4,500.00000
GenWatt Diesel 200kW	20.00000	\$4,500.00000	\$4,000.00000
Installation: Industrial - High	1.00000	\$10,000.00000	\$9,900.00000

When the user clicks **Submit**, the request to create an Agreement is processed, following the properly defined Agreement Rule for Submit Request Mode. In this example, because the **Service Level** specified in the Wizard by the user was "Standard," the auto Submit Request Mode Agreement rule is executed.

Rule Information			
Name	R-1357		
Sequence	1		
Rule Type	Submit Request Mode		
Rule Value	Auto		
Rule Description			
Active	<input checked="" type="checkbox"/>		

Inclusion Criteria			
Field	Operator	Value	
—None—	—None—		

Filter Criteria			
Field	Operator	Value	
Status Category	equal to	Request	AND
Service Level	equal to	Standard	

The Agreement record of type Primary Sales Contract is created and the user is redirected to the newly-created record details page.

Notes & Attachments

New Note

Attach File

View All

Notes & Attachments Help ?

Action	Type	Title	Last Modified	Created By
Edit Del	Note	A - Business Wizard 1 Notes	12/3/2015 3:08 PM	Click to Reveal

Document Versions

New Document Version

Document Versions Help ?

Action	Name	Checkout By	Checkout Date	Last Modified By	Latest Version	Is Transient	Title
Edit Del	Auto Generate Agreement			Click to Reveal 12/3/2015 3:09 PM	1.0.0	<input type="checkbox"/>	a01A000000NMEQ_Original_NK_TestTemplate_2015-12-03.doc

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	Email: Agreement a01A000000NMEQ with Account Acme 1 has been created and is attached for your review	Tester Ram	✓	12/3/2015	Click to Reveal	12/3/2015 3:09 PM
Edit Del	Generated Agreement		✓	12/3/2015	Click to Reveal	12/3/2015 3:09 PM
Edit Del	This record was created from Wizard A - Business Wizard 1 Runtime a01A000000075m2vAA		✓	12/3/2015	Click to Reveal	12/3/2015 3:08 PM

A number of actions take place as a result of Wizard submission and the Submit Request rule:

- A note is added to **Notes & Attachments** related list with details about the Wizard which created the record.
- The document is automatically generated from the Submit Request and is attached to the **Document Versions** related list (the document is here because Contract Document Versioning has been enabled for this org. If it is not enabled, the document would be attached to Notes & Attachments instead).
- Activity History shows which Wizard created the record (this is the same information as the note attached to N&A), the "Generated Agreement" activity, and an Email Template Agreement Rule creates and attaches an automatic email to specified recipients.


The Wizard is now complete and submitted. This example shows one of many outcomes which can occur when the user clicks **Submit**. Refer to [Configuring Wizard Step Rules](#) for more information on creating well-formed rules for your Wizards!

Configuring Wizards as Self-Service with Salesforce Sites and Communities

When you want to provide the ability for partners or other parties to run existing wizard designs created in your organization (or to create Wizards of their own), you must configure a method to make your runtime wizards externally facing. The Wizard Designer and Wizard Runtime pages are normally only available to users within your organization and for those who have proper permission extended to Wizard objects. Thankfully, Salesforce has easily configurable methods for exposing content through the use of Salesforce Sites and Community portals. Depending on the requirements of your partners and other customers and their current configurations, you have two options for exposing Wizards externally:

- unauthenticated access to guests using Salesforce (Force.com) Sites.
- authenticated access to licensed and unlicensed users using Salesforce Communities.

The choice between Salesforce Sites and Communities is mainly a question of how you want users to access Wizard functionality. Salesforce sites allows some flexibility, as you can provide guest users with a URL and allow them to run specific Wizards directly without the need for licenses (beyond a single guest user license). Alternatively, you may want to create and design a Salesforce community and give specific users access to design and run Wizards while interacting with partners and other users. In either case, both options provide authentication solutions and permission sets which identify user access to Contract Wizard features.

 As a pre-requisite to either option, you must first install the **Apttus Contract Management** package in the org where you intend to provide self-service wizards. Refer to [Installing Contract Management Application](#) for instructions.

We will explore self-service options in the following sections. Click **Next** to learn how to set up a Salesforce Site to work with Wizards.

Configuring Salesforce Sites for Self-Service Wizards

You can provide unauthenticated access to the Contract Wizard for guest users without licenses. Using Sites allows your customers to access Wizards from an external location.

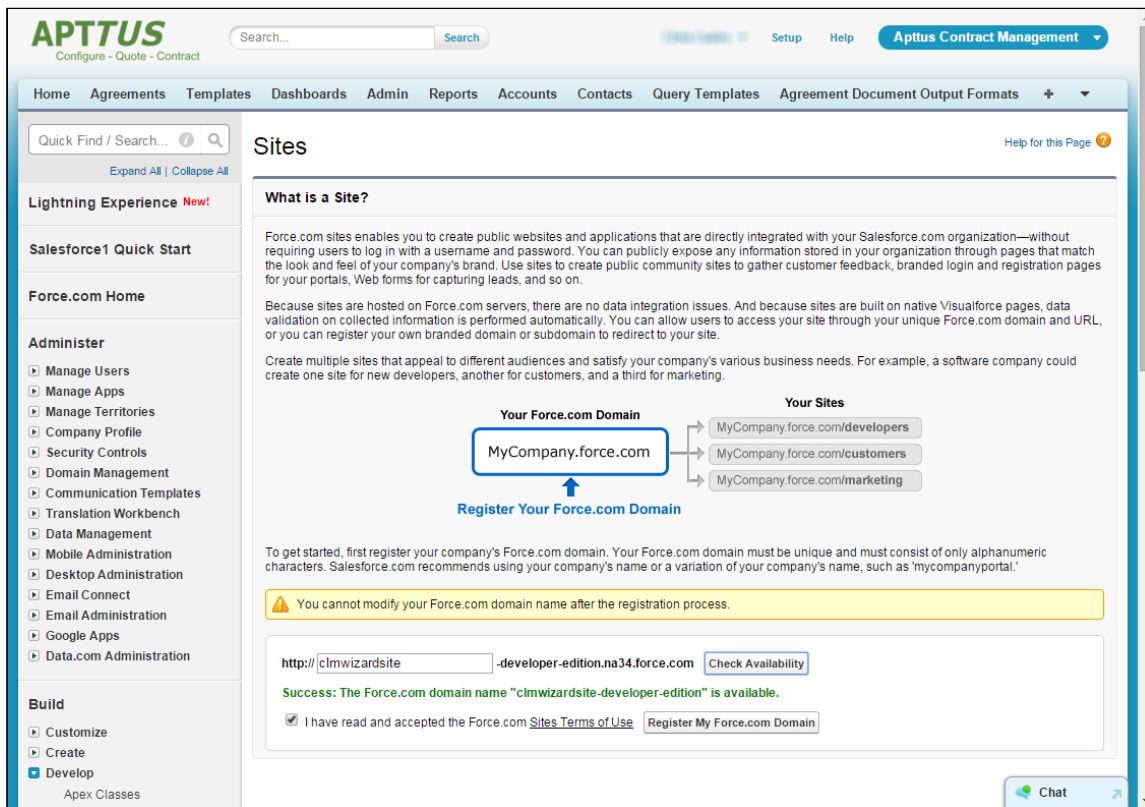
Creating a Salesforce Site

You will make the Contract Wizard available to external users by creating a [Force.com](#) site. To create your Salesforce site:

1. Log in to your org as administrator and go to **Setup > Develop > Sites**.

The screenshot shows the Salesforce Administrator interface for Apttus Contract Management. The left sidebar contains navigation menus for 'Lightning Experience', 'Salesforce Quick Start', 'Force.com Home', 'Administer' (with sub-items like Manage Users, Manage Apps, etc.), and 'Build' (with sub-items like Customize, Create, Develop). The main content area is titled 'Sites' and includes a 'What is a Site?' section explaining the concept of Force.com sites. Below the text is a diagram showing 'Your Force.com Domain' (MyCompany.force.com) branching into 'Your Sites' (MyCompany.force.com/developers, MyCompany.force.com/customers, MyCompany.force.com/marketing). A yellow warning box states: 'You cannot modify your Force.com domain name after the registration process.' At the bottom, there is a form with a text input field containing 'http://', a dropdown menu set to '-developer-edition.na34.force.com', and a 'Check Availability' button. Below the form is a checkbox for 'I have read and accepted the Force.com Sites Terms of Use' and a 'Register My Force.com Domain' button.

2. Enter a unique domain name in the dialog box provided and click **Check Availability**.



- Acknowledge the Sites Terms of Use and click **Register My Force.com Domain**. Please note that you cannot modify the domain name after you have registered.

APTUS
Configure - Quote - Contract

Search... Search

Home Agreements Templates Dashboards Admin Reports Accounts Contacts Query Templates Agreement Document Output Formats

Quick Find / Search... Expand All | Collapse All

Lightning Experience **New!**

Salesforce1 Quick Start

Force.com Home

Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Connect
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize
- Create
- Develop

Apex Classes

Sites

Help for this Page

What is a Site?

Force.com sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Force.com servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Force.com domain and URL, or you can register your own branded domain or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.

Your Force.com Domain

MyCompany.force.com

Your Sites

- MyCompany.force.com/developers
- MyCompany.force.com/customers
- MyCompany.force.com/marketing

Create Your Force.com Sites

Your Force.com domain name is **clmwizardsite-developer-edition.na34.force.com**

Force.com Sites [Terms and Conditions](#)

Sites (clmwizardsite-developer-edition.na34.force.com)

New

Site Label	Site URL	Site Description	Active	Site Type	Last Modified By
No records to display.					

Chat

4. Click **New** to create a new site. The Site Edit form is displayed.

APTUS
Configure - Quote - Contract

Search... Search

Home Agreements Templates Dashboards Admin Reports Accounts Contacts Query Templates Agreement Document Output Formats

Quick Find / Search... Expand All Collapse All

Lightning Experience New!

Salesforce1 Quick Start

Force.com Home

Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Connect
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize
- Create
- Develop

Apex Classes

Site Edit

Help for this Page

New Site

Save Cancel

Site Label

Site Name

Site Description

Site Contact

Default Web Address <http://icimwizardsite-developer-edition.na34.force.com/>

Active ☐

Active Site Home Page

Inactive Site Home Page [InMaintenance](#) [Preview](#)

Site Template [SiteTemplate](#)

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

URL Rewriter Class


Enable Feeds ☐

Clickjack Protection Level [Allow framing by the same origin only \(recommended\)](#)

Require Secure Connections (HTTPS) ☐

Save Cancel

Chat

- Enter details for your site. Click the lookup icon  next to **Active Site Home Page** to choose a Visualforce page which displays as the default home page for your site. If you are not sure what to configure, pick the "Under Construction" page.

The screenshot displays the 'Site Edit' interface in the APTTUS application. The main content area is titled 'New Site' and contains a form with the following fields and options:

- Site Label:** Wizard Site Example
- Site Name:** Wizard_Site_Example
- Site Description:** This site is created to demonstrate how to set up self-service Wizards for your company
- Site Contact:** [Empty field]
- Default Web Address:** http://icimwizardsite-developer-edition.na34.force.com/
- Active:** ☐
- Active Site Home Page:** WizardRuntimeView
- Inactive Site Home Page:** InMaintenance (with a Preview button)
- Site Template:** SiteTemplate
- Site Robots.txt:** [Empty field]
- Site Favorite Icon:** [Empty field]
- Analytics Tracking Code:** [Empty field]
- URL Rewriter Class:** [Empty field]
- Enable Feeds:** ☐
- Clickjack Protection Level:** Allow framing by the same origin only (recommended)
- Require Secure Connections (HTTPS):** ☐

At the bottom of the form are 'Save' and 'Cancel' buttons. The left sidebar shows a navigation menu with sections like 'Lightning Experience', 'Salesforce1 Quick Start', 'Force.com Home', 'Administer', and 'Build'. The top navigation bar includes links for Home, Agreements, Templates, Dashboards, Admin, Reports, Accounts, Contacts, Query Templates, and Agreement Document Output Formats.

6. Click **Save** to save your site details.

Creating Multiple Sites for your Organization

Each additional site you create can provide guest access to a different set of pages, but each site requires a separate guest license. Enterprise and Ultimate editions of Salesforce come with 25 sites/guest user licenses. For more information on Force.com site, refer to the Salesforce help [An Introduction to Force.com Sites](#).

You can create multiple sites in your org, each with a different Active Site Home page. For example, if you want to create a site that gives guests access to the Wizards tab from which they can search for, choose and run specific Wizard design, make the Active home page "WizardRuntimeView" and consider appending "wizards" to your default web address. If you instead want the site to be used for creating Wizard Designs, specify "WizardDesignView" as the Active home page and consider adding "designers" to your default web address.

Guest Access to Sites

Follow the steps in this section to allow for public (guest) access to your sites. Using this method gives access to your sites to a public (guest) user and *does not require* authentication. If you require authentication for your Sites (individual users logging in through a portal), follow the instructions for [configuring self-service Wizards through Communities](#).

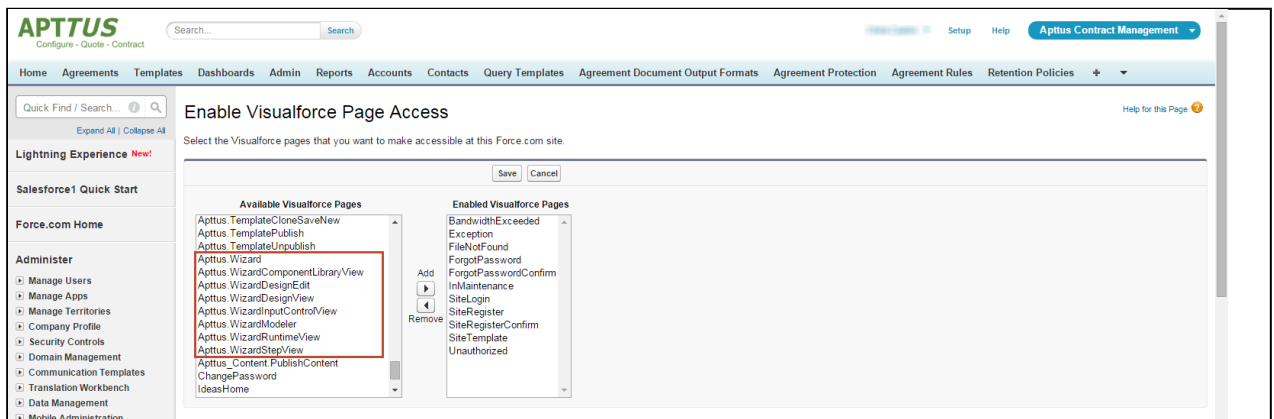
Assigning Visualforce pages to a Site

For each Site you create you need to assign Visualforce pages to the Site to make Wizard functionality available to the guest user. Choose pages to assign based on what functionality and permissions you want to grant publicly.

1. From the Site Details page, go to "Site Visualforce Pages" and click Edit,

The screenshot displays the Salesforce Site Details page for a site named "Wizard Site Example". The page is divided into several sections. At the top, there's a "Site Detail" section with fields for Site Label, Site Description, Site Name, and Site Contact. Below this, there are tabs for "Public Access Settings", "Login Settings", "URL Redirects", and "Deactivate". The "Public Access Settings" tab is selected, showing options for "Active Site Home Page", "Inactive Site Home Page", "Site Template", "Analytics Tracking Code", and "Clickjack Protection Level". The "Site Visualforce Pages" section is highlighted with a red circle around the "Edit" button. This section contains two panes: "Available Visualforce Pages" on the left and "Enabled Visualforce Pages" on the right. The "Available Visualforce Pages" pane lists various Visualforce pages such as "BandwidthExceeded", "Exception", "FileNotFound", "ForgotPassword", "ForgotPasswordConfirm", "InMaintenance", "SiteLogin", "SiteRegister", "SiteRegisterConfirm", and "SiteTemplate". The "Enabled Visualforce Pages" pane is currently empty.

2. Add pages from the left pane of Available Visualforce pages to the right pane of Enabled Visualforce pages.



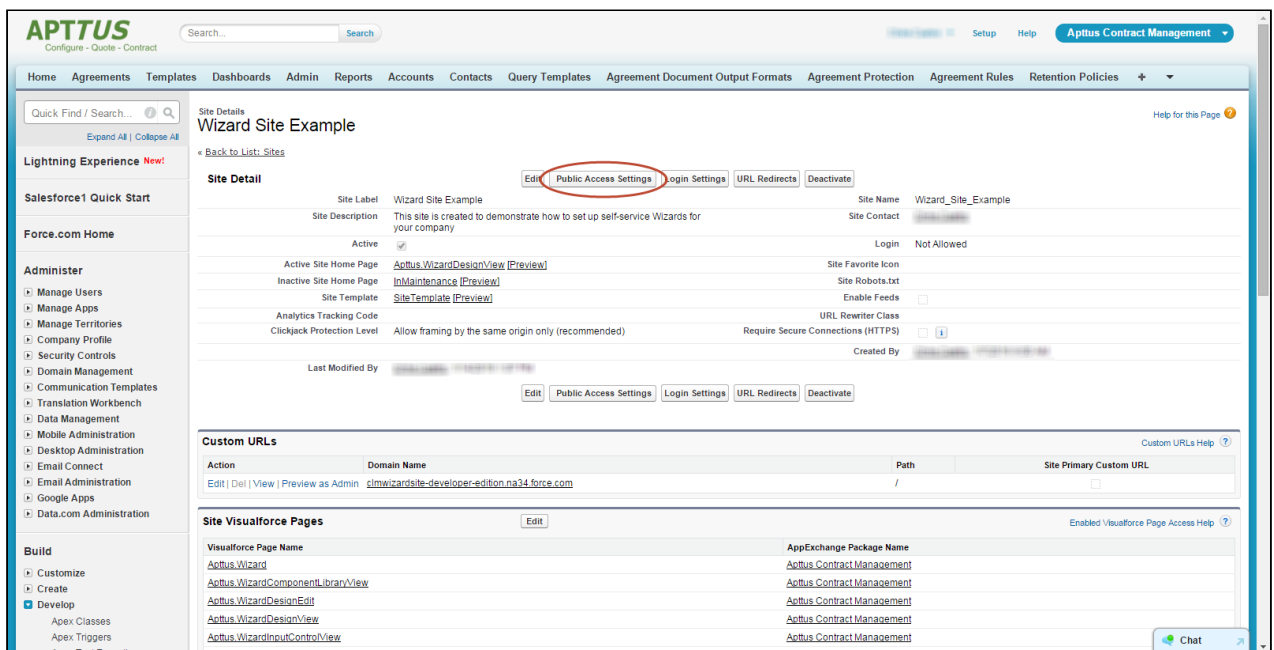
To give access to runtime Wizards, enable pages: *Apttus.Wizard*, *Apttus.WizardRuntimeView*.

3. Click **Save**.

Configuring Public Access Settings

In order for your guest user to interact with the Contract Wizard pages you've just assigned, the user must be granted object permissions and field-level security privileges.

1. From the Site Details page, click on **Public Access Settings** to navigate to the custom profile page for



2. From the Site Profile page, click **Edit**.

The screenshot shows the Apttus Contract Management interface. The left sidebar contains navigation links for various sections like Lightning Experience, Salesforce1 Quick Start, Force.com Home, and Administer. The main content area is titled 'Profile Wizard Site Example Profile'. It includes a 'Profile Detail' section with fields for Name, User License, Description, and Created By. Below this is a 'Page Layouts' section with a table of layouts for different objects. The 'Edit' button in the 'Profile Detail' section is circled in red.

Profile Detail

Name	Wizard Site Example Profile
User License	Guest
Description	
Created By	



Page Layouts

Standard Object Layouts	Global	Outlook	Home Page Layout	Account	Asset	Campaign	Campaign Member	Case	Case Close	Coaching	Contact
Global Layout	Global Layout	Not Assigned	Home Page Default	Account Layout	Asset Layout	Campaign Layout	Campaign Member Page Layout	Case Layout	Close Case Layout	Coaching Layout	Contact Layout
Job Tracker	Job Tracker Layout - Winter '16	Lead	Metric	Metric Data Link	Opportunity	Opportunity Product	Order	Order Product	Performance Cycle	Price Book	Price Book Entry

3. Scroll to Custom Object Permissions. Enable **Read**, **Create** and **Edit** permissions under Basic Access for all Wizard-related custom objects for which you want to grant access to the guest user and **View All** under Data Administration for the same objects.

Wizards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Wizard Designs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Designs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Input Controls	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Wizard Input Controls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Input Control Runtime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Input Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Rulesets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Rulesets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Ruleset Runtime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Runtime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Runtime Inputs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Wizard Steps	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- minimum object permissions for running Wizards requires Read, Create, Edit access to: *Wizard*, *Wizard Input Controls*, *Wizard Runtime Inputs*, *Wizard Steps*. Read Access must also be granted for *Wizard Designs*.
4. If you want guest users to be able to create agreement or other records as a result of executing runtime wizards, you must also assign **Read, Create, Edit** permissions for the Agreement (or object being created) to the guest user.

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All 	Modify All 
Account Hierarchies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agreements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

i If any Wizard you are exposing to the guest user is designed to create an object (Focus Object) you must ensure the Wizard design includes a custom URL to which the user will be redirected once the Wizard is submitted. Since default behavior of agreement and other object-creation Wizards redirects the user to the Object detail page in Salesforce, guest users will not have proper access. Refer to [Configuring Wizard Step Rules](#) for information on how to customize Go to Submit URLs.

5. Click **Save**.
6. Scroll to Custom Field-Level security. For each object you gave access to in Step 3, you must make all fields Visible (in addition to any read-only settings). This is especially important when your site is being used by guests to design Wizards as it will enable various fields in the designer. Click [View](#) next to a custom object name to view its field-level security.
7. Click **Edit** on the next page to edit field security settings.

Wizard Field-Level Security for profile
Wizard Site Example Profile Help for this Page ?

Field Name	Field Type	Visible	Read-Only
Action	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Context Id	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Context Type	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
External Id	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Status	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Submitted By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wizard Design	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wizard Name	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>

8. Enable each disabled check box under the Visible column.
9. Click **Save**. Repeat Steps 6 – 9 for each object which requires field-level access.

Assigning CLM Package to Guest User

Once you have granted permissions to the site user profile, you also need to assign a license for Apttus Contract Management to the guest user for the site.

1. From the Site Details page, click on **Public Access Settings**.
2. From the Site Profile page click **View Users**.
3. Click on the **Full Name** link for the guest user.

Wizard Site Example Profile

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
Edit	Site Guest User Wizard Site Example	guest	wizard_site_example@clmwizardsite-developer-edition-na34.force.com			✓	Wizard Site Example Profile

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W

4. Under Managed Packages, click on **Assign Licenses**,
5. On the next page, choose **Apttus Contract Management** and click **Add**.

Assign Licenses [Help for this Page](#)

Select the checkbox next to each package you want to assign to this user, and then click Assign. The checkbox is absent if a package does not have sufficient licenses available or the package status is expired or suspended.

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other [All](#)

Unassigned Packages		Select Show	Deselect Show	Deselect All	
Action	Package Name ↑	Status	Allowed Licenses	Used Licenses	Expiration Date
<input checked="" type="checkbox"/>	Apttus Contract Management	Active	5	2	3/31/2016 5:00 PM

Selected Packages

Action	Package Name
No rows selected	

[Add](#) [Cancel](#)

Package Access is now granted to the guest user and the Site is configured for guest access.

Managed Packages [Assign Licenses](#)

Action	Package Name	Status	
Remove	Apttus Contract Management	Active	3/31/2016
	Apttus Content Integration	Active	Does not Expire

[Back To Top](#) Always show me [more](#) records per related list

Configuring Sites for a Specific Runtime Wizard

When you configure your site you have the option to choose any Visualforce page as the Active Site Home page. However, a case may exist in which you would prefer for the site to take the user directly to a runtime wizard, rather than giving the user the option to choose it from Wizard tab home page. In this case you will have to configure a **URL Redirect** for the site.

To set up a URL redirect:

1. Go to the Site Details page.
2. Click on **URL Redirects**.

Site Details
Wizard Site Example

[Back to List: Sites](#)

Site Detail [Edit](#) [Public Access Settings](#) [Login Settings](#) [URL Redirects](#) [Deactivate](#)

Site Label	Wizard Site Example	Site Name	Wizard_Site_Example
Site Description	This site is created to demonstrate how to set up self-service Wizards for your company	Site Contact	Chris Castro
Active	<input checked="" type="checkbox"/>	Login	Not Allowed
Active Site Home Page	Apttus.WizardRuntimeView [Preview]	Site Favorite Icon	
Inactive Site Home Page	InMaintenance [Preview]	Site Robots.txt	
Site Template	SiteTemplate [Preview]	Enable Feeds	<input type="checkbox"/>
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by the same origin only (recommended)	Require Secure Connections (HTTPS)	<input type="checkbox"/> i
Last Modified By	Chris Castro , 1/14/2016 4:43 PM	Created By	Chris Castro , 1/7/2016 9:00 AM

[Edit](#) [Public Access Settings](#) [Login Settings](#) [URL Redirects](#) [Deactivate](#)

3. Enter the following to add a new redirect rule:

- **Source URL** – This is the relative URL of the original source page. Enter "/" here.
- **Redirect Type** – Choose "Permanent (301)."
- **Target URL** – Enter "http://{siteurl}/apex/Apttus_wizard?wizardid={wizardid}" where {siteurl} is the actual site URL and {wizardid} is the ID of the desired runtime wizard. For example, if your Site URL is <http://clmwizardsite-developer-edition.na34.force.com/> and the runtime Wizard id is **a0p610000019mTIAAY**, you would enter your target URL as http://clmwizardsite-developer-edition.na34.force.com/apex/Apttus__wizard?wizardid=a0p610000019mTIAAY

Site URL Redirects

[Back to Site Detail](#)

Add A New Rule

Source URL	Redirect Type	Target URL
<input type="text" value="/"/>	<input type="text" value="Permanent (301)"/>	<input type="text" value="http://clmwizardsite-developer-edition.na34.force.com/apex/Apttus__wizard?wizardid=a0p610000019mTIAAY"/>
Save		

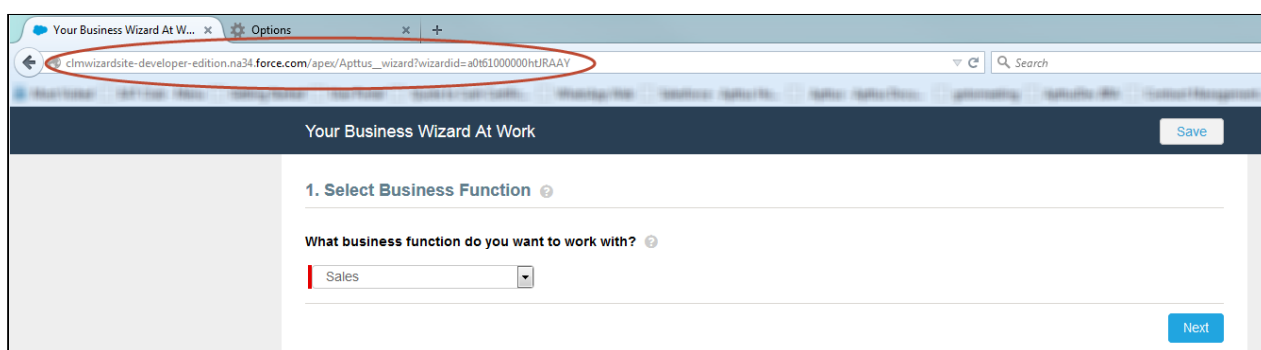
Redirect Rules [Activate](#) [Deactivate](#) [Delete](#)

Action	Active	Source URL	Redirect Type	Target URL

[Activate](#) [Deactivate](#) [Delete](#)

4. Click **Save**.

5. Select the rule you just created and click **Activate** to activate the URL redirect. Now when a user visits your site home page they will be redirected to begin the runtime wizard.



Configuring Self-Service Wizards for Communities

Use Salesforce Communities for your Self-Service Wizards to require authentication for customers and external users when they execute run-time wizards. This section provides instructions for:

- creating a Community portal for licensed Community users to access Self-Service Wizards.
- configuring your Community to allow unlicensed external (guest) users to self-register for accounts.

In Spring 2013, Salesforce introduced Communities, which replaced the Customer and Partner portals. Communities combined the functionality of customer and partner portals with a way to allow customers and employees to collaborate in the same space. Using Communities to provide Self-Service Wizards, you can provide the same functionality but give your Wizard experience a completely unique look and feel.

When you create a Community, you are still creating a Force.com site, but the site is wrapped in the Community, providing authentication options, branding, collaboration and other benefits. The most important consideration to use Communities over Customer/Partner portals is that Customer/Partner portals are ***no longer available for new Salesforce organizations***.

For more information on Salesforce Communities, refer to Salesforce documentation on [Getting Started With Communities](#).

- i** The following pages and sections provide instructions for enabling Self-Service Wizards by creating a new community and assigning members to the Community. While you can create communities for both customers and partners, the instructions provided use customer members as an example. The process for partners is almost identical, but differs slightly. Where the process differs the documentation will provide guidance.

To properly set up Self-Service Wizards using Communities, perform the following steps:

1. Enable Communities in your org and choose a domain.
2. Create a Community for Self-Service Wizards.
3. Create/Modify User Profile(s) to be used in the Community.
 - a. Add custom object permissions to Wizard-related objects.
 - b. Add field-level security privileges for Wizard-related objects.
4. Create Contacts and Enable as Customer or Partner Users.
5. Add Members to the Community.
6. Add Wizard tab to the Community.

7. Activate the Community.

Creating Your Community

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

Enabling Communities

i If Communities is already enabled for your org, skip this step.

1. Go to **Setup > Customize > Communities > Community Settings**.
2. Select the **Enable Communities** checkbox.

APTUS
Configure - Quote - Contract

Search... Search

Home Agreements Templates Dashboards Admin Reports Accounts Contacts Query Templates Agreement Document Output Formats

Quick Find / Search... Expand All Collapse All

Lightning Experience New!

Salesforce1 Quick Start

Force.com Home

Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Connect
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize
 - Tab Names and Labels
 - Home
 - Activities

Communities Help for this Page

Communities are spaces for employees, customers and partners to collaborate on best practices and business processes. [Learn more](#)

To get started with communities, you must first enable it and select a domain.

Save

Enable communities ! = Required Information

Important: Once you enable communities, it cannot be disabled. Enabling communities also permanently turns on the new user interface theme and the universal header. [Learn more](#)

☒ Enable communities

Select a domain name

Important: The domain name will be used in all of your communities and can't be changed after you save it

Sample Domain Name
MyCompany.force.com

Sample Community URLs

- MyCompany.force.com/customers
- MyCompany.force.com/developers
- MyCompany.force.com/partners

Domain name Apttuswizards -developer-edition.na34.force.com **Check Availability**

Save

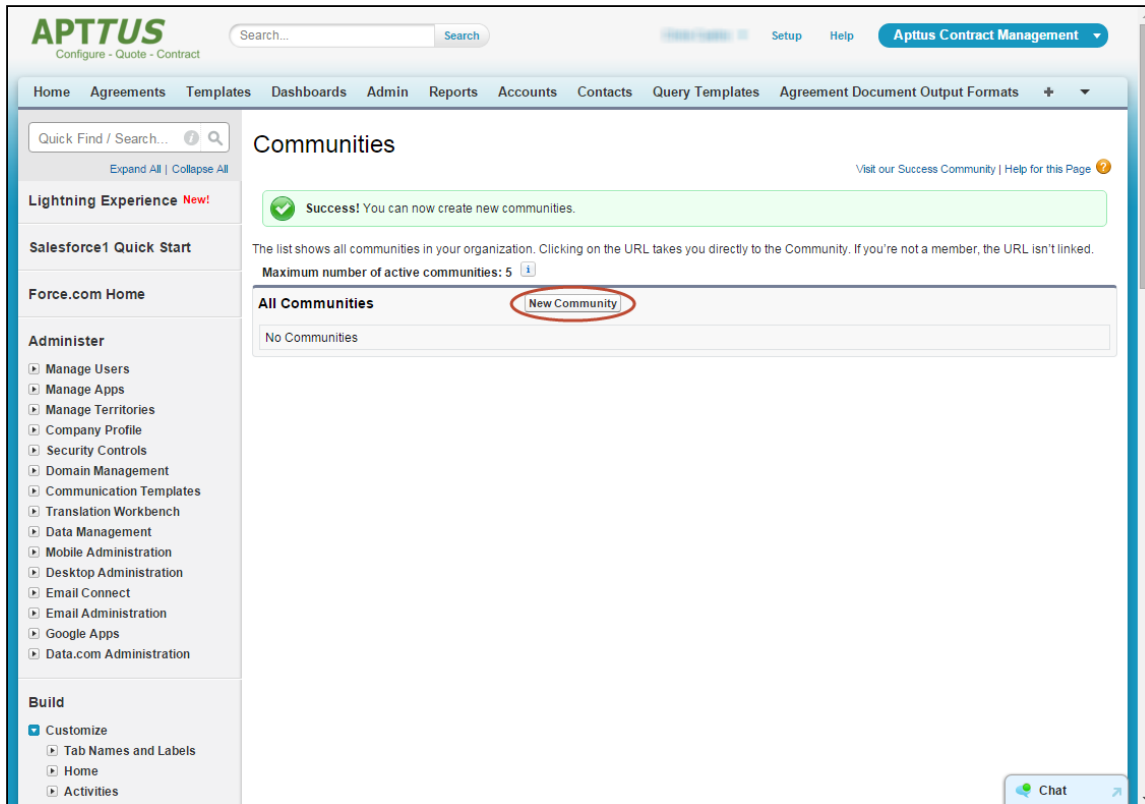
Chat

3. Enter a unique **Domain Name**. This domain name will be used in all of your communities for this org.
4. Click **Check Availability** to confirm that your chosen domain is available.
5. Click **Save**.

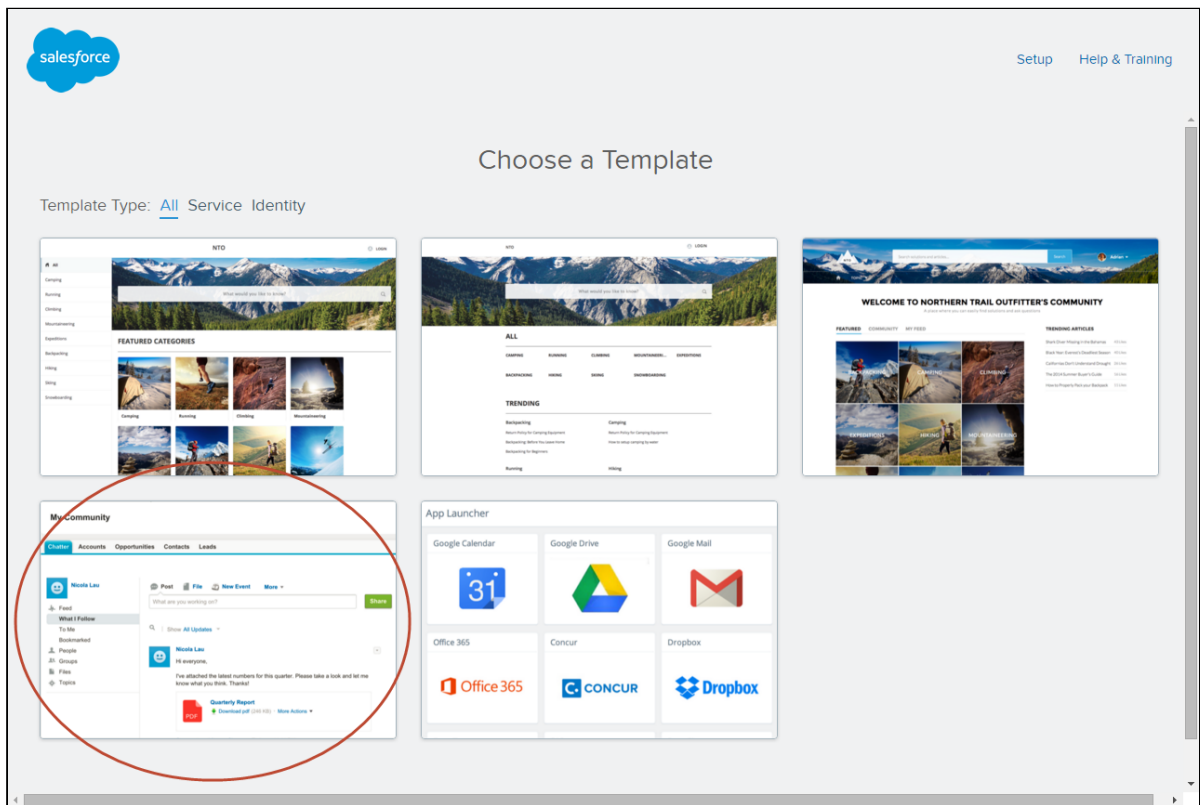
Creating a Community for Self-Service Wizards

With Communities enabled, you can create a Community for your partners and customers to run Wizards.

1. Go to **Setup > Customize > Communities > All Communities**.



2. Click **New Community** to choose a template for your new community. The Community Builder page is displayed.



3. Choose the **Salesforce Tabs + Visualforce** template. This is required for communities which expose custom Visualforce pages (like the Contract Wizard).
4. Choose a **Name** for your Community and an optional prefix for the **URL** (in this example, "wizards" is used as a prefix).

salesforce

Setup Help & Training

Name Your Community

Not sure what to enter? Don't worry—you can always change it later.

Name

URL

[Previous](#) [Create Community](#)

5. Click **Create Community**. Your community has been created and is now ready to be configured for Self-Service Wizards.

Configuring Users for your Community

In order for users to have access to both your community and Wizards, you must complete the following steps:

1. Create a user profile for your community OR modify an existing user profile
2. Add custom object permissions to the profile(s) for Wizard-related objects
3. Add field-level security permissions to the profile(s) for Wizard-related objects
4. Create customer/partner users as contacts and enable as community users
5. Add members to your Community

i The following sections use a Customer Community profile as an example, but you can also create a Partner Community profile. The only major differences are the type of *license* chosen when creating the profile and any users created for the profile must be associated with *partner accounts*.

Creating a User Profile

- i** The following section provides instructions for creating a user profile for use with your Community specifically for the use of running Wizards. If you decide you want to clone and/or modify an existing user profile for use with your Community, you can skip this step, but make sure the user profile you have chosen is assigned a Partner or Community license.

1. Go to **Setup > Manage Users > Profiles**.
2. Click **New Profile**. The Clone Profile page is displayed.
3. Choose an Existing Profile enabled for Salesforce Communities: **Customer Community User** or **Partner Community User** (Customer Community User is used in the examples on this page).

4. Enter the name for the user profile you want to create and click **Save**.

Adding Custom Object Permissions for Wizard-Related Objects

1. Go to **Setup > Manage Users > Profiles** and click on the profile you just created.

The screenshot shows the Apttus Contract Management interface. The top navigation bar includes the Apttus logo, a search bar, and links for Home, Agreements, Templates, Dashboards, Admin, Reports, Accounts, Contacts, Query Templates, Agreement Document Output Formats, and Agreement Protection. The left sidebar contains a 'Quick Find / Search...' bar and a list of navigation items: Lightning Experience, Salesforce1 Quick Start, Force.com Home, and Administer. Under Administer, there are sections for Manage Users (Users, Adoption Manager, Mass Email Users, Roles, Permission Sets), Profiles, Public Groups, Queues, Login History, Manage Apps, Manage Territories, Company Profile, Security Controls, Domain Management, Communication Templates, Translation Workbench, Data Management, Mobile Administration, Desktop Administration, and Email Connect. The main content area is titled 'Profiles' and shows a table of profiles. The 'Test Customer Community User' profile is highlighted with a red circle. The table has columns for Action, Profile Name, User License, and Custom. The 'Test Customer Community User' profile has a 'Customer Community' license and a checked 'Custom' checkbox.

Action	Profile Name	User License	Custom
Edit Clone	Partner Community User	Partner Community	<input type="checkbox"/>
Edit Clone	Read Only	Salesforce	<input type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>
Edit Delete	Test Customer Community User	Customer Community	<input checked="" type="checkbox"/>
Edit Delete	Test Wizard Community User	Partner Community	<input checked="" type="checkbox"/>
Edit Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>

2. Click **Edit** on the Profile Details page.

APTUS
Configure - Quote - Contract

Search... Search

Home Agreements Templates Dashboards Admin Reports Accounts Contacts Query Templates Agreement Document Output Formats Agreement Protection

Quick Find / Search... Expand All Collapse All

Lightning Experience New!

Salesforce1 Quick Start

Force.com Home

Administer

- Manage Users
 - Users
 - Adoption Manager
 - Mass Email Users
 - Roles
 - Permission Sets
- Profiles
 - Public Groups
 - Queues
 - Login History
- Manage Apps
 - Manage Territories
 - Company Profile
 - Security Controls
 - Domain Management
 - Communication Templates
 - Translation Workbench
 - Data Management
 - Mobile Administration
 - Desktop Administration
 - Email Connect

Profile: Test Customer Community User
Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [43] | Enabled Visualforce Page Access [100] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail Edit Clone Delete View Users

Name	Test Customer Community User		
User License	Customer Community	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Chris Castro	1/20/2016 11:23 AM	Modified By: Chris Castro 1/21/2016 11:42 AM

Console Settings
Console Layout [Edit]

Page Layouts

Standard Object Layouts	
Global	Global Layout [View Assignment]
Outlook	Not Assigned [View Assignment]
Home Page Layout	Home Page Default [View Assignment]
Account	Account Layout [View Assignment]
Asset	Asset Layout [View Assignment]
Campaign Member	Campaign Member Page Layout [View Assignment]
Case	Case Layout [View Assignment]
Job Tracker	Job Tracker Layout - Winter '16 [View Assignment]
Order	Order Layout [View Assignment]
Order Product	Order Product Layout [View Assignment]
Price Book	Price Book Layout [View Assignment]
Price Book Entry	Price Book Entry Layout [View Assignment]
Product	Product Layout [View Assignment]
Social Persona	Social Persona Layout [View Assignment]

Chat

3. Under **Custom Tab Settings**, change the Wizards tab to **Default On**.

Custom Tab Settings

About	Default On	Publish Templates	Default On
Admin	Default On	Purge Agreements	Default On
Agreement Document Output Formats	Default On	Query Templates	Default On
Agreement Explorer	Tab Hidden	Retention Policies	Default On
Agreement Protection	Default On	Search Filters (Comply)	Default On
Agreement Rules	Default On	Templates	Default On
Agreements	Default On	Term Exceptions	Default On
Configurable Wizard	Default On	Wizard Component Library	Default Off
Cycle Time Groups	Default On	Wizard Designs	Default Off
Doc Assembly Rulesets	Default On	Wizards	Default On
Formula Fields (Comply)	Default On		

4. Under **Custom Object Permissions** grant Read, Create and Edit permissions to the following objects: *Wizards*, *Wizard Input Controls*, *Wizard Runtime Inputs*, and *Wizard Steps*.

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All 	Modify All 
Wizards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Designs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Designs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Input Controls	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Input Controls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Input Control Runtime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Input Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Rulesets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Rulesets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Ruleset Runtime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Runtime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Runtime Inputs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Steps	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wizard Steps	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Click **Save** to return to the Profile Details page.

Adding Field-Level Security for Wizard-related Objects

1. Go to **Setup > Manage Users > Profiles** and click on the profile you just created.
2. Under **Field-Level Security > Custom Field-Level Security** click the View link for the *Wizard* object.

Custom Field-Level Security	
Account Hierarchy	[View]
Admin	[View]
Agreement	[View]
Agreement Action Condition	[View]
Agreement Clause	[View]
Agreement Document	[View]
Agreement Document Output Format	[View]
Agreement Explorer	[View]
Agreement Hierarchy	[View]
Agreement Line Item	[View]
Agreement Lock	[View]
Agreement Protection	[View]
Agreement Rule	[View]
Agreement Rule Condition	[View]
Agreement Term Exception	[View]
Async Merge Call	[View]
Content Event	[View]
Cycle Time Field	[View]
Cycle Time Field Data	[View]
Cycle Time Group	[View]
Cycle Time Group Data	[View]
Doc Assembly Component	[View]
Doc Assembly Rule	[View]
Doc Assembly Ruleset	[View]
Document Version	[View]
Document Version Detail	[View]
Formula Field (Comply)	[View]
Merge Event	[View]
Merge Event Detail	[View]
Query Template	[View]
Query Template Filter	[View]
Query Template Qualifier	[View]
Related Agreement	[View]
Retention Policy	[View]
Search Filter (Comply)	[View]
Template	[View]
Template Clause Reference	[View]
Template Datasource Filter	[View]
Template Dynamic Section	[View]
Temp Object (Comply)	[View]
Term Exception	[View]
Wizard	[View]
Wizard Design	[View]
Wizard Design (Deprecated)	[View]
Wizard Input Control	[View]
Wizard Input Control (Deprecated)	[View]
Wizard Input Control Runtime (Deprecated)	[View]
Wizard Input Group (Deprecated)	[View]
Wizard Rule	[View]
Wizard Rule (Deprecated)	[View]
Wizard Ruleset	[View]
Wizard Ruleset (Deprecated)	[View]
Wizard Ruleset Runtime (Deprecated)	[View]
Wizard Runtime (Deprecated)	[View]
Wizard Runtime Input	[View]
Wizard Step	[View]
Wizard Step (Deprecated)	[View]
Wizard Step Runtime (Deprecated)	[View]

3. Click on each checkbox under the **Visible** column to enable visibility for all fields in the list.

Wizard Field-Level Security for profile
Test Customer Community User

Save Cancel

Field Name	Field Type	Visible	Read-Only
Action	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Context Id	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Context Type	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
External Id	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Status	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Submitted By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wizard Design	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wizard Name	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save Cancel

4. Click **Save** to return to the Profile Details page.
5. Repeat Steps 2 – 4 for the following objects: *Wizard Input Control*, *Wizard Runtime Input*, *Wizard Step*.

Creating Community Users from Contacts

Assuming the customers or partners who will be using Self-Service wizards are customers of your organization, you must create or use existing contacts in your org and enable them as customer or partner users. Follow these step-by-step instructions to create a new user for your community and assign it a Community profile.

1. Create a new business contact and assign it an account or go to **Contacts** and choose an existing contact.
2. Click on **Manage External User** and choose **Enable Customer User**.

The screenshot shows the Apttus Contract Management interface. The top navigation bar includes 'Home', 'Agreements', 'Templates', 'Dashboards', 'Admin', 'Reports', 'Accounts', 'Contacts', 'Query Templates', 'Agreement Document Output Formats', and 'Agreement Protection'. The 'Contacts' tab is selected. On the left, there is a 'Recent Items' list and a 'Recycle Bin' button. The main content area displays the profile of 'Wally Wizard'. Below the profile, there is a 'Contact Detail' section with fields for 'Contact Owner', 'Name', 'Account Name', 'Title', 'Department', 'Birthdate', 'Reports To', 'Lead Source', 'Mailing Address', 'Languages', 'Created By', and 'Description'. The 'Manage External User' dropdown menu is open, showing the option 'Enable Customer User'.

The New User form is displayed.

- i** You can choose to enable the contact as a Partner User only if the account assigned to the contact has been enabled as a Partner Account. Also keep in mind that when you assign a profile to the user it must use be a Partner profile (using a Partner Community license) instead of a Customer profile.

3. Enter all required information for your new Community user, including:
 - **Email**– the actual email of the user who will logging in to your community (if you have not yet activated the community, choose an email address controlled by your organization–see below)

- **Username** – the Username for this user will be what they use to log in to your Community portal (e.g., "wwizard@wizarduser.com").
- **User License** – the "Customer Community" user license (or "Partner Community" if you are creating a Partner User).
- **Profile** – the User Profile you created in the previous section.

New User [Help for this Page](#)

User Edit

General Information ! = Required Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

User License

Profile

Active ☒

Chatter Answers User ☒

Data.com User Type

Data.com Monthly Addition Limit

Force.com Quick Access Menu ☒

Salesforce CRM Content User ☐

Receive Salesforce CRM Content Email Alerts ☐

Receive Salesforce CRM Content Alerts as Daily Digest ☐

Allow Forecasting ☐

Phone

Extension

Fax

Mobile

Email Encoding

- Click **Save** to create the new user. An email notification is sent to the email address provided in the New User form to complete registration for their account.

! During initial setup of your community before it is activated, it is recommended to create a user password from an email address controlled by you or your administrator. After the community has been activated, any new users created in this way can complete the registration process from their own email address.

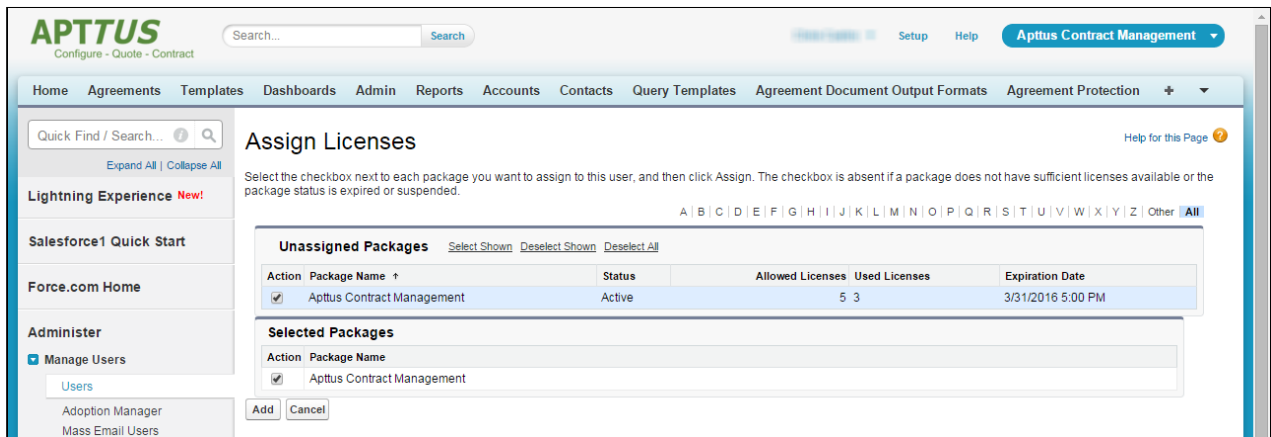
- Return to the detail page for your contact. Click on **Manage External User** and choose **View Customer User**.

The screenshot shows the Apttus Contract Management interface. The top navigation bar includes links for Home, Agreements, Templates, Dashboards, Admin, Reports, Accounts, **Contacts**, Query Templates, Agreement Document Output Formats, and Agreement Protection. The left sidebar shows a 'Recent Items' list with entries like 'Wally Wizard', 'George Wizard', 'XYZ Company', and 'Bertrand Roberts'. The main content area displays the 'Contact Detail' for 'Wally Wizard', owned by 'Chris Castro'. A dropdown menu for 'Manage External User' is open, showing options: 'View Customer User' (highlighted), 'Disable Customer User', 'Log in to Portal as User', and 'Log in to Community as User'.

6. Scroll to the **Managed Packages** section and click on **Assign Licenses**.

The screenshot shows the 'Managed Packages' section. At the top, there is a table with columns 'Action', 'Package Name', and 'Status'. Below the table, the 'Assign Licenses' button is highlighted with a red circle.

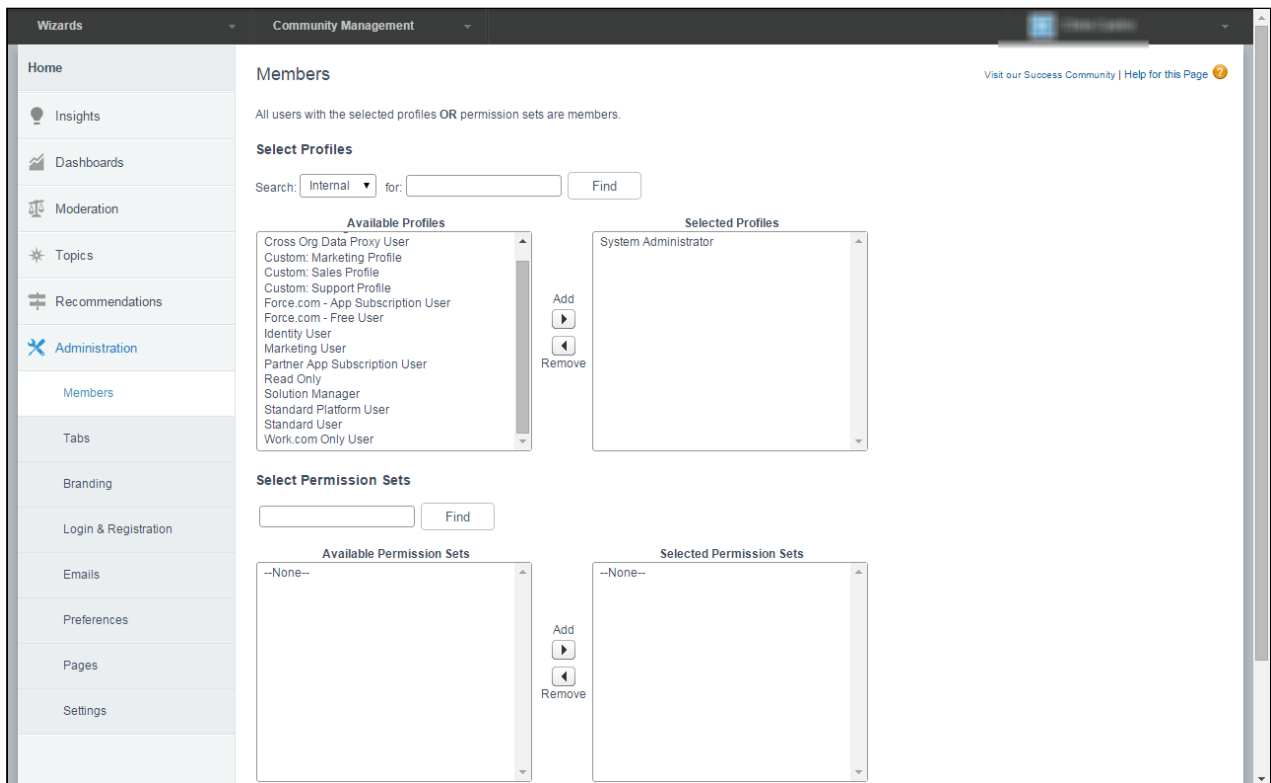
7. Under **Unassigned Packages** select the checkbox next to Apttus Contract Management package and click **Add** to assign a license for that package to the user (this is required of every customer/partner user).



Adding Members to Your Community

Now that you have created/modified user profiles and created users to access your Community, you must add those user profiles to the Community itself to allow access. To add members to your community:

1. Go to **Setup > Customize > Communities > All Communities**.
2. Click **Manage** next to your Community.
3. Go to **Administration > Members**.




4. Search for and select the user profile(s) to add to the Community. In the example below, the user profile **Test Customer Community User** is added to the Community. All users with this profile can log in to your community with the proper credentials.

The screenshot displays the 'Members' configuration page in Salesforce Community Management. The left sidebar contains navigation links, with 'Members' highlighted. The main panel shows the 'Members' section with a search bar and two lists: 'Available Profiles' and 'Selected Profiles'. The 'Test Customer Community User' profile is selected in the 'Selected Profiles' list. Below these lists are 'Available Permission Sets' and 'Selected Permission Sets' lists, both currently empty. At the bottom of the main panel are 'Save' and 'Cancel' buttons. The footer contains copyright information and links to Privacy Statement, Security Statement, Terms of Use, and 508 Compliance.

5. Click **Save**. Users with the selected profile(s) can now access your community.

Configuring and Activating your Community

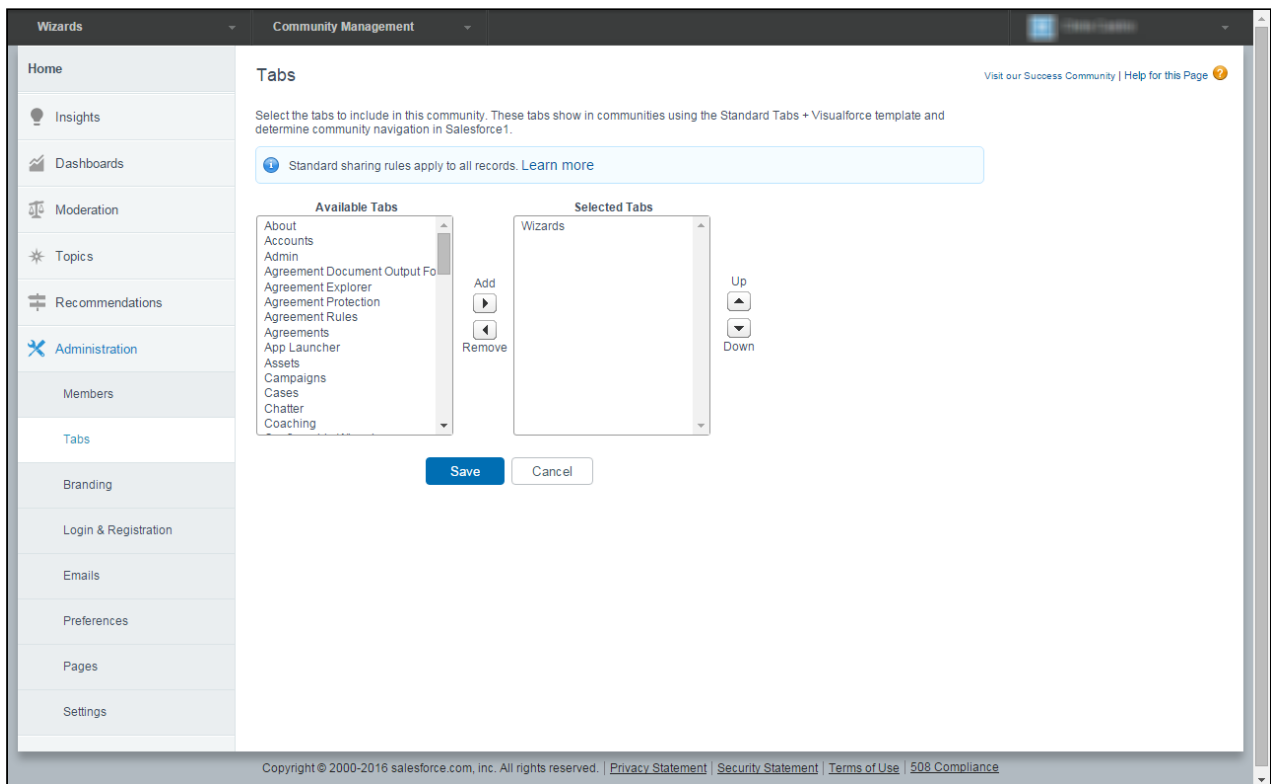
 **Hint:** Click an image on this page to enlarge the view.

To complete the process of enabling Self-Service Wizards as a Community, you need to complete Community configuration and activate the Community itself. Much of Community Management is left up to your organization—how you customize, which Dashboards and Reports you expose, how you brand your site, is all handled as part of Community Management.

Adding Tabs to Your Community

To allow users to choose from available Wizard designs and execute a runtime Wizard you must add the **Wizards** tab to your Community.

1. Go to **Setup > Customize > Communities > All Communities**.
2. Click **Manage** to manage your Community.
3. Go to **Administration > Tabs**.
4. Add the **Wizards** tab from the list of Available Tabs to Selected Tabs.

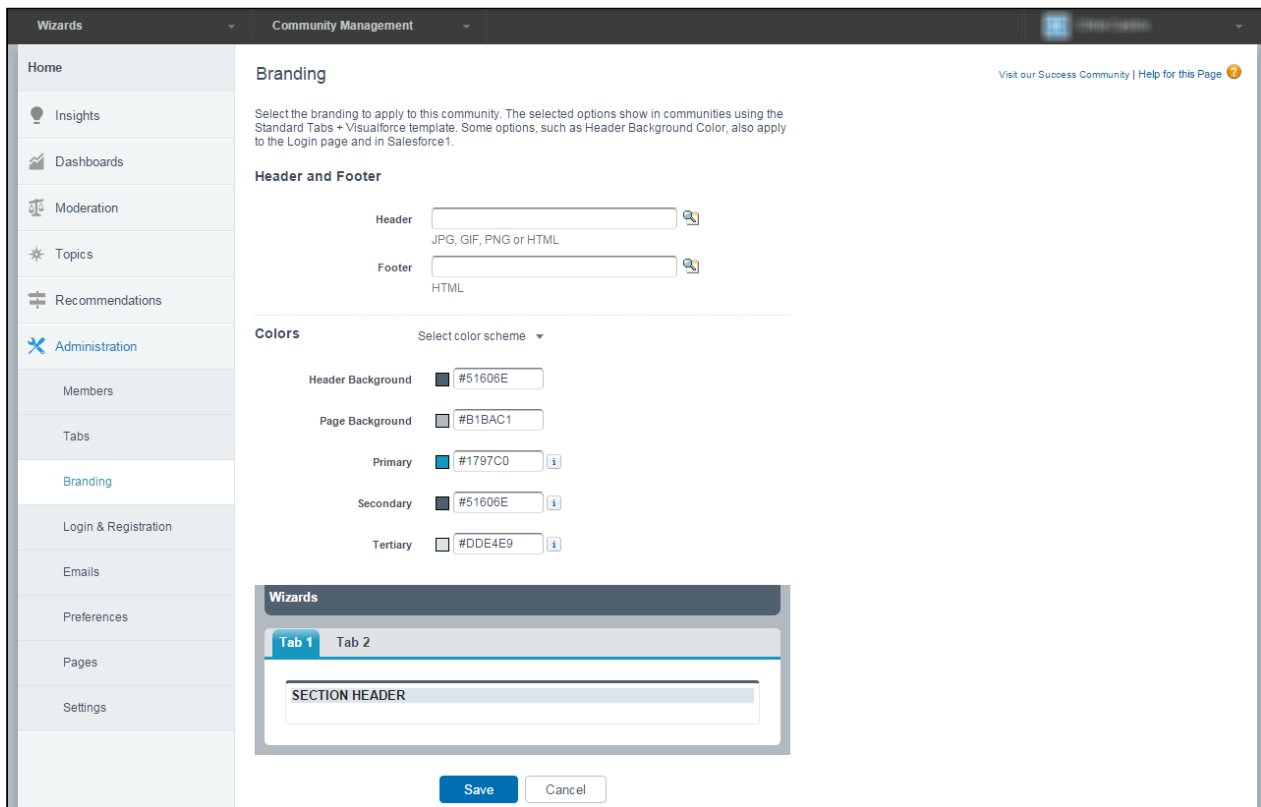


5. Click **Save**.

Branding Your Community

Although not required, you can add branding to your Community, including making changes to the following:

- Use HTML or image files to change the header and footer of your Community site.
- Change the color scheme for your Community, including the header and page background.

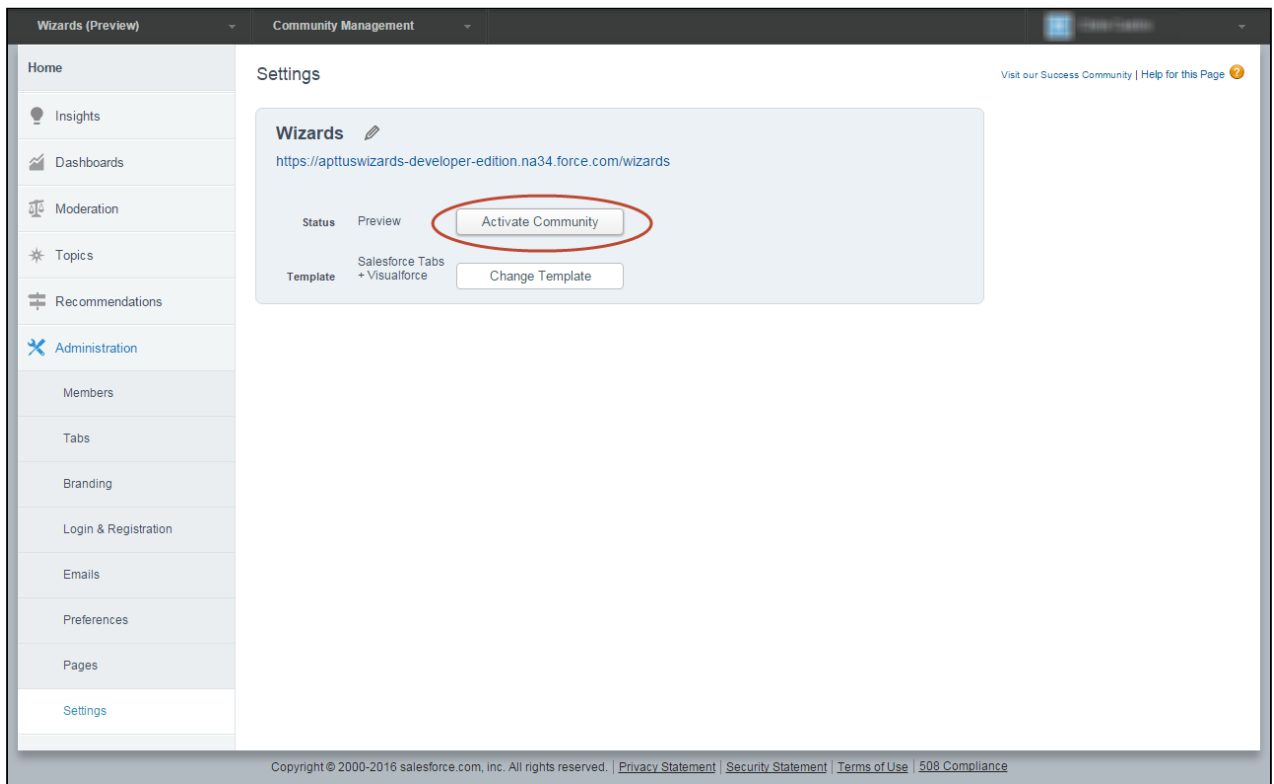


Note that the branding offered in Community Management differs from branding added to Wizard designs when they are created. With the Wizard Designer, you can add branding to both the Wizard banner and individual Steps of your runtime Wizards. For more information on adding branding and logos to your Wizards, refer to [Creating a New Wizard Design](#).

Activating Your Community

When you have completed configuration and are satisfied with customizations to your Community, you can Activate the Community to make it live, allowing your users to access Self-Service Wizards.

1. Go to **Administration > Settings**.
2. Click **Activate Community** to change the status of your Community from Preview to Active.



Your Self-Service Wizards Community is now ready for registered users!

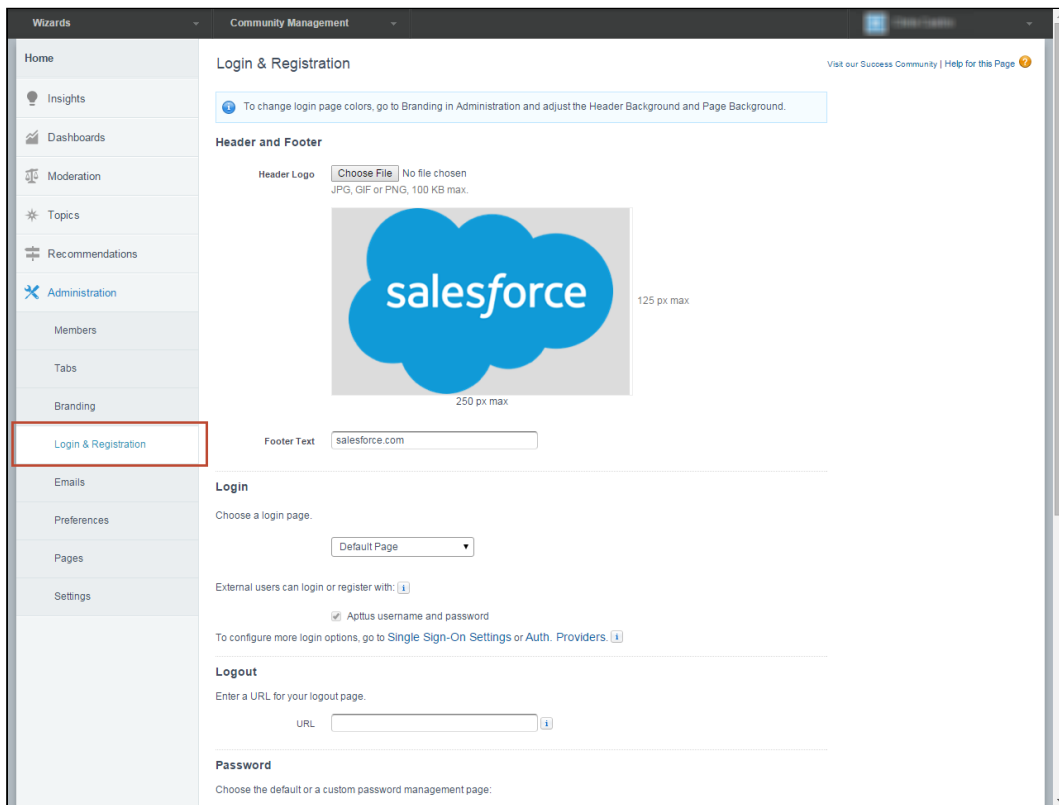
Configuring Guest Access to your Community

You can enable self-registration for your Community to allow unlicensed guest users to join the community. Guest users who register this way are saved:

- as contacts under a business account OR
- as a person account in your organization (if person accounts are enabled)

To enable self-registration for your Community:

1. Go to **Setup > Customize > Communities > All Communities**.
2. Click **Manage** next to the community name.
3. Go to **Administration > Login & Registration**.



4. Under Registration, select **Allow external users to self-register**.

Password

Choose the default or a custom password management page:

Forgot Password

Change Password

Registration

☒ Allow external users to self-register

Choose a self-registration page.

Assign registering users to:

Profile

Account

Information: Self-registering users are saved as person accounts (must be enabled) if you don't assign them to an account by default. Learn more about the [licensing requirements to support person account creation](#). You can use the [self-registration Apex controller](#) to further customize this functionality.

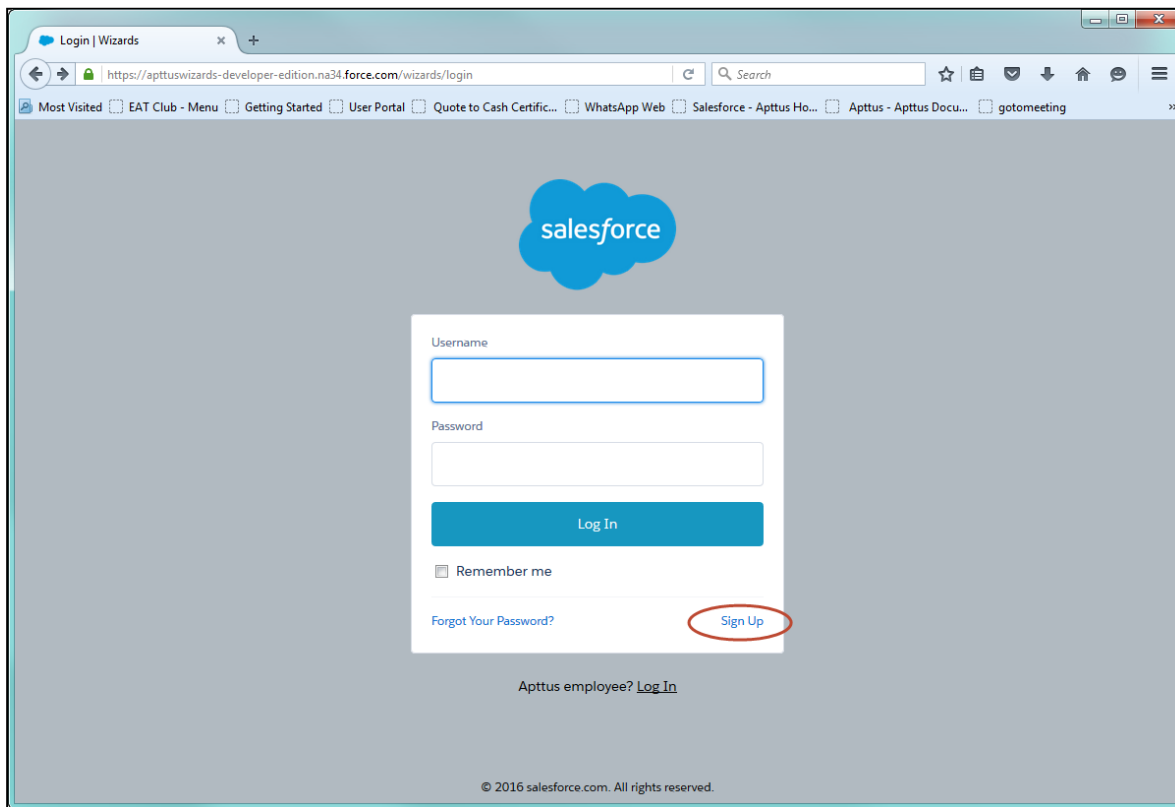
Save **Cancel**

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5. Choose the Default self-registration page, or a Community Builder or Visualforce page developed by your organization.
6. Choose the **User Profile** to assign guests when they self-register for an account. This can be the profile you created or modified when you created the Community, or a different Community-enabled profile.
7. Choose the **Account** to assign to the guest user when they self-register. Only Partner Accounts can be chosen with this option. Refer to Salesforce documentation on [how to enable an account as a partner](#). If you want to create a Person account for the guest instead, leave the field blank.
8. Click **Save**.

⚠ It is important to consider licensing when allowing guests to your Community self-register, as each registered guest will consume a Communities license. If you would prefer to allow access to runtime Wizards publicly but do not want to use licenses, consider the option [set up Self-Service Wizards as a Salesforce Site](#).

When unlicensed guest users navigate to your Community, they will encounter the login page and can click on **Sign Up** to create an account.



Integrating the Contract Wizard with Other Applications

When you integrate your own Salesforce applications with the Contract Wizard embedded in an iframe container, you can make use of several Javascript **event** notifications to have your container application enable/disable or show/hide items.

The following table shows a list of these events and the parameters passed to them, and the Wizard runtime action associated with each event. Events provide a response in the form in JSON format; examples are provided below for each event.

Event	Action	Parameters
onwizardnext	Next	<p>wizardDesignId, wizardDesignName, wizardId, stepDesignId, stepDesignName</p> <p>Example Response</p> <pre>{ "action": "onwizardnext", "data": { "wizardDesignId": "a29M000000rSWVIA2", "wizardDesignName": "SDProposal-1-25", "wizardId": "a28M0000001bmd4IAA", "stepDesignId": "a2EM000000XZSkMAO", "stepDesignName": "SDProposal-1-25" } }</pre> <p>When the next page is the Wizard "Review" page (in this case, the stepDesignId is "Null" and the stepDesignName is "Review" as this is the last page of the Wizard and not a design-defined step):</p> <pre>{ "action": "onwizardnext", "data": { "wizardDesignId": "a29M000000rSWVIA2", "wizardDesignName": "SDProposal-1-25", "wizardId": "a28M0000001bmd0IAQ", "stepDesignId": "", "stepDesignName": "Review" } }</pre>
onwizardback	Back	<p>wizardDesignId, wizardDesignName, wizardId, stepDesignId, stepDesignName.</p> <p>Example Response</p> <pre>{ "action": "onwizardback", "data": { "wizardDesignId": "a29M000000rSWVIA2", "wizardDesignName": "SDProposal-1-25", "wizardId": "a28M0000001bmd4IAA", "stepDesignId": "a2EM000000XZSkMAO", "stepDesignName": "SDProposal-1-25" } }</pre>
onwizardsubmit	Submit	<p>wizardDesignId, wizardDesignName, wizardId</p> <p>Example Response</p> <pre>{ "action": "onwizardsubmit", "data": { "wizardDesignId": "a29M000000rSWVIA2", "wizardDesignName": "SDProposal-1-25", "wizardId": "a28M0000001bmd4IAA" } }</pre>
onwizardabort	Abort	<p>wizardDesignId, wizardDesignName, wizardId</p> <p>Example Response</p> <pre>{ "action": "onwizardabort", "data": { "wizardDesignId": "a29M000000rSWVIA2", "wizardDesignName": "SDProposal-1-25", "wizardId": "a28M0000001bmd9IAA" } }</pre>
onwizardstart	Start	<p>wizardDesignId, wizardDesignName, wizardId</p> <p>Example Response</p> <pre>{ "action": "onwizardstart", "data": { "wizardDesignId": "a29M000000rSWVIA2", "wizardDesignName": "SDProposal-1-25", "wizardId": "a28M0000001bmd4IAA" } }</pre>

Use the event notification data from your embedded Wizards to drive functionality in your application. For example, each "Next" event in the Wizard could trigger your application to add or display a new tab to the user.

Configuring Meta Property Field Sets for Set Custom Value Rules

The "Set Custom Value" step input rule in the Wizard Designer allows you to set the value for special purpose custom fields to permit more conditional logic and data to be captured by the Wizard. These custom fields are added to the Wizard using a MetaProperty Fieldset on the Wizard Runtime Input object. While other rules created in the designer rely on the context object for the agreement or step (e.g., Agreement, Account, Quote/Proposal, etc.), meta properties can be considered and evaluated for any step in the Wizard design, determined specifically by implementation of the Set Custom Value input rule, allowing Wizards to capture additional information at runtime that can be used for a purpose beyond manipulating or using Salesforce data.

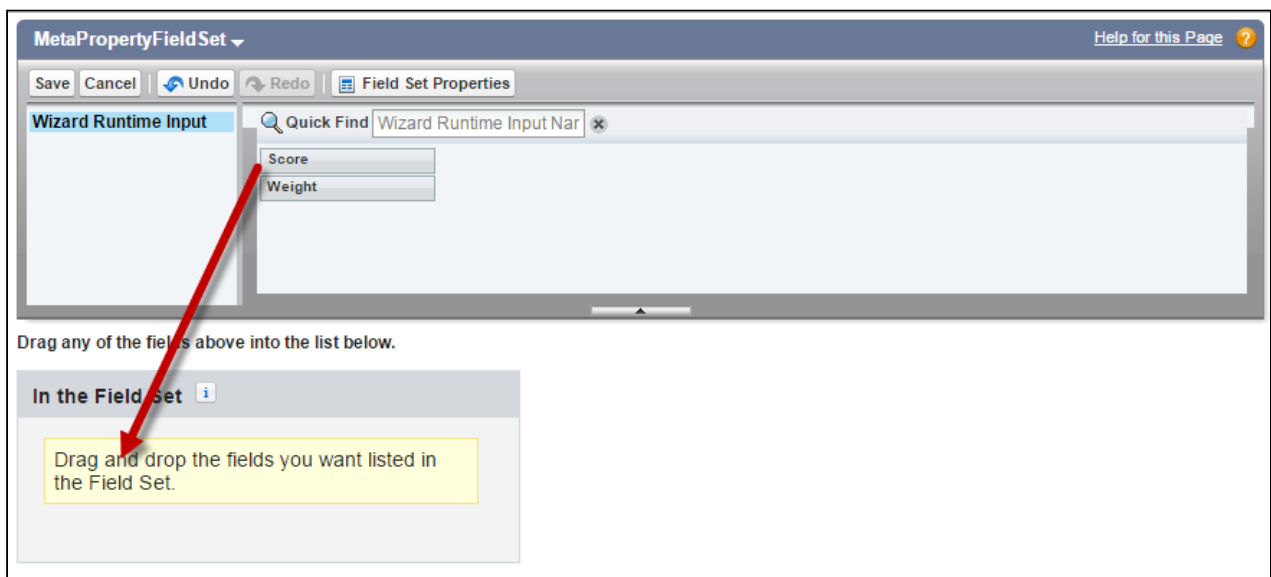
Packages which use the wizard typically create the custom fields and implement them as these meta properties to be used by the Wizard objects. You can also manually add custom fields to the Meta Property Field Set.

Prerequisites

Before you can configure the `MetaPropertyFieldSet` you must define custom fields on the Wizard Runtime Input object to add to the field set. In the steps below, two custom fields, Score (`Score__c`) and Weight (`Weight__c`) were created to be used as meta properties.

To configure Meta Properties

1. Go to **Setup > Create > Objects > Wizard Runtime Input**.
2. Hover over the **Field Sets** link and click **Edit** next to the `MetaPropertyFieldSet` record.
3. Drag and drop the fields you want to use in the Wizard into the list below the field set pane. You can add the fields to the list in any order.



4. After adding all fields to the Field Set, click **Save** in the `MetaPropertyFieldSet` pane. The custom fields in the Field Set are now available to Wizard Designers as Fields on the **Set Custom Value** Wizard Step Input Rule.

Rule For: Extend Service Coverage

Rule	Field	Value
Set Custom Value	-- Select One --	

[Add Another Rule](#)

Save Cancel

i Only one MetaPropertyFieldSet is available for all Wizard designs. Add as many meta properties as needed to the field set and use only the ones you want for specific input rules. All other fields will be ignored during wizard runtime.

Auto-Populating Wizard Fields at Runtime

Occasionally business requirements may require responses in Wizards to be auto-populated when the Wizard is first launched. Circumstances may dictate that fields for a particular Wizard are always populated for reasons such as the following:

- Object field values for the Wizard should always be the same (e.g., an Agreement-creation Wizard that will always have the same Account and Opportunity names filled in for certain steps).
- Wizard Input or Object Field values should always match every new Wizard of the same design (e.g., multiple surveys/questionnaires for each line item in a Cart line that should share the same responses based on a previously completed survey).

There are two primary methods provided in Wizard Design for auto-populating fields during Wizard runtime:

- passing record IDs as parameters when the Wizard launches to auto-populate Object fields.
- implementing a special DataSource callback class that fetches data from one runtime Wizard to populate other Wizards of the same design.

i Note that while the above functionality exists out-of-the-box, use of this feature requires a custom implementation for initiating auto-populated Wizards. Also note that compound and read-only fields cannot be auto-populated at this time.

Auto-populating Wizard Fields using Record ID

To auto-populate fields based on record ID(s) every time a new instance of the Wizard is launched, you need to pass Object record IDs as parameters when the Wizard is launched. In most cases, this implementation will use something like a formula field, which captures the desired record IDs and includes them in the URL when the Wizard is first launched.

Consider a simple agreement creation Wizard. Your requirement include auto-populating the initial steps of the Wizard with details from the associated Account and Opportunity, which will be the same for every instance of the Wizard. Rather than having the Wizard user enter these values every time the Wizard is run, you want them to be automatically filled when the Wizard is launched.

- To use this method, the inputs you want to be auto-populated must be Object fields that match the types of records you are passing as parameters. In this example, the designer creates an input for Account > Account Name.
- In the next step, the designer creates an input for Opportunity > Name.
- As these are pre-existing objects in the same org, it's easy to retrieve record IDs to pass to the Wizard when it is launched. How the record IDs are passed to the Wizard depends on your integration with Apttus Wizard. Record IDs could be passed as parameters using a formula field, for instance.

When the Wizard is first launched through your integration, the URL is constructed in this fashion:

https://apptus-wizard.na34.visual.force.com/apex/apptus_wizard__wizard?wizardid=a11610000016K6fAAE

where "**wizardid=a11610000016K6fAAE**" is passing the Id of the runtime wizard. Your solution should append recordIDs corresponding to the Object where the fields reside and which match the Object of the fields you want to auto-populate.

Returning to the above example, you can auto-populate fields in the Wizard using specific Account and Opportunity record IDs. To see this in action:

1. Go to the **Wizards** tab and launch the Wizard you want to auto-populate. Note the Wizard runtime URL.
2. Open another tab and go to the Account which contains the data you want to capture. Copy the Account Record ID from the URL.
3. Return to the Wizard runtime and append the URL with the Account Record ID, using proper syntax to pass it as a parameter (e.g. "&recordIds={Account_Id}").
4. Repeat steps 2-3 for the Account Opportunity. Comma-separate multiple record IDs.
5. Press Enter. Fields which have values on the Objects corresponding to the record IDs you passed will be automatically populated with data across multiple steps, wherever they appear in the Wizard.
6. Follow this format for your integrations. Using this method, you can easily construct a formula field to pass these parameters from your Wizard launch point and auto-populate data for your users.

Auto-populating Wizard Fields using a Datasource Callback

When you need to build the ability to auto-populate fields in Wizards based on previously entered responses for your integration, you should use the Datasource Callback method. This method also requires passing data to the Wizard as in the previous section, but in this case it is retrieving data from one completed Wizard and using that data to populate newly-invoked Wizards that use the same design.

Wizard Runtime JSON Structure

To properly understand the format of the data returned by the callback to auto-populate a Wizard, let's take a look at a sample JSON structure created from a Wizard step with 2 responses:

Sample JSON: Auto-Populate

```
{
  "UserResponses": [{
    "Question": "sample question - 1",
    "ObjectName": null,
    "Notes": [],
    "metaPropertyFields": null,
    "inputRepeatSequence": 0,
    "inputControlId": "a0236000002LN1DAAW",
    "FieldName": null,
    "FieldClass": null,
    "Comments": "",
    "Attachments": [],
    "Answer": "sample answer - 1"
  }, {
    "Question": "sample question - 2",
    "ObjectName": null,
    "Notes": [],
    "metaPropertyFields": null,
    "inputRepeatSequence": 0,
    "inputControlId": "a0236000002LN1EAAW",
    "FieldName": null,
    "FieldClass": null,
    "Comments": "",
    "Attachments": [],
    "Answer": "sample answer - 2"
  }],
  "Parameters": null
}
```

When using the callback method to auto-populate fields in a runtime Wizard, the method should return a string using a similar JSON structure as shown in the example above. The values in the JSON string auto-populate the fields when the Wizard is invoked.

The parameters described in the following table are relevant for Callback implementations to auto-populate questions/responses in the Wizard:

Parameter	Value	Description
Question	Object/Wizard Input field name	Provide the name of the field in the Input Control as defined (e.g., "AccountName" or "OppName")
inputControlId	Id string of Input Control	Provide the Id string of the input control to be auto-populated (e.g., "a1561000001dXHf")
Answer	Field or Response value	Provide the value to auto-populated as in the Wizard field/response (e.g. "Tier One Systems")
inputRepeatSequence	Numeric sequence for repeatable Wizard Input Controls	If the Wizard step uses a "Repeatable" layout for an input, Provide a numeric value to represent each occurrence (e.g., first occurrence is "inputRepeatSequence:" 0, next occurrence is "InputRepeatSequence:"1, etc.)

Implementing a Datasource Callback

The data captured from the previously completed wizard can be from Wizard Input Fields or Object fields. For your integration, you must create a DataSource Callback class that passes this retrieved data to the new Wizard runtime instance. The process works as follows:

- A custom Data Source callback class is created to implement the DataSource Callback interface *WizardCustomClass.IDataSourceCallback*.
- The DataSource Callback class calls a custom `getData()` method that takes the Wizard Design ID as the primary parameter and a map of parameters passed to the Wizard design.
- The `getData()` method is used to define values for specific runtime input controls in the Wizard design (questions, answers and values) and creates and returns a JSON string using the same structure interpreted by the Wizard.
- The Wizard Design using the DataSource Callback must have the class name defined in the Wizard Settings section of the Wizard Design.
- When a new Wizard is invoked, fields specified by the Callback method are auto-populated.

Use Case for Contract Wizard

This topic describes the use case for Contract Wizard.

Standard Statement

This use case gives one example on how to create user-friendly on-screen Wizards, to quickly create contracts. You might use this functionality differently, depending on your business case.

A Wizard prompts the end user to answer a series of on-screen questions then creates the Agreement record. This use case describes how a non-expert user can use on-screen Wizards, to quickly create contracts.

In this case, ACME needs to provide Sales Representative with a quick and easy way to create Non-Disclosure Agreements.

Prerequisite: Make sure you have the followings:

- Inputs are created.
- Steps are created.
- All agreements must have the following fields completed: Agreement Name, Agreement Category, Account Name, Language, Status Category, Start Date, and Primary Contact.

To create inputs, perform the following steps:

1. Go to the **Apttus Configurable Wizard**.
2. Navigate to the **Wizard Component Library** tab.
3. Click **New Input Control**. Fill in the following fields, then **Save**.

Field	Value
Control Name	Account Name
Question/Instruction	Please select an Account
Field Class	Object Field
Object Name	Agreement
Field Name	Account

4. Click **New Input Control**. Fill in the following fields, then **Save**.

Field	Value
Control Name	Start Date
Question/Instruction	Please select an Account

Field Class	Object Field
Object Name	Agreement
Field Name	Agreement Start Date

You have successfully created all the inputs required to create the steps.

Inputs are placed in Steps. Steps can also contain rules that determine the flow and logic of the Wizard.

To create Steps, perform the following steps:

1. From the **Wizard Component Library**, click **New Step**.
2. Enter **Agreement Step 1** as the **Step Name**.
3. From the **Inputs Library**, drag and drop the following Inputs into the Inputs pane: Agreement Name, Account Name, Agreement Category.
4. Click the **Input Rules** tab at the top of the page.
5. Next, to **Agreement Name** click the **+**.
6. Select **Determine Focus Object** as the picklist value under Rule.
7. In the following picklist, select **Agreement**.
8. Click **Save**.
9. Click the **+** next to **Agreement Name**.
10. Select **Determine Record Type** as the picklist value under Rule.
11. Select **Agreement** in the following picklist.
12. Select **NDA-yourinitials** in the following picklist. Click **Save**.
For Agreement Step 1, you should now see two Agreement Name input rules (1.1 and 1.2).
13. Click **Save**.
14. Repeat steps 1 – 3 to create Agreement Step 2.
Use the following Inputs: Start Date, Status Category, Language, and Primary Contact.
15. Click **Save**.
You have successfully created the two steps for the Wizard.

With the Steps created, the Wizard can now be designed. The Wizard determines the specific process, the end-user will go through, based on **Steps** and **Inputs**.

To create a Contract Wizard, perform the following steps:

1. Go to the **Wizard Designs** tab.
2. Click **New Wizard Design**.
3. Enter **Agreement-yourinitials** as the Design Name.
4. From the **Steps Library**, drag and drop Agreement Step 1 and Agreement Step 2 into the **Steps** in the **Wizard** pane.
5. Click **Activate** twice.
6. Click **Cancel** to exit Wizard Designs.

Result:

You have successfully created the Wizard.

Contract Management with Salesforce Lightning

You can use Apttus Contract Management with the Salesforce Lightning Experience and still accomplish the same tasks with the same features. The only thing that changes is how you access the features, and the process for creating an agreement is slightly different. Follow the instructions on this page to get started when you have the Lightning Experience enabled. Beyond a few different steps, the flows for most CLM tasks remain the same.

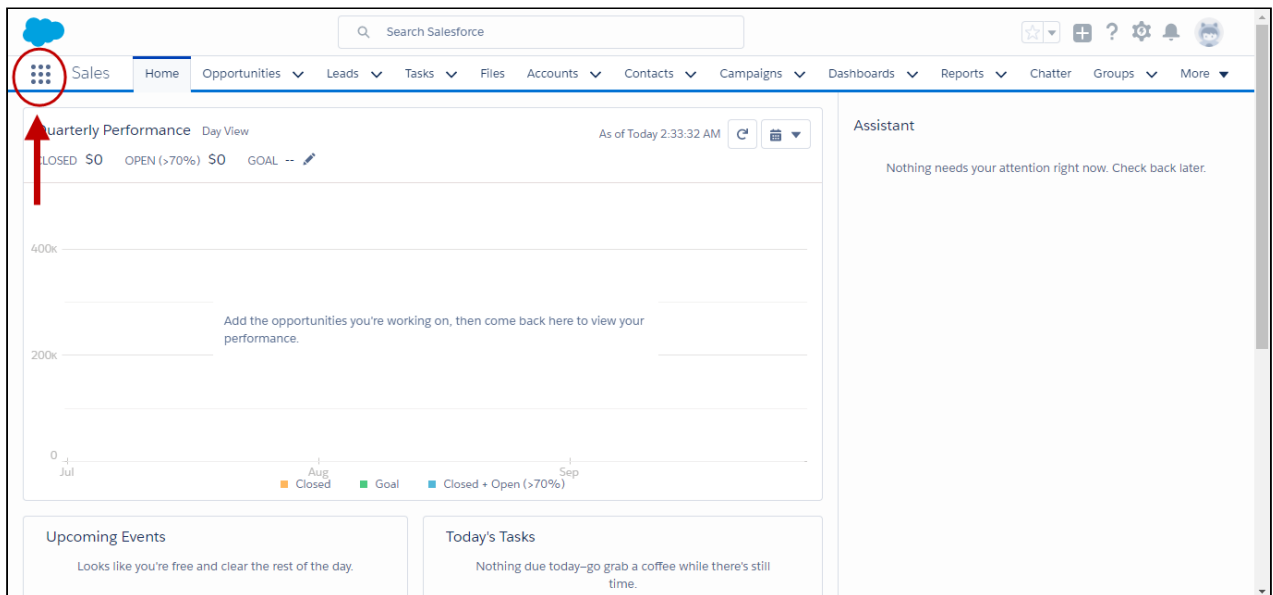
Enabling the Lightning Experience in Salesforce

Enabling the Lightning Experience in your Salesforce org is a very simple process, but requires some consideration of your company's needs before you make the switch. Please refer to [Salesforce's documentation](#) on enabling the Lightning Experience. The topics on this page assume that you have already enabled Lightning in your org.

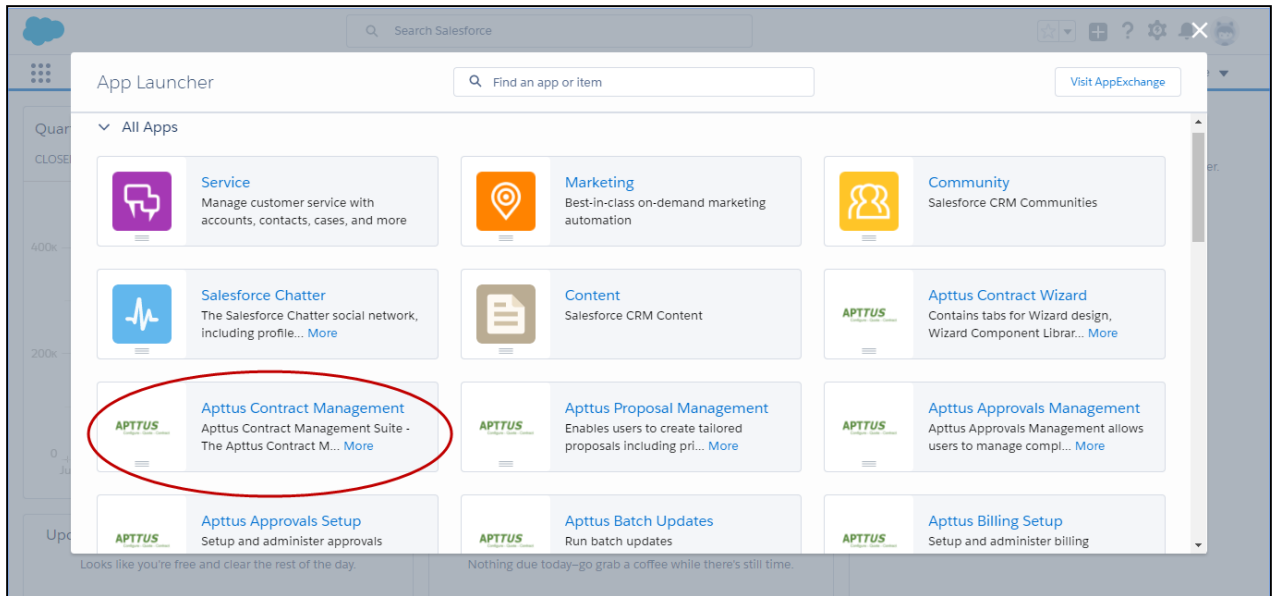
Accessing Contract Management features in Lightning

One of the main differences you will find when you switch to Lightning is how your apps are accessed, like Apttus Contract Management. In Lightning, there is no [Force.com](#) app menu, and you cannot customize the default Tabs to include Custom Objects or Visualforce tabs. Instead, you access all Contract Management features using the App Launcher.

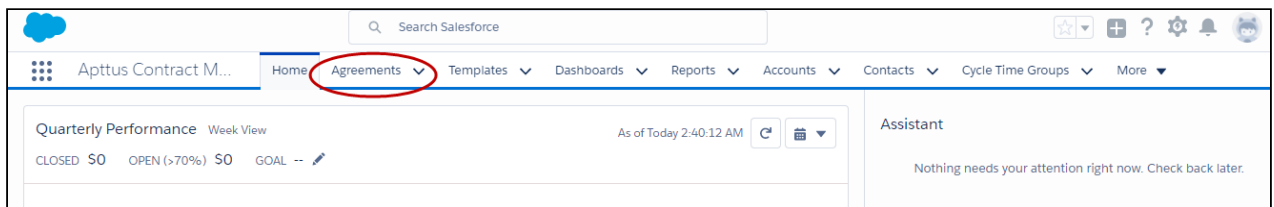
1. Log in to Salesforce with Lightning enabled.
2. Click the **App Launcher** button in the upper left-hand corner of the Home screen.



3. From the App Launcher, click **Apttus Contract Management**.



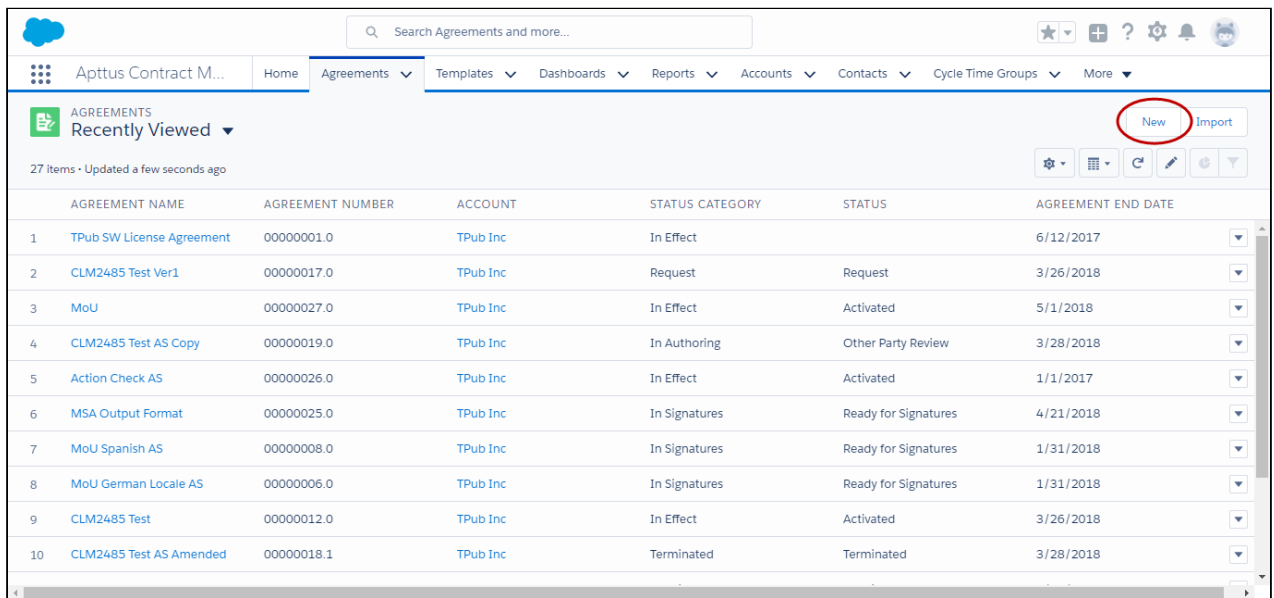
4. Select a Contract Management feature to work with (e.g., "Agreements" to start the agreement creation process.)



Creating an Agreement

The process for creating new agreements is slightly different when you have Lightning enabled. There are two ways to create a new agreement.

1. Go to **App Launcher > Apttus Contract Management**.
2. Click **Agreements**.
3. From the Agreements List, click **New**.



Search Agreements and more...

Agreements ▾

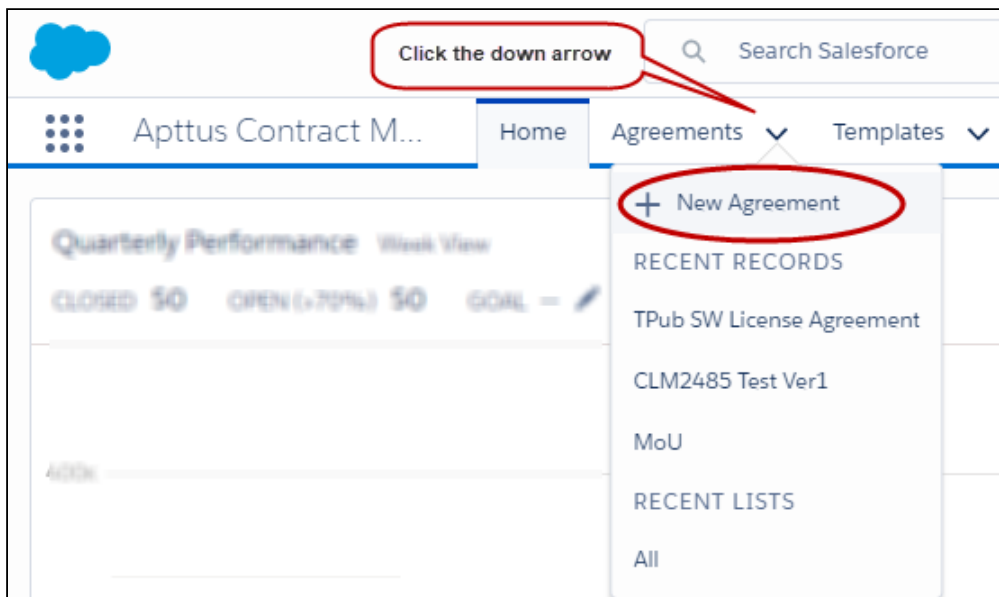
AGREEMENTS Recently Viewed ▾

27 Items • Updated a few seconds ago

	AGREEMENT NAME	AGREEMENT NUMBER	ACCOUNT	STATUS CATEGORY	STATUS	AGREEMENT END DATE
1	TPub SW License Agreement	00000001.0	TPub Inc	In Effect		6/12/2017
2	CLM2485 Test Ver1	00000017.0	TPub Inc	Request	Request	3/26/2018
3	MoU	00000027.0	TPub Inc	In Effect	Activated	5/1/2018
4	CLM2485 Test AS Copy	00000019.0	TPub Inc	In Authoring	Other Party Review	3/28/2018
5	Action Check AS	00000026.0	TPub Inc	In Effect	Activated	1/1/2017
6	MSA Output Format	00000025.0	TPub Inc	In Signatures	Ready for Signatures	4/21/2018
7	MoU Spanish AS	00000008.0	TPub Inc	In Signatures	Ready for Signatures	1/31/2018
8	MoU German Locale AS	00000006.0	TPub Inc	In Signatures	Ready for Signatures	1/31/2018
9	CLM2485 Test	00000012.0	TPub Inc	In Effect	Activated	3/26/2018
10	CLM2485 Test AS Amended	00000018.1	TPub Inc	Terminated	Terminated	3/28/2018

OR

Click the down arrow ▾ next to Agreements tab and click **+New Agreement** from the drop-down menu.



4. Select an Agreement Record Type and click **Continue**.
5. On the New Agreement page, enter values for required fields and any optional fields that are available and click **Continue**.

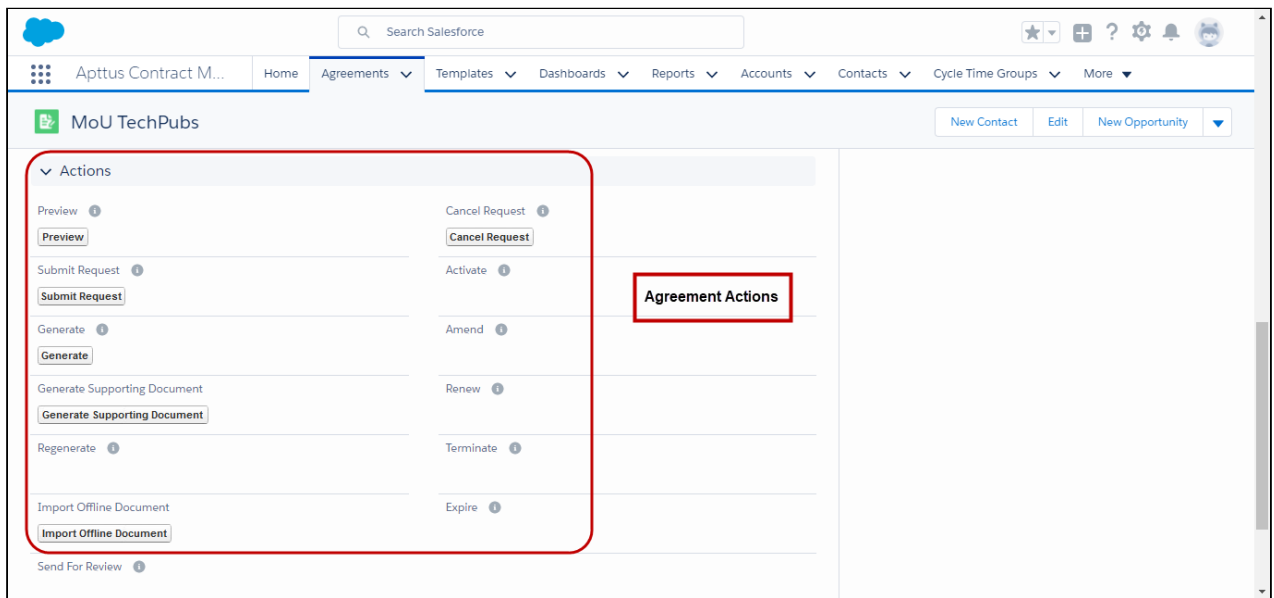
The screenshot shows the Salesforce 'New Agreement' form. The top navigation bar includes the Salesforce logo, a search bar, and various menu items like Home, Agreements, Templates, Dashboards, Reports, Accounts, Contacts, Cycle Time Groups, and More. The form itself is titled 'New Agreement' and contains the following fields:

- Agreement Name: MoU
- Status Category: Request
- Account: [Empty field]
- Primary Contact: [Empty field]
- Related Opportunity: [Empty field]
- Agreement Start Date: [7/19/2017]
- Term (Months): [Empty field]
- Agreement End Date: [7/19/2017]
- Total Agreement Value: [Empty field]

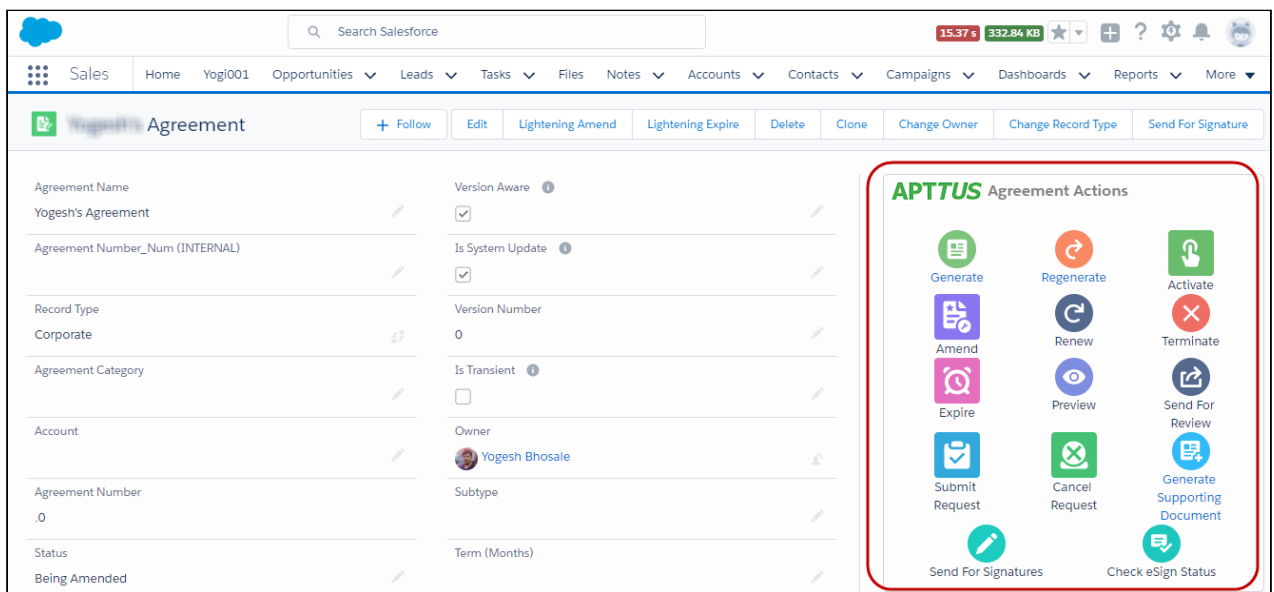
At the bottom of the form, there are 'Continue' and 'Cancel' buttons.

It is recommended when using the Lightning Experience to configure the above page to contain as many fields as you want specified prior moving to the next step. You can configure which Agreement fields are available on this page by editing the **Agreement New Field Set**. For more information, refer to the *Contract Management Administrator Guide* section "To draft an agreement."

6. Click **Edit** to make more changes to your agreement record, or the pencil icon to make changes to any editable field. Note that all the field values you had entered on the previous page, have already been saved to the record.
7. Scroll down the page to find Agreement Actions such as **Preview**, **Generate**, and **Import Offline Agreement**. Any Visualforce pages you have added to the page layout, such as **Document Finder** or **Master Agreement Clauses** are also displayed on this page and should work normally.



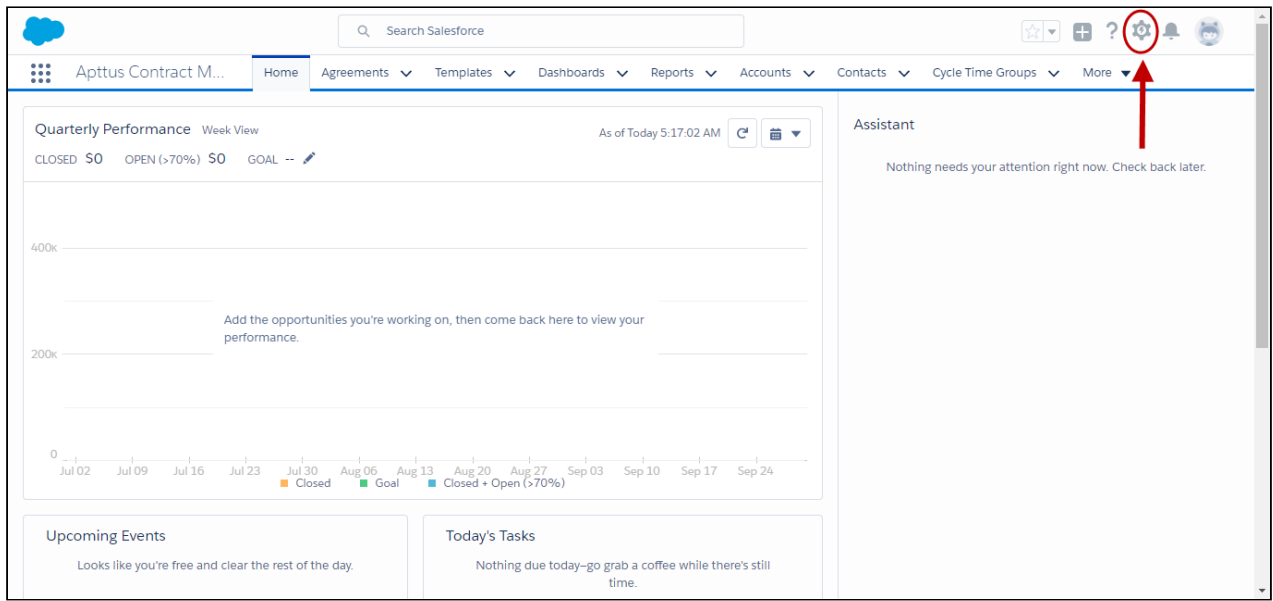
The Agreement Actions can also be accessed from the action panel in the right hand side navigation. The Actions panel shows all the Agreement Actions.



⚠️ If the Action Panel is enabled and you access Action buttons from the **Agreement Actions** panel, the subsequent pages corresponding to the selected action are the new Lightning Experience pages based on Lightning Design. However, accessing the same actions from the **Actions** related list takes you to the pages with Salesforce Classic design.

Managing Comply System Properties

1. From the Lightning Home page, click the **Setup** icon in the upper right-hand corner and select **Setup Home**.



2. From the Setup navigation menu, go to **Custom Code > Custom Settings**.
3. Click **Manage** next to Comply System Properties.

Managing CLM Admin Properties

1. Go to the **App Launcher**.
2. Click **Apttus Contract Management**.
3. Click **Admin**. Create new admin properties or edit existing properties as needed.

Enabling and Customizing Action Panel

The Action Panel is a collection of agreement action buttons which could be enabled for the Agreement Record page in the Lightning Experience mode in Salesforce. Each button in the action panel can be customized to meet your design requirements. The Action Panel is created as a Visualforce Page component and you can include it in your page layout from the Lightning App Builder.

i For enabling the Action Panel in your org, we assume that you have already enabled My Domain in your organization. This step is mandatory for using Lightning Experience in your Salesforce org. To know how to enable My Domain in your org, refer to Salesforce Help page [Enable My Domain](#).

Adding Action Panel to Lightning Record Page

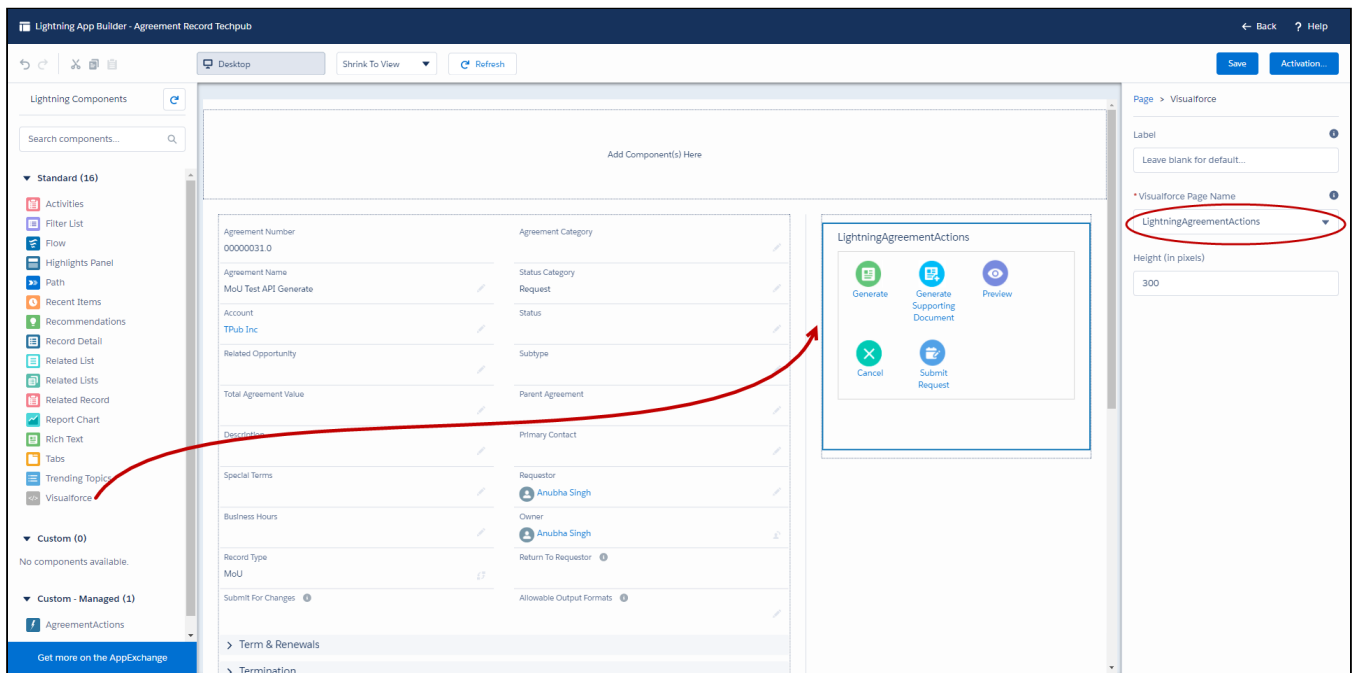
You can add the Action Panel in your Agreement Record page in two ways:

1. from the Salesforce Classic Agreement Record page, and
2. from the Lightning App Builder

Adding Action Panel Using Lightning App Builder

To use the Lightning App Builder for configuring Action Panel in your page layout, you have to create a Lightning Record Page. To create this;

1. Go to **Setup > Objects and Fields > Object Manager**.
2. In the **Object Manager** page click **Agreement** object.
3. In the **Details** page, click **Lightning Record Pages** from the left hand navigation.
4. In the **Lightning Record Pages**, click **New** and select **Record Page**.
5. Complete the steps in the new page creation wizard.
6. In the Lightning App Builder, from the left hand navigation, drag and drop **Visualforce** component on your layout. You can reorder the components in the page layout, to your liking.
7. From the right hand navigation pane, go to **Visualforce Page Name** field and select **LightningAgreementActions** from the picklist. You will now see the action panel in your layout
8. Click **Save** and then **Activate** your page, to make the record page available.



⚠ For more details on how to customize a Lightning Record Page, refer to Salesforce Help section [Configure Lightning Experience Record Pages](#).

Adding Action Panel from Salesforce Classic

The Action Panel can also be added to the Agreement Record page by editing the page layout in Classic Salesforce. To do this:

1. Go to **Agreements** and select an agreement record.
2. In the Agreement Record Details page click **Edit Layout**.
3. From the Layout Designer menu, choose Visualforce Pages.
4. Drag and drop the LightningAgreementActions visualforce component on to the Agreement Layout.
5. Click **Save**.


If you now switch to the Lightning Experience, the Action Panel would be part of the Agreement Record layout.

⚠ It is recommended that you enable the Action Panel from the Lightning App Builder for better user experience, as the Action Panel is not designed according to the Salesforce Classic design. Using the Action Panel with Salesforce Classic mode may lead to inconsistent user experience.

Customizing Action Buttons

All the action buttons which are part of the Action Panel can be customized and configured to suit your needs. For using your own customized buttons in the action panel, you will have to create custom formula fields with required logic and add them to the agreement layout. To create a custom formula field for an action, follow the naming convention outlined as under:

1. Go to **Setup > Object Manager > Agreement** object.
2. Click **Fields and Relationships** from the left navigation panel.
3. Click **New** to create a new custom field.
4. Select **Formula** data type and click **Next**.
5. For **Field Label**, enter `<action_name>_Custom`. For example, to create a Generate button, enter `Generate_Custom`
6. The value in field label is automatically copied as **Field Name** when you click anywhere outside the field.
7. Select the **Formula Return Type** as Text and click Next.
8. Enter the formula for your action button.

 To display an action button in the Action Panel, make sure that the formula entered for the custom formula field returns a non-null value. If the formula returns Null value, the action button or field would be hidden in the Action Panel.

9. Apply the field's access setting and page layout and click **Save**. Your action button is created.

To learn how to create custom fields, refer to Salesforce Help [Custom Fields | Salesforce](#).

The following table gives list of actions which are supported in and can be customized for, the Action Panel in the Lightning Mode.

Action Name	Field Name
Generate	Generate_Custom
Regenerate	Regenerate_Custom
Preview	Preview_Custom
Generate Supporting Documents	Generate_SupportingDocument_Custom
Amend	Amend_Custom
Terminate	Terminate_Custom
Expire	Expire_Custom
Renew	Renew_Custom
Activate	Activate_Custom

Action Name	Field Name	
Submit Request	SubmitRequest_Custom	
Cancel Request	CancelRequest_Custom	
Send For Review	SendForReview_Custom	
Send For Signature	SendForSignatures_Custom	

Thus, you can create customized links or buttons and then add them to the action panel.

Appendices

Use these appendices to find the following information:

- [Admin Objects](#)
- [Comply System Properties](#)
- [Document Version Properties](#)
- [Apttus Contract Management Package Objects](#)
- [Profile Settings and Security](#)
- [Apttus Status Categories and Statuses](#)
- [Agreement Actions](#)
- [Agreement Fields](#)
- [Apttus Retention Policy Schema](#)
- [Translatable Customizations](#)
- [List of Objects supporting Document Generation](#)
- [Document Search](#)
- [Temporary Email Template Cleanup](#)
- [Creating Custom Fields](#)

Admin Objects

The table depicts Admin objects name, values and their purpose.

Name	Values	Purpose
APTS_AutoContentSearchable	True	This automatically enables Content Search on an activated agreement. By setting the flag to true, the system skips the prompt to select attachments for content search. The attachment already selected as part of the activation process will be automatically enabled for content search.
APTS_DefaultEmailContact Name	<Name of the user>	This specifies the name of the default contact to resolve merge fields in an email template. To specify the name of a contact to send emails to, if a contact is not defined for the agreement. If this property is not defined and the agreement does not have a primary contact, the merge fields in the email would not be resolved to their values.

Name	Values	Purpose
APTS_MS_EnableNameSort	True	This specifies whether the related list should be sorted by the name field in the generated agreement document. When enabled the related lists will be printed in the agreement's merge documents in the order of the name field of the related list.
APTS_EnableTermExceptionInAuthor	True	This entry associates the Agreement Term Exception related list to the Agreement record after you have associated your Term Exception with the clause and the clause is inserted in your agreement template.
APTS_Password	<your own password>	This creates a password for protecting Microsoft Word agreements that are generated by the application. Allows the application to password protect generated Microsoft Word documents. Note: This password will be used for password protecting Microsoft Word agreements generated by the application. Please provide this password to all power users who will be using the Apttus Author to negotiate contracts.
APTS_Protection	Enter 1 to turn document protection on or 0 to turn it off.	This specifies whether protection for Microsoft Word agreements that are generated by the application should be on or off. Allows the application to specify protection for generated MS-Word documents. Note: If final agreements are generated when this setting is on, they will be password protected with the password stored in the APTS_Password object even if this value is changed to false later. In other words, this setting applies to new agreements generated after the setting has taken effect.
APTS_UseWorkflow	True	This disables the creation of default set of tasks when agreement is generated. In some cases the default tasks created to ensure Signing, Scanning and Attaching the scanned image to the agreement record is redundant or is taken care of by a different work-flow process. In such cases the default behavior of the system needs to be modified to ensure those tasks are not created.

Name	Values	Purpose
<ul style="list-style-type: none"> • APTS_AsyncMerge Call • APTS_AsyncMerge Email 	True	Publishing a template takes the text from any referenced clauses and enters it inline as part of the template text. This functionality allows the clause template changes to be reflected in the agreement template and creates a new published version document in the Notes and Attachment section of the Template. Whenever the agreement document generation exceeds 60 seconds, users get timeout message and this is NOT an error message. To make sure the status changes during this scenario, add these Admin entries.
APTS_EmailTemplateForReview	Email Template Name or Template Unique Name	<p>A text property to hold the name of the email template for Send for Review action.</p> <p>Note: this property can only specify values for Email Templates with the "Available for Use" flag set to true.</p>
APTS_EmailTemplateForSignatures	Email Template Name or Template Unique Name	<p>A text property to hold the name of the email template for Send for Signatures action.</p> <p>Note: this property can only specify values for Email Templates with the "Available for Use" flag set to true.</p>
APTS_SkipEmailTemplateSelection		A boolean property to indicate whether the email template selection step should be skipped.
APTS_DefaultEmailTemplateFolder		A text property to hold the name of the default email template folder.
APTS_EmailTemplateForReviewSignatures	Email Template Name or Template Unique Name	<p>A text property to hold the name of the email template to use for Send for Review and Send for Signatures actions. <i>This property is only used if APTS_EmailTemplateForReview and APTS_EmailTemplateForSignatures are not specified.</i></p> <p>Note: this property can only specify values for Email Templates with the "Available for Use" flag set to true.</p>


Name	Values	Purpose
APTS_ContentRecordType Name	<content type name>	This property is used to indicate the content type to associate the published documents with. If this property is not specified, no content type will be used.
APTS_UseWizardServer	True	Apttus merge web service endpoint
APTS_UIPageConfig	XML	This property is used to indicate the visualforce page to perform the publish action. The integration module provides the <i>Visualforce page Apts_Content__PublishContent</i> .
APTS_MergeCallTimeOut	True	Whenever the agreement document generation exceeds 60 seconds, the timeout message is displayed. This is NOT an error message. To make sure the status changes during this scenario, add these Admin entries
APTS_DefaultContentWork spaceName	<default workspace name>	This property is used to indicate the default content workspace to publish the documents selected by the user during the agreement activation process. The user activating the agreement must be a member of the default content workspace.
APTS_CycleTimeReporting Enabled	True	To Track the time spent in between two statuses or status Categories. Entry for the specified status changes under Cycle Time Group tab must be created
APTS_ContentRepositoryT ype	content	This property is used to indicate in which repository the searchable documents should be published. During the agreement activation process, you may choose to publish one or more documents. If the document repository is chosen, the selected documents will be published to the Documents folder. This is the default behavior in the Comply module. If the content repository is chosen, the selected documents will be published to a content workspace. The workspace (like the document folder) can be inferred by querying agreement rules. If the rules do not specify a workspace, the default workspace will be chosen. The user activating the agreement must be a member of the content workspace. If the external repository is chosen, an entry will be written to the content event table. A trigger can be written for the event table to handle the event.


Name	Values	Purpose
APTS_NoNameFieldObjects	Value: XML Code: <Object API name>	Use this property to add support for custom object generation for Objects that do not have a Name field. (e.g., "EventRelation," "Task," "TaskRelation") Separate Object names using a comma or new line.
APTS_NoISOCurrencyFieldObjects	Value: XML Code: <Object API name>	Use this property to add support for custom object generation for objects that do not have a CurrencyIsoCode field (e.g., "EventRelation," "Task," "TaskRelation"). Separate Object names using a comma or new line. This property is only applicable to templates in <i>multi-currency orgs</i> .

Comply System Properties


You can enter one or more of the following property details.

Setting	Description
Admin User	The admin user is the default owner of activities created by a user who is not allowed to be the owner (for example, customer portal user).
Auto Enable PDF For Final Docs	Select this and the Create PDF Attachment check box is always selected when you choose to save as Final - to be signed from the check-in dialog. You may use this field when you want to finalize an agreement document.
Auto Enable Reconciliation	Select this and the Reconcile Document option is always selected when you go to check-in an agreement document.
Agreement Number Field For Imported Docs	In this field, specify the API name of the field you want to use. For example, use <code>Apttus__Agreement_Number__c</code> . 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. For more information about when to use this field, refer Agreement Number/Header Configuration.
Allow PDF Select Override	This is only applicable when <i>Auto Enable PDF For Final Docs</i> is selected.
Allow Reconcile Selection Override	This is only applicable when <i>Auto Enable Reconciliation</i> is selected.
Auto Enable Private Indicator	Select this checkbox if you want to auto enable private indicator for documents. If you select this checkbox, the Make this document private checkbox for any agreement document is auto selected.

Setting	Description
Auto Insert Header Footer Data	<p>Select this field to automatically insert the Agreement Number Field For Imported Docs field value to the header and the latest timestamp to the footer of an agreement document. This field is available for Generate, Import and Offline actions. For more information about when to use this field, refer Agreement Number/Header Configuration.</p> <div>  The value of the latest timestamp for the footer is taken from the User Account Timezone field on Salesforce. </div>
Allow Private Selection Override	Select this checkbox if you want to allow the user to override the private document selection. This setting is applicable only when Auto Enable Private Indicator is selected for documents.
Auto Sync With Opportunity	Indicates whether the agreement will be automatically synchronized with the opportunity when the agreement is accepted.
Bypass Sharing	Indicates whether apex code can bypass record sharing during selective operations such as clone and deleting draft attachments.
Contract Summary Template	This field contains the name of the contract summary template. You may have to define a separate template to contain the contract summary details and mention the name of the template here.
Default Opportunity Agreement Owner	The default owner for the agreement created from an opportunity. The valid values for this field are <i>Opportunity Owner</i> and <i>Current User</i> . If not set, the Opportunity Owner will become the owner of the new agreement. If you want to make the current logged in user as the Agreement Owner, type <i>Current User</i> in this field.
Default Document Tags	Enter a comma-separated list of tags to make available for any agreement document as it is checked in from X-Author Contracts. Use of these tags requires Contract Document Versioning to be enabled. The Document Finder feature must also be configured in your org. For more information, refer to Configuring Document Finder .

Setting	Description
Document Naming Convention	<p>Specify a value to apply a custom naming convention for all agreement documents at generation, check-in and signature events.</p> <p>The following attributes permitted when formulating a document naming convention are:</p> <ul style="list-style-type: none"> • %checkintype% • %action% • %templatename% • %user% • %timestamp% • %version% • Agreement attributes such as %:Name%. Note: any variable prefixed by ':' represents a field on the Agreement object. <p>If the property contains a null value (i.e., if left blank), the current default naming convention will be used: %:Name%_%action%_%templatename%_%timestamp%</p> <p>Example agreement document name using the default naming convention: <i>SOW_Regenerated_SOW ABC_2015-08-07</i></p> <p>For more information on using document version in document naming convention, refer to Enabling Contract Document Versioning.</p>
Document Structure FX2 For Imported Docs	<p>Check this box to make document structure FX2 format for all Offline documents (created or imported). If not checked, all offline documents are created in the "pre-existing" format.</p> <div>  This property only applies to Offline agreements created from the Agreement or user Home page links in Salesforce. The format of Offline agreements created using X-Author for Contracts will still depend on user-input from X-Author. </div>
Email Template For Checkin Notification	The email template for sending check-in notifications.
Enable Clause Approvals	This check box allows you to set up approval processes on clauses used in your document.

Setting	Description
Enable Document Versioning	<p>Check this box to enable Document Versioning. <i>All new agreement records created in your org will use Document Versioning after this setting is enabled.</i> Enable Version Control must be enabled for Document Versioning to work properly.</p> <p>Enabling Document Versioning changes the value of the Version Aware Agreement field to TRUE for all new agreements after the property is activated. The Version Aware field is a flag that tells Apttus Contract Management to use Document Versioning for a specific record.</p> <p>Important Note: It is recommended that once a record is flagged as Version Aware, you do not disable this field, as versioning will become undefined for the agreement record in question. Instead, ensure that records which should not use Document Versioning do not have the field enabled when they are created.</p> <p>For more information on how you can configure Document Versioning for your org, refer to Enabling Contract Document Versioning.</p>
Enable File	Select Enable File check box to enable File Type to be visible in the Notes & Attachment section of an agreement.
Enable Merge Call Debug	Enable Merge Service debugging.
Enable Multiple Checkout	This feature will be functional in later releases. Indicates whether multiple checkout is allowed. Only applicable when version control is in effect.
Enable PDF Security	Enabling PDF security lets users apply security settings to PDF documents and protect them with a password. See Enabling PDF Security for Agreement Documents for more information.
Enable Submit Merge Call	Enable to submit merge calls for processing. When enabled, the "Submit" button is displayed as a document generation option.
Enable Template Versioning	<p>Check this box to enable Template Versioning. <i>All new Templates created in your org will use Template Versioning after this setting is enabled.</i></p> <p>For more information, refer to Template Versioning.</p>
Enable Version Control	Check this box to enforce a check-in/check-out policy for agreement documents. This setting must be enabled when "Enable Document Versioning" is checked. Note: This property existed in CLM versions prior to 8, so this property may already be enabled.

Setting	Description
Footer Datetime Format For Imported Docs	<p>Specify the format in which date and time will be shown in the generated agreement. 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. For a list of supported date and time formats, refer to Setting date and time format for footer.</p> <div>  The value of the latest timestamp for the footer is taken from the User Account Timezone field on Salesforce. </div>
Hide Content Control Border	Check this box to hide smart boundaries (for smart fields and clauses) in generated documents. Refer to the <i>X-Author Contracts User Guide</i> for more information on showing/hiding boundaries as an admin user in the add-in.
Instance URL	The Salesforce instance url for redirecting to custom pages.
Max Child Level	The maximum level of lookups and child objects available from the parent object to generate the merge data for. For example, Agreement is the parent object, Agreement Fee is the child object of Agreement and Agreement Fee Adjustment is the child of Agreement Fee and grandchild of Agreement .
Merge Call Timeout Millis	The timeout in milliseconds for the merge request. Default value = 120000 milliseconds.
Merge Webservice Endpoint	Type the Apttus merge web service endpoint. For example https://mergeweb.apttus.net/cgi-bin/MergeServer/Bin/MMCGI.exe
PDF Owner Password	<p>The password required to change the permissions of the PDF document like printing or editing.</p> <p>Note: If this password is not specified, the password configured for the Admin object "APTS_Password" is used instead. See Admin Objects.</p>
Publish Author Events	Indicates whether merge events that occur in X-Author, such as check-in or check-out, should be published. If enabled, a record is inserted in the Merge Event table on the Agreement record.
Publish Merge Events	Indicates whether merge events, such as generating an agreement document or creating offline document should be published. If enabled, a record is inserted in the Merge Event table on the Agreement record. For more information about when to use this field, refer To get a template ID for generating an agreement document as an example.
Sync Bundle Using Line Items	Indicates whether agreement line items should be used to synchronize bundle products. The default uses agreement summary objects.

Setting	Description
Sync Option Products	Indicates whether the option products should be synchronized along with the bundle. The default is 'synchronize bundle' only.
Temp Email Template Inactive Hours	<p>Use this property to set the orphan period of temporary email templates to use in conjunction with the CleanupJobScheduler APEX class. The default value of this property is set to 4 hours.</p> <p>For more information, refer to Temporary Email Template Cleanup.</p>
Use Agreement Locks for Versioning	<p>Check this box to use Agreement locks for versioning instead of document-level locking:</p> <ul style="list-style-type: none"> • If enabled, all agreement documents are locked (by the user checking out) when any one of them is checked out. • If disabled, only checked out documents are locked (by the user checking out)—any other agreement documents which have not yet been checked out can be checked out for editing.

Document Version Properties

For agreement documents, Apttus follows the X.Y.Z pattern of document versioning where X denotes the major document version, Y denotes the minor document version and Z denotes the revision version. The Document Version Properties let you set the version increment factor and set the initial version number for your agreement documents.

Configuring document version properties

To use and configure Document Version Properties in your org:

1. Navigate to Setup > Develop > Custom Settings.
2. Click the **Manage** link next to Document Version Properties. Click **Edit** to edit Document Version Properties. The Document Version Properties form is displayed.

Document Version Properties Edit Help for this Page ?

Provide values for the fields you created. This data is cached with the application.

Edit Document Version Properties
Save Save & New Cancel

Document Version Properties Information
! = Required Information

Name i

Trim Document Version ? ☒

Initial Version ?

Document Regenerate

Increment Checkin Final ?

Increment Checkin Without Redlines ?

Increment Checkin With Redlines ?

You can enter following property details in Document Version Properties:

Setting	Description
Initial Version	<p>This property specifies the initial version number of a newly generated or uploaded document. If you want the document versioning to start from 0.0.0, specify 0 and if you want to start the document versioning to start from 1.0.0, specify 1. Default value of this field (if left blank) is 1.</p>
Document Regenerate	<p>This property specifies the document version increment factor when the document is regenerated with the same template as of the original agreement, from Contract Management. Specify Major if you want to increment the major version of the document and specify Minor if you want to increment the minor version of the document. Default value of this field (if left blank) is Major.</p> <div> <p>Note</p> <p>Regenerating an agreement document with a different template than the one used for generating the original agreement, restarts the version numbering of the document.</p> </div>
Increment Checkin Final	<p>This property specifies the document version increment factor when the document is checked in as Final- to be signed from X-Author Contracts for Microsoft Word. Specify Major if you want to increment the major version number of the document and specify Minor if you want to increment the minor version number of the document. Default value of this field (if left blank) is Major.</p>
Increment Checkin with Redlines	<p>This property specifies the document version increment factor when the document is checked in using the option With Redlines from X-Author Contracts for Microsoft Word. Specify Major if you want to increment the major version number of the document and specify Minor if you want to increment the minor version number of the document. Default value of this field (if left blank) is Minor.</p>

Setting	Description
Increment Checkin without Redlines	This property specifies the document version increment factor when the document is checked in using the option Without Redlines from X-Author Contracts for Microsoft Word. Specify Major if you want to increment the major version number of the document and specify Minor if you want to increment the minor version number of the document. Default value of this field (if left blank) is Major.
Trim Document Version	This property specifies whether the document version number in the Document Naming Convention would be of 3 digits or 2 digits. Selecting this property, trims the last decimal and number from the document version number in the Document Naming Convention. For example, version 1.2.0 would become 1.2 in the name of the document. By default, this property is not selected.

Apttus Contract Management Package Objects

Apttus Contract Management package objects contain fields that are maintained in the corresponding tables for the objects.

Note

Check organization-wide defaults set for the objects. This table is intended for guidance purpose only.

Apttus Object	Purpose of the Object
Account Hierarchy	This defines a single instance of an account hierarchy relationship. It contains the leaf Id, the parent Id, the root Id, and the level.
Agreement Action Condition	Represents conditions to enable agreement actions
Agreement Explorer	A reusable, unique combination of Field Sets and Filter Sets.
Agreement Hierarchy	This defines a single instance of an agreement hierarchy relationship. It contains the leaf Id, the parent Id, the root Id, and the level.
Agreement Line Item	Represents a product or service line item associated with an agreement
Agreement Lock	Represents a lock on the agreement
Agreement Clause	Represents a clause associated with an agreement
Agreement Document	Links to agreement documents that are not stored in Apttus

Apttus Object	Purpose of the Object
Agreement Protection	Specifies protection settings for agreements generated by the Apttus Contract Wizard and maintained by the Apttus Contract Author
Agreement Rule Condition	Specifies a condition used to evaluate an agreement rule
Agreement Rule	Specifies a rule used to evaluate various agreement actions such as submit request
Agreement Term Exception	Term Exceptions associated with a given Agreement
Admin	Store admin preferences and metadata
Agreement	Represents an agreement in the system
Related Agreement	To identify the different types of relationships between agreements
Template	Contract language templates available in the system. These templates specify guidance, language, local settings, and include Word attachment templates representing the bulk of actual contracts that can be used when creating a first draft . Templates can include standard and non-standard language.
Async Merge Call	Holds asynchronous merge calls
Content Event	Holds content events for subscribers to handle
Cycle Time Field Data	Holds the data captured on fields for cycle time reporting
Cycle Time Field	Holds the fields monitored for cycle time data capture
Cycle Time Group Data	Holds the data captured on groups for cycle time reporting
Cycle Time Group	Holds the groups monitored for cycle time data capture
Doc Assembly Component	Represents a single component in a document assembly rule
Doc Assembly Ruleset	Represents a rule set that contains a list of rules to determine the sections to include in a dynamic template.
Doc Assembly Rule	Represents a single rule in a document assembly ruleset
Document Agreement Clause	Agreement clauses in an agreement document
Document Version Detail	Holds the version details of a document
Document Version	Represents a document version
Agreement Document Output Format	Holds default output format preferences by user profile and agreement type for use in the agreement document generation process.

Apttus Object	Purpose of the Object
Formula Field (Comply)	Represents a formula field used in agreement rules
Merge Event Detail	Holds document merge event details
Merge Event	Holds document merge events for subscribers to handle
Query Template Filter	Filter expression used in a query
Query Template Qualifier	Filter used to select a query template
Query Template	Query Template for bulding soql queries and filters
Retention Policy	Holds object retention policies
Search Filter (Comply)	Represents a search filter
Template Clause Reference Version	Holds Template Clause References for this version
Template Clause Reference	Represents a clause reference in a template or a library
Template Datasource Filter	Represents a datasource filter associated with a template
Template Dynamic Section Version	Holds the template dynamic section details for a given template version
Template Dynamic Section	Represents a dynamic section in a template
Template Version	Holds various versions of this template and is a Master-detail to Template
Temp Object (Comply)	A container for temporary objects and attachments
Term Exception	Term Exceptions master table
Wizard	A runtime instance of the wizard design
Wizard Design	Holds all the wizard design records
Wizard Input Control	The individual question, instruction statements and associated field attributes
Wizard Input Control Runtime(Deprecated)	Input Control instance within a runtime wizard
Wizard Input Control (Deprecated)	The individual question, instruction statements and associated field attributes
Wizard Input Group (Deprecated)	Groups input controls within a step
Wizard Rule	Individual rules which are applied within a ruleset.

Apttus Object	Purpose of the Object
Wizard Ruleset	A collection of rules that are applied to input control and steps. The system determines a ruleset at the level of input control expression formula, determine focus objects, record type and step navigation rules.
Wizard Ruleset Runtime (Deprecated)	A runtime instance of the ruleset provided by the wizard design
Wizard Ruleset (Deprecated)	A collection of rules that are applied to input control and steps. The system determines a ruleset at the level of input control expression formula, determine focus objects, record type and step navigation rules.
Wizard Rule (Deprecated)	Individual rules which are applied within a ruleset.
Wizard Runtime Input	Input Control instance within a runtime wizard
Wizard Runtime (Deprecated)	A runtime instance of the wizard design
Wizard Step	The step that is designed and used in Wizard designs.
Wizard Step Runtime (Deprecated)	A runtime instance of a wizard step design.
Wizard Step (Deprecated)	The step that is designed and used in Wizard designs.
Wizard Design (Deprecated)	Main Wizard Object, each record represents a Wizard design

Profile Settings and Security

Use the following settings to ensure the profile settings correspond to the Apttus custom profile.

See also [Sharing Security](#).

 Apttus recommends to check **field level security** for corresponding objects when configuring profiles.

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Apttus Administrator
Custom App Settings					
Apttus Contract Management	Yes	Yes	Yes	Yes	Yes
Enabled Apex Class Access					

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Apttus Administrat or
Apttus.*	Yes	Yes	Yes	Yes	Yes
Enabled Visualforce Page Access					
Apttus.*	Yes	Yes	Yes	Yes	Yes
Standard Tab Settings					
Accounts	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Contacts	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Dashboards	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Reports	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Apttus Custom Tab Settings					
Admin	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreement Protection	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreement Rules	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreements	Tab Hidden	Default On	Default On	Default On	Default On
Agreement Document Output Formats	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Configurable Wizard	Tab Hidden	Tab Hidden	Tab Hidden	Default On	Default On

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Apttus Administrator
Cycle Time Groups	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Doc Assembly Rulesets	Tab Hidden	Tab Hidden	Tab Hidden	Default On	Default On
Query Templates	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Retention Policies	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Search Filters (Comply)	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default On
Publish Templates	Tab Hidden	Tab Hidden	Tab Hidden	Default On	Default On
Purge Agreements	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default On
Templates	Tab Hidden	Tab Hidden	Tab Hidden	Default On	Default On
Term Exceptions	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Administrative Permissions					
Manage Users	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
Customize Application	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
View Setup & Configuration	Yes	Yes	Yes	Yes	Yes
Manage Public Reports	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
Manage Dashboards	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
Edit HTML Templates	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
General User Permissions					

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Apttus Administrator
Create and Customize Reports	Use Existing Setting	Use Existing Setting	Use Existing Setting	Yes	Yes
Edit Events	Use Existing Setting	Yes	Yes	Yes	Yes
Edit Tasks	Use Existing Setting	Yes	Yes	Yes	Yes
Export Reports	Use Existing Setting	Use Existing Setting	Use Existing Setting	Yes	Yes
Run Reports	Use Existing Setting	Use Existing Setting	Use Existing Setting	Yes	Yes
Send email	Use Existing Setting	Use Existing Setting	Yes	Yes	Yes
Folder Permissions					
See Folder Security					
Custom Object Permissions					
Admin	Read	Read	Read	Read	Read, Create, Edit, Delete
Agreement	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Agreement Clause	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Document	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Document Output Format	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Agreement Line Item	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Lock	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Apttus Administrator
Agreement Protection	Read	Read	Read	Read	Read, Create, Edit, Delete
Agreement Rule	Read	Read	Read	Read	Read, Create, Edit, Delete
Agreement Rule Condition	Read	Read	Read	Read	Read, Create, Edit, Delete
Agreement Term Exception	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
AsyncMergeCall	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Content Event	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Field	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Field Data	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Group	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Group Data	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Doc Assembly Component	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Doc Assembly Rule	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Doc Assembly Ruleset	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Document Version	Read	Read, Create	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Document Version Detail	Read	Read, Create	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Formula Field (Comply)	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Apttus Administrator
Merge Event	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Merge Event Detail	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Query Template	Read	Read	Read	Read	Read, Create, Edit, Delete
Query Template Filter	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Query Template Qualifier	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Related Agreement	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Retention Policy	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Search Filter (Comply)	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Temp Object (Comply)	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Template	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Template Clause Reference	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Template Datasource Filter	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Template Dynamic Section	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Term Exception	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Wizard Design	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Apttus Administrator
Wizard Input Control	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Wizard Ruleset	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Wizard	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit	Read, Create, Edit, Delete
Wizard Step	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Custom Record Type Settings for Agreements					
Record Types (Create Permission) Permission for the Record Types needs to be provided.	No	Yes	Yes	Yes	Yes

Folder Security and Sharing Permissions

This reference goes into more detail regarding typical permission settings for Folders used by Apttus Contract Management and provides guidelines for enforcing Sharing settings within your organization.

Folder Security

The following table represents typical Profile-based permission settings for folders used by Apttus Contract Management. Security of any folder should be set according to the needs of your business and is independent of Agreement record security. Read further on this page for more discussion on security considerations for your folders, content repositories and records.

Profile	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager	Apttus Administrator
Apttus Documents	Read	Read	Read	Read, Create, Edit, Delete
Apttus Images	Read	Read	Read	Read, Create, Edit, Delete

Apttus Email Templates	Read	Read	Read	Read, Create, Edit, Delete
Apttus Temporary Email Templates	Read	Read	Read	Read, Create, Edit, Delete
Agreement Report	Read	Read	Read	Read, Create, Edit, Delete
Agreement Dashboard	Read	Read	Read	Read, Create, Edit, Delete

Content Repositories

Following activation of an agreement, documents designated for content search are routed to a content repository. The default content repository for Apttus agreement documents is the Documents folder, but you can also configure the system to route these documents to any of the following:

- Content Libraries
- Chatter Feed (File Feed data store)

See [Routing Documents to Content Libraries](#) for more information on setting up alternate content repositories for your activated agreement documents.

Email Folders

Email templates and temporary email templates with Agreement attachments are stored in the Apttus Email Templates and Apttus Temporary Email templates folders. If you have integrated electronic signature functionality into your Apttus solution, the respective custom objects store the request and response information which might contain the contract documents. Because of this, access should be restricted to specified users and user groups, and external portal users should be explicitly restricted from accessing these folders.

Sharing Security

Permissions associated with User Profiles are not always sufficient when determining access to specific records. Profile security is granted at the Object level. If a particular User Profile has Read/Edit permissions for an Object, by default they have the same permissions at the record level. Sharing security allows you to enforce permissions at the **Record** level.

Creating Your Private Sharing Model

The default Sharing setting (controlled by Organization-Wide Defaults) is always Public Read/Write for all Apttus custom objects. You can restrict any of these defaults by changing settings to Private or Public Read Only. Then use **Sharing Rules** to allow specific users or groups of users additional access. Rules are typically based on the record owner or Field values on the records in the Object (e.g. for Agreements,

"Agreement Type"). You can also decide to grant access using Role hierarchies, meaning access is automatically given to users above the record owner in your organization's hierarchy.

For more information on determining Organization-Wide Defaults and creating Sharing Rules, please refer to Salesforce Documentation [here](#).

Apttus Status Categories and Statuses

This section describes the purpose of status categories and associates Statuses.

1. **Request:** This Status Category indicates that the Contract is in the Request stage.

Stage	Description
Request	New request
Request Approval	Request being approved
Submitted Request	Request submitted
Approved Request	Request approved
Cancelled Request	Contract request cancelled
In Amendment	Contract being amended

2. **In Authoring:** This Status Category indicates that the contract is in the Authoring stage.

Stage	Description
Author Contract	Contract being authored
Language Approval	Language being approved
Language Approved	Language approved
Internal Review	Contract in an internal review
Other Party Review	Contract in an other party review
Signature Declined	Signature is declined

3. **In Signatures:** This Status Category indicates that the contract is in the Signatures stage.

Stage	Description
Internal Signatures	Contract sent for internal signatures
Other Party Signatures	Contract sent for other party signatures
In Reconciliation	Terms are being reconciled
Reconciled	Terms reconciliation completed
Signature Declined	Signature is declined
Ready for Signatures	Contract ready for internal or other party signatures
Fully Signed	Contract fully signed and ready for activation.

4. **In Filing:** This Status Category indicates that the contract is in the Filing stage.

Stage	Description
In Reconciliation	Terms are being reconciled
Reconciled	Terms reconciliation completed

5. **In Effect:** This Status Category indicates that the contract is in the Effect stage.

Stage	Description
Activated	Active Contract
Being Amended	Contract is in the amendment process
Being Renewed	Contract is in the renewal process
Superseded	Contract is superseded.
Being Terminated	Contract is in the termination process

6. **Expired:** This Status Category indicates that the contract is in the Expired stage.

Stage	Description
Expired	Contract expired

7. **Terminated:** This Status Category indicates that the contract is in the Terminated stage.

Stage	Description
Terminated	Contract terminated

8. **Amended:** This Status Category indicates that the contract is in the Amended stage.
9. **Cancelled:** This Status Category indicates that the contract is in the Cancelled stage.

Apttus Status Category Map

The Status Category and Status combination determines the actions available for a particular agreement.

Status category map provides an idea of various agreement status categories during the contract lifecycle.

The following tables describes the purpose of Apttus status category maps:

Status Category	Request	In Authoring	In Signatures	In Filing	In Effect	Expired	Terminated	Amended	Cancelled
Status									
Request	✓								
Request Approval	✓								
Submitted Request	✓								
Approved Request	✓								
Cancelled Request	✓								
In Amendment	✓								
Author Contract		✓							
Language Approval		✓							
Language Approved		✓							
Internal Review		✓							
Other Party Review		✓							
Internal Signatures			✓						
Other Party Signatures			✓						
Activated					✓				
Being Amended					✓				
Being Renewed					✓				
Superseded					✓				
Being Terminated					✓				
Terminated							✓		
Expired						✓			
In Reconciliation			✓	✓					
Reconciled			✓	✓					
Signature Declined		✓	✓						
Ready for Signatures			✓						
Fully Signed			✓						

Agreement Actions

The Type and the actions vary according to the agreement status.

▼ Actions	
Preview ⓘ	Preview
Generate ⓘ	Generate
Generate Supporting Document	Generate Supporting Document
Regenerate ⓘ	
Import Offline Document	Import Offline Document
Send For Review ⓘ	
Send For Signatures ⓘ	
Cancel Request ⓘ	Cancel Request
Activate ⓘ	
Amend ⓘ	
Renew ⓘ	
Terminate ⓘ	
Expire ⓘ	

The following table describes the Actions available at various stages of the Agreement and their significance:

1. Preview Agreement

Action	Preview Agreement
Description	Generates a <i>Draft</i> version of an agreement document based on the template set up for the agreement type. The draft agreement is rendered in the Microsoft Word format. If more than one agreement template is setup, you would be prompted to pick a specific template.
Availability	If Status Category = Request
Task	A task, Previewed Agreement in completed status is, added to the Activity History related list.
Post Status	N/A
Comments	

2. Generate Agreement

Action	Generate Agreement
--------	--------------------

Description	<p>Generates the first version of an agreement document, and attaches a copy of the same to the agreement record.</p> <p>When you initiate the Generate action, you are navigated to an intermediary screen to select additional information about the document to be generated. Select the document output format for your agreement record. Supported document output formats are .DOC, .DOCX, .RTF, and .PDF. Additionally, if document protection has been enabled for you, you can generate a document with the appropriate protection options.</p> <p>The first draft version of the agreement is generated and attached to the system in the Notes & Attachment or Document Versions (if the document is Version Aware) related list of the agreement details page.</p> <p>You can:</p> <ul style="list-style-type: none"> • Save it to the desktop, close the Microsoft Word application, and come back to the agreement record later. • Access the agreement document from the Notes & Attachments section (click on the View link corresponding to the document).
Availability	If Status Category = Request
Task	A task, Generated Agreement in completed status, is added to the Activity History related list. Also, three tasks with Not Started status are added to the Open Activities related list. These tasks are Get Internal Signatures, Get External Signatures, and Scan & Attach Agreement.
Post Status	Ready for Signatures
Comments	

3. Regenerate Agreement

Action	Regenerate Agreement
Description	<p>Regenerates a new version of the agreement document from a selected template based on values from the agreement record. The regenerated agreement document is attached to the Notes & Attachments or Document Versions (if the document is Version Aware) related list. Since it is regenerated from template, any red lines made in previous version would not be carried into this version and must be manually applied.</p>
Availability	If Status Category = In Authoring or In Signatures
Task	A task, Regenerated Agreement, in completed status is added to the Activity History related list.

Post Status	N/A
Comments	

4. Generate Supporting Document

Action	Generate Supporting Document
Description	Generates a document from a template of type "Supporting Document" and attaches the same to Agreement Record. Can be used for Contract Summary, Renewal Letter, Termination Letter, etc.
Availability	N/A
Task	A task, Generated Supporting Document in completed status, is added to the Activity History related list.
Post Status	N/A
Comments	This can be used to generate contract summary

5. Send for Review

Action	Send for Review
Description	Allows you to select one or more attachments from the Agreement record and from related parent/child agreements, select an email template, address the same, and send it out.
Availability	If Status Category = In Signatures or In Authoring
Task	Two tasks- Email: <i>emailSubject</i> task in completed status and Sent For Review task in completed status, are added to the Activity History related list.
Post Status	Other Party Review
Comments	

6. Send for Signatures

Action	Send for Signatures
Description	Allows user to select one or more attachments from the Agreement record and from related parent / child agreements, select an email template, address the same, and send the agreement document as a final copy for Signatures.
Availability	If Status Category = In Signatures or In Authoring
Task	Two tasks- Email: <i>emailSubject</i> task in completed status and Sent For Signatures task in completed status, are added to the Activity History related list.
Post Status	Other Party Signatures
Comments	

7. Import Offline Document

Action	Import Offline Document
Description	<ul style="list-style-type: none"> Imports a third party contract and attaches it to the agreement record in the Agreement Documents related list. Allows the user to use the attached document in the Apttus Author process
Availability	If Status Category = Request or In Authoring or In Filing
Task	A task, Imported Offline Document in completed status, is added to the Activity History related list.
Post Status	N/A
Comments	

8. Activate

Action	Activate
Description	<ul style="list-style-type: none"> Marks the agreement as a finalized, executed contract Prompts the user to select which attachment is the signed copy and records the same in activity history

Availability	If Status Category = In Signatures
Task	A task, Activated Agreement in completed status, is added to the Activity History related list.
Post Status	Sets Status Category = In Effect, Status = Activated. If an Amendment or Renewal is being Activated, sets Status Category of Original Agreement to Amended or Renewed and Status to Superseded
Comments	

9. Amend

Action	Amend
Description	Creates a new dot version of the Agreement (<i>nnnn.1, nnnn.2, and so on</i>) after doing a deep copy of the agreement fields and related objects.
Availability	If Status Category = In Effect
Task	A task, Amended Agreement in completed status, is added to the Activity History related list.
Post Status	Sets Status of Original Agreement to Being Amended, and Status Category of New Agreement to Request and Status to In Amendment
Comments	

10. Renew

Action	Renew
Description	Creates a new minor version of the Agreement (<i>nnnn.1, nnnn.2, and so on</i>) after doing a deep copy of the agreement fields and related objects. To know more about the number of fields cloned in the renewal process, refer Clearing Cloned Agreement Fields.
Availability	If Status Category = In Effect
Task	A task, Renewed Agreement in completed status, is added to the Activity History related list.
Post Status	Sets Status of Original Agreement to Being Renewed, and Status Category of New Agreement to Request and Status to In Renewal

Comments	Agreement End Date must be in the past
-----------------	--

11. Expire

Action	Expire
Description	Sets the Agreement to an Expired or Lapsed Status.
Availability	If Status Category = In Effect
Task	A task, Expired Agreement in completed status, is added to the Activity History related list.
Post Status	Sets Status Category = Expired, Status = Expired
Comments	

12. Terminate

Action	Terminate
Description	Sets the Agreement to a Terminated state.
Availability	If Status Category = In Effect
Task	A task, Terminated Agreement in completed status, is added to the Activity History related list.
Post Status	Sets Status Category = Terminated, Status = Terminated
Comments	

13. Cancel Request

Action	Cancel Request
Description	Voids an Agreement Request.
Availability	If Status Category = Request or In Authoring or In Signatures and Status <> Cancelled Request
Task	A task, Cancelled Request in completed status, is added to the Activity History related list.
Post Status	<ul style="list-style-type: none"> • Sets Status to Cancelled Request • If an Amendment is being Cancelled, sets Status Category of Original Agreement to In Effect and Status to Activated
Comments	

Agreement Fields

Field Label	Description	Data Type	Required	Default Value	Reserved
Agreement Name	Unique identifier for the agreement record. This name appears in page layouts, related lists, lookup dialogs, search results, and key lists on tab home pages. By default, this field is added to the custom object page layout as a required field	Text(80)	Yes		Yes
Created By	User who created the record	Lookup(User)	Yes – System assigned		Yes
Last Modified By	User who most recently changed the record	Lookup(User)	Yes – System assigned		Yes
Owner	Assigned owner of the agreement record	Lookup(User)	Yes – System assigned, changeable by user	Login User	Yes

Field Label	Description	Data Type	Required	Default Value	Reserved
Record Type	The agreement type for this record	Record Type	Yes	Agreement Type from selection screen	Yes
Account	The link to the account record to identify the external party to this agreement.	Lookup(Account)	Yes		Yes
Activated By	Auto-populated with the user who activates the agreement in the system. Read-only	Lookup(user)			
Activated Date	Auto-populated with the date on which the agreement was activated in the system. Read-only.	Date			
Agreement Category	Used to categorize agreement types. This can be agreement type specific (add appropriate values for each agreement type) and can also be used for template filtering.	Picklist			
Agreement End Date	The end date for this agreement. A required field on activation, if the agreement is not perpetual.	12 months from billing activation	yes		Yes
Agreement Number	The system assigned unique agreement number. Identifies the agreement number, including the version number. Use this field to display on screens, reports, dashboards, search filters and columns, etc.	Auto Number	Yes		Yes. Not changeable by user.

Field Label	Description	Data Type	Required	Default Value	Reserved
Agreement Start Date	The effective date of the agreement. A required field on activation.	Date	yes		Yes
Amendment Effective Date	Auto populated with the date on which amendment is effective.	Date			
Auto Renew	Indicates whether the agreement will auto renew	Check box			
Auto Renewal Terms	Specifies any terms associated with auto renewal	Long Text Area (32000)			
Business Hours	Corporate Business Hours associated with the agreement; used for cycle time reporting.	Lookup(Business Hours)			
Company Signed By	Link to contact record to identify internal signatory	Lookup(Contact)	Yes		
Company Signed Date	Date when internal signatory signed	Date	yes		
Company Signed Title	Title of person signing on behalf of Company	Text(80)			
Contract Duration (Days)	The duration from Start Date to End Date in days. Shown when agreement is 'In Effect'.	Formula(number)	yes		
Contracted Days	Days from Contract Start Date to Current Date if the contract is In Effect and Start Date is set.	Formula(number)	yes		
Description	Detailed description of this agreement	Long Text Area(32000)	yes		
Executed Copy Mailed Out Date	Date the final, executed copy was mailed out to the external party	Date			

Field Label	Description	Data Type	Required	Default Value	Reserved
Initiation Type	To indicate whether this record is being filed as an executed agreement or is being negotiated in the system	Picklist(Negotiate Contract, Store Executed Contract)	Yes		Yes. Not changeable by user.
Internal Renewal Notification Days	Notification period prior to Renewal Notice Date when notification is sent out internally that renewal is approaching. Email alert needs to be setup, if needed.	Number	yes		
Internal Renewal Start Date	Auto populated with Date by which internal notice of internal renewal is approaching. Issue Renewal Notice Date less internal renewal notification days.	Date	Yes – System assigned, changeable by user		
Non Standard Legal Language?	To indicate whether this agreement contains non-standard language	Checkbox			
Other Party Returned Date	The date on which other party returned signed agreement	Date			
Other Party Sent Date	Auto populated with the Date on which agreement was first sent to other party for review/ signatures	Date			
Other Party Signed By	Link to contact record to identify external signatory	Lookup(Contact)			
Other Party Signed By (Unlisted)	External Signatory identifier (when signatory is not maintained as contact (record) in the system).	Text Area			

Field Label	Description	Data Type	Required	Default Value	Reserved
Other Party Signed Date	Date when external signatory signed	Date			
Other Party Signed Title	Title of person signing on behalf of Other Party	Text			
Outstanding Days	Shows the number of days between date agreement was today, if not returned as yet. Else number of days between returned and sent.	Formula(number)			
Owner Expiration Notice	To indicate the number of days prior to expiration date that a notification needs to be sent to the owner	Picklist(60-45-15-1)		90 Days	
Parent Agreement	Reference to parent agreement if current agreement was created as child or assigned manually.	Lookup(Agreement)			
Perpetual	Identifies whether the agreement has a specified end date or if it is open ended	Checkbox			
Primary Contact	Primary external contact for the agreement.	Lookup(Contact)			
Related Opportunity	Identifies the opportunity related to the agreement	Lookup (opportunity)			
Remaining Contracted Days	If the agreement is In Effect, this value is calculated as Contract Duration Days less Contracted Days.	Formula(number)			
Renewal Consent	Indicates whether consent is required to extend / renew this agreement	Checkbox			

Field Label	Description	Data Type	Required	Default Value	Reserved
Renewal Notice Date	Issue Renewal Notice Date = End Date - Renewal Notice Days	Formula(Date)			
Renewal Notice Days	The number of days before end date when renewal notice is due	Number			
Renewal Term (Months)	The number of months to extend the agreement	Number			
Renewal Terms	Specifies any terms for renewal	Text Area			
Request Date	The date the agreement was requested	Date			
Requestor	Agreement Requestor (user).	Lookup(user)			
Risk Rating	This field allows users to track agreement risk rating	Number(5, 2)			
Source	Source of this contract – internal paper or third party contract	Picklist			Yes. Not changeable by user.
Special Terms	Identifies any special terms related to contract	Text Area			

Field Label	Description	Data Type	Required	Default Value	Reserved
Status	The sub stage of an agreement – the status underneath a given status category. These are generally modifiable by the customer except for the following values which are Apttus reserved to manage agreement life cycles: Request, Submitted Request, Cancelled Request, In Amendment, Being Amended, Superseded, Activated, Expired, Internal Signatures, Author Contract, Expired, Terminated, Ready for Signatures, Fully Signed, Signature Declined	Picklist			
Status Category	The higher level state of the agreement – In Authoring, In Effect, Expired, etc. These are Apttus reserved values	Picklist (Request , In Authoring, In Signatures, In Filing, In Effect, Expired, Terminated, Amended, Cancelled)	Yes – System Assigned		Yes. Not changeable by user.
Submit Request Mode		Picklist			
Subtype	The subtype of the agreement for a given agreement type. Please specify values based on your agreement types	Picklist (Default)			
Term (Months)	Identifies the term, in months, of an agreement from the agreement start date	Number			
Termination Date	Date contract terminated	Date			

Field Label	Description	Data Type	Required	Default Value	Reserved
Termination Notice Days	Notice period prior to termination	Number			
Termination Notice Issue Date	Date termination notice was sent / received	Date			
Total Agreement Value	Total value of agreement	Currency (16, 2)			
Version	The version number of the agreement that is incremented each time an agreement is amended	Number (3,0)	Yes – System Assigned		Yes
Version Aware	Indicates whether the Agreement record is Version Aware. If checked, versioning is enabled for all documents belonging to the agreement record. This field is checked by default for all new agreements when Document Versioning is enabled (Comply System Properties <i>Enable Version Control</i> and <i>Enable Document Versioning</i>).	Checkbox			
Activate	Link to activate the agreement; Shown only in desired statuses.	Action			
Amend	Link to amend the agreement; Shown only for active agreements.	Action			
Cancel Request					
Expire	Link to expire the agreement; Shown only for active agreements.	Action			

Field Label	Description	Data Type	Required	Default Value	Reserved
Generate	Link to generate agreement document using one of the templates in library. Shown only is appropriate agreement statuses. Attaches generated doc under Notes & Attachment and creates 3 tasks. Write activity history. Changes status from "Request" to "In Signatures/Ready for signatures"	Action			
Generate Supporting Document	Link to generate supporting document using one of the templates in library. Shown only is appropriate agreement statuses.	Action			
Insert Offline Document	Link to add an external/offline document to the agreement record. Shown only is appropriate agreement statuses.	Action			
Preview		Action			
Regenerate	Regenerate a new agreement doc using one of the templete in the library. The new version will not have redlines (if any) from the earlier versions.	Action			
Renew	Start Renewal of an active agreement.	Action			
Return To Requestor	Return the agreement to Requestor.	Action			

Field Label	Description	Data Type	Required	Default Value	Reserved
Send For eSignature	Send document to external party using EcoSign/Docusign integration. Status changes to "In Signatures/Other party Signatures"	Action			
Send For Review	Send agreement for other party review. Status changes to "In Authoring/Other Party Review"	Action			
Send For Signatures	Send document for Signatures. Status changes to "In Signatures/Other party Signatures"	Action			
Submit Request		Action			
Terminate		Action			

Apttus Retention Policy Schema

An XML schema describing the policy specification is provided as a static resource named *RetentionPolicySchema*.

The policy specification contains filters and retention rules. The filters are used to constrain the set of agreements to which the policy applies. The retention rule specifies how to compute the retention date based on existing date fields in the agreement. The sequence field may be used to establish the order in which the policies should be applied.

Here is the schema for the Apttus retention policy:

```

1  <!-- Description:
2      Defines schema RetentionPolicy
3  -->
4  <xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema"
5      elementFormDefault="unqualified" attributeFormDefault="unqualified">
6      <xs:element name="RetentionPolicy" type="RetentionPolicyType">
7          <xs:annotation>
8              <xs:documentation>Retention Policy</xs:documentation>
9          </xs:annotation>
10     </xs:element>
11     <!-- retention policy -->
12     <xs:complexType name="RetentionPolicyType">
13         <xs:sequence>
14             <xs:element name="Filter" type="FilterType" minOccurs="0">
15                 <xs:annotation>
16                     <xs:documentation>The record filter</xs:documentation>
17                 </xs:annotation>
18             </xs:element>
19             <xs:element name="Rule" type="RuleType" minOccurs="0">
20                 <xs:annotation>
21                     <xs:documentation>The retention rule</xs:documentation>
22                 </xs:annotation>
23             </xs:element>
24         </xs:sequence>
25     </xs:complexType>
26     <!-- filter -->
27     <xs:complexType name="FilterType">
28         <xs:sequence>
29             <xs:element name="Predicates" type="PredicateCollType">
30                 <xs:annotation>
31                     <xs:documentation>The filter predicates</
32                 </xs:annotation>
33             </xs:element>
34             <xs:element name="ConditionExpr" type="xs:string">
35                 <xs:annotation>
36                     <xs:documentation>The filter expression</
37                 </xs:annotation>
38             </xs:element>
39         </xs:sequence>
40     </xs:complexType>
41     <!-- rule type -->
42     <xs:complexType name="RuleType">
43         <xs:sequence>
44             <xs:element name="RetainForever" type="xs:boolean">
45                 <xs:annotation>
46                     <xs:documentation>Retain forever indicator</
47                 </xs:annotation>

```

```

48         <xs:element name="RetainFor" type="RetainForType" minOccurs="0">
49             <xs:annotation>
50                 <xs:documentation>Retain for</xs:documentation>
51             </xs:annotation>
52         </xs:element>
53     </xs:sequence>
54 </xs:complexType>
55 <!-- retain for -->
56 <xs:complexType name="RetainForType">
57     <xs:sequence>
58         <xs:element name="Period" type="RetentionPeriodType">
59             <xs:annotation>
60                 <xs:documentation>The retention period</xs:documentation>
61             </xs:annotation>
62         </xs:element>
63         <xs:element name="AfterDate" type="AfterDateType">
64             <xs:annotation>
65                 <xs:documentation>The after date</xs:documentation>
66             </xs:annotation>
67         </xs:element>
68     </xs:sequence>
69 </xs:complexType>
70 <!-- retention period -->
71 <xs:complexType name="RetentionPeriodType">
72     <xs:simpleContent>
73         <xs:extension base="xs:nonNegativeInteger">
74             <xs:attribute name="uom" type="PeriodUOMType">
75                 <xs:annotation>
76                     <xs:documentation>Retention period</xs:documentation>
77                 </xs:annotation>
78             </xs:attribute>
79         </xs:extension>
80     </xs:simpleContent>
81 </xs:complexType>
82 <!-- after date -->
83 <xs:complexType name="AfterDateType">
84     <xs:sequence>
85         <xs:element name="FieldName" type="xs:string">
86             <xs:annotation>
87                 <xs:documentation>Field name</xs:documentation>
88             </xs:annotation>
89         </xs:element>
90         <xs:element name="FieldLabel" type="xs:string">
91             <xs:annotation>
92                 <xs:documentation>Field label</xs:documentation>
93             </xs:annotation>
94         </xs:element>
95     </xs:sequence>
96 </xs:complexType>
97 <!-- predicate collection -->

```

```

98     <xs:complexType name="PredicateCollType">
99         <xs:sequence>
100             <xs:element name="Predicate" type="PredicateType"
maxOccurs="unbounded">
101                 <xs:annotation>
102                     <xs:documentation>The predicate</xs:documentation>
103                 </xs:annotation>
104             </xs:element>
105         </xs:sequence>
106     </xs:complexType>
107     <!-- predicate -->
108     <xs:complexType name="PredicateType">
109         <xs:sequence>
110             <xs:element name="RowNum" type="xs:positiveInteger">
111                 <xs:annotation>
112                     <xs:documentation>Row number</xs:documentation>
113                 </xs:annotation>
114             </xs:element>
115             <xs:element name="FieldName" type="xs:string">
116                 <xs:annotation>
117                     <xs:documentation>Field name</xs:documentation>
118                 </xs:annotation>
119             </xs:element>
120             <xs:element name="FieldLabel" type="xs:string">
121                 <xs:annotation>
122                     <xs:documentation>Field label</xs:documentation>
123                 </xs:annotation>
124             </xs:element>
125             <xs:element name="FieldType" type="xs:string">
126                 <xs:annotation>
127                     <xs:documentation>Field type</xs:documentation>
128                 </xs:annotation>
129             </xs:element>
130             <xs:element name="CompOper" type="xs:string">
131                 <xs:annotation>
132                     <xs:documentation>Comparison operator</xs:documentation>
133                 </xs:annotation>
134             </xs:element>
135             <xs:element name="FieldValue" type="xs:string">
136                 <xs:annotation>
137                     <xs:documentation>Field value</xs:documentation>
138                 </xs:annotation>
139             </xs:element>
140             <xs:element name="BoolOper" type="xs:string">
141                 <xs:annotation>
142                     <xs:documentation>Boolean operator</xs:documentation>
143                 </xs:annotation>
144             </xs:element>
145         </xs:sequence>
146     </xs:complexType>
147     <!-- period uom -->
148     <xs:simpleType name="PeriodUOMType">

```

```

149         <xs:restriction base="xs:string">
150             <xs:enumeration value="Days"/>
151             <xs:enumeration value="Months"/>
152             <xs:enumeration value="Years"/>
153         </xs:restriction>
154     </xs:simpleType>
155 </xs:schema>

```

Translatable Customizations

To view the translatable customizations, click **Translation Workbench > Translate**. If needed, select the **Setup Component**.

You can translate the following components:

- Apex Sharing Reasons
- Button and Link Labels
- Custom App Labels
- Custom Field Help
- Custom Fields
- Custom Report Types
- Data Categories
- Data Category Groups
- Divisions
- Layout Sections
- Lookup Filters
- Picklist Values
- Record Types
- Related List Labels
- S-Controls
- Solution Categories
- Standard Field Help
- Validation Error Messages
- Web Tabs
- Workflow Tasks

List of Objects supporting Document Generation

The following table contains the summary of whether Document Generation feature is supported for the specific objects or not:

Note

Kindly note that for any object to support Document Generation, there can be 2 options.

- For any object, if the value is *Yes*, system supports Document Generation for that object but certain setup needs to be done.
- The value *No* indicates that Document Generation is not supported for that object.

Feature Description	Agreement Object	Quote/ Proposal Object	Standard Salesforce Objects	Other Custom Objects
Merge service endpoint	Yes	Yes	Yes	Yes
Controlling Merge Call Time out (default 60sec)	Yes	Yes	Yes	Yes
Publish Merge Events	Yes	No	No	No
Generate Document from Record	Yes	Yes	Yes	Yes
PDF security on generated document	Yes	Yes	Yes	Yes
Protection on generated Word document	Yes	No	No	No
Versioning. Word document protection	Yes	Yes	Yes	SR
Async mode of Merge	Yes	Yes		
Template setup for default system filtering on generate and other Template functionality from X-Author	Yes	Yes	Yes	Yes
Auto Enabling Checking In for Final version in PDF format	Yes	Yes	Yes	Yes
Auto Enable Reconciliation	Yes	Yes	Yes	Yes
Header / Footer Stamp	Yes	No	No	No

Feature Description	Agreement Object	Quote/ Proposal Object	Standard Salesforce Objects	Other Custom Objects
Enabling Term Exceptions In Author	Yes	No	No	No
Create New Template	Yes	Yes	Yes	Yes
Check-in Template				
Check-out Template	Yes	Yes	Yes	Yes
Clone Template	Yes	Yes	Yes	Yes
Template Playbook: default Search, Select, Insert Clause inline / as reference	Yes	Yes	Yes	Yes
Insert Merge Fields for corresponding Objects <ul style="list-style-type: none"> • Header • Lookups • Related - In Section • Related - In Table 	Yes	Yes	Yes	Yes
Insert Smart Merge Fields for corresponding Objects <ul style="list-style-type: none"> • Header • Lookups • Related - In Section • Related - In Table 	Yes	Yes	Yes	Yes
Document Assembly Rules	Yes	No	No	No
Filtered Rows	Yes	Yes	Yes	Yes
Conditional content	Yes	Yes	Yes	Yes
Auto-publish	Yes	Yes	Yes	Yes
Output Format (Doc, Docx, RTF, PDF) and add Watermark Support for generated document	Yes	Yes	Yes	Yes

Feature Description	Agreement Object	Quote/ Proposal Object	Standard Salesforce Objects	Other Custom Objects
Support Controlled Preferences for Output Format and Watermark *pairs: Record Type / User Profile	Yes	Yes	No	No
Check-in third party document. Import Offline – Create record and attach	Yes	No	No	No
Check-In third party document. Import Offline – Attach to existing record	Yes	No	No	No
Check-In document, attachment of the record. Versioning of the Documents, such as <ul style="list-style-type: none"> • With Redlines • Without Redlines • Final to be Signed • Watermark • Naming Override 	Yes	Yes	Yes	Yes
Check-out document, attachment of the record	Yes	No	No	No
Compare documents, attachments of the record	Yes	Yes	Yes	Yes
Locking: Refresh Lock	Yes	No	No	No
Create Section: Save selection as agreement clause	Yes	No	No	No
Playbook: Insert Clause into the Document on the records	Yes	No	No	No
Reconcile documents <ul style="list-style-type: none"> • Highlight Smart Fields • Reconciliation of the values 	Yes	Yes	Yes	Yes

Feature Description	Agreement Object	Quote/ Proposal Object	Standard Salesforce Objects	Other Custom Objects
Tag Smart Fields	Yes	Yes	Yes	Yes
Update Document from Salesforce	Yes	No	No	No
Multicurrency support by the products of the system: 1. Merge-Comply-Proposals 2. X-Author	1. Yes 2. Yes	1. No 2. Yes	1. No 2. Yes	1. No 2. Yes
Chatter with Record	Yes	Yes	Yes	Yes

Document Search

Use the Find Document button on the documents home page to find specific documents.

The Find Document action searches the following fields:

- Document Name
- Keywords
- Description

To search a document

1. Click the **Documents** tab.
2. Enter your search terms and click **Find Document**.

The search returns a list of documents that match all your search terms. The search results are listed in order of the closest matches. The Keywords and Document Name fields are used to determine the closest matches. The fields you see are predefined and cannot be changed.

Temporary Email Template Cleanup

You may find in some cases that contents in your **Apttus Temporary Email Templates** folder contain sensitive contractual data as attachments to offline agreements. To remedy this, you can use the following APEX job and associated Comply System Property to clean up temporary email templates that are older than a configured period. When this job runs it checks for all temporary email templates older than the period configured by the new Comply System Property and deletes them.

Step 1: Configure APEX Scheduler Job

Schedule a new job using the Apex Scheduler using the standard Salesforce process.

1. From Setup, enter "Apex Classes" into the Quick Find box, select Apex classes, and click the **Schedule Apex** button.
2. Enter a **Job Name** and click the lookup button to choose **CleanupJobScheduler** as the Apex Class.

Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

Save Cancel

Job Name Email Template Cleanup

Apex Class CleanupJobScheduler

Schedule Apex Execution

Frequency

☒ Weekly
☐ Monthly

Recurs every week on

☐ Sunday
☐ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☒ Friday
☐ Saturday

Start 12/16/2015 [12/16/2015]

End 1/16/2016 [12/16/2015]

Preferred Start Time --None--

3. Choose the job **Frequency** and other execution options for the class.
4. Click **Save**.

Step 2: Configure Comply System Property

Use the **Temp Email Template Inactive Hours** Comply System Property to set the orphan period of temporary email templates to use in conjunction with the **CleanupJobScheduler** APEX class. The default value of this property is set to 4 hours.

1. Navigate to Setup > Develop > Custom Settings.
2. Click **Manage** next to Comply System Properties.
3. Click **Edit**.

- Specify a value for the property **Temp Email Template Inactive Hours**. This sets the number of hours after which a temporary email template is considered inactive. When the **CleanupJobScheduler** job runs (Step 1), any temporary email templates which are older will be deleted.

The screenshot shows the Salesforce Custom Settings interface. On the left, a sidebar lists various settings categories: Custom Settings, Email Services, Lightning Components, Visualforce Pages, Platform Cache (New!), S-Controls, Sites, Static Resources, Tools, Remote Access, External Data Sources, External Objects, Secure Agents, Secure Agent Clusters (New!), Schema Builder, Lightning App Builder, Canvas App Previewer, and Installed Packages. The main content area displays a list of configuration options. The 'Temp Email Template Inactive Hours' field is circled in red.

Property Name	Value
Enable PDF Security	<input type="checkbox"/>
Enable Submit Merge Call	<input type="checkbox"/>
Enable Version Control	<input checked="" type="checkbox"/>
Footer Datetime Format For Imported Docs	
Instance Url	
Max Child Level	
Merge Call Timeout Millis	60,000
Merge Webservice Endpoint	https://mwsdev.apptus.net/cg
PDF Owner Password	
Publish Author Events	<input checked="" type="checkbox"/>
Publish Merge Events	<input checked="" type="checkbox"/>
Use Agreement Locks for Versioning	<input type="checkbox"/>
Temp Email Template Inactive Hours	

- Click **Save**.

Note: You cannot set this property value to zero (0) as it will interfere with the execution of your email templates. Please set the property to 1 or higher if you intend to configure temporary email cleanup.

Creating Custom Fields


To create custom fields

- From **Setup**, go to **Create > Objects > Agreement** (*Apttus Contract Management*).

2. From **Custom Fields & Relationships**, click **New**. Dynamic Document Assembly supports custom fields of all data types, except *Picklist (Multi-Select)* and *Text Area (Long)*.
3. Follow the standard [Salesforce instructions](#) for creating a field.
4. After you have created all the fields on the **Agreement** object, go to **Create > Objects > Doc Assembly Rule**.
5. From **Custom Fields & Relationships**, click **New**.
6. Create the exact same fields that you did for the Agreement object and you must use the same API names to ensure the correct auto mapping of fields between the agreement object and the rule.

The fields required for auto mapping and the field set are available.

Create field sets to be used as static and dynamic field sets for the Doc Assembly Rule using the fields created in steps 4 to 6. The fields in the static field set are a subset of the fields in the dynamic field set.

 Packaged fields cannot be added to a Field Set as custom fields pointing toward the same namespace (e.g., "Apttus"). Also, if you omit the namespace when you create the field, you will get an error on generate. If you want to include fields from a package you will need to create a custom formula field that points to the packaged field.

Glossary

This section lists the terms and their definitions of the CLM application.

A

Term	Definition
Agreement	Is a set of terms and conditions agreed between two or more parties.
Agreement Document Protection	Apttus uses Agreement Document Protection to help users protect your documents when they are generated in Microsoft Word format.
Agreement Explorer	Is a search and reporting feature that allows you to search records in the Agreement object through the use of configurable and reusable search reports.
Agreement Line Item	Represents a product or service line item associated with an agreement.
Agreement Lock	Represents a lock on the agreement.
Agreement Protection	Specifies protection settings for agreements by the Apttus Contract Wizard.
Agreement Rule	Allows you to identify how an agreement request is processed when you click the Submit Request action button.
Amend	The Amend action button enables you to modify the contract.
Apttus Retention Policy Schema	An XML schema describing the policy specification is provided as a static resource named Retention Policy Schema.

C

Term	Definition
Clause	Clauses are modular blocks of text that are used frequently across multiple templates.
Contract	Is an agreement with specific terms between two or more entities.
Contract Document Versions	Contract Document Versioning enhances existing version control by introducing a solution framework of document versioning at the Agreement record level.

Term	Definition
Contract Management	Contract Management (CM) or Contract Lifecycle Management (CLM) or Comply Management is the process of systematically and efficiently managing contract creation, execution, and analysis.
Cycle Time Reporting	Provides organizations the ability to track the time that has elapsed between any two statuses or status categories.

D

Term	Definition
Document	Is generated by merging information stored in a record with an existing template.
Dashboard	Organizes key statistics in easy to understand, bottom-line format, allowing you to gain the insight you need to fulfill your business needs.
Document Finder	Helps your contract managers, sales persons, and legal teams to easily filter and find agreement documents directly from an agreement record.
Dynamic Document Assembly	Enables you to preconfigure filter rules that drive a sequence of prescribed dynamic clause or attachment insertions in a generated document.

E

Term	Definition
Expire	The Expire action is used to mark the agreement as Expired after the agreement term ends.

M

Term	Definition
Merge web Service	Three Merge Web Service APIs are used for generating and manipulating documents.

O

Term	Definition
Object	Is a definition of a specific type of information you can store in Salesforce. Some objects are native to Salesforce, such as Contacts or Accounts, while others are specific to Apttus functionality, such as Templates or Agreements.

Term	Definition
Organization/ Org	Is a deployment of Salesforce that has a defined set of licensed users. Your organization includes all of your data and applications and is separate from all other organizations.

P

Term	Definition
Page layout	Allows you to control the layout and organization of detail and edit pages.

R

Term	Definition
Record	A collection of fields that store information about a specific item of a specific type (represented by an object), such as a Contact, an Account, or an Opportunity.
Record Type	Allows you to offer different business processes, picklist values, and page layouts to different users.
Renew	The Renew action enables users to create a new version of the agreement.
Reports	Salesforce delivers standard report folders containing reports for each record type. For example, Accounts, Opportunities, Leads, and so on.
Retention Policy	Determines the length of time a record must be stored.

T

Term	Definition
Template	Is a blueprint used to generate a wide variety of document types when merged with data from agreements or quotes.
Template versioning	Template Versioning provides a solution framework of document versioning at the Template level to track template versions against generated documents.
Terminate	Terminate Action enables users to terminate a contract.

W

Term	Definition
Wizard	A wizard prompts the end user to answer a series of on-screen questions then creates the Agreement record.
Wizard Component Library	This tab is used to create reusable Inputs and Steps for your Wizard Designs.

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