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Contract Management on Salesforce

Summer 2020 User Guide

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About this Guide

This guide describes how Apttus Contract Management works and how to manage contracts for your organization and your customers.

Topic	Description
What's Covered	This guide walks the Contract Management user through a set-up of the entire contract management process. It covers step-by-step instructions, and use cases for the features provided by Contract Management.
Primary Audience	Individuals who are working on any aspect of contracts: contract managers, contract creators, contract negotiators, contract reviewers, contract facilitators, and legal team.
IT Environment	Refer to the latest Contract Management on Salesforce Release Notes for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this guide for each release, see the What's New.
Other Resources	• Contract Management Admin Guide: Refer to this guide for installing and setting-up Contract Management in your organization. • X-Author User Guide: Refer to this guide for detailed instructions on setting up templates and editing agreement documents.

This guide describes the following tasks:

- **Creating an Agreement from an existing Account or Opportunity:** You can choose an existing Account or Opportunity to create a new agreement.
- **Generating an Agreement:** After creating an Agreement, you can use a template to generate a document and preview it.
- **Sending an Agreement for Review:** You can send the generated Agreement document to the customer for review.
- **Completing Negotiations:** After the review phase, the terms and conditions are negotiated and finalized between the engaged parties.
- **Activating an Agreement:** After an Agreement is finalized and signed, you can activate the Agreement to bring it into effect.
- **Reporting:** You can store the activated agreements in different formats, such as reports and dashboards.

Before using Contract Management, you must be familiar with the following:

- Basic Salesforce administration
- Salesforce and Apttus terms and definitions
- If you are new to Apttus Contract Management, begin here: get started.

What's New

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

Document	Topic	Description
Summer 2020	Online Contract Collaboration	New section. A new feature for this release.
	Importing Supporting Document	New topic. A new feature for this release.
	Merging Documents in Lightning	New topic. A new feature for this release.
	Generating an Agreement	Modified topic. Added details about Document Type.
	Importing an Offline Agreement	Modified topic. Added details about: • Document Type • Agreement status
	Creating an Offline Agreement	Modified topic. Added details about: • Document Type • Agreement status
	Storing an Executed Agreement	Modified topic. Added details about Document Type.
	Finalizing an Agreement	Modified topic. Added details about Document Type.
	Running Wizards in Lightning	Modified topic. Added details about Document Type.
	Reviewing an Agreement Created by Intelligent Import	Modified topic. Added details about enhancements to: • Document viewer • Agreement status
	Uploading Signed Documents	Modified topic. Added details about: • Version update after uploading the signed document • Intelligently importing signed documents

Document	Topic	Description
	Activating an Agreement	Modified topic. Added details about restrictions on deleting executed documents.
	Sending an Agreement Document for Parallel Review	Modified topic. Added the details about: • Email notification after canceling review • Ending a parallel review without document • Restriction for parallel review
Spring 2020 (Rev C)	Intelligently Importing Large Files in Lightning	Modified topic. Added details about storing executed documents.
	Uploading Signed Documents in Lightning	Modified topic. Added a prerequisite that the feature is only available for version aware agreements.
Spring 2020 (Rev B)	Running Wizards in Lightning	Modified topic. Added a prerequisite about configuring Wizard as a Related Tab.
	Uploading Signed Documents in Lightning	Modified topic. Added a note for Document Version Support for Signed Documents.
	Finalizing an Agreement	Modified topic. Added a note for Document Version Support for Signed Documents.
Spring 2020 (Rev A)	Supported File Size	New topic.
Spring 2020	Uploading Signed Documents	New topic. A new feature for this release.
	Clause Versioning	Modified topic. Added a table for clause status after each agreement action.
	Intelligently Importing Large Files in Lightning	New topic. A new feature for this release.

Document	Topic	Description
	Reviewing an Agreement Created by Intelligent Discovery in Classic	Modified topic. Add details regarding date and currency fields,
	Running Wizards in Lightning	New topic. A new feature for this release.
	Working with Wizard Launcher in Lightning	New topic. A new feature for this release.
	Tracking Wizard Activity in Lightning	New topic. A new feature for this release.
	Previewing Wizards in Lightning	New topic. A new feature for this release.
Winter 2019	Sending an Agreement Document for Parallel Review	Modified topic. Added a prerequisite for tracking review status from X-Author Contracts.
	Sending an Agreement Document for Microsoft Teams Review	New topic. A new feature for this release.
	Emailing Multiple Agreement Documents	Modified topic. Added a note for the recommended maximum file size.
	Searching Agreement Documents	Modified topic. Added new Basic Search filters.
	Agreement Fields	Modified topic. Added new field details.
	Generating an Agreement	Modified topic. Added content for changes in agreement clauses status.
	Reviewing an Agreement Created by Intelligent Import	Modified topic. Added content for changes in agreement clauses status.
	Finalizing an Agreement	Modified topic. Added content for changes in agreement clauses status.
	Contract Management with Salesforce Lightning	Modified topic. Added content for Salesforce Lightning Console support.

Document	Topic	Description
	Accessing In-Effect View	New topic. A new feature for this release.
	Activating an Agreement	Modified topic. Added a restriction for activating an agreement.
	Clause Versioning	New topic. A new feature for this release.
Summer 2019 (Rev A)	Managing Agreement Lifecycle Post-Activation	Modified topic.
Summer 2019	Viewing Agreement Hierarchy	New topic.
	Searching Agreement Documents	New topic.
	Sending an Agreement Document for Parallel Review	New topic.
	Finalizing an Agreement	Modified topic.
Spring 2019	Reviewing an Agreement Created by Intelligent Import	Updated the topic with: • Sending highlighted or unhighlighted documents for review • Details on the OCR Quality field on the Document Viewer • Information on Review Offline Document Status Popup • Adding a clause when reviewing an offline document
	Emailing Multiple Agreement Documents	Added a new topic for sending a downloadable link for downloading multiple documents.
Winter 2018	Working with Offline Agreements	Added a new section for intelligent data extraction feature.
Summer 2018	Creating an Agreement	Updated the topic with information on the action panel in classic mode for community portals.

About Contract Management

A *contract* or an *agreement* is a legally binding arrangement between two or more entities. Contract Management (CM) or Contract Lifecycle Management (CLM) is the process of managing contract creation, analysis, execution, and maintenance. Apttus Contract Management is a cloud-based solution that standardizes, streamlines, and automates the contract lifecycle management process—from the initial request through drafting, redlining, sending for signatures, securing documents, managing obligations, and renewing contracts.

The following flowchart depicts the Apttus Contract Management process:

Apttus Contract Management process

Apttus Contract Management lets you create a contract from a pre-loaded template(s) or import a third-party document as an offline agreement document. Apttus Contract Management works with optical character recognition software to scan imported third-party papers and convert them to a searchable PDF. You can send your agreement documents for eSignatures if Apttus Contract Management is integrated with eSignature solutions—Adobe Sign and DocuSign. Apttus Contract Management is able to provide a set of standard or customized, reports to track activity status, expirations, non-standard terms, etc. You can also use Agreement Explorer to configure and reuse searches and reports.

An agreement goes through the contract management lifecycle according to the workflow defined by the application administrator. Your access to all the features of Apttus Contract Management depends on the roles and permissions assigned to you by the application administrator.

Apttus Contract Management allows a user to perform the following tasks:

- Work with agreements

- Create
- Generate
- Send for review
- Negotiate
- Finalize
- Sign/Execute
- Activate
- Manage agreement lifecycle post-activation
  - Amend
  - Renew
  - Terminate
  - Expire
- Work with offline agreements
  - Create
  - Import
  - Review an agreement created by intelligent import
  - Store an executed agreement
- Manage document and template versioning
- Run the contract wizard to automate agreement creation
- Create, run, and delete an Agreement Explorer report

Key Terminology

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

Term	Description
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.
Agreement actions	The actions available at various stages of the agreement such as Preview Agreement, Generate Agreement, Regenerate Agreement, Generate Supporting Document, Send for Review, Send for Signatures, Import Offline Document, Activate, Amend, Renew, Expire, Terminate, and Cancel Request.

Term	Description
Agreement document	A document generated by merging information stored in a record with an existing template.
Agreement Explorer	A configurable and reusable search and reporting feature that allows you to search records in the agreement object.
Agreement protection	It is a feature that allows you to specify protection settings for agreements.
Agreement versioning	A solution framework for document versioning at the agreement record level.
Clause	Modular blocks of text that are used frequently across multiple templates.
Contract wizard	A wizard that prompts the end user to answer a series of on-screen questions, and then creates the Agreement record.
Intelligent import	Intelligent data extraction functionality lets you import a third-party paper. Apttus Contract Management works with optical character recognition software to scan the imported third-party paper and convert the document to a searchable PDF. ⓘ **Note** You need to have Apttus Intelligent Import license to process third-party paper in Apttus Contract Management.
Offline agreement	A third-party paper that you want to use as a basis for your contract.
Organization/Org	An organization (org) is a Salesforce instance with a defined set of licensed users. An org is the virtual space provided to Apttus by Salesforce. Your org includes all of your data and applications, and is separate from all other orgs.
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.

Term	Description
Record type	Allows you to offer different business processes, picklist values, and page layouts to different users.
Redlining	Allows you to identify the changes made by reviewers and accept or reject changes according to your business requirement.
Template	A blueprint to generate a wide variety of document types when merged with data from agreements or quotes.
Template versioning	Document versioning at the Template level to track template versions against generated documents.
User profile	A set of permissions granted to a group of users for the purpose of limiting feature accessibility. According to a user's role in an organization, an Apttus Administrator can assign a profile to the user. There are five basic profiles associated with Apttus Contract Management—Apttus Administrator, Contract Manager/Template Admin, Read Only, Requester/Approver, and Contract Creator/Negotiator.

Setting Up Contract Management

This section covers the following topics:

☐

Logging in to Contract Management

This section explains how to log in to Contract Management

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

Prerequisites

- Apttus Contract Management package must have been installed.
- You must have login credentials provided by Apttus.

To log on to Contract Management

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 into Salesforce**.
   You are successfully logged into Apttus Contract Management.
4. Navigate to the Salesforce.com App Menu, and select **Apttus Contract Management** to access the Contract Management tabs.
5. Navigate to the **Opportunities** or **Accounts** tab.

> ⓘ **Note**
>
> Contract Management enables you to launch community portals and perform all operations that you perform in internal environments. You must belong to the Gold Partner profile to be able to launch a community portal.

User Profile Management

A profile contains user permissions and access settings.

There are four 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	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.
Requestor	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

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

Contract Management User Roles and Tasks

The following table shows some key Contract Management roles and their descriptions.

Role	Description
Legal function	• Design, creation, maintenance of contract template contents • Review, negotiation, and contract legal content assurance • Legal admin, Internal counsel, External counsel

Role	Description
Finance function	• 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	• 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	• Definition of non-standard, complex, or global contract components • Assignment of contributors, scoring, approval, and strategic aspects • VP Strategic Accounts, CEO, CFO, COO
Admin	• General definition of process, contributors, contract elements • Configuration of applications and tools required by the process • Application admin, system analyst, business analyst

Agreement Lifecycle Management

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

- **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.

- **Finalizing an Agreement**
  This stage covers the process for sending agreements for executing, gathering signatures and logging into the repository.

Creating an Agreement

In most cases, you will create an agreement record from the standard Salesforce Opportunities tab, Accounts tab or the Apttus Agreements tab.

> ⓘ **Note**
>
> **You can also create an agreement using the** Contract Wizard**. The Wizard enables you to choose from and execute runtime Wizard instances based on pre-configured Wizards to create well-formed agreements. The Contract Wizard allows legal experts to pre-define the desired interface look and feel as well as the desired process flows and contents which will be used by non-legal experts in any function.**

When drafting your agreement record, you fill out certain mandatory data fields, such as Agreement Name and Account for your agreement record. The system automatically populates the system fields, such as Status Category and Status 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.

For details on various Status categories, Statuses, and Agreement Actions, see Apttus Status Categories and Statuses and Agreement Actions.

> **Note**
>
> Each agreement type can have data fields that are specific to an agreement type.

To complete the agreement, you must fill out various data fields relevant to your agreement. For the complete list of agreement fields, see Agreements Fields.

To Create an Agreement

You must be logged in to Salesforce.com.

User Permissions Needed	
To create an agreement record:	Agreement: Create, Edit.

1. Navigate to the agreement you just created to generate an agreement document. Navigate to the Opportunities or the Accounts tab, scroll down to the Agreements related list, and click **New Agreement**.
   - OR -
   Navigate to the Agreements tab, and click **New**.
   Apttus can accommodate any type of Agreement Category such as Sales, Procurement, Services, Corporate and Other.
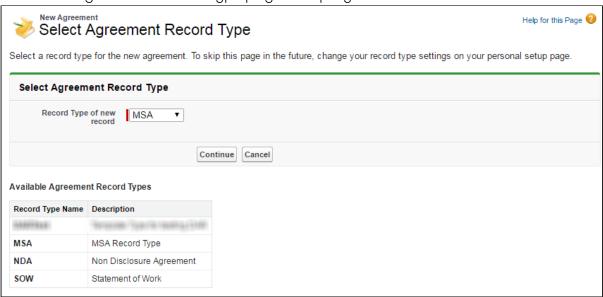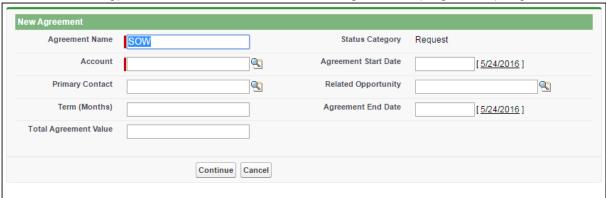
   > **Note**
   >
   > If the default Agreement type is not set up for your org or you see only one agreement type, you will be navigated to the New Agreement page.
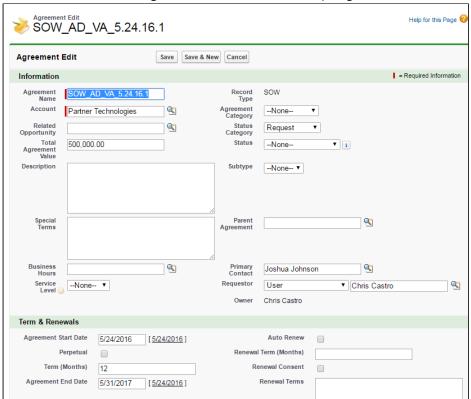
The Select Agreement Record Type page is displayed.

1. Choose an option from the Record Type of new record drop-down list, select the desired record type and click **Continue**. 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. You must complete all required fields (marked in red) at a minimum. Fields included on this page are configured by a FieldSet.

2. Click **Continue**. The Agreement Edit form is displayed.

3. Enter values for any required fields (marked in **red**) and additional fields as needed to complete the agreement record details.
4. Click **Save**.

You have created an agreement record.

ⓘ **Note**

If the Action Panel is enabled by your administrator, you can access action buttons from the LightningAgreementActions panel. For more information, see "Adding and Defining Action Panel" in *Contract Management on Salesforce Administrator Guide*.

Use Case for Creating an Agreement

This topic describes the use case for creating a perpetual Agreement.

> ⓘ **Note**
>
> This use case gives one example on how to create a perpetual agreement between the company and the contract employee. You might use this functionality differently, depending on your business case.

This use case describes how to create a contract between two entities to hire a contract employee in the company ABC without the need of further renewal required for the employee, though he is a contract employee.

In this case, a contract administrator or an authorized HR person creates, manages, and finalizes the contract between the company ABC and the contract employee.

Pre-requisite: Make sure you have the following:

- An account for the company ABC is created.

For this business, the contract employee must serve the company ABC, for a long term.

To create a perpetual agreement, perform the following steps:

1. Go to the **Agreement** tab and click **New.**
   The **SelectAgreement Record Type** page is displayed.
2. Select an option from the **Record Type of new record** drop-down list, and click **Continue**.
   The New **Agreement** page is displayed.
3. Click **Continue.**
   The **Agreement Edit** page is displayed.
4. Enter agreement name in the **Agreement Name** field.
5. Select an account from the **Account** picklist.
6. Select **Start Date.**
7. Select the **Perpetual** check box in **Terms and Renewals** section.
8. Enter or select values in the required fields (marked in **red**) which are mandatory to complete the agreement record details.
9. Click **Save**.

Result:

The perpetual agreement is created.

Next Step:

Similarly, you can create other agreements that do not have an end date and do not require further renewal of the contract.

Generating an Agreement

You can generate an agreement using an existing template. 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 using X-Author Contracts to create a template, refer to the Apttus X-Author Contracts User Guide.

Prerequisites

- You must have an existing agreement record.
- You must have a template ready for the record type of your agreement.

User Permissions Needed	
To preview an agreement:	Agreement: ReadTemplate: ReadAsyncMergeCall: Read, Create, Edit (Field Access: Read, Edit)
To generate/regenerate an agreement:	Agreement: EditTemplate: ReadAsyncMergeCall: Read, Create, Edit (Field Access: Read, Edit)

To generate an agreement document

1. Navigate to the **Agreements tab** and select an existing agreement record.
2. Click **Generate** to generate an Agreement document.
3. You will be navigated to the Template selection page. From the Options section, select one of the following output formats for your agreement record:
   a. **DOC or DOCX**: To generate a Microsoft Word document.
   b. **RTF**: To generate an agreement document in Rich Text Format.
   c. **PDF**: To generate a PDF protected agreement document.
4. To include a watermark across your agreement document, select the **Include Watermark** checkbox.
5. From the Templates section, select the template to generate your agreement document, and click **Generate**. If only one template is available for a record type or only one template is available based on query template filter then that template is selected by default.

> ⓘ You can configure the template attributes to be displayed in the Template Selection section. For more information, see *Configuring Columns in the Template Selection Page in Lightning* topic in the *Contract Management Administrator Guide*.

6. Click the **Click here to view your file** link to view your agreement or click **Return** to return to the agreement detail page.
7. An agreement document is generated using the selected template and can be found in the Notes & Attachments related list. Click the **Preview** button to preview the generated document.

> ⓘ **Note**
>
> When a document is generated or regenerated, all the smart clauses are displayed in the Agreement Clauses section with Action as Original. When a document is regenerated a new entry is created in the Agreement Clauses section even if the same clause already exists.
> In the version aware agreements, the Document Type of the generated and regenerated documents are updated as Agreement Document and the generated supporting documents are updated as Supporting Document.

Sending an Agreement Document for Review

You can send the generated agreement document to the customer for review. The Send for Review button allows you to specify attachments to send to the customer by email.

Prerequisites

- You must have an existing generated Agreement document.
- You must ensure that the Status Category for the Agreement record is In Authoring or In Signatures.
- You must ensure that Track Changes is enabled on the agreement document that you send to the customer for review.

User Permissions Needed	
To send a document for review:	Agreement: Edit.

To send an agreement document for review

1. On the Agreement detail page, click the **Send for Review** button.
2. From the Attachments section, select the file to send for review and click **Next.**
3. (Optional) Select files to attach to the review email from Parent, Child, or other agreement records related to the current agreement.
    a. Select the type of agreement to show attachments from.
    b. Select any attachments from the list displayed under "Attachments" to add to the review email.
    c. Repeat steps a – b for additional agreement types.
    d. Click **Next** when you are finished.

    > ⓘ The Show Attachments From page is only shown if the current agreement has related records.

4. (Optional) Choose the form of document protection to be applied to any documents selected as attachments in previous steps.

    > ⓘ This page is only shown if Agreement Document Protection rules for "Send to Other Party for Review" are specified and properties for document protection are enabled. For more information, see *Setting Up Agreement Document Protection* and *Admin Objects* in the *Contract Management Administrator Guide*.

5. (Optional) Select an appropriate template for your agreement document and click **Next.**

> ⓘ **Important Notes on Email Template Selection**
>
> - A default email template is usually configured by your administrator (using an Admin property) for the Send for Review action. Check with your administrator if you are unsure.
> - If no Email Template is selected and no default email template has been configured (using the above properties), the Email Template "Apttus Email Template For Review Signature" is used. In most cases, this template not configured as "Available for Use" and must be manually set to true or an error will occur. In the case of a new installation of the package (non-upgrade), this Email Template is automatically configured as "Available for Use."
> - You cannot return to this page after you click Next. If you decide you want to use a different email template after this point, you will have to cancel the Send for Review and start over from the agreement record.

6. In the **To** field, enter the name or use the Lookup to find the contact you want to send the document to.

> ⓘ **Note**
>
> At least one recipient must be specified in the To field. If the email IDs or contacts specified in the **To** or **Additional To** fields are invalid, when the **APTS_EnableValidationForEmailWithoutUserContact** property is set to true, an error is displayed.

7. Enter or use the Lookup icon to add recipients to the **Additional To, Cc** or **Bcc** fields.

> ⓘ **Note**
>
> If there are many contacts (for example, more than one million), you can launch a custom pop-up page where you can quickly search and select contacts for the **Additional To, Cc, and Bcc** fields.
>
> a. Click the **Lookup** icon next to the **Additional To** field to launch the Email Address Lookup window.
>
> b. Search for contacts and add them to the **Additional To Recipients**, **CC Recipients**, and **BCC Recipients** lists.
>
> c. Click **Save.**
>
> d. You must set the admin setting **APTS_EnableCustomEmailAddressLookup** to True, only then the custom pop-up page is displayed; otherwise, the standard Salesforce pop-up page is displayed. At least one recipient must be specified in the **Additional To** field.

8. Type a mandatory **Subject** and **Body** for your email and click **Send.** The activity is logged in the Activity History. The Status Category changes to In Authoring and the Status changes to Other Party Review for your agreement record.

> ⓘ **Note**
>
> The Admin Property **APTS_DefaultEmailContactName** is required to create an "Email: Subject" entry on the Agreement record Activity History Related List after the email is sent. If the property is not defined or is invalid, Email details are not recorded in the Activity History.

After the customer receives your email and responds back, you can track the changes made by your customer, negotiate for the terms and conditions and finalize the agreement.

Tracking X-Author Reviews

A significant part of the negotiation process for an agreement involves including reviewers–internal or external–in the collaboration process. This typically requires the main agreement document and any supporting documents to be sent by the contract negotiator to reviewers for term changes, additional redlining, clarification of language, or other legal or contractual input. Apttus Contract Management provides a standard Send for Review process from Agreement records in Salesforce, but this may not always be the most ideal solution for contract negotiators.

Sending for Review in X-Author Contracts

Customers who have X-Author Contracts and the X-Author Contracts for Outlook add-in can manage the entire Send for Review using Microsoft Office applications. This allows them to:

- Use the X-Author for Microsoft Outlook add-in to send and receive agreement documents.
- Track and manage review cycles of negotiated documents along with their recipients.
- Use review cycles of agreement documents to monitor negotiations at the summary and detail level.
- Complete the end-to-end negotiation process without leaving Microsoft Office.
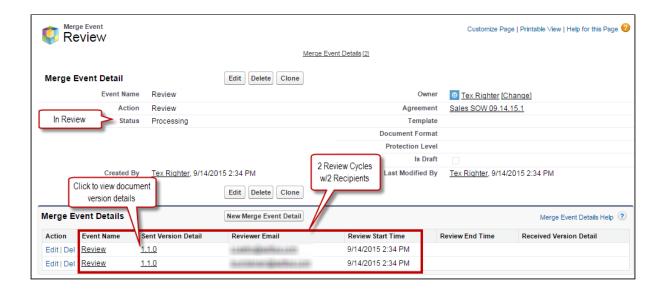
Tracking Reviews on the Agreement Record

X-Author Review Cycles can be tracked on the Apttus Contract Management side, using the Merge Events related list on the agreement record. Tracking of review cycles is only enabled for Version Aware agreement records.

You can track individual Review Cycles through the Merge Event Details object (child object of Merge Event) on the agreement record. To view information on Out for Review and Complete Review Cycles, drill down to the Merge Event Details through the Review action link, located in the Merge Event related list. You can also review Document Version information for any document that is part of a Review Cycle.
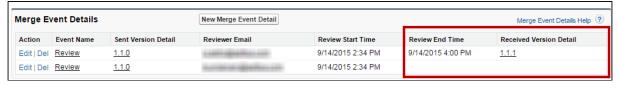
Example: Version Aware Agreement Document

1. Prior to Send for Review, the Merge Event-related list might display the merge events already taken on the agreement.
2. Next, you initiate a review of the main agreement document from X-Author Contracts, sending it to 2 recipients. After sending, you refresh the agreement record and view the Merge Event list.
3. You can track status for all Review Cycles by clicking on the Review event link. The Merge Event Detail screen is displayed.

The Merge Event Detail page displays information about the Review. Status indicates it is currently in progress. The Merge Event Details list contains a separate record for each individual review cycle (a unique combination of recipient and document). Each review cycle displays the Reviewer Email and the Review Start Time.

4. Click the version number under Sent Version Detail to view the Document Version Details for the version of the agreement document under review. The Document Version Detail is displayed. You can view information for the document being reviewed. The version 1.1.0 indicates that it is the first Negotiator (minor) version, checked in by you before being sent for review.

5. One of the reviewers replies to your review request and you check in the document on behalf of the reviewer. You return to the agreement record to track the review. The agreement has been checked in as a new Reviewer (revision) version 1.1.1.

6. Click the **Review** link to view the updated review cycle.

7. You can choose to close all remaining cycles at the next document check-in, rather than check the document in on behalf of the second reviewer. This creates a new Negotiator (minor) version of the document. The Merge Events related list is updated to reflect the Review as complete now that all review cycles are closed.

8. Click the **Review** link to drill down into Merge Event Details. Review End Time and Version Details information is displayed for all review cycles. View Document Versions and download attachments as needed.

Sending an Agreement Document for Parallel Review

At any point in the negotiation process, prior to finalizing the document, you can send an agreement document for review to your customers or other parties involved in the negotiation. After an agreement document is generated, you can send it for internal or external review to one or more reviewers. You can also select multiple Apttus documents and send them for review.

The parallel review is an unordered workflow that allows reviewers to review an agreement document without having to wait for another reviewer to approve it. After the review cycle has started, you can view the review progress for the document in the Document Versions section, whether the review cycle is In Progress, Cancelled, or Completed. A reviewer can upload the reviewed document or send the reviewed document to the Contract Administrator to upload it. The review cycle is marked as complete when all the reviewers have uploaded their reviewed documents. You can track review activity in the Document Version section on the Agreement Detail page when you send the agreement for review, add additional reviewers, cancel review, or end review.

You can only send documents with DOCX format and the Document Type as Agreement Document for parallel review. If you send documents for parallel review with any other file format (PDF, PNG, DOC, etc.), the documents will go through the normal review (not parallel review). If you send documents with other file formats along with DOCX, the documents with other file formats will go through the normal review whereas the document with DOCX file format and the Document Type as Agreement Document will go through the parallel review. If you select documents with Document Type as Agreement Document and other file formats (PDF, PNG, DOC, etc.), you will see the send for review page instead of the parallel review page.

This feature spans X-Author Contracts and Contract Management. For more information, refer to *Send for Parallel Review* in the *X-Author Contracts on Salesforce User Guide*.

Prerequisites

- You must enable "Parallel Review" and "Enable Document Versioning" Comply System Properties.
- You must have a generated agreement document.
- You must ensure that the Status Category of the Agreement is In Authoring or In Signatures.
- You can only send DOCX documents for parallel review.

- When you track the review status from X-Author Contracts, the buttons on the Review Cycle page are disabled.

To send an agreement document for review

1. On the Agreement detail page, click the **Send for Review** button.
2. Select a DOCX file to send for review and click **Next.**
3. (*Optional*) Select files to attach to the review email from Parent, Child, or other agreement records.
   a. Select a type of agreement.
   b. Select any attachment from the list displayed under "Attachments" to add to the review email.
   c. Repeat steps a – b for additional agreement types.
   d. Click **Next** when you have completed attaching the review documents.

   > ⓘ **Note**
   >
   > You can view the Choose Related Document(s) page only when the current agreement has related or child records.

4. (*Optional*) Select a type of document protection to be applied to the documents selected as attachments in previous steps.

   > ⓘ **Note**
   >
   > You can view the Set Document Permissions page only if the Agreement Document Protection rules for "Send to Other Party for Review" are specified and properties for document protection are enabled. For more information, see *Setting Up Agreement Document Protection* and *Admin Objects* in the *Contract Management Administrator Guide*.

5. (*Optional*) Select an appropriate email template for your agreement document and click **Next.**

> ⓘ **Important Notes on Email Template Selection**
>
> - A default email template is usually configured by your administrator for the Send for Review action. Check with your administrator if you are unsure.
> - If no Email Template is selected and no default email template has been configured, the Email Template "Apttus Email Template For Review Signature" is applied. In most cases, this template is not configured as "Available for Use" and must be manually set to true or an error will occur. In the case of a new installation of the package (non-upgrade), this Email Template is automatically configured as "Available for Use."
> - You cannot return to this page after you click **Next**. If you decide you want to use a different email template after this step, you will have to cancel the Send for Review and start over from the agreement record.

6. In the **Contact** field, enter the name or use the Lookup to find the contact.

> ⓘ **Note**
>
> At least one recipient must be specified in the **Contact** field. If the email IDs or contacts specified in the **Contact** or **User or Email** fields are invalid, when the **APTS_EnableValidationForEmailWithoutUserContact** property is set to true, an error is displayed.

7. Enter or use the Lookup icon to add recipients to the **User or Email** field.
8. (*Optional*) Modify **Subject** and **Body** of the review email and click **Send.** This action is logged in the Activity History. The Status Category changes to In Authoring and the Status changes to Other Party Review for the current agreement.
An email notification with the review document as an attachment is sent to all the reviewers. The review document name is prefixed with the reviewer's email id.

To view review cycle of an agreement

1. Navigate to the Agreement detail page of an agreement sent for parallel review.
2. Go to the Document Versions section.
3. In the Review Status column, click the **In Progress** link to open the Review Cycle page.

> ⓘ **Note**
>
> The Review Status column displays the *Not Started* link till the emails are sent to all the recipients. When you refresh the page you can see the *In Progress* link in the Review Status column.

To add additional reviewers to the review cycle

1. Navigate to the Review Cycle page.
2. Click **Add Reviewer**. This opens the Email Edit page.
3. Enter *Contact* or *User or Email* details.
4. Click **Send**. An email notification is sent to the reviewer.

To end review in a review cycle

1. Navigate to the Review Cycle page.
2. Click the **End Review** button in the Actions column for a reviewer. This opens the Upload Document (End Review) window.
3. (*Optional*) Click **End Review** to end the review without uploading the reviewed document. A message is displayed—your request to end the review is being processed and you will be notified upon completion.
   An email notification is sent to the reviewer that the review was ended without uploading the reviewed document.
4. To upload the reviewed document, click **Choose File**.
5. Select the reviewed document from your local drive and click **Open**.
   If you select a document unrelated to the current review cycle, an error is displayed.
6. Click **Upload**. A success message is displayed.
7. Add a comment (*optional*) and click **End Review**. A message is displayed—your request to end the review is being processed and you will be notified upon completion.
8. Click **Ok**. The review status changes to *Completed* for the reviewer on the Review Cycle page.
   You must end review for each document individually. After the end review request is processed, the checkbox, End Review, and Cancel Review are not visible for that reviewer. The reviewed document is merged with the latest version of the document. When you end the review for all the reviewers, the review cycle status changes from *In Progress* to *Completed*.

> ⓘ **Note**
>
> You can click the **Upload Review Document** button on the Agreement Detail page to end the review for a document. The corresponding review status for the reviewer changes to *Completed*.

If two or more reviewers have reviewed the same field or content, the review of the last reviewer is considered as final.

To cancel review in a review cycle

Prerequisite: The Review Status must be in *In Progress* status to view the *Cancel Review* button.

1. Navigate to the Review Cycle page.
2. Click the **Cancel Review** button in the Actions column for a reviewer or select multiple reviewers and click the **Cancel Review** button in the header. This opens the Cancel Review window.
3. Add a comment (*optional*) and click **Submit**. The review status for that reviewer changes to *Cancelled* on the Review Cycle page and the reviewer receives a notification email regarding cancellation of the review. The review cycle status remains *In Progress* until all the reviews are completed or Cancelled. If you cancel the review for all the reviewers, each reviewer's review status and the review cycle status changes to *Cancelled* and the original document is available for activation. If one reviewer has completed the review but other reviews are Cancelled in that review cycle, the review cycle status changes to *Completed,* and the reviewed document is considered as the final version.

To submit a reviewed document via email

Prerequisite: You must configure the email service and admin entry to submit a reviewed document via email. For more information, see *Configuring Email Service for Ending Review by Email* in *Contract Management on Salesforce Administrator Guide*.

1. Open the email containing the review document.
2. Download the document and make the required changes.
3. Reply to the review email by attaching the reviewed document and adding your comments in the email body.
4. To verify if the review has ended for you:

a. Navigate to the Review Cycle page of the agreement that you have reviewed.
b. You can see that the Review Status is *Completed* and the Comments column has your review comments.

> ⓘ **Note**
>
> If you do not reply to the review email with an agreement document that belongs to the current review cycle, you will receive an email notification to attach a valid document.
>
> The agreement documents that are in the review are locked and will not be available for sending for review and activation.

Sending an Agreement Document for Microsoft Teams Review

You can send the agreement documents to Microsoft Teams (MS Teams) for collaboration review. In MS Teams, you can collaboratively edit and review an agreement document with all the team members and view live changes. A review cycle is created when you send an agreement document in DOCX format for MS Teams review.

Prerequisites

- You must have configured MS Teams Setting to send an agreement document for review. For more information, see *Configuring MS Teams Setting* in the *Contract Management Administrator Guide*.
- You can only send Apttus agreement documents in DOCX format for review.
- You must ensure that the Status Category for the Agreement record is In Authoring or In Signatures.
- You must ensure that Track Changes are enabled on the agreement document that you send to the customer for review.
- You cannot send related agreements for MS Teams review.
- If the document name, channel name, or team name contains special characters, the special characters are not displayed in the MS Teams view.
- If the document name or channel name exceeds 150 characters or the team name exceeds 250 characters, the names are truncated.

User Permissions Needed	
To send a document for review:	Agreement: Edit.

To send an agreement document for review

1. On the Agreement detail page, click the **Send for Teams Review** button.
2. From the Select Document(s) page, select documents that you need to send for teams review and click **Next.**

   > ⓘ **Note**
   >
   > The documents that are in review are not displayed on the Select Document(s) page.

3. Choose the form of document protection to be applied to documents selected in the previous step and click **Next**.
   In the Edit Permissions Level section, the Full Access protection is selected by default.

   > ⓘ **Note**
   >
   > This page is shown only if Agreement Document Protection rules for "Send to Other Party for Review" are specified and properties for document protection are enabled. For more information, see *Setting Up Agreement Document Protection* and *Admin Objects* in the *Contract Management Administrator Guide*.

4. In the Reviewers field, enter the name or email id of a reviewer from your organization in the search bar and click the search icon (🔍). After the search results are displayed, click the add icon (👤⊕) to add the reviewer.
   The newly added reviewer is displayed in the Added Reviewers section.
5. After adding all the reviewers, click **Send**.
   This displays a popup message that your document is being processed. After processing, a new MS Team is created. If multiple documents are sent for review, then multiple teams are created. The name of the team is according to the Team Name Format defined in MS Teams custom setting. For more information, see *Configuring MS Teams Setting* in the *Contract Management Administrator Guide*.
6. Click **Ok** on the popup message.
   This opens the Agreement Detail page.

   > ⓘ **Note**
   >
   > When you send a document for MS Teams review, you cannot check out the document.

To review a document in MS Teams

1. Open MS Teams application.
2. On the left side of Teams, click **Teams**.
3. Type the agreement name in the search box at the top right and press Enter.
4. Expand the team to see the channels in the team.
5. Click **ReviewCycle_<date>**.
   The channel name is according to the Channel Name Format in MS Teams custom setting. For more information, see *Configuring MS Teams Setting* in the *Contract Management Administrator Guide*.
6. Click the **Files** tab.
7. Click More options (☐) next to the file name.
8. Select an edit option according to your requirements. For more information, see *Microsoft Teams documentation*.
   After you end the review in Contract Management, the reviewed document is available in the Document Version Detail page.

To view review cycle of an agreement

1. Navigate to the Agreement detail page.
2. Go to the Document Versions section.
3. In the Review Status column, click the **In Progress** link to open the Review Cycle page.

To add additional reviewers to the review cycle

1. Navigate to the Review Cycle page.
2. Click **Add Reviewer**. This opens the Add Reviewer page.
3. In the Reviewers field, enter the name or email id of a reviewer from your organization in the search bar and click the search button (🔍). Once the search results are displayed, click the add icon (👤⊕) to add the reviewer.
4. Click **Send**. An email notification is sent to the reviewer.

> ⓘ **Note**
>
> If you add a new member in MS Teams, the new member can review the document, but the new member details are not available in the Review Cycle page of Contract Management.

To end review on the review cycle page

1. Navigate to the Review Cycle page.
2. Click the **End Review** button in the Actions column for a reviewer. This displays a popup message stating that the end review is initiated.
3. Click **Ok** on the popup message.
4. Click **Refresh** to view the updated status of the review cycle.
   When you end the review for all the reviewers, the review cycle status changes from *In Progress* to *Completed*. The MS Team is Archived and you cannot edit the document. An email notification is sent to all the reviewers that the reviewed document is checked-in successfully.
5. Click **Exit**.
6. To view the reviewed document, navigate to the Document Version Detail page.

To cancel review on the review cycle page

Prerequisite: The review cycle should be In Progress status.

1. Navigate to the Review Cycle page.
2. Click the **Cancel** button in the header.
   The review status changes to *Cancelled* on the Review Cycle page. The MS Team is Archived. If you edit the document, the changes will not be added to the agreement. An email notification is sent to all the reviewers that the review has been cancelled.

> ⓘ **Note**
>
> An entry is added in the Activity History section when you initiate a review, add additional reviewers, cancel review or end review.

Negotiating an Agreement

In this stage, you can manage the Agreement Negotiation process. You can use the X-Author Contracts Word add-in to create and negotiate an agreement, which is designed to help streamline the process of maintaining agreements and associated agreement and clause templates. As a Contract Negotiator, you coordinate changes to the agreement that might occur over the course of agreement negotiation. These changes are generally

concerned with finalizing the process in accordance with company policies and legal requirements. You can perform the following:

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

For example, if your agreement document contains Agreement End Date as a smart field, and your customer wants to extend the Agreement End Date, you can do one of the following:

- Accept the change and Reconcile the change back to Salesforce.
- Deny the change, save it with or without Redlines and send it back to your customer.

For more details refer to the *X-Author Contracts User Guide*.

Prerequisite

You must have an existing agreement document generated in doc or docx format. The generated document must have been sent to the customer for review.

To negotiate an agreement

1. Next to your Agreement document received from your customer in the Notes & Attachments related list, click **View**.

2. Open the Agreement document in Microsoft Word. If the document opens in Protected View, click **Enable Editing** to continue with the negotiation phase.
3. On the toolbar, click **X-Author Contracts**.
4. From the Access ribbon group, click Connect and login with your salesforce.com credentials.

5. Click **Check-Out** > **This document**.
6. Check your customer's redlined changes in the agreement document.
7. After finalizing the changes, from the Versions ribbon group, click **Check-In**.
8. Do one of the following actions from the **Save** drop-down list:
    - To save the agreement document with redlines in order to send it to the customer again, select With Redlines.
      X-Author Contracts automatically renames the agreement document as *agreement document name_version number_Redlines*.
    - To save the agreement document without redlines, select Without Redlines.
      X-Author Contracts automatically renames the agreement document as *agreement document name_version number_Clean*.
    - To save and override the changes of the agreement document and reflect them in the same document, select the Final - to be signed option and select the **Reconcile Document** checkbox.
    - To save the agreement document separately with new changes, select the Final - to be signed option. Use Compare to track the changes in the different versions of the agreement document.
      X-Author Contracts automatically renames the agreement document as *agreement document name_version number_Final*.

> ⚠ The Include Watermark checkbox remains enabled for With
> Redlines and Without Redlines options and the Create
> PDF attachment checkbox remains enabled for the Final - to be signed option
> of the Save drop-down list.

9. Click **Save**.
10. Click **Refresh** in your browser to see the changes. This action updates the agreement version in the repository and activity history.

A new version of the negotiated agreement document is saved in the Notes & Attachments related list. The finalized agreement document can now be sent to the customer for signature.

Finalizing an Agreement

After you complete the negotiation process with the customer, you can send the finalized agreement document to the customer for gathering signatures. When the agreement is ready to execute, you can collect the required internal and external signatures. Depending on your organization's requirements, you can send the agreement document for a manual signature to your customer or if a third-party application, such as Echosign or DocuSign is

installed in your org, you can send the agreement document for an electronic signature. Once you receive the manually signed documents from the customer, you can upload the signed documents to finalize the agreement. Documents in the review are not available to send for signatures or eSignatures.

User Permissions Needed	
To send a document for signature:	Agreement: Edit.

> ⓘ **Note**
>
> Before sending the agreement document for signature, you must ensure that a final version of the agreement document is present in the Notes & Attachments related list.

Prerequisites

- You must have sent a generated Agreement document to the customer for review.
- You must ensure that the Status Category for the Agreement record is In Authoring.
- You can also upload manually signed documents for the agreement. For more information, see Uploading Signed Documents in Lightning.

To Send an Agreement for Manual Signature

1. From the Agreement detail page, click the **Send for Signature** button.
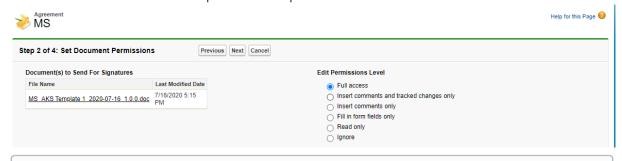2. From the Attachments section, select the file to send for signature and click **Next**.

3. (Optional) Select files to attach to the review email from Parent, Child, or other agreement records related to the current agreement.
   a. Select the type of agreement to show attachments from.
   b. Select any attachments from the list displayed under "Attachments" to add to the review email.

> ⓘ In Version Aware agreements, it is recommended to select a document associated with document version for agreement clauses to be marked as Final.

   c. Repeat steps a – b for additional agreement types.

   d. Click **Next** when you are finished.

> ⚠️ The Show Attachments From page is only shown if the current agreement has related records.

4. (Optional) Choose the form of document protection to be applied to any documents selected as attachments in previous steps.
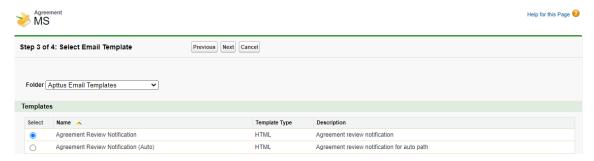
> ⓘ **Note**
>
> The Apply Document Protection page is only shown if Agreement Document Protection rules for "Send to Other Party for Review" are specified and properties for document protection are enabled. For more information, see *Setting Up Agreement Document Protection* and *Admin Objects* in the *Contract Management Administrator Guide*.

5. (Optional) Select an appropriate template for your agreement document and click **Next**.

ⓘ Important Notes on Email Template Selection
- A default email template is usually configured by your administrator (using an Admin property) for the Send for Signature action. Check with your administrator if you are unsure.
- If no Email Template is selected and no default email template has been configured (using the above properties), the Email Template "Apttus Email Template For Review Signature" is used. In most cases, this template not configured as "Available for Use" and must be manually set to true or an error will occur. In the case of a new installation of the package (non-upgrade), this Email Template is automatically configured as "Available for Use."
- You cannot return to the Select Email Template page after you click **Next**. If you decide you want to use a different email template after this point, you will have to cancel the Send for Signature and start over from the agreement record.

6. In the To field, enter the name of the contact you want to send the document to.

ⓘ **Note**

At least one recipient must be specified in the To field. If the email IDs or contacts specified in the **To** or **Additional To** fields are invalid, when the **APTS_EnableValidationForEmailWithoutUserContact** property is set to true, an error is displayed.

7. Enter or use the Lookup icon to add recipients to the **Additional To**, **Cc** or **Bcc** fields.

ⓘ **Note**

If there are many contacts (for example, more than one million), you can launch a custom pop-up page where you can quickly search and select contacts for the Additional To, Cc, and Bcc fields.
   a. Click the **Lookup** icon next to the Additional To field to launch the Email Address Lookup window.
   b. Search for contacts and add them to the **Additional To Recipients**, **CC Recipients**, and **BCC Recipients** lists.
   c. Click **Save**.
You must set the admin setting **APTS_EnableCustomEmailAddressLookup** to True-only then is the custom pop-up page is displayed; otherwise, the standard Salesforce pop-up page is displayed. At least one recipient must be specified in the Additional To field.

8. Type a mandatory Subject and Body for your email and click **Send**. The activity is logged in the Activity History. The Status Category and Status of the agreement record are updated to *In Signature* and *Other Party Signature* respectively. After the agreement document is signed, all the clauses are marked as Final in the Agreement Clauses section. In version aware agreement, Document Type of the signed document is updated as the *Executed Document*. An executed document is a finalized version of an agreement that is ready for activation.

> ⓘ **Note**
>
> The Admin Property **APTS_DefaultEmailContactName** is required to create an "Email: Subject" entry on the Agreement record Activity History Related List after the email is sent. If the property is not defined or is invalid, details are not recorded in the Activity History. After the customer signs the agreement document, you can activate the agreement.

To Send an Agreement for Electronic Signature

- You must have sent a generated Agreement document to the customer for review.
- You must ensure that the Status Category for the Agreement record is In Authoring.

From the Agreement detail page, click the **eSignature** button. This action takes you to the EchoSign or Docusign wizard. For more information on EchoSign, refer to the *Adobe Sign Integration Guide*. For more information on DocuSign, refer to the *DocuSign for Apttus Administrator* and *User Guide*. The Status Category changes to In Signatures and the Status changes to Other Party Signatures for your agreement record. After the customer signs the agreement document, you can activate the agreement.

> ⓘ **Note**
>
> After an agreement document is signed, all the smart clauses are marked as Final in the Agreement Clauses section.

The following conditions apply when you send documents in Version Aware agreement for eSignatures in EchoSign:

- You can send generated, regenerated, supporting, imported offline, created offline, or manually uploaded documents.
- You can select any document from Files or Notes and Attachments. You can also select the latest document version from the Document Version related list.
- The Document Type of the signed document is updated as the *Executed Document*.

- The intermediate signed documents from EchoSign are available in Contract Management as a major document version with name as Intermediate Signed Document in the Document Version related list. In version aware agreement, the Document Type of the document is updated to Intermediate Document.

Activating an Agreement

After the agreement is finalized and signed between the engaged parties, you can activate the agreement to bring it into effect. Activating an agreement record is very important because it ensures that key dates and events will be monitored by the system, and that all In Effect agreements are included in appropriate searches, reports, and views. As a part of the activation sequence, the system will ensure that your organization has identified and attached the proper, final executed version of the agreement.
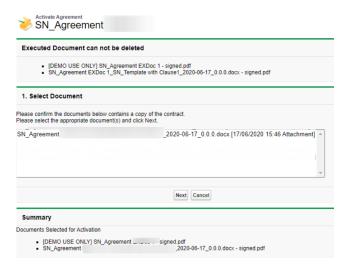
User Permissions Needed	
To activate an agreement:	Agreement: Edit.

Prerequisites

- You cannot activate an agreement if review cycles are In Progress.
- You must have an existing reviewed and signed agreement document.
- You must ensure that the Status Category for the Agreement record is In Signatures or In Filing.

To Activate an Agreement

1. On the Agreement detail page, click the **Activate** button.
2. From the Select Document section, select the Agreement document that you want to activate. Click **Next**. The selected Agreement document is shown in the Summary section under the Documents Selected for Activation area.

> ⓘ You cannot select executed documents for activation. The executed documents are selected by default and are displayed in the Summary section. If executed documents are available in the agreement, you can skip Step 2 and the executed documents are considered for activation.

3. You can select an Agreement document for content search or click **Next** to skip this optional step.
   - The selected Agreement document is reflected in the Summary section under the Documents Selected for Content Search area.
   - The selected Agreement document is removed from the Notes & Attachments related list and reflected in the Agreement Documents related list.
4. You can select an Agreement document to be removed from the Notes & Attachments related list or click **Next** to skip this optional step.

> ⓘ During the agreement activation process, you cannot remove the executed documents.

5. Review the agreement documents chosen for activation, content search, and removal. Click **Activate**.
   The button text changes from Activate to Activating and you are redirected to the agreement detail page.

For the activated agreement record, the Status Category changes to In Effect and the Status changes to Activated. The activated agreement record can now be amended or renewed or terminated or expired.

For community portal users, after you activate an agreement, the system returns to the community page.

Managing Agreement Lifecycle Post-Activation

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.

> ⚠ The APTS_RecordTypeUpdateOnAmend admin object allows you to update the record type while amending and agreement.

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.

> ⓘ **Note**
>
> When you clone, amend, or renew an agreement, the notes of the parent agreement are copied to the new agreement.

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.

Working with Offline Agreements

If you have a third-party paper that you want to use as a basis for your contract, Contract Management lets you create or import it as an offline agreement document. After an offline document is uploaded, Contract Management tags it with Apttus metadata so that it can be checked out with X-Author Contracts.

Contract Management along with an intelligent data extraction software enables you to intelligently import a third-party paper. The intelligently imported third-party paper is scanned by the optical character recognition method and converted the document to a searchable PDF.

Apttus Contract Management supports the following use cases:

☐

For information on managing an offline document with intelligent import, refer to "Managing Offline Agreements" in the Contract Management on Salesforce Administrator Guide.

> ⓘ **Note**
>
> You can upload the offline documents in any file format. When you import an offline document through intelligent import, intelligent data extractor (KIRA) processes the file formats it supports. When you import an offline document without intelligent import, the merge server processes the file formats it supports. When you import an offline document in a non-supported file format (with or without intelligent import), the unprocessed document is available in the Notes & Attachments related list in the agreement.

Creating an Offline Agreement

Contract Management enables you to create an offline agreement from a third-party paper. This feature creates an agreement record in Contract Management and tags with Apttus metadata so that it can be checked out with X-Author Contracts.

Prerequisite

- You must be logged in to Salesforce.com.
- You must have Create and Edit agreement permissions.
- Refer to the Contract Management on Salesforce Administrator Guide for admin configurations.

To create an offline agreement

1. Click **Create Offline Agreement** link under Apttus Links. This displays Select Agreement Record Type page.
2. Select an agreement record type from the Record Type of the new record drop-down list and click **Continue**. This displays the New Offline Agreement page.
3. Click **Continue**. In the Select the File section, click **Choose File** to select a document to attach to this agreement. This displays the Open window.
4. Navigate to the file you want to upload. Select the file and click **Open**. In the Click the **Attach File** button section, click **Attach File** to create the offline agreement with the selected document attached to the agreement.
5. In the Select this option for Intelligent extraction of data and clauses from the uploaded file, select the Intelligent Import checkbox for intelligent data extraction.

> ⓘ **Note**
>
> You can leave the Intelligent Import checkbox unselected if you want to import the document without intelligent data extraction.

6. Click **Continue**. This displays the Agreement Edit page.
7. Enter values into any required fields (marked in red) and additional fields as needed to complete the agreement record details.
8. Click **Save**. This displays a message stating that Intelligent Import will create a batch.
   You will also receive an email notification with the IDEJobProcess status and error information.
9. Click **Ok**. This displays the Agreement Detail page.
   For the agreement imported using Intelligent Import, the Status Category is set to *Import* and Status is set to *Review*. For the agreement imported without using intelligent import, the Status Category is set to *In Authoring* and the Status is set to *Author Contract*.

> ⓘ **Note**
>
> Only Review Offline Document action is available after Intelligent Import and other agreement actions are disabled. Other agreement actions are enabled after reviewing the agreement.
> In the version aware agreements, the document type of the document created offline is updated as Agreement Document.

Importing an Offline Document

This feature enables you to import an offline document into an existing agreement record in Contract Management. You can also import the document with intelligent import.

Prerequisites

- You must have Create and Edit agreement permissions.
- Refer to the Contract Management on Salesforce Administrator Guide for admin configurations.

To import an offline document

1. On the Agreement Detail page, click Import Offline Document. This displays the Import Offline Document page.
2. In the Select the File section, click **Choose File** to select a document to attach to this agreement. The Open window appears.
3. Navigate to the file you want to upload. Select the file and click **Open**.
4. In the Click the "Attach File" button section, click **Attach File** to import an offline document.

> ⓘ **Note**
>
> If you have enabled document versioning, select the Intelligent Import checkbox before attaching the document.

5. In the Select this option for Intelligent extraction of data and clauses from uploaded file:
   a. To import an offline document with Intelligent Import
      i. Select the Intelligent Import checkbox to upload the agreement to the Apttus Intelligent server for processing.
      ii. Click **Continue**. This displays a message stating that Intelligent Import will create batch and you will be navigated to the Agreement Detail page. You will also receive an email notification with the IDEJobProcess status and error information.
      iii. Click **Ok** on the message.
      iv. Click **Return**. This displays the Agreement Detail page.
   b. To import an offline document without Intelligent Import
      i. Leave the Intelligent Import checkbox unselected.
      ii. Click **Continue**. This displays a message stating that Documents Imported.
      iii. Click **Return**. This displays the Agreement Detail page.

Reviewing an Agreement Created by Intelligent Import

This section describes how to review an agreement document created or imported by intelligent import.

When you complete the review of an offline document (created or imported):

- All the clauses in the document are updated to Inserted in the Agreement Clauses section
- The Agreement Status Category is updated to In Authoring
- The Agreement Status is updated to Author Contract.

When you complete the review of an executed document (uploaded as a signed document):

- All the clauses in the document are updated to Final in the Agreement Clauses section
- The Agreement Status Category is updated to In Filling.
- The Agreement Status is updated to blank.

Prerequisites

- Ensure that you select Intelligent Import when you create an offline document.
- The document is successfully processed by the Apttus Intelligent server and returned to Apttus Contract Management.

To review an intelligent import agreement document

1. In the Agreement Action Panel, click **Review Offline Document**. The Review Offline Document screen with the current status of the extraction is displayed.
   You will receive an email notification with the Batch job status for IDE process status and error information.
2. Click **Return**. This displays the Agreement Detail page.
   You will receive an email notification with the Batch job status for IDE process status and error information after the agreement is processed.

   > ⓘ **Note**
   >
   > You can also refresh the page instead of clicking **Return** > **Review Offline Document** to view the extraction status. The Agreement Detail page is displayed after the extraction is complete.

3. Click **Review Offline Document**. An intermittent page is displayed that checks for document status and the document is displayed in the document viewer.
   The Language, Document Search, Page Navigation, and OCR Quality of the document are displayed at the top of the document viewer. The OCR quality determines the quality of the transcription recognized by OCR.

> ⓘ **Note**
>
> The document viewer does not load if you import a file that exceeds 10 MB via the Import Large File button.

4. On the Agreement Detail tab, review the following details and modify them as required:
   a. **Agreement Name**: Name of the agreement
   b. **Account Name**: Name of the account
   c. **Effective Start Date**: Delete additional text (if any). Click in the field and a date picker popup appears. Select the required date from the date picker.
   d. **Effective End Date**: Delete additional text (if any). Click in the field and a date picker popup appears. Select the required date from the date picker.

> ⓘ **Note**
>
> During Intelligent Import, extracted date or currency fields may contain additional extraneous texts. If the administrator has configured currency or date field, delete the extraneous text before saving those fields.
> The fields in the Agreement Detail tab are configurable and may vary based on the administrator settings. For more information, see *Configuring Intelligent Import Fields* in *Contract Management on Salesforce Administrator Guide*.

5. On the Clauses tab, you can view all the extracted clauses. When you select a clause, you are navigated to the clause location in the document. When you select a clause that contains special characters and the system is unable to locate the selected clause in the document, you can see a message. When you click **Ok**, you are navigated to the page that contains the clause. You can perform the following tasks in the Clauses tab:
   a. To add a clause:
      i. Click **Add Clause**.
      ii. Enter the following details:
         - **Clause Name**: Enter the clause name.
         - **Clause Text**: Enter the clause text.
      iii. Click **Add Clause**.
   b. To mark a clause from the PDF document:
      i. Select the text in the document, right-click, and select **Add Clause**. The Add Clause window with the following fields is displayed.
         - **Clause Name**: Set to a clause name by default.
         - **Mapped Clause Details**: Clause text of the default clause.
         - **Clause Text**: Clause text selected from PDF.
      ii. Enter the following details:

- **Clause Name**: Select a clause from the dropdown to add to an existing clause or click New and enter the name of the clause. When you select a clause from the dropdown, the Mapped Clause Details change accordingly. When you click New, only clause text is displayed.
        - **Clause Text**: Displays the selected clause.
    i. Click **Add**.
  c. To modify a clause:

    i. Click the ✏ icon. The Edit Clause page is displayed.
    ii. Modify the following details:
        - **Clause Name**: Modify the name of the clause.
        - **Clause Text**: Modify the text of the clause.
    iii. Click **Save**.
  d. To delete a clause:

    i. Click the 🗑 icon. This displays Confirm Delete window.
    ii. Click **Yes**.
6. To save the agreement document, click **Save**.
   You can check out the document with X-Author Contracts and version it.
7. To save your review and revisit the review screen later:
   a. Click **Cancel**. The Warning message is displayed prompting you to confirm if you want to proceed.
   b. Click **Yes**.
      If you had added or modified a clause, the new clause or changes to the clause are saved.
8. To download highlighted or unhighlighted documents:
   a. Go to the **Files** or **Notes & Attachments** section.
   b. To download the document with highlights, click the **Download** hyperlink before the <filename>_with_highlights.pdf hyperlink. The document is downloaded in the default download location of the browser.
   c. To download the document without highlights, click the **Download** hyperlink before the <filename>_processed.pdf hyperlink. The document is downloaded in the default download location of the browser.
   d. To download the original document, click the **Download** hyperlink before the original file name. The document is downloaded in the default download location of the browser.

> ⚠ You can select the highlighted and unhighlighted documents from Document Version Details while sending for review, signatures, or eSignatures.

Storing an Executed Agreement

An agreement passes through various phases during the agreement lifecycle, from the time the agreement is created until the agreement is activated. Sometimes, the agreement is managed offline and the contract manager will need to upload the executed document. Also while uploading a signed agreement offline, you can upload the executed agreement.

An *executed document* is a finalized version of an agreement that is ready for activation in the Contract Management application.

Prerequisites

- At least one template must exist for the corresponding agreement record type.
- Refer to the Contract Management on Salesforce Admin Guide for admin configurations.

To store an executed document

1. Click **Store Executed Agreement** link under Apttus Links. This displays Select Agreement Record Type page.
2. Select an agreement record type from the Record Type of new record drop-down list and click **Continue**. This displays New Offline Agreement page.
3. Click **Continue**.
4. In the Select the File section, click **Choose File** to select a document to attach to this agreement. This displays the Open window.
5. Navigate to the file you want to upload. Select the file and click **Open**.
6. In the Click the "Attach File" button section, click **Attach File** to create the offline agreement with the selected document attached to the agreement.
7. In the Select this option for Intelligent extraction of data and clauses from uploaded file, select the Intelligent Import checkbox for intelligent data extraction.

   > ⓘ **Note**
   >
   > You can leave the Intelligent Import checkbox unselected if you want to import the document without intelligent data extraction.

8. Click **Continue**. This displays the Agreement Edit page.
9. Enter values into any required fields (marked in red) and additional fields as needed to complete the agreement record details.

10. Click **Save**. This displays a message stating that Intelligent Import will create batch. You will also receive an email notification with the IDEJobProcess status and error information.
11. Click **Ok**. This displays the Agreement Detail page.
    For the Intelligent Import agreement, the Status Category is set to Import and Status is set to Review. For the imported agreement without intelligent import, the Status Category is set to In Filling.
    In the Agreement Clauses section, the clause Action is displayed as Final. When Document Versioning is enabled, the document is added to the Document Versions related list. When Document Versioning is disabled, the document is added to the Notes & Attachments section.

ⓘ In the version aware agreements, the document type of the uploaded executed documents is updated as an Executed Document.

Working with Agreements

This section covers the following topics:

☐

Searching Agreement Documents

This feature allows you to use keywords, text, or agreement field names to search agreement documents. The agreement documents of type - Files can be in PDF, DOC, DOCX, and RTF formats. You can use the basic search filters to narrow down the search results. You can preview or download individual documents that match your search criteria. You can also select multiple agreement documents from search results and email them as a downloadable link to a group of users.

Salesforce Limitations

- Global Search with the email address does not return RTF type files.
- Document Search does not work when the content contains a period in the sentence.
- The Owner, CreatedBy, and LastModifiedBy fields are not supported for lookups.

To search agreement documents

1. Click the **Agreement Document Search** tab to open the Search Contract Documents page.
2. Enter a keyword or text in the search box.

   > ⓘ **Note**
   >
   > The keyword should contain more than 2 characters.

3. Click the **Show Filter** link to define search criteria.
4. You can use the Basic Filters to define multiple search criteria.
   Basic filters include Agreement Number, Agreement Name, Owner ID, Status, Status Category, Agreement Start Date, Agreement End Date, Account, and Record Type.

   > ⓘ **Note**
   >
   > You can use the APTS_DocumentSearchBasicFilters property to add or remove search filters according to your requirement.

5. Click **Search** to view a list of agreements and their document versions matching the search criteria that contain the keyword.

> ⓘ **Note**
>
> The Search Contract Documents page displays a maximum of 1000 search results. You can enter a keyword in the search box and click **Search** to search across all the agreement documents in Apttus Contract Management without applying search filters. You can use wild cards (* and ?) and logical operators (AND and OR) to search agreement documents. You can also use quotation marks around a phrase to search for exact words in the agreement documents.

6. Click the expand icon (⟩) to view the content snippet. In the content snippet, the first occurrence of the search text is highlighted and the corresponding page number to which the content snippet belongs. If the keyword is an agreement field, the content snippet is not displayed.

7. Click the download icon (⬇) to download an agreement document containing the keyword or text.

8. Click the preview icon (👁) to view the keyword or text in an agreement document in the Document Viewer window.

9. In the Document Viewer window, click ⟨ to go to the previous instance of the keyword or click ⟩ to go to the next instance of the keyword in the agreement document.

10. Click **Cancel** to exit the Document Viewer window and return to the search results.

11. Select multiple documents from the search results and click the email icon (✉) to send a downloadable link to download multiple documents of multiple agreements through email.
    For more information, see *Emailing Multiple Agreement Documents* in the *Contract Management for Salesforce User Guide* and *Scheduling Expiration Date for Email Downloadable Link* in the *Contract Management for Salesforce Administrator Guide*.

Viewing Agreement Hierarchy

You can click the **Agreement Hierarchy (New)** button on the Agreement Detail page to view the agreement hierarchy of an agreement. The agreement hierarchy page displays a hierarchical list of agreements related to the current record. Hierarchical relationships to the current agreement include:
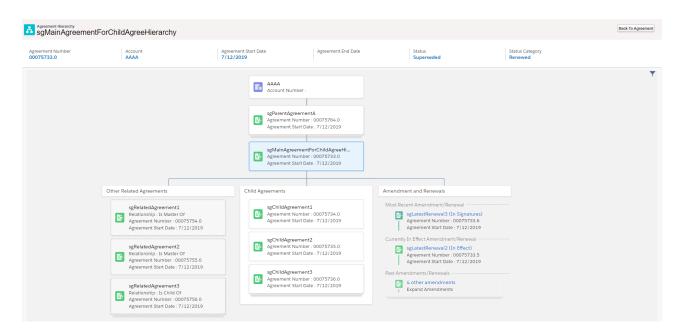
- Parent agreements

- Child agreements
- Related agreements
- Amended and renewed agreements

In the Agreement Hierarchy page as shown in the figure below, the account details of the current agreement, parent agreements, current agreement (highlighted in blue), and the relationships of the current agreement are displayed.

> ⓘ **Note**
>
> The current agreement refers to the agreement for which you are viewing the agreement hierarchy. The Agreement Hierarchy page displays a maximum of 88 parent agreements in the agreement hierarchy.

If any section has more than 3 agreements, the first 3 agreements are displayed and the remaining agreements are displayed as stacked cards. When you click third agreement, you can view the remaining agreements. The fields displayed for the agreements on the agreement cards are based on the **APTS_AgreementHierarchyFields** admin object. For more information, see *Admin Objects* in *Contract Management Administrator Guide*. You can configure the header fields as per your requirement. For more information, see *Configuring Agreement Hierarchy Page Header* in *Contract Management Administrator Guide*.

To return to the agreement, click the **Back to Agreement** button.

> ⓘ **Note**
>
> Except for the related agreements with Is Amendment For, Is Amended By, Is Renewed For, and Is Renewed By as relationship types, all the other related agreements are displayed below the Related Agreements section in the Agreement Hierarchy page.

Prerequisite

You must configure the Agreement Hierarchy button. For more information, see *Adding Agreement Hierarchy Button* in *Contract Management on Salesforce Administrator Guide*.

To view agreement details and related agreements

1. Click the **Agreement Hierarchy (New)** button on the Agreement Detail page.
2. Hover over an agreement card and click ▼. Select either of the following options:
   a. Select *View Record* from the menu to view the details of the agreement. The Agreement Detail page of the selected agreement opens in a new tab.
   b. Select *Show Related Agreements* from the menu. A window containing Child Agreements and Related Agreement opens.

To customize agreement hierarchy view

1. Click the filter icon (▼) in the Agreement Hierarchy page.
2. Turn off Child Agreements, Amendment, or Other Related Agreements toggle to remove that section from the agreement hierarchy view.

Emailing Multiple Agreement Documents

You can send a downloadable link for downloading multiple documents of multiple agreements through email, to selected contacts or to a user group without downloading the agreement documents and sending them through email individually.

Prerequisite

- (*Optional*) You can configure the Email Agreement(s) Document(s) button on the Agreements page. For more information, see *Adding the Email Agreement(s) Document(s) Button* topic in *Contract Management on Salesforce Administrator Guide*.
- If you are using Salesforce Lightning, you need to configure CORS to use this feature. For more information, see *Configuration to Email Multiple Agreement Documents in Lightning* topic in *Contract Management on Salesforce Administrator Guide*.
- Content Delivery must be enabled.

To email multiple agreements

1. Navigate to the Agreements tab.
2. Select the checkboxes for the agreements that you want to email.

   ⓘ **Note**

   You cannot select more than 200 agreements.

3. Click **Email Agreement(s) Document(s)**.
   This displays the Select Agreement(s) Documents(s) To Email page. The related documents are nested below the agreement.
4. Select the header checkbox before the agreement name to select all documents belonging to the agreement or select documents from multiple agreements based on your requirement.
   The Email Downloadable Link button is enabled.

   ⓘ **Note**

   The recommended maximum file size to email agreements is 300 MB and the recommended maximum number of flies to email agreements is 100.

5. To email the downloadable link, click **Email Downloadable Link**.
   This displays a message that the downloadable link is being generated.
6. To add or remove the selected agreements, click **Modify Agreement Selection**. This opens the Modify Agreement Selection window.
   You can perform the following actions on the Modify Agreement Selection window:
   a. Click the **Next** or **Previous** links to navigate to other pages.
   b. From the List of Unselected Agreements, select the agreements you need to add to the selection and click **Add Selected**.

      c. From the List of Selected Agreements, select the agreements you need to remove from the selection and click **Remove Selected**.

      d. Click **Apply**.
The agreements that have documents are displayed on the Select Agreement(s) Document(s) To Email page.

7. When the downloadable link is ready, the Send an Email page is displayed.
8. Enter or use the lookup icon to add recipients to the **Related To**, **Additional To**, **Cc** or **Bcc** fields.
9. Click **Send**.
An email is sent to all recipients.

To download the agreement documents

When **Password protection is optional and defaults to ON** or **Password protection is required** options are selected for content-delivery password protection, you will receive two separate emails—one with the download link for agreement documents and one with the password to download the agreement document. When **Password protection is optional and defaults to OFF** is selected for content-delivery password protection, you will receive only one email containing the download link for agreement documents. If the agreement documents size exceeds 50MB, you will receive multiple download links in the email.

1. Navigate to your email client and open the email—Notification: Agreement documents are ready for download.
2. Click the **Download Agreement Documents** hyperlink.
This opens the link in your default browser and you will be prompted to provide the password.
3. Navigate to your email client and open the email—Notification: Password(s) to download agreement document(s).
4. Copy the document password and navigate back to the browser and paste the password in the Password Required field.
5. Click **Go!**.
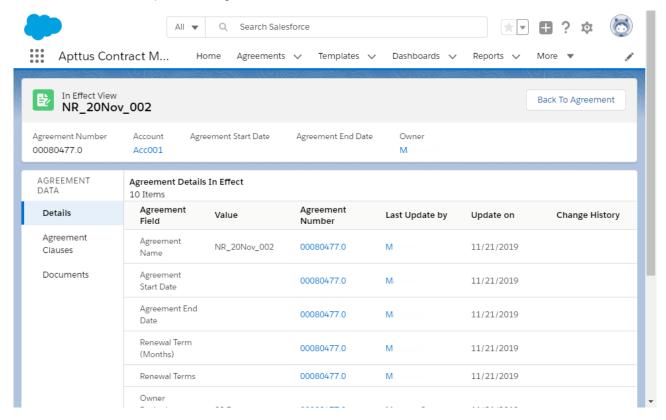6. Click the Download button on the top of the page.
This downloads the AgreementDocuments_DD-MM-YYYY HH-MM-SS.zip file.
7. Extract the documents from the .zip file. The document name is appended with a numeral when the documents have the same name.

> ⓘ **Note**
>
> It is recommended to clean the File Storage of your org regularly.

Accessing In-Effect View

You can use the In-Effect View to gather key information and agreement data of the agreement that has been In-Effect at least once. You can view the agreement data such as agreement details, clauses, and documents that are cumulatively effective and enforced by the latest in-effect agreement. You can also track the amendments of the agreement to view combined data from the original and amended agreements that are part of the in-effect agreement at any given point of time. In-Effect View is available for the agreements with Status Category as In Effect and Status as Activated. In Effect View is not supported when clauses are copied during amendment.

Prerequisites

- You must configure the In-Effect View button. For more information, see *Adding In-Effect View Button* in *Contract Management on Salesforce Administrator Guide*.
- You can access In-Effect View for the agreements with Status Category as In Effect and Status as Activated.
- The fields available on Agreement Details In Effect is according to the value defined for the APTS_InEffectViewMetadataFields admin object. For more information, see *Admin Objects* in *Contract Management on Salesforce Administrator Guide*.

To view the In-Effect View

1. Open an activated agreement.
2. Click the **In Effect View** button.
   The In Effect View page opens.

To view the change history of agreement fields

In the Agreement Details In Effect section in the Change History column, click the **View** hyperlink to view all the changes made to the field in chronological order.
This opens a <field name>Changes popup. You can view in-effect and previous changes. The value changes are highlighted.

> ⓘ **Note**
>
> The View hyperlink is displayed only if the field was updated while amending the agreement.

To view the change history of clauses

1. On the AGREEMENT DATA pane, click **Agreement Clauses**.
2. In the Clauses In Effect section in the Change History column, click the **View** hyperlink.
   This opens a <clause name> Version History popup. You can view different versions of the clause on the left pane and the clause text on the right.

   > ⓘ **Note**
   >
   > The View hyperlink is displayed only if the clause was updated while amending the agreement.

3. Turn on **Show Changes** to view changes in clause text.
4. Select a different version of the clause on the left pane to view the clause text of that version.

To view and email in-effect documents
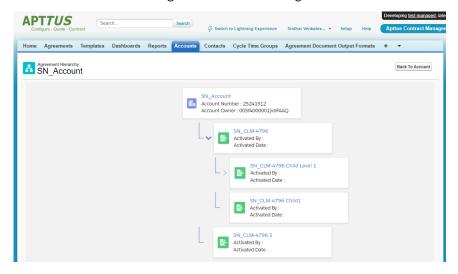
Prerequisite: Content Delivery must be enabled.

1. On the AGREEMENT DATA pane, click **Documents**.
   This displays the Documents In Effect section.
2. Select the required documents and click ✉.
   This displays the Generating Downloadable Link(s). After processing, the Send an Email page opens.
3. Enter the required details and click **Send**.
   An email notification is sent to all the recipients with the download link and password. For more information on downloading agreement documents, see *Emailing Multiple Agreement Documents* in the *Contract Management for Salesforce User Guide* and *Scheduling Expiration Date for Email Downloadable Link* in the *Contract Management for Salesforce Administrator Guide*.

Viewing Agreement Hierarchy of an Account

You can click the **Agreement Hierarchy** button on the Account Detail page to view all the agreements of that account. The agreement hierarchy page displays a hierarchical list of agreements related to the current account. The current account refers to the account for which you are viewing the agreement hierarchy. Hierarchical relationships to the current account include parent agreements, child agreements, related agreements, amended agreements, and renewed agreements. Renewed and amended agreements are displayed as child cards in the agreement hierarchy.

The fields displayed on the account card (first card) are according to the value set for the **APTS_AccountHierarchyFields** admin object. The fields displayed on the agreement cards are based on the **APTS_AgreementHierarchyFields** admin object. For more information, see *Admin Objects* in *Contract Management on Salesforce Administrator Guide*.

Prerequisite

You must configure the Agreement Hierarchy button. For more information, see
Adding Agreement Hierarchy Button For Accounts in *Contract Management on Salesforce Administrator Guide*.

To view agreement details and related agreements

1. Navigate to the **Accounts** tab.
2. Click an account name.
3. Click **Agreement Hierarchy**.
4. Hover over an account card and click ![dropdown]. Select either of the following options:
   a. Select *View Record* from the menu to view the details of the agreement. The Agreement Detail page of the selected agreement opens in a new tab.
   b. Select *Show Related Agreements* from the menu. A window containing Child Agreements and Related Agreement opens.

To view child agreements

1. If an agreement has child agreements, you can view ![arrow] before the account card.
2. Click ![arrow] to view the child agreements of the agreement.

Clause Versioning

Clause versioning allows you to view all the versions of a clause along with the modified text. You can view the number of times the clause is revised in the version number column of the Agreement Clauses section. Each clause has a single entry with the revised number.

Prerequisite
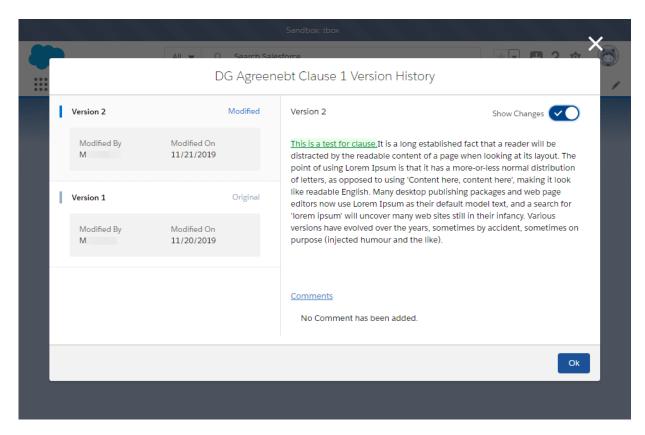
To access this feature you need to install Contract Management dependent packages— Apttus DocuSign API (v5.88), Apttus Contract DocuSign Integration (v3.38), and Apttus EchoSign Integration (v7.30).

To view versions of a clause

1. Navigate to the Agreement Detail page
2. In the Master Agreement Clauses section, click the number hyperlink in the No. of Versions column.
   This opens a <clause name> Version History popup. You can view different versions of the clause on the left pane and the clause text on the right.
3. Turn on **Show Changes** to view changes in clause text.
4. Select a different version of the clause on the left pane to view the clause text of that version.

> ⓘ **Note**
>
> The Show Changes toggle is not enabled for the first version of the clause.

A clause status is updated based on the agreement action. The following are the agreement actions and their corresponding clause statuses.

Agreement Action	Clause Status
Generate or Regenerate	Original
Store Executed Agreement, Upload Signed Document, or eSign	Final
Create Offline Agreement or Import Offline Document	Inserted
A smart clause is modified and checked-in from X-Author Contracts	Modified
A smart clause is deleted and checked-in from X-Author Contracts	Deleted

Uploading Signed Documents

You can upload the manually signed document to an agreement in DOC, DOCX, or PDF format.

Prerequisite

You can view the Upload Signed Document button after you send a document for signatures (manual or wet signatures).

To upload signed documents

1. In the Agreement Action Panel, click **Upload Signed Document**.
2. In the Select the File section, click **Browse**. The Open window appears.
3. Navigate to the file you want to upload. Select the file and click **Open**.
4. In the Click the "Attach File" button section, click **Attach File**.
5. Repeat steps 2 to 4 to upload multiple signed documents.
6. Click **Continue**.
7. After the documents are imported, click **Return**.
   You are navigated to the Agreement Detail page. The **Status Category** | **Status** of the Agreement is updated to **In Signature** | **Fully Signed**. The Executed Date field is updated. The Upload Signed Document button is not available.

   > ⓘ **Note**
   >
   > If you send multiple documents for signatures, you need to upload all the signed documents together. If you send multiple documents for signatures and upload only one document, the uploaded document is considered as the final document.

To upload signed documents using Intelligent Import

Prerequisite: The **Intelligent Import for Signed Document** Comply System Property must be enabled to view the intelligent import option and intelligently import signed documents. The Intelligent Import settings must be configured in your org. For more information, see *Comply System Properties* and *Configuring Intelligent Import Settings topics* in *Contract Management on Salesforce Administrator Guide*.

Restriction: You can only upload one signed document when you select the intelligent import option.

1. In the Agreement Action Panel, click **Upload Signed Document**.
2. In the Select the File section, click **Choose File**. The Open window appears.

3. Navigate to the file you want to upload. Select the file and click **Open**.
4. In the Click the "Attach File" button section, click **Attach File**.
5. In the Select this option for Intelligent extraction of data and clauses from uploaded file:
   a. To import offline agreement with Intelligent Import:
      i. Select the Intelligent Import checkbox to upload the agreement to Apttus Intelligent server for processing.
      ii. Click **Continue**. A notification message is displayed.
      iii. Click **Ok** on the message.
      iv. Click **Return**. This displays the Agreement Detail page.
      The **Status Category | Status** of the Agreement is updated to **Import | Review**. The Review Offline Document button is enabled and you can review the intelligently imported document.
   b. To import offline agreement without Intelligent Import:
      i. Leave the Intelligent Import checkbox unselected.
      ii. Click **Continue**. This displays a message stating that Documents Imported.
      iii. Click **Return**. This displays the Agreement Detail page.
      The **Status Category | Status** of the Agreement is updated to **In Signature | Fully Signed**.

ⓘ The fully signed documents are added as a major version with the name as Upload Signed Document in the Document Version related list. In the version aware agreements, the Document Type of the uploaded executed documents is updated as an Executed Document.
When you upload a signed document using intelligent import, all the clauses recognized by the IDE are marked as Final in the Agreement Clauses section. When you upload a signed document without intelligent import, all the clauses are marked as Final in the Agreement Clauses section.

Intelligently Importing Large Files in Lightning

This feature allows you to intelligently import executed documents of size more than 10 MB in Salesforce Lightning mode. When you review intelligently imported files larger than 10 MB, the document viewer does not load, but you can view the extracted fields and clauses in the Agreement Detail tab. For more information, see Reviewing an Agreement Created by Intelligent Import and Storing an Executed Agreement.

Prerequisites

- Intelligent Import must be configured in your org. For more information, see *Managing Offline Agreements* topic in *Contract Management on Salesforce Administrator Guide*.
- The *XAJS End Point* Comply System Property must be enabled. For more information, see *Comply System Properties* topic in *Contract Management on Salesforce Administrator Guide*.
- Import Large Files button is visible only for non-version aware agreements.
- You can only upload one file at a time.
- The maximum recommended file size to upload large files is 200MB.

To intelligently import large files

1. Navigate to a non-version aware agreement record.
2. Click **Import Large Files**.
3. You can either click Upload Files or drag and drop your files.
   This displays the Upload Files window.
4. After the upload is complete, click **Done**.
5. Save and Stored Execute option is selected by default.
6. Click **Continue**.
   This displays the Import Large Files window.
7. Click **OK**.
   You will receive an email notification with the Batch job status for IDE process status and error information (if any) after the agreement is processed. After the agreement document is imported, all the clauses are marked as Final in the Agreement Clauses section.

Merging Documents in Lightning

This feature allows you to combine the latest versions of different agreement documents along with the documents uploaded to the version aware agreement in Salesforce Lightning. You can merge the documents in different formats (DOCX, DOC, and PDF formats) into one DOCX or PDF document.

You can set the following preconditions before generating the merged document:

- Document type
- Document permission

- Watermark
- Redlines
- Order of the documents

If all the documents you are merging are in DOC or DOCX format, you can select the output format (DOCX or PDF). If the documents you are merging contains at least one PDF, the PDF output format is selected by default and the DOCX output format is disabled.

If you have selected DOCX as the output format, you can select any protection type. The protection type is only applicable to DOCX documents.

If a DOCX document contains the draft watermark among the DOCX documents you need to merge and you select the Remove Draft Watermark option, the merged document will not retain the watermark from the original document. The Remove and Apply Draft Watermark option is only applicable to DOCX documents but not for PDF documents.

If you have redlines in the documents you need to merge, you can use the Preserve Redlines option to retain the redlines in the merged documents.

You can select any document type except for the Executed Document. By default, the Agreement Document option is selected.

Prerequisites

- You need to set up new agreement protection for merge documents. For more information, see the topic *Configuring Agreement Document Protection* in *Contract Management on Salesforce Administrator Guide*.
- You can merge the documents in DOC, DOCX, and PDF format in version aware agreements.
- Ensure that you have at least two different documents (documents generated using different templates) available in your agreement.

Restrictions

- The Merge button is disabled if the agreement is in the following Status | Status Category:
    - In Signatures | Other Party Signature
    - In Signatures | Fully Signed
    - In Effect | Activated
- The Document Permission field is not visible when you select PDF as the output format.

Limitations

- The merge document name must not exceed 250 characters.
- The document size of the combined documents must not exceed 25 MB.

To merge documents

1. On the Agreement Detail page, click **Merge Documents**. This displays the Merge Documents page.
2. Enter a name for the merged document in the Document Name field.
3. Select DOCX or PDF as the merged document output type.
4. Select a document type for the merged document.
5. Select document permission for the merged document.
6. Select a watermark option per your requirement either to apply or remove watermark in the merged document.
7. Select the Preserve Redlines checkbox to retain the redlines in the merged document.
8. Drag and rearrange the documents in the order you need to merge documents.
9. Select the documents that you need to merge.
10. Click the **Merge** button on the top of the page.
    You are navigated to the Agreement Detail page.
11. Navigate to the Related tab.
12. In the Document Versions section, click the Merge Documents hyperlink. This displays the Document Versions Detail page.
13. Click the **View** hyperlink.
    If you had selected DOCX as the output format, then a new tab and the merged document is downloaded to your system. If you had selected PDF as the output format, then the document opens in the document viewer online.
    The merged document is now available when you send for review, send for eSignature using EchoSign, send for manual signature, and activate an agreement.

Importing Supporting Document

You can import supporting documents in a version aware agreement. You can also select Document Type while importing the supporting document. The Import Supporting Document option is available irrespective of the agreement status and status category.

To import supporting documents

1. In the Agreement Action Panel, click **Import Supporting Document**.
   This displays the Import Supporting Document page.
2. In the Select the File section, click **Browse**. The Open window appears.
3. Navigate to the file you want to upload. Select the file and click **Open**.
4. In the Click the "Attach File" button section, click **Attach File**.
5. Repeat steps 2 to 4 to import multiple documents.
6. From the Select Document Type dropdown, select **Supporting Document**.

   > ⓘ   You can select any Document Type except *Agreement Document* and *Executed Document*. You can also select custom document types.

7. Click **Import**.
8. After the documents are imported, click **Return**.
   You are navigated to the Agreement Detail page. The imported documents are added as a major version with the name as Supporting Document in the Document Version related list.
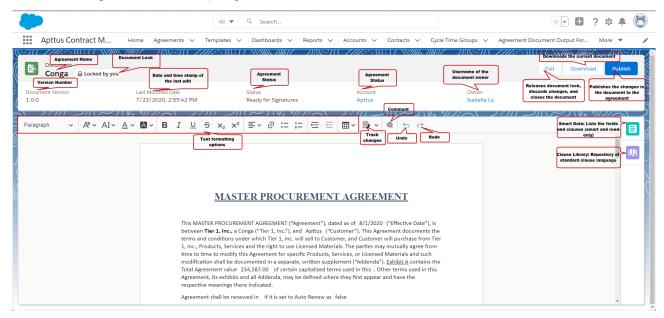
Online Contract Collaboration

Online Contract Collaboration (OCC) allows you to review, and redline agreement documents within Contract Management without the need for any dedicated software. To access online contract collaboration, the *Enable Online Contract Collaboration* comply system property must be enabled. For more information, see *Comply System Properties* topic in *Contract Management on Salesforce Administrator Guide*.

The following features are available for online contract collaboration:

- Redline agreement document
- Differentiate edits by each negotiator/collaborator
- Add, reply, and resolve comments
- Access Smart Data and view smart and read-only data
- Identify modified and new smart data
- Access Clause Library and insert clauses
- Sync the changes in a document to the corresponding agreement record by publishing the document
- Interoperate with X-Author Contracts and X-Author for Contracts 2.0

The following screenshot displays the Online Contract Collaboration view:

For more information on online contract collaboration, you can review the following topics:

Getting Started

Before you begin using the Online Contract Collaboration (OCC) feature, ensure that you meet the following requirements.
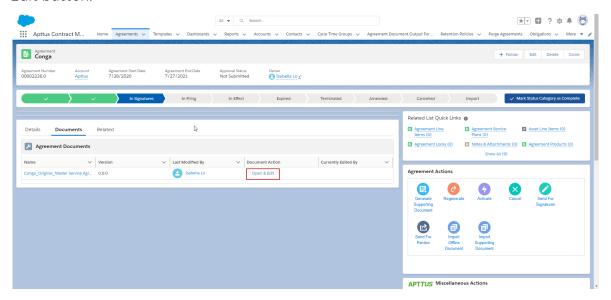
Item	OCC Support
Operating System	• Window 10 • Mac Catalina
Browsers	• Chrome • Microsoft edge
Browser Zoom	80-150 %
Document protection	• Full Access • Insert Comments and Track Changes • Insert Comments only • Read-only
Document format	DOCX
Agreement documents	• Generated document • Regenerated document
Document versioning	• Salesforce Lightning: Version aware and non-version aware • Salesforce Classic: Version aware
Template type	• FX2 templates • Localized agreement and clause templates • Non-localized agreement and clause templates

Launching Documents
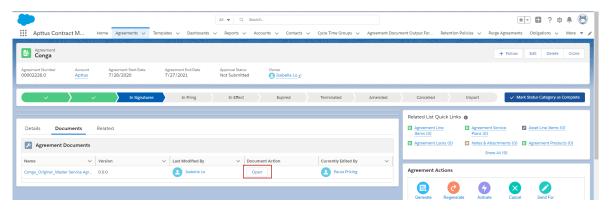
You can access the Online Contract Collaboration (OCC) feature from both Salesforce Classic (version aware) and Lightning (version aware and non-version aware). You can access OCC from the Documents tab in the Lightning mode and Document Version Detail page in the Classic mode.

You can also click the Download button in OCC to download the document and check out using X-Author Contracts or X-Author Contracts 2.0. You can also view all the documents that were checked in using X-Author Contracts or X-Author Contracts 2.0 in OCC.
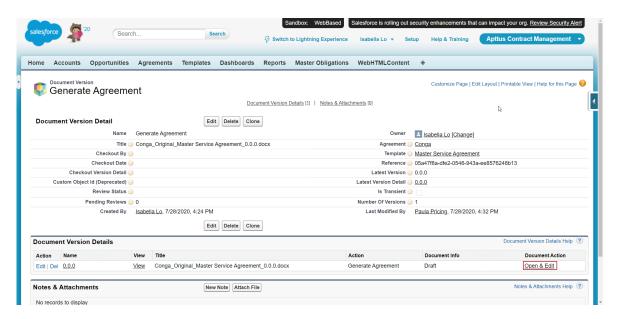
The following screenshot displays the Document Action column in Lightning with Open & Edit button:
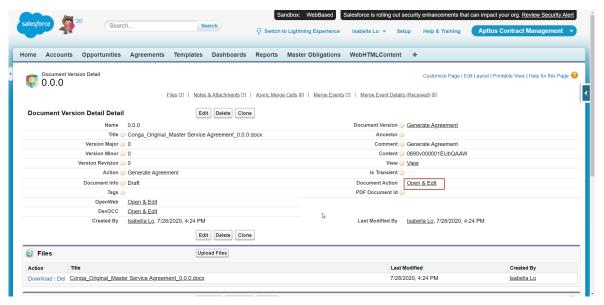
The following screenshot displays the Document Action column in Lightning with Open button:

The following screenshot displays the Document Action column in the Document Version Detail page in Classic:

The following screenshot displays the Document Action field in the Document Version Detail Detail page in Classic:

Prerequisites

- Only DOCX format documents are supported in OCC.
- You must configure the Documents tab for the agreement page in Lightning. For more information, see *Configuring Documents Tab in Lightning* topic in *Contract Management on Salesforce Administrator Guide*.

- You must configure the Document Action column for the agreement page in Classic. For more information, *Configuring Document Action Column in Classic* in *Contract Management on Salesforce Administrator Guide.*

Restrictions

- The Open & Edit button is disabled when the Enable Online Contract Collaboration property is disabled.
- When the document is being viewed or edited by another user, the document is locked and you will see the **Open** button instead of the **Open & Edit** button. When you click the **Open** button, you can view the document in read-only mode. When the other user clicks the **Exit** button or saves the document, the document lock is released and you will be able to view the **Open & Edit** button.
- If you close the OCC tab or click the back button in your browser without clicking the Exit button, the document lock will not be released and the document will be locked by you.

To launch Online Contract Collaboration in Lightning

1. Navigate to Agreement Detail page.
2. Click the **Documents** tab.
   You can view the Document Name, Version Number (available only for version aware agreement), Last Modified By, Document Action, and Currently Edited By columns. You can also view the latest agreement document on the top row.
3. If more than one document or document versions are available for the agreement, click **View All** to view all the documents of the agreement.
4. Click the **Open & Edit** button to view or edit the document online.
   This launches the Online Contract Collaboration view.

To launch Online Contract Collaboration in Classic

1. Navigate to **Agreement Detail** page > **Document Versions** section.
2. Click the link in the Name column to View all document version details.

3. In the Document Version Details section, click the **Open & Edit** link the Document Action column.
   This launches the Online Contract Collaboration view.

> ⓘ You can also launch OCC in Classic by navigating to **Document Version Detail Detail** and clicking the **Open & Edit** link in the Action field.

To exit the Online Contract Collaboration view

1. Open a document in OCC.
2. Click **Exit**.
   This displays the Exit Document popup.
3. Click **Exit**.
   If you have modified the document, the changes are discarded and the document lock is released.

To download the document

1. Open a document in OCC.
2. Click **Download**.
   This downloads the document. You can open the document in MS Word and check-out the document in X-Author Contracts or X-Author Contracts 2.0.

Tracking Changes in Documents
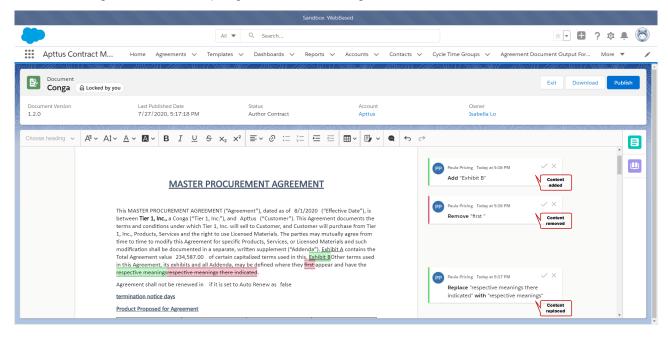
While collaborating on an online document, you can track changes in the document. You can track whether the text was added, replaced, or removed. You can also track newly inserted clauses in the document. When the track changes option is enabled:

- Added or replaced text is highlighted in green color and the comment card has green border color.
- Deleted text is highlighted in red color and the comment card has red border color.

The following table provides details about the default setting of track changes option for different protection levels:

Protection Level	Default setting of track changes option
Full access	Track changes option is disabled by default and you can enable track changes option according to your requirement.
Insert comments and tracked changes only, Insert comments only, and Read only	Track changes option is enabled by default and you cannot disable the track changes option.

The following screenshot displays the track changes in a document:

To track changes in a document

1. On the OCC toolbar click track changes icon (📝).
2. You can add, replace, or remove the text in the document.
   The changed text is highlighted and the suggestion is displayed as a comment in the right margin. If you open Smart Data or Clause Library pane when there are suggestions in a document, the comment boxes are displayed as comment bubbles. You can click on the bubble to view the comment.

To accept or reject track changes in a document

1. Open a document that contains track changes.
2. Click the Accept Suggestion icon (✓) to accept a suggestion.
   or Click the Reject Suggestion icon (✗) to reject a suggestion.
   When you accept suggestions to add, replace, or remove text, the suggested text is

added, replaced, or removed respectively from the document. When you reject a suggestion to:
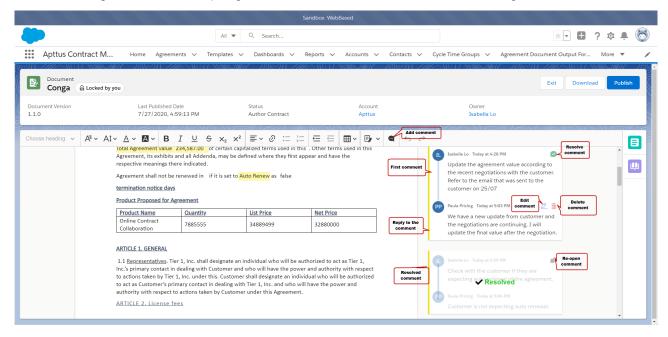
- Add text - the suggested text is removed.
- Replace text - the suggested text is removed and the original text is retained.
- Remove text - the original text is retained.

When you accept or reject changes that have field values in an incorrect format except for the date and picklist fields, an error message is displayed for that field.

Working with Comments

Comments allow you to bring attention or provide additional information to other collaborators reading a document. You can add, edit, delete, reply, resolve, and re-open comments during online contract collaboration (OCC). You can also add another comment on the commented text. You can view the comments added in X-Author Contracts or X-Author Contracts 2.0 in OCC. You can also view the comments added in OCC in X-Author Contracts or X-Author Contracts 2.0.

The following screenshot displays the comments added and resolved by different users:

To add a comment

1. Open a document.
2. Select the text you that you need to comment on.

3. Click the comments icon ( ).
   This displays a comment box in the margin of the document and the selected text
   gets highlighted.
4. Add your comment in the comment box.
5. Click the ok icon (✓) to save the comment.
   On the comment, you can view the name of the commenter and date and time that
   the comment was made.

To edit a comment

Prerequisite: You can only edit comments that you have added.

1. Select a comment that you need to edit.
2. Click the edit icon ( ) and modify the comment.
   This displays that the comment was edited in OCC.

To delete a comment

1. Select a comment that you need to delete.
2. Click the delete icon ( ).
   This displays Delete comment? dialogue.
3. Click the ok icon (✓) to delete the comment.
   If you delete a parent comment, then the child comments will also get deleted.

To reply to a comment

1. Select a comment that you need to reply to.
   This displays the reply box below the comment.
2. Type your reply and click the ok icon (✓) to save the reply.

To resolve a comment

1. Select a comment that you need to resolve.
2. Click the resolve icon ( ) on the parent comment to resolve the comment.

To reopen a resolved comment
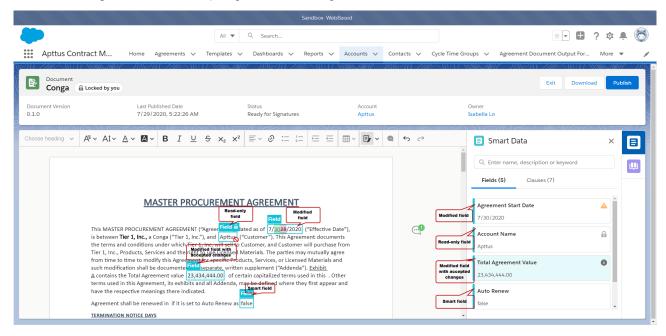
1. Hover over a resolved comment the reopen icon changes from to .

2. Click the re-open icon (💬) on the parent comment to unresolve the comment.
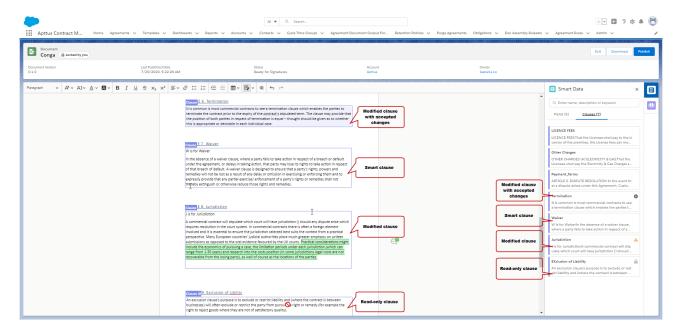
Working with Smart Data

The Smart Data pane lists the fields and clauses (smart and read-only) in the order they appear in a document. If a field or clause in the Smart Data pane or the document has a lock icon (🔒), it indicates that the field or clause is read-only. When you hover over a field or clause in a document and your cursor changes to 🚫 , it indicates that the field or clause is read-only. When you modify smart data, ensure that you do not enter an invalid value. You cannot publish the document if you enter an invalid value.

The following screenshot displays a read-only field, smart field, and modified smart field:

The following screenshot displays a read-only clause, smart clause, and modified smart clause:

You can perform the following tasks on the Smart Data pane:

- Click the Smart Data icon (📋) to view the list of fields and clauses available in the document.
- Enter a name, keyword, or description and click the Fields tab to view search results for fields or click the Clauses tab to view the search results for clauses in the document.
- In the Fields tab:
  - Click a field name to go to the field in the document.
  - Click a Table name to go to the table in the document.
    - Click a field within the table to go to the field in the document table.
- In the document:
  - Click within a smart field and the field is highlighted in **Smart Data** > **Fields** pane.
  - Click within a smart clause in the document and the clause is highlighted in **Smart Data** > **Clause** pane.
  - Click within a date smart field and click the calendar icon (📅) to view the date popup and change the date.
  - Click within a smart field with a picklist value and select the required value from the dropdown.
- In the Clauses tab, click a clause name to go to the clause in the document.
- When the protection level of a document is Insert comments and tracked changes only or Full Access:
  - You will see a modified icon (⚠️) beside the modified smart field or clause in the Smart Data pane when you modify a smart field or clause in the document.
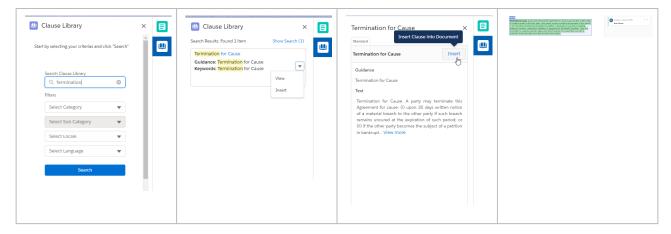
- You need to accept or reject the changes to sync the values to the agreement record.
- After you accept or reject the changes in the document, the modified icon is replaced with the info icon (ⓘ) and the values in the agreement record are updated after you publish the document.
- If you do not accept or reject changes and select the **With Redlines** option while publishing the document, the changes are not updated in the agreement record and when you open the published document, you will see the modified icon (⚠) beside the modified smart field or clause in the Smart Data pane.
  For more information on how to accept or reject changes, see Tracking Changes in Documents.

Working with Clause Library

Clause Library is a repository of standard clause language. Your org administrator pre-populates the Clause Library with your legal team's pre-approved terms and conditions that allow the users to build contracts. You can insert clauses from Clause Library directly into the agreement document and track and manage changes to clause content as negotiations proceed. You can also insert clauses with fields, without fields, and with segments. You can use Clause Library to:

- Search Clauses
- View Clauses
- Insert Clauses

The following screenshots display the various actions in Clause Library:

Restriction

You cannot insert a clause within a clause.

To search clauses in the Clause Library

1. Open a document in OCC.
2. Click the **Clause Library** icon (📖).
3. Click the **Clauses** tab.
4. Enter a search term or keyword in the search box.
5. (*Optional*) Select Filters to narrow down search results.
   You can filter your clause search based on clause **Category, Subcategory, Locale,** and **Language**.
6. Click the **Search** button.
   Based on the search and filter criteria, the search results (clauses) are displayed and the search term is highlighted as shown in the below screenshot. You can click the Show Search hyperlink to review the search and filter criteria.

To view a clause

1. From the search results, select a clause and click ▾.
2. From the dropdown, select **View Clause**.
   This displays clause text.

To insert a clause

1. Place the cursor at an appropriate place to insert a clause in the document.
2. Search for the clause and select a clause and click ▾.
   or When you view a clause, click ▾.
3. From the dropdown, select Insert.
   The clause is inserted as a smart clause at the cursor position. You can view the inserted smart clause and fields in the smart clause in the Smart Data panel.

Publishing Documents

Publishing a document creates a new document version and syncs the changes made in the document to the corresponding agreement record. You can publish the document with
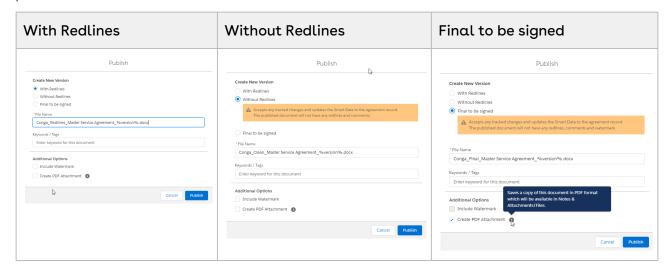
redlines, without redlines, or final to be signed a redlined version. You can navigate to the Document Version section to view the most recent version of the document.

In a typical scenario where an agreement document is sent to a customer for negotiation, the customer will make changes to the document as part of the negotiation. If the changes to the document involve data belonging to the Agreement record, reconciliation provides the mechanism to ensure the values in the document and the Agreement record are in sync. To reconcile an agreement, you must publish the document. Publishing the document is similar to the reconciliation feature in X-Author Contracts.

The following table provides details about the updating value in agreement record for different protection levels:

Protection level	Updating modified smart element values in agreement
Full Access	No action required. All the smart element changes are synced to the agreement record
Insert Comments and Track Changes	You must accept the modified smart element values in the document if you need to sync the changes to the agreement record

The following screenshots display the various publishing options available when you publish a document:

With Redlines	Without Redlines	Final to be signed

To publish a document

1. After you modify or redline a document, click the **Publish** button.
   This displays the Publish popup window.
2. Select one of the following options from the Create new version list:

Option	Description (Non-Version Aware in Lightning)	Description (Version Aware in Classic and Lightning)
With Redlines	This saves a draft version of the agreement document with all markups._Redlines is used as the action in your org's configured default document naming convention. All the accepted track changes in the document are synced to the agreement. All the unaccepted track changes are not synced to the agreement.	This saves a draft version of the agreement document with all markups and _Redlines is used as the action in your org's configured default document naming convention. Selecting this option creates a Minor version under the **Document Version Details** related list in your Agreement record. All the accepted track changes in the document are synced to the agreement. All the unaccepted track changes are not synced to the agreement.
Without Redlines	This saves a draft version of the document without markups and is typically done before sending an agreement to a third party for review. _Clean is used as the action in the configured default document naming convention. All the track changes in the document are automatically accepted and the changes in smart fields and clauses are synced to the agreement.	This saves a draft version of the document without markups and is typically done before sending an agreement to a third party for review. Track changes/redlines are automatically removed from the Word file and _Clean is used as the action in the configured default document naming convention. Selecting this option creates a version under the **Document Version Details** related list in your Agreement record per the Document Version Properties custom setting. All the track changes in the document are automatically accepted and the changes in smart fields and clauses are synced to the agreement.

Option	Description (Non-Version Aware in Lightning)	Description (Version Aware in Classic and Lightning)
Final to be signed	This saves a version of the document without markups and also enables a PDF version of the document to be created. If this option is selected, both a Word and a PDF file will be saved to the agreement's Notes and Attachments related list. _Final is used as the action in the configured default document naming convention. All the track changes in the document are automatically accepted and the changes in smart fields and clauses are synced to the agreement.	This saves a version of the document without markups and also enables a PDF version of the document to be created. If this option is selected, both Word and PDF files are created. The PDF file is saved to the agreement's Notes and Attachments related list and the Word document is saved to the Document Version Details' Notes and Attachments related list. By default, _Final is used as the action in the configured default document naming convention. Selecting this option creates a Major version under the Document Version Details related list in your Agreement record per the Document Version Properties custom setting. All the track changes in the document are automatically accepted and the changes in smart fields and clauses are synced to the agreement.

3. In the **File Name** field, enter the required name for the document or leave it as it is. The default name depends on the version of Contract Management and the default document naming convention defined for your org. You do not need to specify a file extension in the **File Name** field, the file is automatically saved in .docx format.
4. Enter any comma-separated Keywords/Tags you want to associate with the document upon publishing.
5. In the Additional options section, you can turn on the toggle button for the following options:
   a. **Include Watermark**: This option allows you to add watermark to your document. By default, the checkbox is disabled when you select the Final to be signed option. If there is a watermark in the document, it is automatically removed.
   b. **Create PDF Attachment**: This option allows you to generate PDF attachment with any save (With Redlines, Without Redlines, or Final to be signed) option.

This option is turned on by default when you select Final to be signed option. The PDF file is available in the agreement's Notes and Attachments related list.

6. Click **Publish**.

Go to the Agreement Detail page in Lightning or the Document Version Details page in Classic to view the published documents. According to the protection level, all the accepted:

- Modified smart field values are updated in the agreement record.
- Inserted or modified clauses are added in the Agreement Clauses section with actions as Inserted or Modified respectively.

Limitations

The following are the limitations that currently exist in Online Contract Collaboration:

- Documents generated using Pre-FX2 templates are not supported.
- Document formats other than DOCX are not supported.
- Documents containing Document Assembly Rules are not supported.
- Editing and publishing of documents are not restricted according to the *Restrict Checkin of Documents* comply system property.
- Nested clauses cannot be inserted.
- Inserting of duplicate clauses is not supported.
- The *Fill in form fields only* protection level is not supported.
- Deleting smart elements using Backspace or Delete keys is not supported.
- Non-English characters and languages are not supported.
- Documents imported offline and supporting documents are not supported.
- When there are comments at the end of the documents, the comment cards float beyond the document view.

You can refer to this document in addition to the release notes every time a new version is released for the feature updates.

Frequently Asked Questions

This topic provides information about the online contract collaboration (OCC) feature implementation.

What does OCC stand for?

OCC stands for Online Contract Collaboration. For more information, see Online Contract Collaboration.

Is OCC available with all Contract Management licenses?

OCC is available with Contract Management Essentials and Enterprise editions. OCC is not available with Contract Management QuickStart edition.

Is OCC available for every Contract Management user?

Only users in orgs that have the *Enable Online Contract Collaboration* comply system property enabled can access OCC. For more information, see Launching Documents.

Can external users access OCC?

If a user belongs to an org that has the Contract Management package with OCC configurations enabled, only those users can access OCC.

Can users cross collaborate between XAC and OCC?

Yes. You can download OCC document and check out using X-Author Contracts or X-Author for Contracts 2.0. You can also review the document that was checked in using X-Author Contracts or X-Author Contracts 2.0 in OCC. For more information, see Launching Documents.

Is OCC replacement for X-Author Contracts?

No. OCC is not a replacement for X-Author Contracts or X-Author for Contracts 2.0.

Are all features of X-Author Contracts available in OCC?

No. OCC is an addition to X-Author Contracts or X-Author for Contracts 2.0 for the non-legal users. For more information, see Launching Documents.

Does OCC support all the redline capabilities that are available in X-Author Contracts?

Yes. OCC supports all the redline capabilities. For more information, see Tracking Changes in Documents.

Do I need MS Word to work with OCC?

No. You do not require MS word to access and work with OCC. For more information, see Launching Documents.

I have enabled the Enable Online Contract Collaboration comply system property, but I do not see OCC options in the agreement record?

You must configure the Documents tab in Lightning and the Document Action column in Classic to view the OCC options. For more information, see Launching Documents.

I am able to view the document in OCC, but why cannot I edit it?

You might be viewing the document that is being edited by another user. For more information, see Launching Documents.

Why is the Open & Edit button disabled?

The Open & Edit button is disabled when the Enable Online Contract Collaboration property is disabled. For more information, see Launching Documents.

Why do I see only the Open button in Documents tab but not the Open & Edit button?

When the document is being viewed or edited by another user, the document is locked and you will see the Open button instead of the Open & Edit button. For more information, see Launching Documents.

I have disabled the Enable Online Contract Collaboration comply system property, but I can still see Documents tab in the Lightning?

You need to manually remove the Documents tab in Lightning.

Can I open all the documents in Contract Management in OCC?

No. You can only open and edit documents in DOCX format in OCC. For more information, see Launching Documents.

Can I open version aware and non-version aware agreement documents in Salesforce Classic mode?

No. You can only open and edit version aware agreement documents in Salesforce Classic. For more information, see Launching Documents.

I do not see any preview reconcile or reconcile page when I try to publish a document. Will the document changes be synced to the agreement record?

According to the protection level, after you publish the document, all the accepted changes are reconciled to the agreement record. For more information, see Publishing Documents.

How can I identify read-only fields and clauses in OCC view?

If a field or clause in the Smart Data pane or the document has a lock icon (🔒), it indicates that the field or clause was marked as read-only in the template by the template administrator. For more information, see Working with Smart Data.

How can I identify modified fields and clauses in OCC view?

If a field or clause in the Smart Data pane or the document has a modified icon (▢), it indicates that the field or clause is modified. For more information, see Working with Smart Data.

Can I view page breaks, column breaks, watermarks, header, and footer in OCC?

No. Currently, OCC does not support page breaks, watermarks, header, and footer. However, if you publish the document in OCC and open in X-Author Contracts, you can view the 2 column page breaks, watermarks, header, and footer.

Does OCC support real-time collaboration?

No. OCC, currently, does not support real-time collaboration.

If a third-party redlines a document and sends it back, how do I open in OCC?

OCC does not support documents imported offline. However, you can open any document in DOCX format in OCC but you cannot access the OCC features.

Does OCC support regenerate with redlines and update from salesforce features?

OCC, currently, does not support regenerate with redlines and update from salesforce features. You can download the document and utilize these features in X-Author Contracts.

Does OCC support the update current version feature?

OCC, currently, does not support the update current version feature.

Can I perform a parallel review using OCC?

OCC currently does not support parallel review. You can use the parallel review feature in Contract Management.

Can I accept all or reject all changes in a document?

OCC does not support Accept All and Reject All changes in a document.

Can I save and exit the OCC view without publishing?

You can exit the OCC view without publishing the document but you need to publish the document to save changes.

Can I delete smart clauses or fields in a document?

You cannot delete smart elements in a document.

Can I use keyboard shortcuts to cut, copy, or paste the content in a document?

Yes, you can use keyboard shortcuts to cut, copy, or paste the content in a document except for the content that contains smart elements.

Can I view the signature panel in OCC?

You can view the signature panel in OCC but you might observe formatting issues.

When I open a document redlined in X-Author Contracts in OCC, are all track changes displayed?

Yes, the track changes are displayed except the formatting changes.

How does reconciliation work in OCC?

When the protection mode of a document is *Full Access* and you publish the document, all the smart element changes are synced to the agreement record. When the protection mode of a document is *Insert Comments and Track Changes*, you need to accept all the changes

and publish the document, all the smart element changes are synced to the agreement record.

Can I view non-English characters and non-English language in OCC?

No, OCC does not support non-English characters and non-English language in OCC.

Does OCC support clauses with conditional paragraphs?

Yes. You can insert a clause that has a conditional paragraph in OCC.

Can I disable track changes when the document has Insert Comment and Track Changes protection mode?

No. You cannot disable the track changes option when the protection mode of the document is *Insert Comments and Track Changes*.

Can I enable track changes when the document has Full Access protection mode?

Yes. You can manually enable the track changes option when the protection mode of the document is *Full Access*.

Are third-party paper documents supported in OCC?

No. OCC does not support third-party paper documents.

Can I zoom a document in OCC?

Yes. You can increase the zoom level of the browser to 120%.

Can I view custom bullets in OCC?

No. OCC does not support custom bullets.

Can I track deleted comments?

No. OCC, currently, does not track deleted comments.

Can I save the document before publishing?

No. OCC, currently, saves the document on publishing.

Are complex agreement documents supported in OCC?

OCC supports agreement documents that have a maximum of:

- 2.37 MB file size
- 100 Smart fields
- 100 smart clauses
- 5 repeat tables
- 5 repeat sections
- 13 conditional segments
- 1 style segment

Contract Document Versioning

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).

When Document Versioning is enabled for your organization, not every document is attached to an agreement's Notes & Attachments Related List. Instead, each major version of a document is populated in the Document Versions Related list, with individual version information tracked using Document Version Details.

> (i) To take advantage of the full functionality of Contract Document Versioning, your organization should also be using X-Author for Contracts.

Restriction

- Contract document versioning is not supported for the documents uploaded with Intelligent Import.
- Clause versioning is not supported for wet signatures.

About Document Versions Concepts

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"). As different users perform various actions on the document, version values are numerically incremented. 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	A major version type is created every time a user: • 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. 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.	Contract Requestor / Owner	1.0.0 2.0.0 3.0.0
Minor (Negotiator)	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: • 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

Version Type	Document Action	User Role	Example Value
Revision (Reviewer)	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 *X-Author Contracts for Outlook* plug-in, or checked in on their behalf by the Negotiator (for both internal and external reviewers) using *X-Author Contracts for Word*. See the <u>X-Author Contracts User Guide</u> for more information on Send for Review using X-Author.	Reviewer	1.0.1

2.0.2 |

New Document versus Incremented Version

To understand versioning, it is important to recognize the difference between a MAJOR *document* (a new Document Versions record) and a new MAJOR *document version* (a new Document Version details record). For generated documents, template use defines the document being versioned–that is, when a document is generated or regenerated using a different template, a new MAJOR document is created. Likewise, when an offline document is created or imported, a UUID (Universally Unique Identifier) is assigned to that document. Each newly created or imported offline document is a new MAJOR document.

Alternatively, when an agreement document is Regenerated using the same template, a new MAJOR document version is created, meaning the MAJOR value of the document is incremented (e.g., 1.0.0 to 2.0.0) instead of a new document instance/record being created. The same is true when a generated or offline agreement is checked in as final, or when a document is checked in as clean (without redlines). The following example of the Document Versions related list shows 3 documents: generated from a template, imported from offline, regenerated from a different template. Each is a new MAJOR document (with its own versions).

Viewing Document Versions on an Agreement Record

You can view a snapshot of each agreement document on the Document Versions Related List on the Agreement record. Each Document Versions record allows you to drill down into Document Version Details, which contains information and the drafts of each individual version of the agreement document up to its current stage in the lifecycle. The Document Versions Related list displays information for the primary agreement document and an imported offline agreement.

- Click on the link under **Name** to View *all document version details* for the chosen agreement document.
- Click on the link under **Template** to View Template record details.
- Click on the link under **Latest Version Detail** to View document version details for the *latest version* of the agreement document.
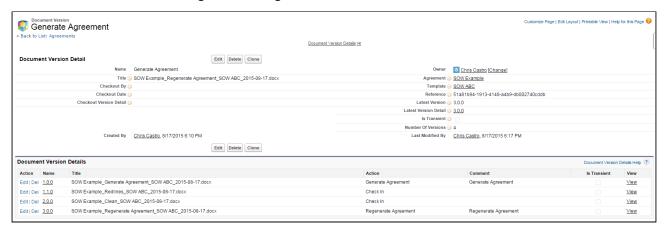
> ⓘ **Note**
>
> The name of each entry under Document Versions is based on the naming convention for Document Versions decided by your administrator. See Enabling Contract Document Versioning in the *Contract Management Administration Guide* for more details.

Viewing Document Version Details

You can use Document Version Details to view all versions of a specific agreement document. Versions in the table are listed in ascending order from oldest to newest version and break down each version value as Major, Minor or Revision. You can also see the action taken to create a specific version of the Agreement document. In the example below, the

user has drilled down into the Document Version Details for the primary agreement document (click on the image to enlarge the view).

In this example, the following actions created the listed document versions:

1. The agreement requestor **Generated** the original version (version 1.0.0).
2. The negotiator **Checked Out** the generated version (remember, this does not create a version) and **Checked In** a new version after some changes (version 1.1.0).
3. The negotiator **Checked Out** the checked-in version, made additional changes, and **Checked In** a new version (version 1.2.0).
4. The contract owner **Regenerated** the agreement document (version 2.0.0).

To Download a Specific Version of the Agreement Document
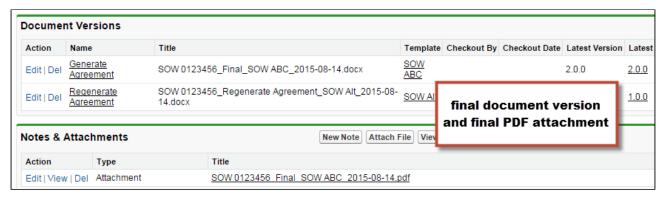
Click the **View** link in the appropriate row. The agreement document is downloaded to your local drive.

Checking in the Final Version

When the contract owner or negotiator checks in the final version of an agreement document using X-Author and selects "Create PDF attachment," two actions occur on the Agreement record:

- A MAJOR version of the agreement is added to Document Version details for that document.
- The FINAL PDF agreement document version is added to the Notes & Attachments related list.

The final version of the agreement document and any additional final documents can be Sent for Review or Sent for Signatures.
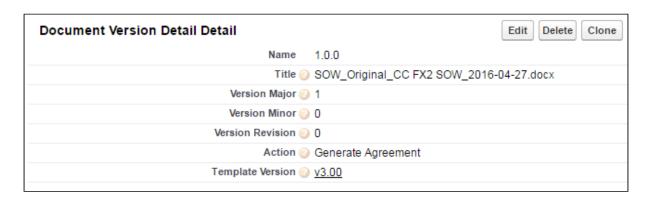
Document Versions and Template Versioning

If your org has Template Versioning enabled, you can also view the version of the Template used to generate the document.

> ⓘ The **Template Version** field must be added to the Document Version Detail layout in order to view template version information. Follow the standard Salesforce process for adding fields to the layout.

To view the template version used to generate the document:

1. Go to the Agreement Record.
2. Under Document Versions, click on the Document Versions **Name**.
3. Under Document Version Details, click on the version link (e.g., "1.0.0"). The Template version is displayed in the **Template Version** field.

Searching and Viewing Version-Aware Documents

The contract negotiation process for agreements often involves multiple iterations of agreement documents for a particular record: primary agreement documents, third-party paper, addendums and schedules and any number of other versioned documents. As a result, it can sometimes be difficult task to find the right document to work with. **Document Finder** extends Contract Document Versioning by providing a Visualforce page on the Agreement record to permit Contract Management users to use filters and tags to quickly search for and view version-aware agreement documents.

Use Document Finder to search for version-aware agreement documents by:

- Document name
- Keywords/tags defined at document check-in
- All Versions or the Most Recent Version
- Document State: All, Final, Draft, Clean or Redlines (Negotiator or Reviewer version)
- Document Owner: All or specific user name

Prerequisites

Before you can use the full features of Document Finder, the following prerequisites must be satisfied:

- Contract Document Versioning must be enabled.
- Document Finder must be added to the Agreement record layout and the Document Finder Visualforce Page must be added to user profiles.
- One or more version-aware agreement documents must be attached to the record.
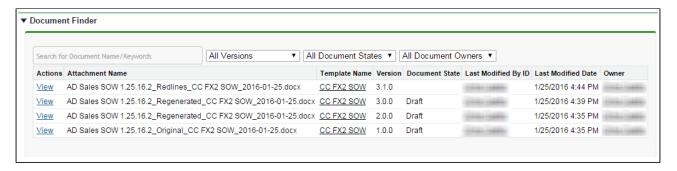
> ⓘ **Note**
>
> Refer to the table in the following section for guidance on which filters are available only with version-aware documents.

Using Document Finder

To begin using Document Finder, open an agreement record with one or more version-aware documents and scroll to the section containing Document Finder.
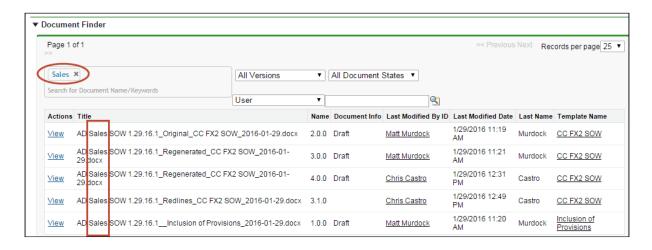
By default, all version-aware documents you have access to are listed in Document Finder.
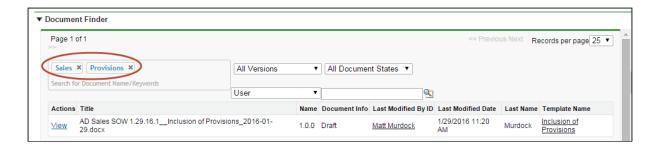
Searching for Documents by Document Name or Keywords

To search for documents by document name or keywords/tags:

1. Enter a name or keyword into the Document Finder search box. (Note: If there a predefined tags set by the Default Document Tags property, or from previous check-ins of other agreement documents, they will be displayed in a drop-down).

2. Press **Enter** or type a comma (,) at the end of each name or tag you enter. You can enter any number of values. The list of documents updates as you enter each tag.

3. After you enter a name or a tag, click on the 'X' in the tag (tag ✕) to remove it from your search. This updates the document list to reflect only the current keywords/tags.
4. Click **View** next to any document to download it.

> ⓘ Note: When you enter multiple keywords/tags they are interpreted by Document Finder as being joined by the AND operator.

Refine Your Search

If necessary, you can refine your search in Document Finder by adding additional filters to your search. Consult the following table for a list of these filters and how to define them. Some filters are only available for Version-Aware records.

Document Filter	Version-Aware Required	Description
Version	Yes	Choose from **All Versions** to list all versions of all agreement documents which match the current search configuration, or **Most Recent Version** to constrain the current list to only the most recent versions.
Document State	Yes	Choose the Document State to list only document versions matching the selected Document State for the current configuration: **All Document States, Final, Clean, Draft,** or **Redlines**.
Document Owner (User)	No	Choose a **User** type from the drop-down menu and use the lookup to search for and choose a user to constrain the list of documents to only documents owned by the chosen user. You can also directly type the name of the user and click outside the provided field.

Contract Wizard in Classic

Use the Apttus Contract Management Contract Wizard to run custom, user-friendly Wizards based on any standard or custom Salesforce object (Agreements, Accounts, Proposals, Leads, etc.). These Wizards are intended to be used by 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.

Use the Wizards tab to run Wizards from the existing Wizard Designs. You can easily search and select from Wizard designs to create well-formed records. Wizards also contain a feature that allows users to review their responses prior to submission, returning to previous 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.

For information on creating Wizards using the Wizard Designer, see Contract Wizard in the *Contract Management Administrator Guide*.

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
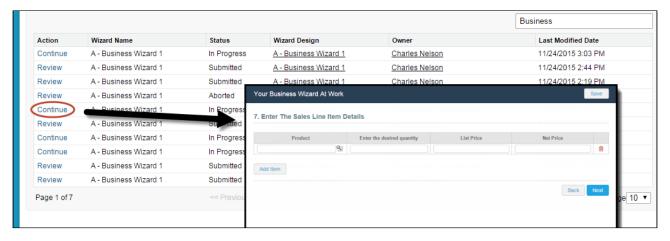
Perform a type-ahead Search to locate an In Progress, Submitted or Aborted Wizard in the table.

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.
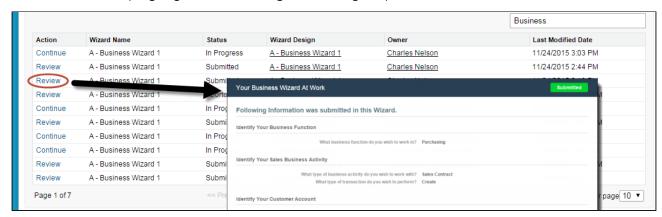
> ⓘ **Note**
>
> If "No Action" is available for a Wizard in the list, it means that the Wizard design associated with the runtime Wizard has been retired by your administrator. You can neither initiate nor continue Wizards that are associated with retired designs.

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).
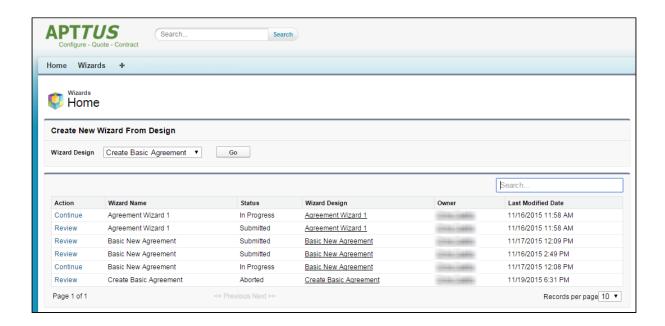
Running Wizards
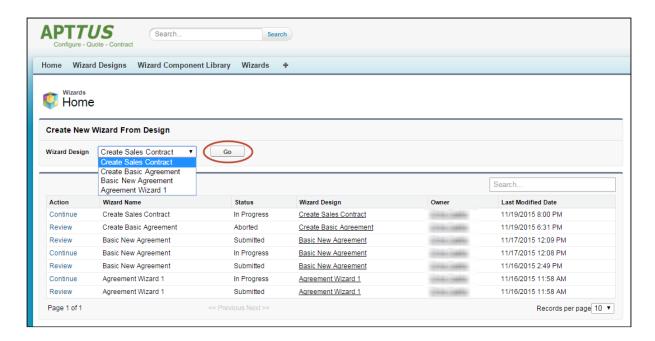
You can use the Wizards tab to run Wizards from the existing Wizard Designs.
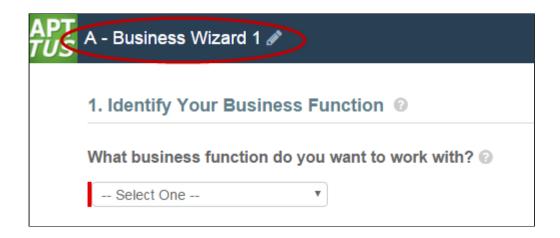
To run a Wizard

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).

2. 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.

ⓘ Ensure that you have not blocked pop-ups in your browser because new Wizards are always launched in a separate tab.
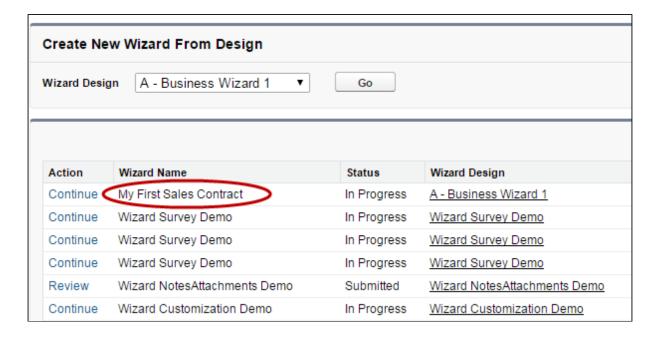
3. **(Optional)** Click the pencil icon in the banner to give your Wizard a unique name, so you can differentiate it from other Wizards you run using the same Wizard design.

The new name for your Wizard is shown in the list of In Progress and Submitted Wizards on the Wizards tab.

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.
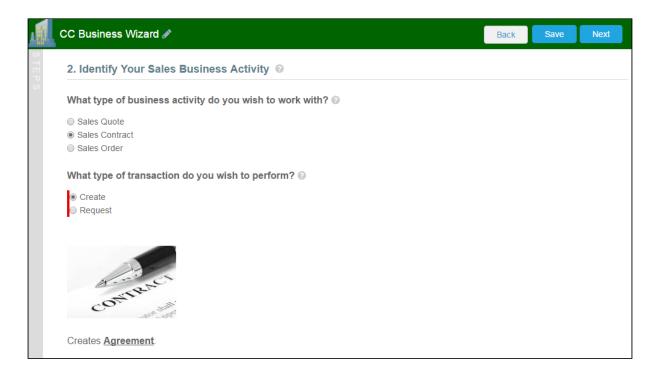
> ⓘ **Note**
>
> You must fill in all the required fields on the current wizard page before clicking Save; otherwise, the Wizard will throw a validation error.
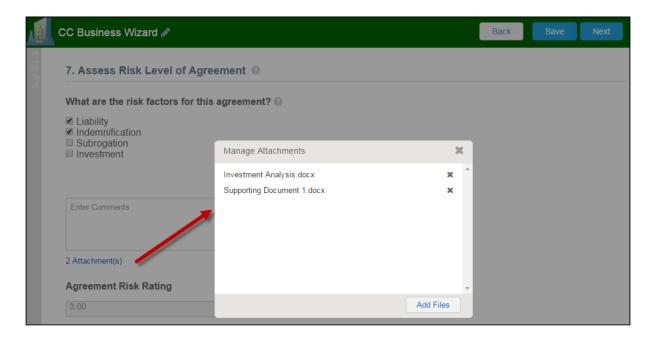
When you choose options (or a combination of options) that result in the creation of an object record, the Object name or Record Type will be displayed immediately upon choosing the option(s). For example, in the following step, when you choose "Sales Contract" as the business activity and "Create" as the transaction type, the Wizard evaluates a condition that determines that an Agreement record will be created when the Wizard is submitted.
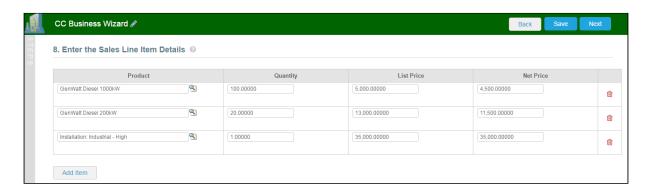
5. Some Wizard steps may include the option to add comments and/or attachments in addition to providing traditional responses. You can add comments in the text area provided (500 character limit), click **Attach Files** to attach files to the Wizard step. When you use the Wizard to create a record, the attached files are added to the Notes & Attachments Related List of the new record along with the recorded comments. To add an attachment:

a. Click the **Attachment(s)** link below the Comments box. The Manage Attachments window is displayed.

b. 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.

c. Repeat the previous step for each attachment you want to add. Close the window when you are finished adding attachments.
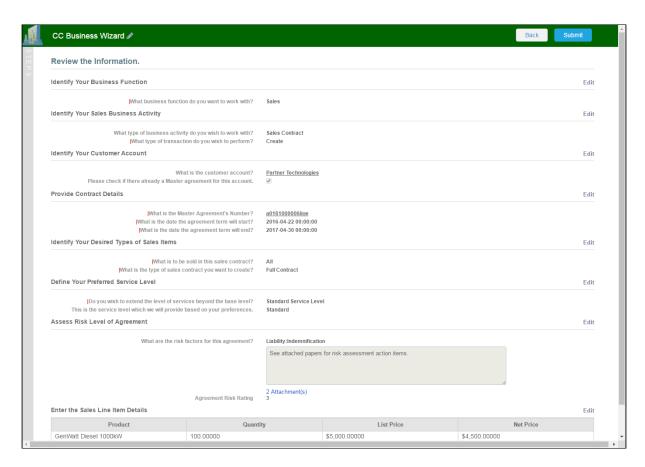

6. Click **Add Item** when there is a repeatable field in the Wizard. These fields are used when you need to enter multiple values as certain responses—for example when you are adding multiple business addresses, or product line items and prices to a Sales Contract, as shown in the example below.

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.
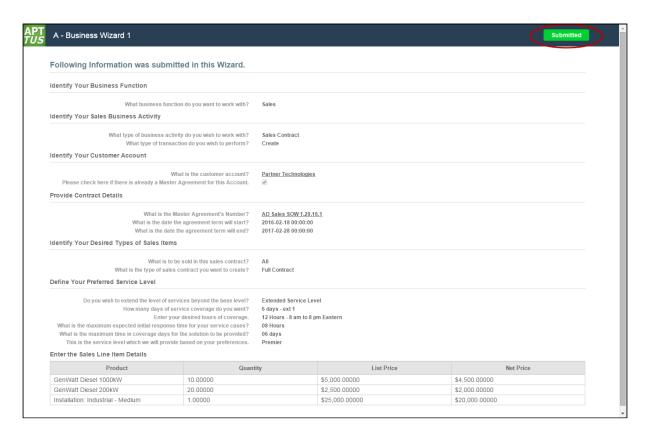

9. Click **Edit** to change your answers for any steps in the Wizard. A dialog warns that you may have to repeat steps of the Wizard that you previously completed depending on edits you make.
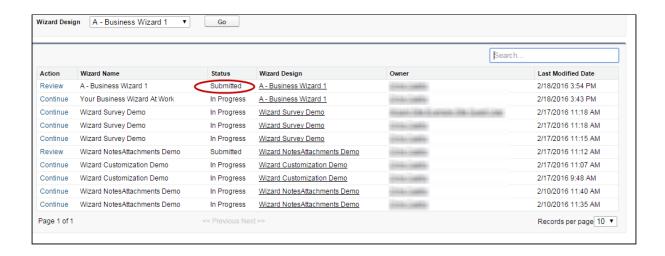

10. Click **OK** to edit the step or **Cancel** to return to the Review page.

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 been submitted for purposes other than creating a record).

12. Return to the **Wizards** tab. The Wizard you created and executed now shows its **Status** as Submitted in the list of Wizards.
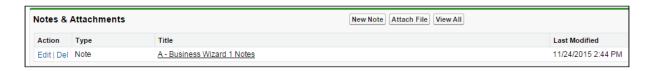
Tracking Wizard Activity from a Record

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.
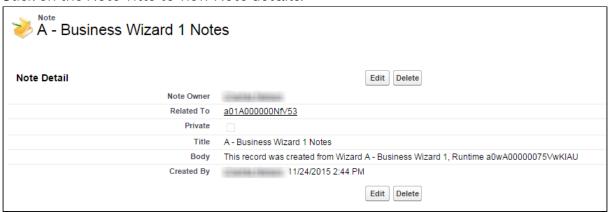
For example, an Agreement record has been created from a Wizard.

To track wizard activity from a record

1. From the Agreement record page, scroll to **Notes & Attachments**.

2. Click on the Note Title to view Note details.

In the Body description, note the Wizard name that created the record.

> ⓘ Add the Notes & Attachments Related List to the record layout to view the Wizard notes.
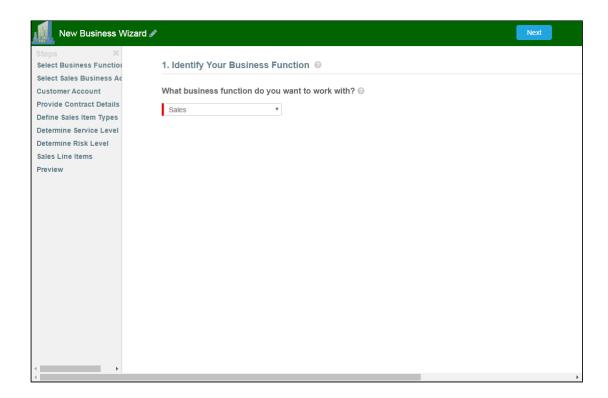
Using the Preview Sidebar

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:
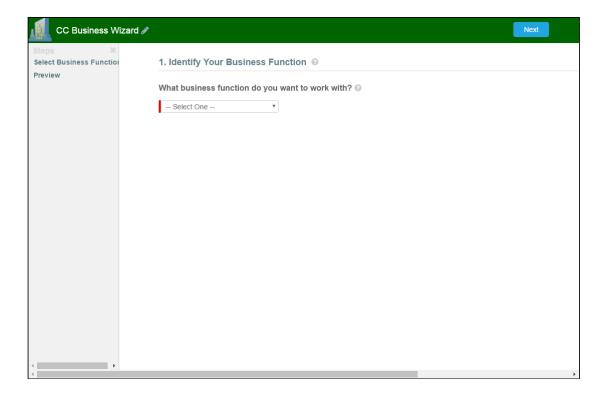
- Preview a future step in the Wizard.
- Track overall completion progress.
- Return to a previous step in the Wizard to complete responses or correct a mistake.
- View a full preview of all completed responses.

Using 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 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.

- 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.

3. Click 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.

4. Click **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.

Use Case for Running Contract Wizard

This topic describes the use case for contract wizard.

> ⓘ This use case gives one example on how to run a contract wizard created by Administrator. You might use this functionality differently, depending on your business case.

This use case describes how a Sales Representative creates records based on any standard or custom Salesforce object (Agreements, Accounts, Proposals, Leads, etc.).

In this case, a Sales Representative can quickly create their own records by entering responses to criteria-based inputs that follow a logical series of steps.

Pre-requisite: Make sure you have the following:

- New inputs are created
- Steps are created

To Run a Contract Wizard

To run a Contract Wizard, perform the following steps:

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).

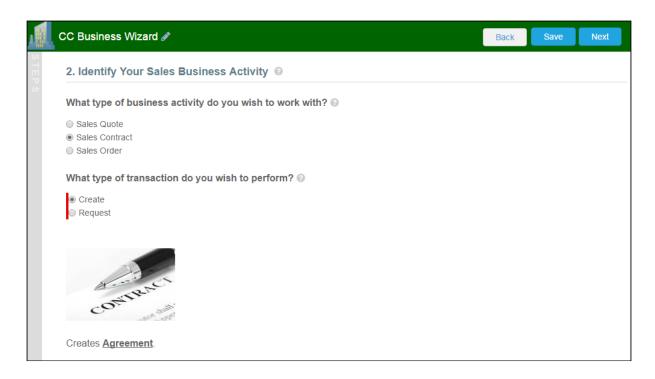2. Choose a Wizard to run from the drop-down list of designs and click **Go**.

> ⓘ **Note**
>
> Wizards associated with deactivated or retired Wizard designs will not be available in this list. 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 displayed banner to give your Wizard a unique name, so you can differentiate it from other Wizards you run using the same Wizard design.
   The new name for your Wizard is shown in the list of In Progress and Submitted Wizards on the Wizards tab.
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.

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. 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.

5. 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:

    a. Click the **Attachment(s)** link below the Comments box. The Manage Attachments window is displayed.

    b. 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.

    c. Repeat the previous step for each attachment you want to add. Close the window when you are finished adding attachments.

6. 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.

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.

9. Click **Edit** to change your answers for any steps in the Wizard. A dialog box warns 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 is created (e.g., a Sales Agreement record).

      • You are redirected to the record details page of the record just created by the Wizard.

      • You are redirected to another page in Salesforce.

      • You remain on the Review page and the Wizard shows as **Submitted** (in this case data from the Wizard has been submitted for purposes other than creating a record).

12. Return to the **Wizards** tab. The Wizard you created and executed now shows its **Status** as **Submitted** in the list of Wizards.

    Result:

    You have created and executed the wizard.

Reports and Dashboards

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 information related to creating and customizing reports. Apttus provides 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 organize key statistics in an easily understood, bottom-line format, allowing you to gain the insight you need to fulfill your business needs. For more information, see Working with Dashboards.

About Agreement Explorer Reports

Agreement Explorer is a powerful search and reporting feature that allows you to use configurable and reusable search reports to search for records in the Agreement object. 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 fieldsets 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.
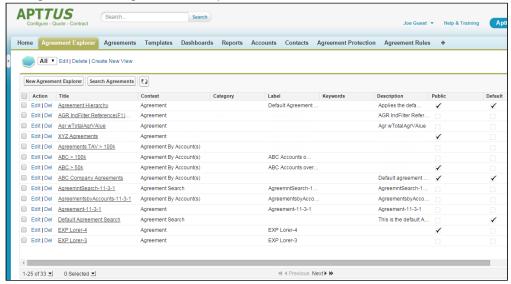
Creating an Agreement Explorer Report

> ⓘ   Hint: click on images on this page to enlarge the view.
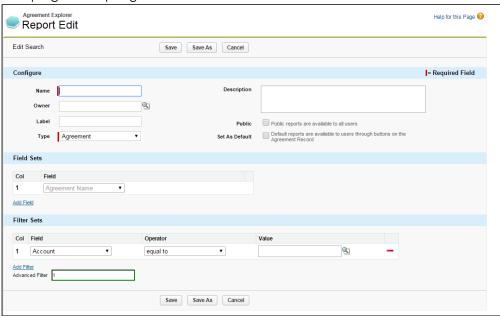
When you create a new Agreement Explorer report, you are creating a public or private report to generate a list of agreement records based on one of three contexts: Agreement Search, Agreement, or Agreement Hierarchy by Account(s). You use the same form to create new reports and edit existing reports. The following section provides instructions for creating your own Agreement Explorer reports. To create an ad hoc report from a report you have executed, see Managing Report Settings.

To create an agreement explorer report

1. Navigate to the **Agreement Explorer** tab.

2. Click the **New Agreement Explorer** button to create a new report or click the **Edit** link next to any report in the Saved Reports table to edit an existing report. The *Report Edit* page is displayed.

To define Report Attributes

Use the first section of the Edit Report form to identify the attributes of your report, including report type.

Consult the following table to define or edit the attributes for your Agreement Explorer report. Attribute fields in **bold** are required.
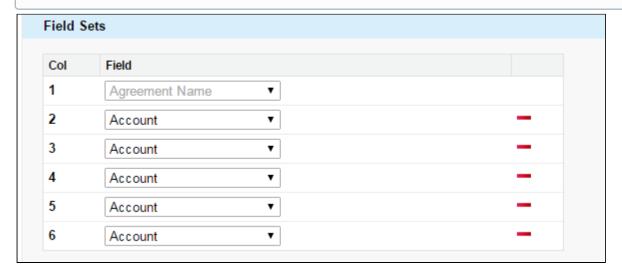
Attribute	Description
Report Name	Enter a short name for your report that will help you identify it. This name is displayed in the Saved Reports table on the main Agreement Explorer tab.
Owner	Use the lookup field to search for a user to designate as the owner of this report. By default, the current user is the report owner. Only the report owner or an administrator can modify an existing report.
Label	Enter a label which can be used to provide additional clarity for the report's intended use.
Type	Use the drop-down menu to specify the context of your report: Agreement, Agreement Search or Agreement Hierarchy by Account(s). See Agreement Explorer Reports for an explanation of report contexts.
Description	Enter a description for your report which provides guidance to users on using the report. The description is displayed in the Saved Reports table on the Agreement Explorer tab.
Make Public	Click this checkbox to make your report publicly available to all users. Any users with access to Agreement Explorer will be able to run this report from the Agreement Explorer tab.
Set as Default	Click this checkbox to make your report the Default report for the chosen report context. See Running Agreement Explorer Reports

ⓘ At this point, you can click **Save** to save your new Agreement Explorer report without any Field or Filter settings. When your report is run, it will return all agreement records you have permission to view. Continue to the next section if you want to configure Fieldsets for your report.
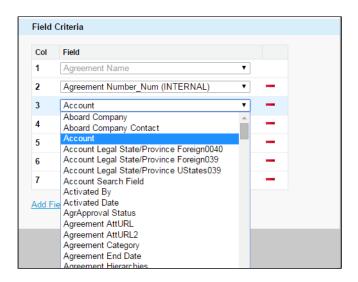
To define Report Field Sets

Use the **Fields** section in the Edit Report form to define the fields (columns) displayed in the report and expand or limit the actions that can be taken from report results. When you edit, add or remove fields in this way, you are creating a new *FieldSet* unique to the report you are creating. The only field that is always required (and cannot be removed) is **Agreement Name** because reports always display a list or hierarchy of agreement records.

> ⓘ Fieldsets in Agreement Explorer reports are always defined explicitly for each report and change based on the report settings.

Individual fields are listed in sequence by column number. "Agreement Name" is always the first field in the fieldset and cannot be removed or reordered.

1. Use the drop-down menu to choose or change fields to add to the FieldSet. You can add any field that is a part of the Agreement or Account object, including any lookup fields from these objects.
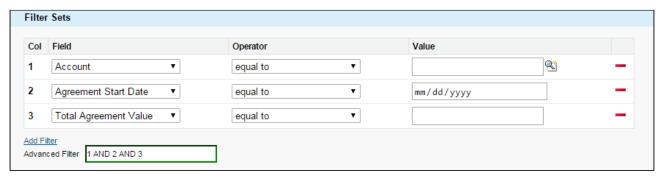
a. When you add certain fields to your Field Set, they enable you to take actions from the Agreement Explorer report listing, depending on the type of the report. The following table describes which actions you can take with these fields and defines which contexts use these fields:

Field	Description of Action	Report Type
Agreement Name	Click on Agreement Name to open the corresponding agreement record in a new tab.	Agreement, Agreement Search, Agreement Hierarchy by Account(s)
Account	Click on Account name to open the corresponding account record in a new tab.	Agreement, Agreement Search, Agreement Hierarchy by Account(s)
Related TO Agreement	Click **View TO Relations** to change the report view to a list of agreement records related to the agreement of context.	Agreement, Agreement Search, Agreement Hierarchy by Account(s)
Related FROM Agreement	Click **View FROM Relations** to change the report view to a list of agreement records related from the agreement of context.	Agreement, Agreement Search, Agreement Hierarchy by Account(s)
Agreement Hierarchy	Click on **Agreement Hierarchies** to navigate to the default Agreement Hierarchy report for the agreement of context.	Agreement Search

2. Click the **Add Field** button at the end of the Field Set to add another field. Click the ➖ button to remove a field from the FieldSet. Field Sets for Agreement Explorer reports can have a maximum of 24 fields.

> ⓘ Although Agreement Explorer report Field Sets can have up to 24 fields, only the first 12 fields can be displayed in the Agreement Explorer listing when the report is run. When you export a report to an Excel spreadsheet, all fields and any data they contain are displayed. Keep this in mind when planning the sequence of fields in your FieldSet.

3. Save your report or continue to the next section to define Filter settings.

To define Report Filter Settings

Agreement Explorer report results can be constrained through the use of Filter Sets defined for any given report. When your report is run, the results are filtered according to the expressions you define here.

1. Define or change Filter Sets to filter the report based on the criteria you specify.

Field	Description
Field	Choose a field from an alphabetical list of fields available for the Object (including lookup fields). For example, if you want to filter the agreement records where Agreement Name contains "MSA", select Agreement Name from this drop-down list.

Field	Description
Operator	Choose an operator based on the data type for the field you selected. In the example above, you would choose "contains."

Datatype	Operator
Account lookup	equal to; not equal to
Date, Number, Currency	equal to; not equal to; greater than; less than; greater than or equal to; less than or equal to
Text	starts with; equal to; not equal to; contains; does not contain

Field	Description
Value	Enter the value to be met for the condition expression. In the example above, you would enter "MSA."

2. Click **Add Filter** to create additional expressions to add to the Filter set. Click ➖ to remove an expression.

3. Choose an option from **Filter for** to define the logic used in the Filter set.

Filter for	Filter logic used
All	AND
Any	OR
Advanced	Advanced expression which can use either logic

By default, all Filter Sets use AND logic. Choose advanced if you want to apply more than one type of logic to your filter. For example, if you have 3 Filter Sets and but you want to make only 1 of the first 2 required, you would manually change the expression to "(1 or 2) AND 3."
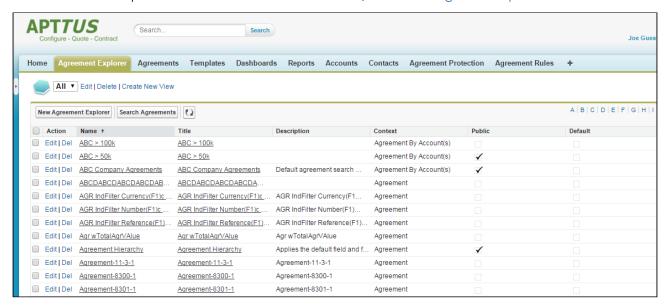
4. When you are finished configuring the Filter Set, click **Save** to save your report. The application refreshes to display the Agreement Explorer tab.

Running Agreement Explorer Reports

Depending on the context of the search, you can use the Agreement Explorer tab to run reports to find agreements and their respective hierarchies. Each context has a default search defined by an Administrator which can be run from the Agreement Explorer tab (or in the case of Agreement hierarchy, from an individual agreement or account record page).

Individual searches differ based on **Field Sets** and **Filter Sets** configured when the search was created or modified in an ad hoc fashion at runtime.

Use the following instructions to run the right report to meet your needs. For more information on report results and how to use them, see Working with Report Results.
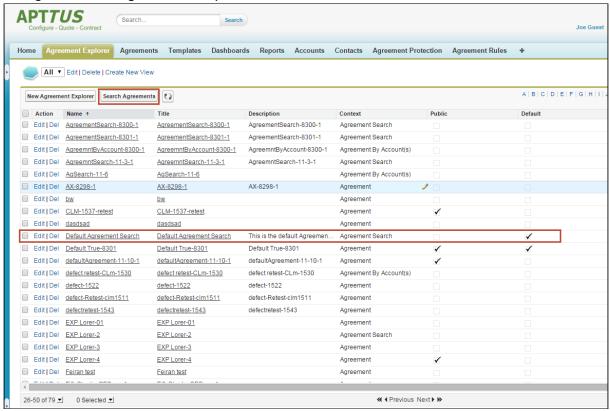

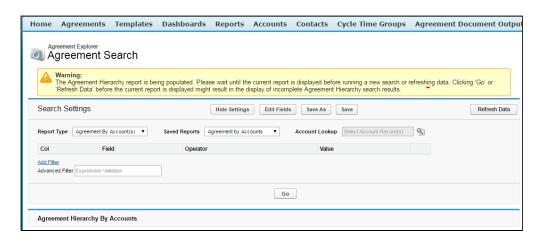
Running Agreement Search Reports

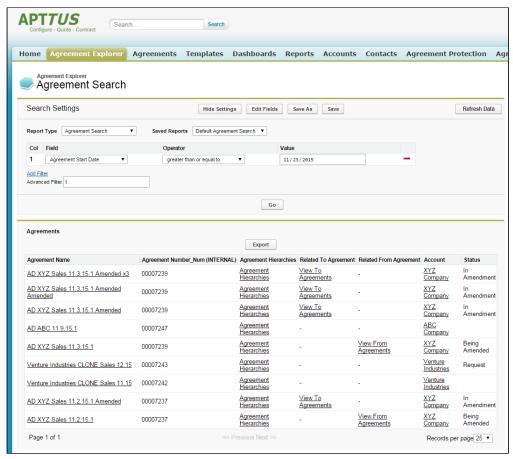This feature lets you run the default agreement search report.

To run the default agreement search report

1. Navigate to the **Agreement Explorer** tab.

2. Click the **Search Agreements** button or the Title link in the Saved Reports table marked as Default. The report listing all Agreements records that match the default Agreement Search report settings (filters and fieldsets) is displayed.

3. You can take several actions from the resulting report list. See Using Agreement Search Reports for a description of these actions.

To Run a Custom Saved Agreement Search Report

From the Agreement Explorer tab, you can run Agreement Search reports that you own (private) or that have been saved as Public (by you or others).
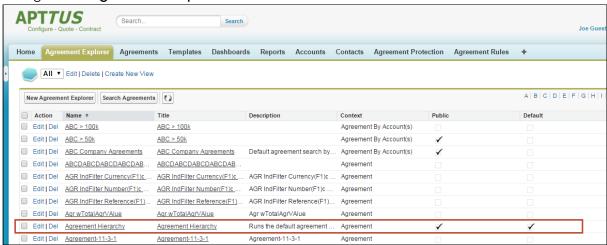
1. Navigate to the **Agreement Explorer** tab.
2. Click on a link in the Saved Reports table with the Agreement Search as context. The report listing all Agreement records that match the settings for that specific report is displayed.
3. You can take several actions from the resulting report list. See Using Agreement Search Reports for a description of these actions.
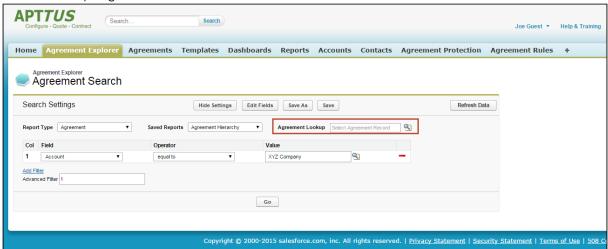
Running Agreement Hierarchy Reports

You can run the default agreement hierarchy report for any record.
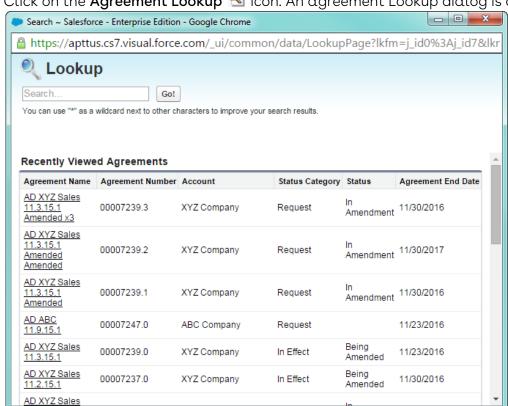
To run an agreement hierarchy report

1. Navigate to **Agreement Explorer** tab.

2. Click the link in the Saved Reports table marked as **Default**. The Agreement Search screen is displayed.
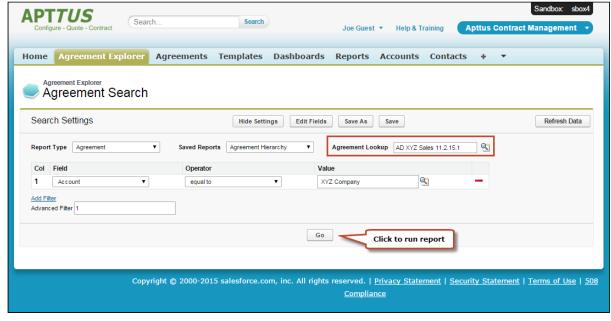

No results are displayed initially because no agreement record has been chosen as context. All Filter Sets are displayed in the Search Settings and you can preview Field Sets by clicking **Edit Fields**.
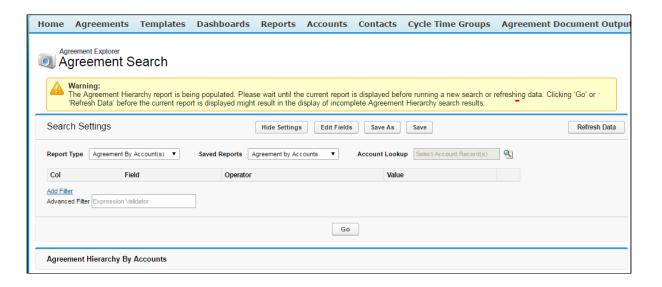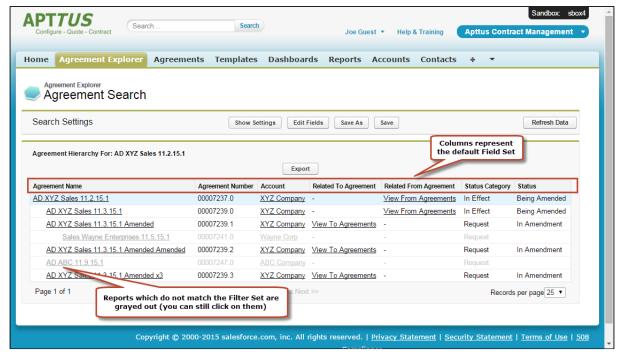
3. Click on the **Agreement Lookup** 🔍 icon. An agreement Lookup dialog is displayed.

4. Search for your agreement record or click on a link to select a record from the list.

5. Click **Go** to run the report. The report listing the Agreement hierarchy for your agreement record is displayed, filtered to match the default Agreement report settings and display the data according to the defined field sets (columns). Records that do not match the filter settings for the report are grayed out (you can still click the links).
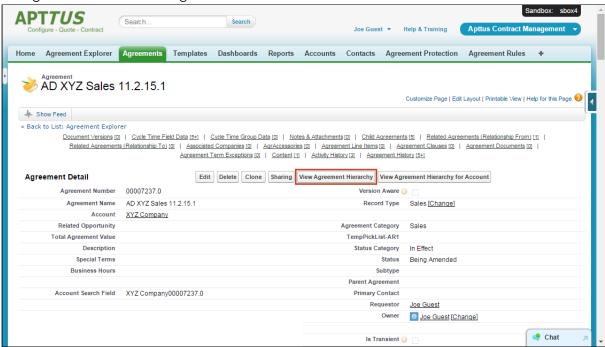
6. You can take several actions from the resulting report list. See Using Agreement Hierarchy Reports for a description of these actions.
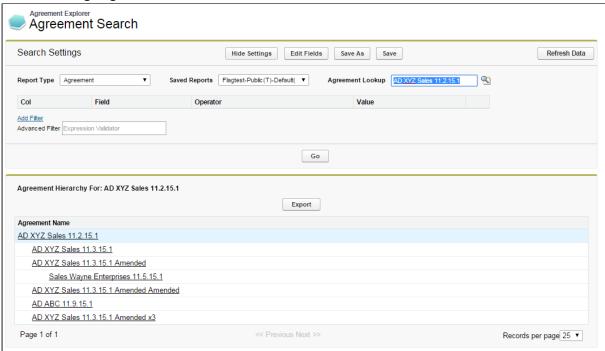
To Run the Default Agreement Hierarchy Report for a Specific Record

1. Navigate to the desired agreement record.

2. Click **View Agreement Hierarchy**. The report listing the Agreement hierarchy for your agreement record is displayed, filtered to match the default Agreement report settings and display the data according to the fieldset. The agreement record of

context is highlighted in the list.

3. You can take several actions from the resulting report list. See Using Agreement Hierarchy Reports for a description of these actions.
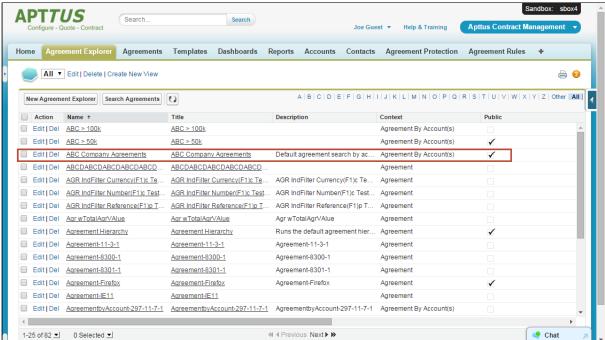
To Run a Custom Agreement Hierarchy Report

From the Agreement Explorer tab, you can run Agreement Hierarchy reports that you own (private) or that have been saved as Public (by you or others).

1. Navigate to the **Agreement Explorer** tab.
2. Click on a link in the Saved Reports table with **Agreement** as context.
3. Click on the **Agreement Lookup** icon. An Agreement Lookup dialog is displayed, prompting you to search for a specific record or select one from a list of recent agreements.
4. Search for your agreement record or click on a link to select a record from the list.
5. Click **Go**. The report listing the Agreement hierarchy for your agreement record is displayed, filtered to match the report settings and fieldsets specified when the report was created or modified. Your agreement is highlighted in the list.
6. You can take several actions from the resulting report list. See Using Agreement Hierarchy Reports for a description of these actions.
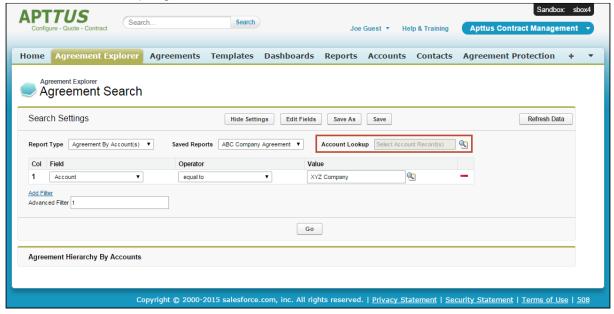
Running Agreement Hierarchy by Account(s) Reports

To Run the Default Agreement by Account(s) Report for One or More Accounts

1. Navigate to **Agreement Explorer** tab.
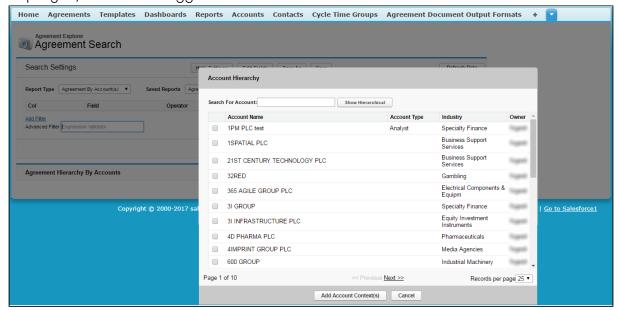
2. Click the **Title** link in the Saved Reports table marked as **Default**. The Agreement Search screen is displayed.
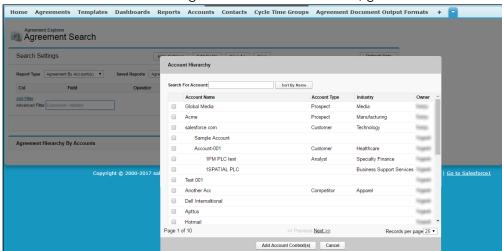
No results are displayed initially because no account records have been chosen as context. All Filter Sets are displayed in the Search Settings and you can preview Field Sets by clicking **Edit Fields**.

3. Click the **Account Lookup** icon. A dialog opens displaying a list of all Accounts you have permission to view organized into a hierarchy of parent and child accounts by default.

4. To view the accounts in alphabetical order click **Sort by Name**. This opens the account list in the alphabetical order. As soon as the alphabetically sorted list is displayed, the button toggles to **Show Hierarchical**.
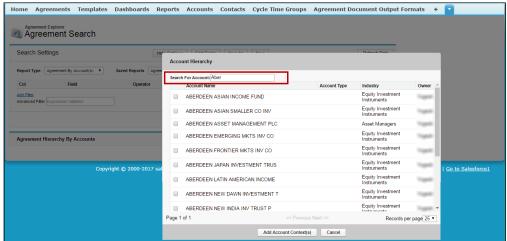
To view the accounts list again in hierarchical form, you can click **Show Hierarchical**.
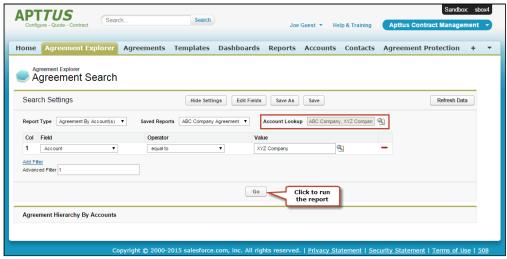
The Sort by Name and Show Hierarchical are toggle buttons.

5. You can also search a particular account by entering the account name as search string in the **Search For Account** field. The account results displayed are sorted
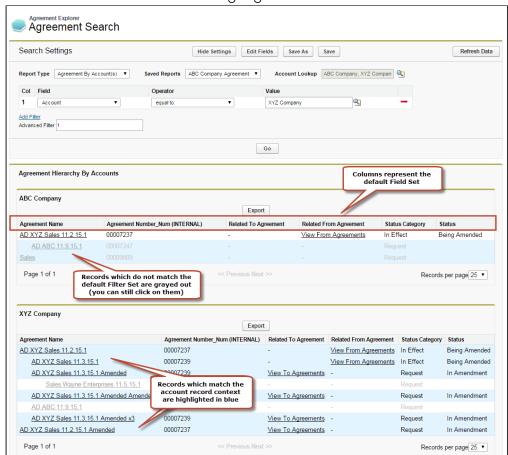
alphabetically by default.

6. Select the check box next to one or more Accounts in the list and click **Add Account Context(s)**.

7. Click **Go** to run the report. The resulting list displays full agreement hierarchies organized by the account they are associated with, using the default Agreements by Account report settings and field sets. Records that do not match the filter settings for the report are grayed out (you can still click the links). Records which match the
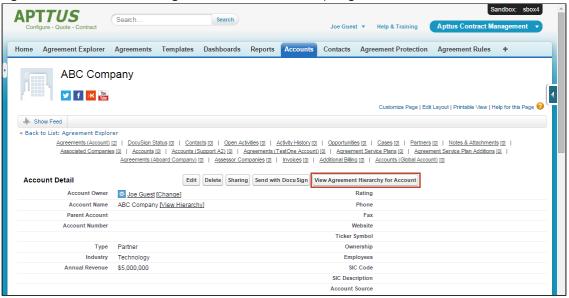
account record of context are highlighted in blue.

8. You can take several actions from the resulting report list. See Using Agreement by Account(s) Reports for a description of these actions.
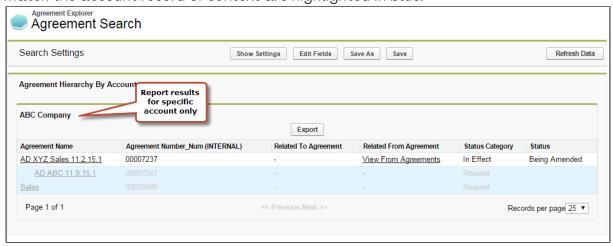
To Run the Default Agreement by Account(s) Report for a Specific Account

1. Do one of the following:
   a. Navigate to the **Accounts** tab. Search for or click the link to view a specific Account record. The Account record is displayed.
      (screenshot here)

b. Navigate to the **Agreements** tab. Search for or click the link to view a specific Agreement record. The Agreement record is displayed.

2. Click the V**iew Agreement Hierarchy for Account** button. The resulting list displays full agreement hierarchies associated with the account of context (either the Account record from 1a. or the Agreement Account from 1b). The report uses the default Agreements by Account report settings and fieldsets. Records which match the account record of context are highlighted in blue.

3. You can take several actions from the resulting report list. See Using Agreement by Account(s) Reports for a description of these actions.

To Run a Custom Agreement Hierarchy by Account(s) Report

From the Agreement Explorer tab, you can run Agreements by Account reports that you own or that have been saved as Public.

1. Navigate to the **Agreement Explorer** tab.

2. Click on a link in the Saved Reports table with **Agreements by Account** as context.
3. Click on the **Account Lookup** icon. A dialog displays a list of all Accounts you have permission to view organized into a hierarchy of parent and child accounts.
4. Select the check box next to one or more Accounts in the list and click **Add Account Context(s)**.
5. Click **Go**. The report listing the Agreement hierarchies organized by the Accounts chosen is displayed, filtered to match the report settings and fieldsets specified when the report was created or modified.
6. You can take several actions from the resulting report list. See Using Agreement by Account(s) Reports for a description of these actions.

Working with Report Results
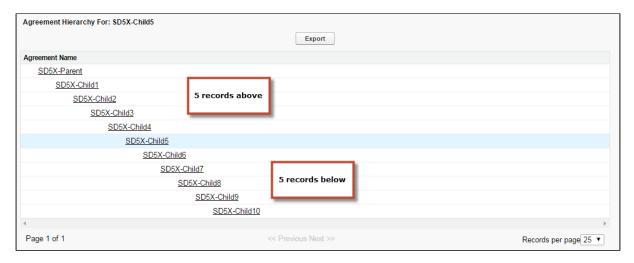
When you run an Agreement Explorer report, listed results are displayed in the **Agreement Explorer** tab. The results are displayed as a list or in a hierarchical format and the columns are displayed based on the settings defined when the report was *created* or *modified*.

The following sections describe how report results differ based on context, and the actions you can take from report results. All report results can be exported to an Excel spreadsheet as needed.

Report Limits

Agreement Explorer report results are subject to the following limits:
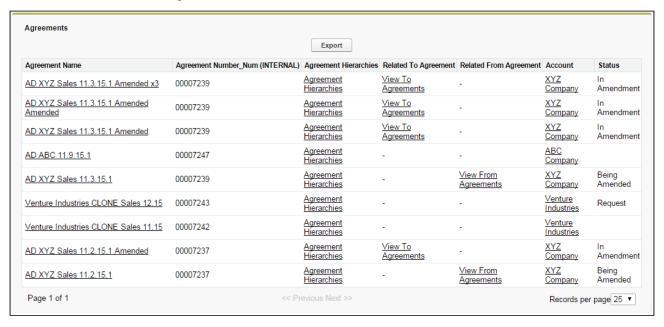
- Report results can display a maximum of **200** Agreement records. For example, if you are a running an Agreement Hierarchy report and your parent agreement has more than 200 descendant agreements, to see additional agreements that are not listed, you must change the **Agreement Lookup** focus to one of the child agreements to narrow your search.

- Agreement Hierarchy Reports can display a maximum of **5** levels both above and below the agreement record of context. To return additional agreements that are more than 5 levels above or below the agreement of context, change the **Agreement Lookup** focus to one of the parent or child agreements in the hierarchy.

For more information on modifying reports, see Managing Report Settings.

Using Agreement Search Reports

When you run an Agreement Explorer report using the Agreement Search context or type, you are returning a list of Agreement records that you have permission to access organized into a table from which you can take several actions.

You execute an Agreement Search report in one of the following ways:

- From the Agreement Explorer tab:
    - the administrator-defined default report for Agreement Search
    - a public Agreement Search report created by yourself or another user

- a private Agreement Search report created by yourself
- By editing **Search Settings** from an existing report.

Taking Actions from Report Results

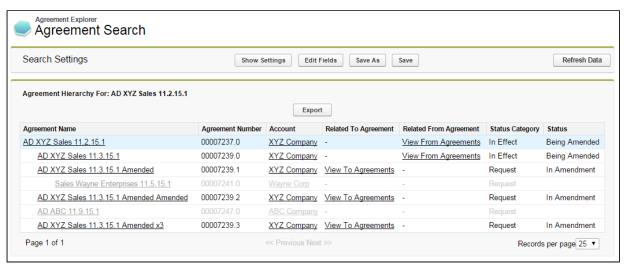Actions you can take from Agreement Search report results will vary based on the columns that are displayed in the report (fieldsets) and your own security permissions. The following table describes actions you can take from report results.

Action	Description
View Agreement Record	Click on a record link under Agreement Name to open the corresponding Agreement record page in a new tab.
View Account Record	Click on a record link under Account to open the Account record page for the Account associated with the corresponding agreement in a new tab.
View Agreement Hierarchy	Click on a record link under Agreement Hierarchies to navigate to the default Agreement Hierarchy report for the corresponding agreement. See Using Agreement Hierarchy Reports for more information.
View Related To Agreements	Click on a View To Agreements link to view a list of all agreements which are Related To the corresponding agreement. All listed agreements are a source or reference to create or associate the current record (e.g., renewed from, amended from). These results do NOT display Agreement Hierarchy. See Viewing Related To Agreement Reports for more information.
View Related From Agreements	Click on a View From Agreements link to view a list of all agreements which are Related From the corresponding agreement. All listed agreements are created or associated from the current record (e.g., renewals, amendments). These results do NOT display Agreement Hierarchy. See Viewing Related From Agreement Reports for more information.
Export	Click Export to export all report results to a Microsoft Excel spreadsheet. Note: Any records which do NOT match Filter Sets (grayed out) will not be included in the export.
Show Settings / Hide Settings	Click Show Settings/Hide Settings to expand/collapse the Search Settings section. You can use Search Settings to edit the filter settings to change the list of results based on context type, a saved search (with its own settings) and filter expressions. Click Hide Settings to collapse the Search Settings section. See Managing Report Settings for detailed instructions on how to use Search Settings.

Action	Description
Edit Fields	Click Edit Fields to change the fieldset (columns) displayed when the current report is executed. When you add Agreement Hierarchy, Related To Agreement and Related From Agreement to a fieldset those actions become available for records listed in the report. See Managing Report Settings for detailed instructions on how to edit fieldsets for a report.
Back to Root Report	Click this link to return to the first set of results generated when the report was originally executed.
Show 5 more	Click this link at the bottom of the report listing to view additional returned records. You can also use page navigation to navigate between pages of the report.

Using Agreement Hierarchy Reports

When you run an Agreement Explorer report using the Agreement context or type, you are returning a list of agreement records organized into a hierarchy in relation to a specified agreement record that you have permission to access.

The hierarchy displayed in the report represents the entire agreement hierarchy with respect to the specified agreement record. Indented agreement records represent parent-child relationships.

> ⓘ **Any agreement records in the hierarchy that do not meet the requirements of the report filter are presented as gray text.**

You execute an Agreement Hierarchy report in one of the following ways:

- From the **Agreement Explorer** tab:
    - the administrator-defined default report for Agreement Hierarchy
    - a public Agreement Hierarchy report created by yourself or another user
    - a private Agreement Hierarchy report created by yourself
- clicking on the **View Agreement Hierarchy** button on an agreement record (default settings)
- clicking on the **Agreement Hierarchies** link in an Agreement Search report (default settings).
- editing **Search Settings** from an existing report.
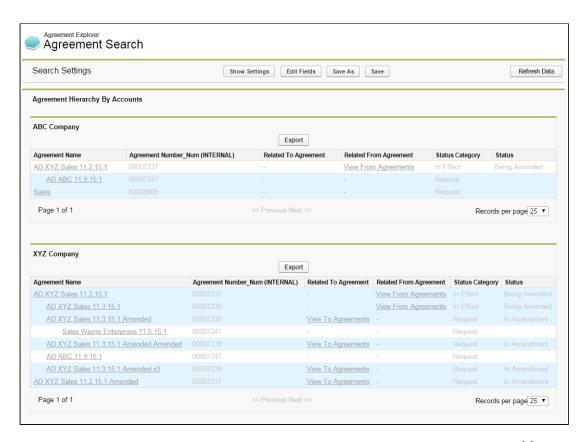
Taking Actions from Report Results

Actions you can take from Agreement Hierarchy report results will vary based on the columns which are displayed in the report (fieldsets) and your own security permissions. The following table describes actions you can take from report results.

Action	Description
View Agreement Record	Click a record link in the hierarchy to open the corresponding Agreement record page in a new tab.
View Account Record	Click a record link under Account to open the Account record page for the Account associated with the corresponding agreement in a new tab.
View Related To Agreements	Click a **View To Agreements** link to view a list of all agreements which are Related To the corresponding agreement. All listed agreements are a source or reference to create or associate the current record (e.g., renewed from, amended from). These results do NOT display Agreement Hierarchy. See Viewing Related To Agreement Reports for more information.
View Related From Agreements	Click a **View From Agreements** link to view a list of all agreements which are Related From the corresponding agreement. All listed agreements are created or associated from the current record (e.g., renewals, amendments). These results do NOT display Agreement Hierarchy. See Viewing Related From Agreement Reports for more information.
Export	Click **Export** to export all report results to a Microsoft Excel spreadsheet. Note: Any records which do NOT match Filter Sets (grayed out) will not be included in the export.

Action	Description
Show Settings / Hide Settings	Click **Show Settings/Hide Settings** to expand or collapse the Search Settings section. You can use Search Settings to edit the filter settings to change the list of results based on context type, a saved search (with its own settings) and filter expressions. Click Hide Settings to collapse the Search Settings section. See Managing Report Settings for detailed instructions on how to use Search Settings.
Edit Fields	Click **Edit Fields** to change the fieldset (columns) displayed when the current report is executed. When you add Account, Related To Agreement and Related From Agreement to a fieldset those actions become available for records listed in the report. See Managing Report Settings for detailed instructions on how to edit field sets for a report.
Back to Root Report	Click this link to return to the first set of results generated when the report was originally executed.
Show 5 more	Click this link at the bottom of the report listing to view additional returned records. You can also use page navigation to navigate between pages of the report.

Using Agreement by Account(s) Reports

When you use the Agreement Hierarchy by Account(s) type to run an Agreement Explorer report, you are returning a list of agreement records that are organized into hierarchies by associated Account record.

The above image represents a default Agreement Hierarchy by Account(s) report run from the Agreement Explorer tab. In this case, the report returns a filtered list of hierarchies for more than one account record (selected at the time the report was run). If you run an Agreement Hierarchy by Account(s) report from an agreement or account record it will always return a list of hierarchies associated with a single account.

You execute an Agreement Hierarchy by Account(s) report in one of the following ways:

- from the Agreement Explorer tab:
    - the administrator-defined default report for Agreement Hierarchy by Account(s)
    - a public Agreement Hierarchy by Account(s) report created by yourself or another user
    - a private Agreement Hierarchy by Account(s) report created by yourself
- by clicking **View Agreement Hierarchy** for Account from an agreement record (default settings).
- by clicking **View Agreement Hierarchy** for Account from an account record (default settings).
- by editing **Search Settings** from an existing report.

Taking Actions from Report Results

Actions you can take from Agreement Hierarchy by Account(s) report results will vary based on the columns that are displayed in the report (fieldsets) and your own security permissions. The following table describes actions you can take from report results.

Action	Description
View Agreement Record	Click a record link in the hierarchy to open the corresponding Agreement record page in a new tab.
View Account Record	Click a record link under Account to open the Account record page for the Account associated with the corresponding agreement in a new tab.
View Related To Agreements	Click a **View To Agreements** link to view a list of all agreements which are Related To the corresponding agreement. All listed agreements are a source or reference to create or associate the current record (e.g., renewed from, amended from). These results do NOT display Agreement Hierarchy. See Viewing Related To Agreement Reports for more information.
View Related From Agreements	Click a **View From Agreements** link to view a list of all agreements which are Related From the corresponding agreement. All listed agreements are created or associated from the current record (e.g., renewals, amendments). These results do NOT display Agreement Hierarchy. See Viewing Related From Agreement Reports for more information.
Export	Click **Export** to export all report results to a Microsoft Excel spreadsheet. Note: Any records which do NOT match Filter Sets (grayed out) will not be included in the export.
Show Settings/Hide Settings	Click **Show Settings/Hide Settings** to expand or collapse the Search Settings section. You can use Search Settings to edit the filter settings to change the list of results based on context type, a saved search (with its own settings) and filter expressions.Click Hide Settings to collapse the Search Settings section.See Managing Report Settings for detailed instructions on how to use Search Settings.

Action	Description
Edit Fields	Click Edit Fields to change the fieldset (columns) displayed when the current report is executed. When you add Account, Related To Agreement and Related From Agreement to a fieldset those actions become available for records listed in the report. See Managing Report Settings for detailed instructions on how to edit field sets for a report.
Back to Root Report	Click this link to return to the first set of results generated when the report was originally executed.
Show 5 more	Click this link at the bottom of the report to view additional returned records. You can also use page navigation to navigate between pages of the report.

Managing Report Settings
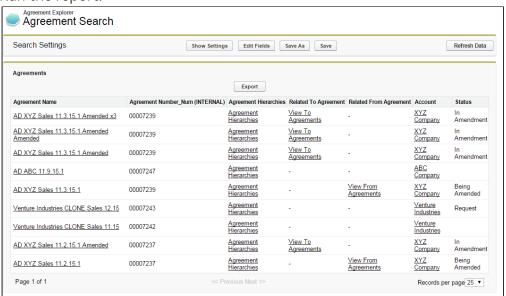
For any Agreement Explorer report (Agreement Search, Agreement Hierarchy or Agreement Hierarchy by Account(s)), the report results are determined by three main parameters:

- the Search Type (e.g., Agreement Search, Agreement Hierarchy or Agreement Hierarchy by Account(s))
- the individual Agreement Explorer report's Field Sets (sequenced columns displayed in the report)
- Agreement Explorer Filter Settings (displays report results based on simple or advanced expressions)
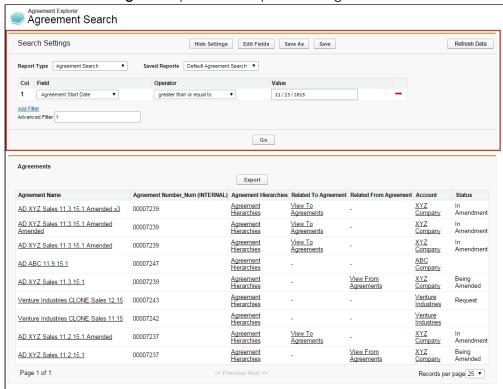
The following topic describes how to edit report settings after running any report for which you have access.

To edit the settings for any report

1. Run the report.

2. Click **Show Settings** to expand the report settings section.

Use the following links to quickly jump to a task:

- To edit the settings for any report

To Change the Saved Report Type

You can change the search settings to display results based on a different report type.

To Change the Report Type to Agreement Search

1. Click on the **Type** drop-down menu and choose **Agreement Search**.

2. Click **Go**. The report listing is refreshed to display a list of agreements according to the current filter settings and fieldsets defined for the report. Any agreement or account lookup field is removed from the settings view.
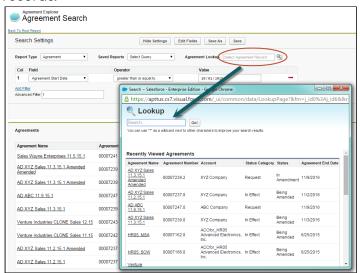
To Change the Report Type to Agreement

1. Click on the **Type** drop-down menu and choose **Agreement**.

Search Settings are refreshed to display the **Agreement Lookup** field.
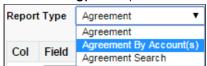
2. Click on the **Agreement Lookup** 🔍 icon to display a lookup dialog for agreement records.

3. Search for and click on an **Agreement Name**.

4. Click **Go**. The report listing is refreshed to display a list of agreement records organized into a hierarchy according to the filter settings and fieldsets defined for the report. The specific record chosen in the previous step is highlighted in the list.
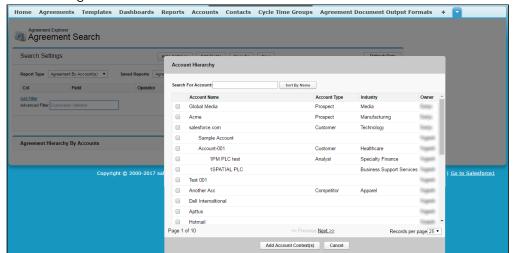
To change the report type to Agreement Hierarchy by Account(s)

1. Click the **Type** drop-down menu and choose **Agreement by Account(s)**.
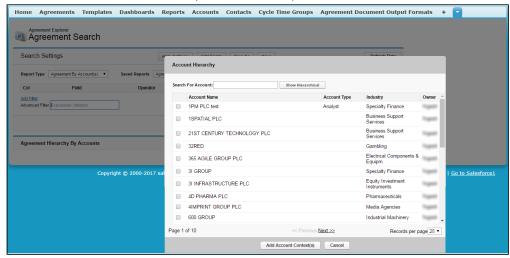
Search Settings are refreshed to display an **Account** lookup field.

2. Click the **Account Lookup** 📇 icon to display a lookup dialog of accounts organized in a hierarchy.
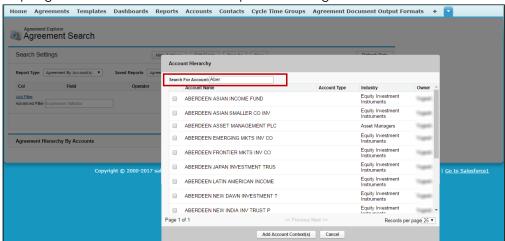
3. Click **Sort By Name** toggle button (shown above), to view the alphabetical list of accounts in the Account Hierarchy window. To switch back to the hierarchy view, click **Show Hierarchical** button (shown below.)

4. You can also search Agreement Accounts by searching the account name as a search string in the **Search For Account** field in the Account Hierarchy window. The result
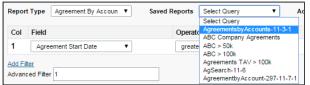
displays account names sorted alphabetically.

5. Select one or more Accounts from the list and click **Add Account Context(s)**.
6. Click **Go**. The report listing is refreshed to display a hierarchy of agreements organized by the account(s) specified using the current filter and fieldsets defined for the report.

To run a saved Agreement Explorer report

You can edit report settings to change the type and choose an already saved report for that context. You have access to the following saved reports for any type:

- Public Agreement Explorer reports available to all users.
- Private Agreement Explorer reports you have created.

1. Change the current Agreement Explorer context type as described in the previous section.
2. Click the **Saved Reports** drop-down menu and choose a saved public or private report. Filters and fieldsets are changed based on saved settings for the selected report.

3. Click **Go.** The report listing is refreshed to display an Agreement Explorer report that matches the chosen saved report.
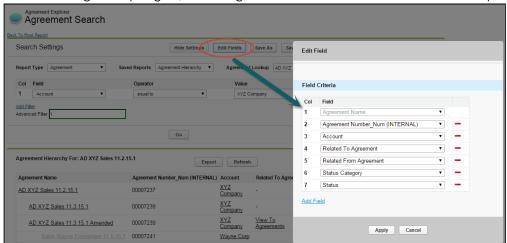
To Edit Fields Displayed in a Report

You can **Edit Fields** from Agreement Explorer reports to modify the fields (columns) displayed in the report and expand or limit the actions that can be taken from report results. When you edit, add or remove fields in this way, you are creating a new *FieldSet*

unique to the report which is displayed. The only field that is always required (and cannot be removed) is **Agreement Name**, because reports always display a list or hierarchy of agreement records.
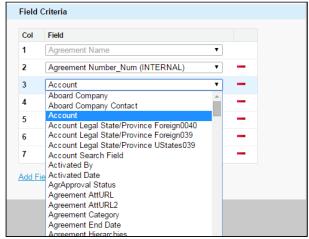
> ⓘ   FieldSets in Agreement Explorer reports are always defined explicitly for each report and change depending on settings for a specific report.

1. From any report listing, click the **Edit Fields** button at the top of the page. The *Edit Fields* dialog is displayed, showing the current fieldset used for this report.

   Individual fields are listed in sequence by column number. "Agreement Name" is always the first field in the fieldset and cannot be removed or reordered.

2. Use the drop-down menu to choose or change fields to add to the Fieldset. You can add any field which is a part of the Agreement or Account object, including any lookup fields from these objects.

   a. When you add certain fields to your Field Set, they enable you to take actions from the Agreement Explorer report listing, depending on the type of the report. The following table describes which actions you can take with these fields and defines which contexts use these fields:

Field	Description of Action	Agreement Explorer Context Type
Agreement Name	Click on Agreement Name to open the corresponding agreement record in a new tab.	Agreement, Agreement Search, Agreement Hierarchy by Account(s)
Account	Click on Account name to open the corresponding account record in a new tab.	Agreement, Agreement Search, Agreement Hierarchy by Account(s)
Related TO Agreement	Click **View To Agreements** to change the report view to a list of agreement records related to the agreement of context.	Agreement, Agreement Search, Agreement Hierarchy by Account(s)
Related FROM Agreement	Click **View From Agreements** to change the report view to a list of agreement records related from the agreement of context.	Agreement, Agreement Search, Agreement Hierarchy by Account(s)
Agreement Hierarchy	Click on **Agreement Hierarchies** to navigate to the default Agreement Hierarchy report for the agreement of context.	Agreement Search
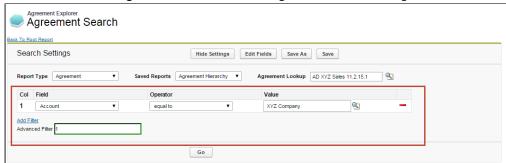
3. Click **Add Field** at the end of the Field Set to add another field. Click the ➖ button to remove a field from the FieldSet. Field Sets for Agreement Explorer reports can have a maximum of 24 fields.

> ⓘ Although Agreement Explorer report FieldSets can have up to 24 fields, only the first 12 fields can be displayed in the Agreement Explorer listing. When you export a report to an Excel spreadsheet, all fields and any data they contain are displayed. Keep this in mind when planning the sequence of fields in your Fieldset.

4. Click **Apply** to save the changes to your report Fieldset.
5. Click **Go** to execute the report using your modified Fieldset.

To Change Filter Settings for a Report

Agreement Explorer report results can be constrained through the use of Filter Sets defined for any given report. When you first run an Agreement Explorer report, the report listing is

displayed based on the defined Filter Set. You can change these Filter settings to return specific results based on a set of expressions you build.

1. Click **Show Settings** if the Search Settings are not already visible.

Any already existing Filter Sets are displayed in this section.

2. Define or change Filter Sets to filter the report based on the criteria you specify.

Field	Description
Field	Choose a field from an alphabetical list of fields available for the Object (including lookup fields). For example, if you want to filter the agreement records where Agreement Name contains "MSA," select Agreement Name from this drop-down list.
Operator	Choose an operator based on the data type for the field you selected. In the example above, you would choose "contains." <table><tr><td>**Datatype**</td><td>**Operator**</td></tr><tr><td>Account lookup</td><td>equal to; not equal to</td></tr><tr><td>Date, Number, Currency</td><td>equal to; not equal to; greater than; less than; greater than or equal to; less than or equal to</td></tr><tr><td>Text</td><td>starts with; equal to; not equal to; contains; does not contain</td></tr></table>
Value	Enter the value to be met for the condition expression. In the example above, you would enter "MSA."

3. Click **Add Filter** to create additional expressions to add to the Filter set. Click ➖ to remove an expression.
4. Choose an option from **Filter for** to define the logic used in the Filter set.

Filter for	Filter logic used
All	AND

Filter for	Filter logic used
Any	OR
Advanced	Advanced expression which can use either logic
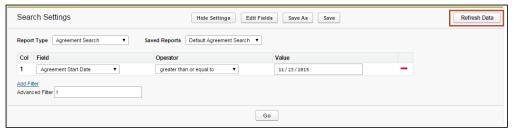
By default, all Filter Sets use AND logic. Choose Advanced if you want to apply more than one type of logic to your filter. For example, if you have 3 Filter Sets and but you want to make only 1 of the first 2 required, you would manually change the expression to "(1 or 2) AND 3."

5. When you are finished configuring the Filter Set, click **Go** to run the report using your modified Filter conditions.

To Refresh Agreement Data for a Report

Because the Agreement Explorer uses data stored in the most recent cache for the Agreement object, you may find that more recently created agreement records are not listed in your reports. If you are uncertain how recently agreement data was updated from the backend or want to include agreement records that were just created, use the **Refresh Data** button in Report Settings to refresh the data pool extracted from object tables in the database.

1. Click **Show Settings** to display Search Settings.
2. Click **Refresh Data**.

3. Return to the **Agreement Explorer** tab or Agreement or Account record and run the report.
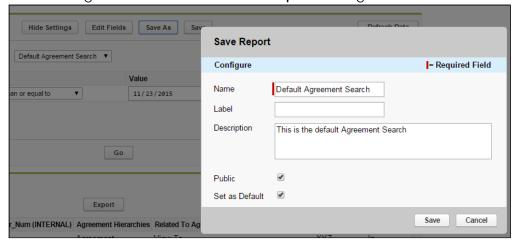
> ⚠ Alternatively, the Contract Management administrator can schedule a job using the Apex Scheduler to refresh data such as agreement hierarchy and account hierarchy. For more information, see "Schedule Jobs to Refresh Agreement Data" in the *Contract Management on Salesforce Administrator Guide*.

To save Edits to report settings

When you edit report settings, you can run reports in an ad hoc fashion without saving any changes to the existing report by changing settings as described in the previous sections. Agreement Explorer also gives you the option to save edits you have made to an existing report, or to save edits as a new report.
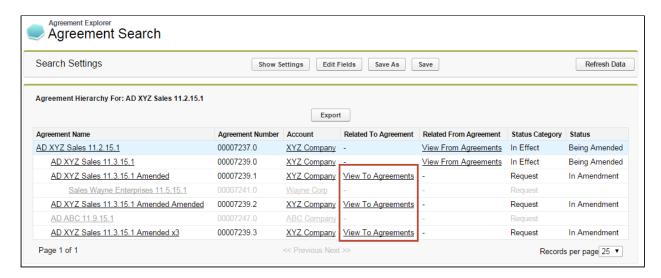
1. Add, remove or change Filter settings for the report, including changing the context type of the report.
2. Add, remove or change the order of Field Sets for the report.
3. Click **Go** to run the report using any new Filter or Field Set settings.
4. Click **Save** to save your changes. Settings are changed for the existing report. You can only save changes to an existing report if you own the report (private).
5. Click **Save as** to save your changes as a new Agreement Explorer report.
   a. Make changes as needed in the **Save Report** dialog box.
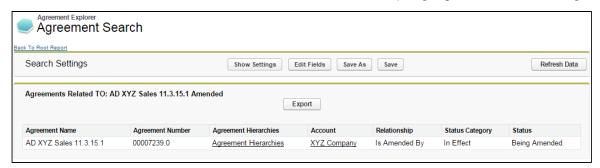
   b. Click **Save**. A new Agreement Explorer report is created using the new report settings and the details you specified.

Viewing Related To Agreement Reports

When you run an Agreement Explorer report, if you have the "Related To Agreement" field as part of the report Field Set, you have the option to view a filtered report of agreements related to agreement records in your report (if any exist).

To view this list, click **View To Agreements** from the Agreement Explorer report listing. All listed agreements are a source or reference to create or associate the current record (e.g., renewed from, amended from) These results do NOT display Agreement Hierarchy.

In the above example, the agreement record Related To "AD XYZ Sales 11.3.15.1 Amended" is the original contract from which the agreement was amended (Relationship = Is Amended By).

The Agreements Related To report displays without any applied Filter set. You *cannot* modify the Field Set used for this type of report. The following table describes which fields are displayed for Related To Agreement reports.

Field	Description
Agreement Name	Click the Agreement Name to open the corresponding related agreement record in a new tab.
Agreement Number	The agreement number of the related agreement record.
Agreement Hierarchy	Click **View Hierarchy** to run display a hierarchy report for the related agreement record using administrator-defined default report settings.

Field	Description
Account	Click the Account name to open the related agreement's account record in a new tab.
Relationship	The relationship of the related record with the original agreement record.
Status Category	The Status Category of the related agreement record.
Status	The Status of the related agreement record.
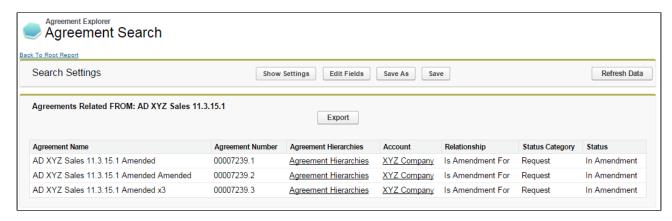
Click **Export** to export the Related To Agreements report to an Excel spreadsheet. You *cannot* save a Related To Agreement report as an Agreement Explorer report.

Viewing Related From Agreement Reports

When you run an Agreement Explorer report, if you have the "Related From Agreement" field as part of the report Field Set, you have the option to view a filtered report of agreements related from agreement records in your report (if any exist).

To view the related agreements list, click on **View From Agreements** from an Agreement Explorer listing. All listed agreements are created or associated with the current record (e.g., renewals, amendments). These results do NOT display Agreement Hierarchy.

In the above example, the agreement records Related From "AD XYZ Sales 11.3.15.1" are three separate pending amendments for the same contract (Relationship = Is Amendment For)

The Agreements Related From report displays without any applied Filter set.
You *cannot* modify the Field Set used for this type of report. The following table describes which fields are displayed for Related From Agreement reports.
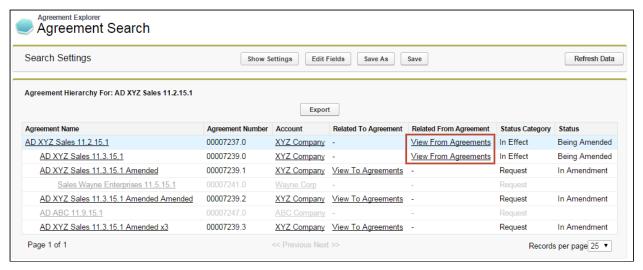
| Field	Description
Agreement Name	Click on the Agreement Name to open the corresponding related agreement record in a new tab.
Agreement Number	The agreement number of the related agreement record.
Agreement Hierarchy	Click **View Hierarchy** to run display a hierarchy report for the related agreement record using administrator-defined default report settings.
Account	Click on the Account name to open the related agreement's account record in a new tab.
Relationship	The relationship of the related record with the original agreement record.
Status Category	The Status Category of the related agreement record.
Status	The Status of the related agreement record.
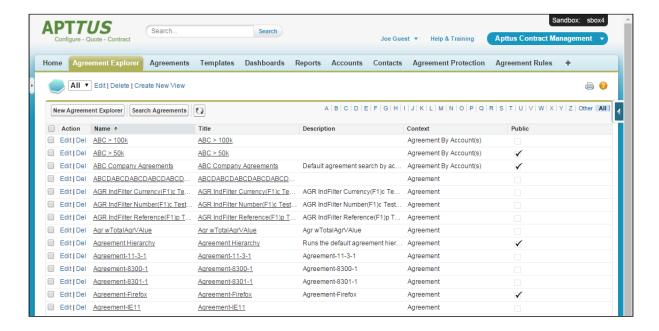
Click **Export** to export the Related From Agreements report to an Excel spreadsheet. You *cannot* save a Related From Agreement report as an Agreement Explorer report.

Deleting an Agreement Explorer Report

ⓘ Hint: click on images on this page to enlarge the view.

If you have the correct permissions, you can delete an Agreement Explorer report from the **Agreement Explorer** tab.

1. Navigate to the **Agreement Explorer** tab.

2. Click the **Del** link (Delete) next to the corresponding report to delete it. A confirmation dialog appears.
3. Click **OK** to confirm deletion of the report.

ⓘ If you delete a default Agreement Explorer report, the *most recently modified* public report will automatically be assigned as the default report for that report type.

Contract Management on Salesforce Lightning

You can use Apttus Contract Management with the Salesforce Lightning Experience and still accomplish the same tasks with the same features that are available in the Classic Experience. The change that you will observe is in accessing the features and the process for creating an agreement. Beyond a few different steps, the flows for most Contract Management tasks remain the same as in the Classic Experience. You can also access Contract Management from the Lightning Console. You can use the Lightning Console to Generate, Regenerate, Activate, Amend, Renew, Submit Request, Terminate, Expire, and Clone an agreement.

Enabling the Lightning Experience in Salesforce

Enabling the Lightning Experience in your Salesforce org is simple, but requires some consideration of your company's needs before you make the switch. Refer to Salesforce's documentation on enabling the Lightning Experience.

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 by 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 on **Apttus Contract Management**.

4. Select a Contract Management feature to work with (e.g., "Agreements" to start the agreement creation process.)
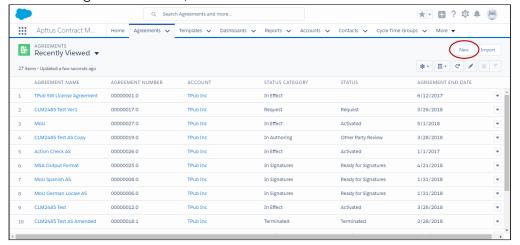
Creating an Agreement in Lightning

There are two ways to create a new agreement in the Lightning experience.
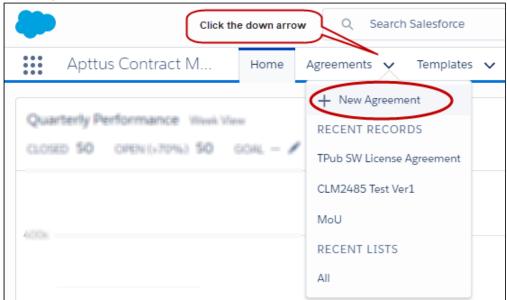
1. Go to **App Launcher > Apttus Contract Management**.
2. Click on **Agreements**.

3. From the Agreements List, click **New**.
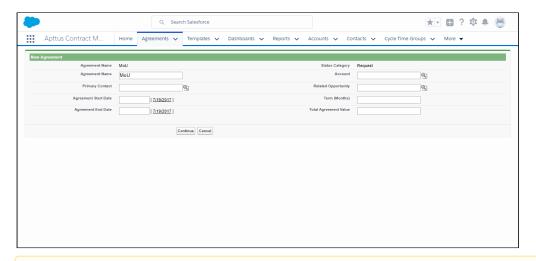
OR

Click the down arrow ⌄ next to the Agreements tab and click **+New Agreement** from the drop-down menu.
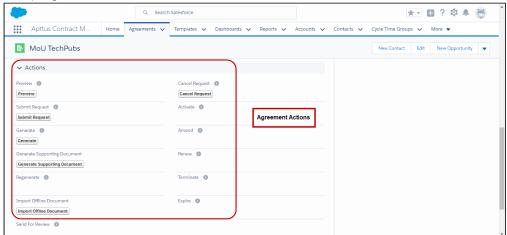
4. Select an Agreement Record Type and click **Continue**.
5. On the New Agreement page, enter values for required fields and any optional fields that are available and click **Continue**.
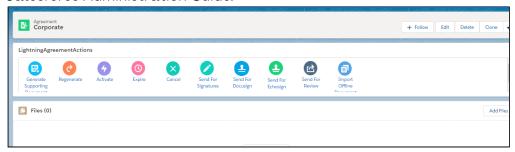
> ⚠ It is recommended when using the Lightning Experience to configure the above page to contain as many fields as you want specified prior moving to the next step. You can configure which Agreement fields are available on this page by editing the **Agreement New Field Set**. For more information, refer to the *Contract Management Administrator Guide* topic "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.

The agreement actions can also be accessed from the **LightningAgreementActions** panel on the Agreement Details page. The panel shows the agreement action buttons clustered in a group. You can add the **Send For Docusign**, **Send For Echosign**, and **Check Docusign Status** custom action buttons to the panel. For more information,

refer to "Enabling and Customizing Action Panel" in the *Contract Management on Salesforce Administration Guide*.

> ⓘ **Note**
>
> Document Search and User Filter are unavailable on the Salesforce Lightning Document Finder page component.

Contract Wizard in Lightning

Use the Apttus Contract Management Contract Wizard to run custom, user-friendly Wizards based on any standard or custom Salesforce object (Agreements, Accounts, Proposals, Leads, etc.). These Wizards are intended to be used by 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.

Use the Wizards tab to run Wizards from the existing Wizard Designs. You can easily search and select from Wizard designs to create well-formed records. Wizards also contain a feature that allows users to review their responses prior to submission, returning to previous 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.

For information on creating Wizards using the Wizard Designer, see Contract Wizard in the *Contract Management Administrator Guide*.

Running Wizards in Lightning

You can use the Run Wizard tab within the Wizard Launcher tab to run Wizards from the existing Wizard Designs.

To run a Wizard

1. Navigate to the Wizard Launcher tab.
2. Click 〔»〕.
   This launches the wizard.
3. (**Optional**) Click the pencil icon (✎) to give your Wizard a unique name, so you can differentiate it from other Wizards you run using the same Wizard design.

The new name for your Wizard is displayed in the In Progress tab of the Wizard Launcher tab.

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 **Previous** to return to the previous step. Click **Save** to save the data on the current wizard page.
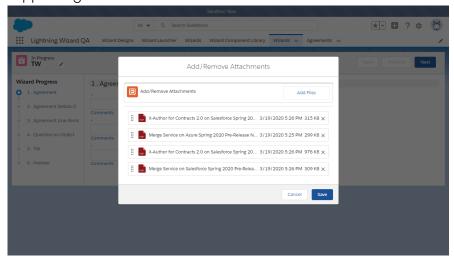
> ⓘ **Note**
>
> You must fill in all the required fields on the current wizard page before clicking **Save**. If a lookup field is configured in the wizard design, it will appear as a search field in the wizard.
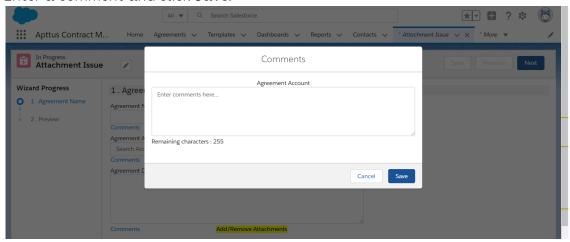
5. Some Wizard steps may include the option to add attachments in addition to providing traditional responses. To add an attachment:
   a. Click the **Add/Remove Attachments** link. This displays the Add Attachments window.
   b. Click **Add Files**. Browse for a file on your machine and add it as an attachment. The attachment uploads to the Wizard and displays in the Upload window.
   c. After the attachment is uploaded, click **Done**.
   d. Repeat the previous steps for each attachment you need to add.

e. Click **Save**.
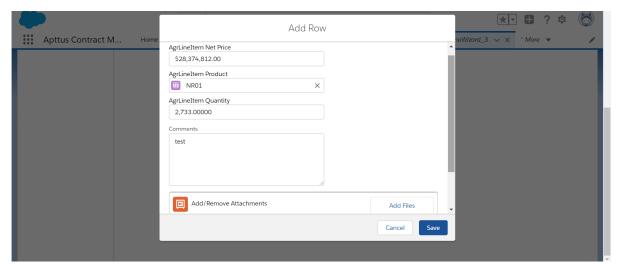
The attached files are added to the Notes & Attachments Related List of the new agreement record and a new document version is created for each attachment. The attachments are added to Document version if the object record is agreement and document type is Supporting Document. In the version aware agreements, the document type of the attached files is updated as Supporting Document.
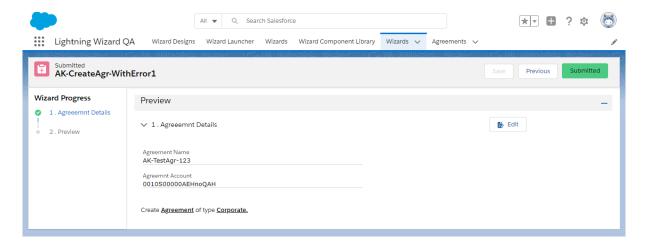
6. Some Wizard steps may include the option to add comments in addition to providing traditional responses. To add a comment:

   a. Click the **Comments** link. This displays Comments window.

   b. Enter a comment and click **Save**.

7. 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.

8. When you have answered the final question in the Wizard and clicked **Next**, the page will display a Preview of all steps you have completed.

9. Click **Edit** to change your answers for any steps in the Wizard.
10. 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 is created according to the Input Rules configured during designing a wizard.
    - You will be redirected to another page in Salesforce.
    - Depending on the rule configured for Submit in Wizard Design:
        - You will be navigated to the visual force page.
        - You will be navigated to the record detail page.
        - You will be redirected to the created focus object on the record detail page.
        - You will stay on the submitted wizard page:

> - If there are more than 2 focus objects defined and the submit rule is not defined.
> - If the wizard was not configured to create a record.

11. Return to the **Wizard Launcher** tab. The Wizard you created and executed now displayed in the Completed tab.

Limitations

1. You cannot launch Wizard with a static resource (image or CSS).
2. Salesforce Limitation: If help text is defined at object level for a field then it cannot be overridden. Hence, if help text is defined in a wizard for both object and field, then two help texts are displayed when you run the wizard.
3. Salesforce Lightning limitation: The dependent picklist is displayed below the controlling picklist and not as per the order configured in the wizard design.

Working with Wizard Launcher in Lightning

You can take several actions from the Wizards tab in addition to running new Wizards:

Prerequisite
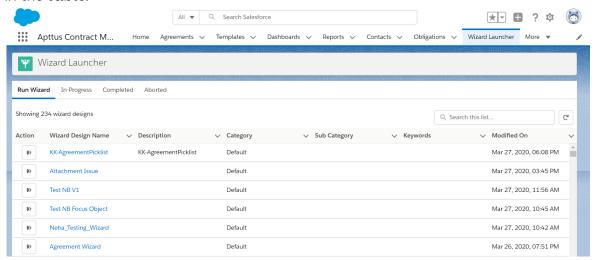
You must configure the Wizard Launcher tab to appear on the navigation menu. For more information see *Adding Wizard Launcher Tab in Lightning* in *Contract Management on Salesforce Administrator Guide*.

To search for Wizards

1. Navigate to the Wizard Launcher tab.

2. Perform a type-ahead Search to locate an In Progress, Completed or Aborted Wizard in the table.

To continue an In Progress Wizard

Pick up where you left off to complete an In Progress Wizard.

1. Go to the **Wizard Launcher** tab > **In-Progress** subtab.
2. Click the **Resume** hyperlink.
   This opens the Wizard and you can continue adding the required information.

To review a completed Wizard

You can revisit the Review page for a Completed Wizard.

1. Go to the **Wizard Launcher** tab > **Complete** subtab
2. Click the **Review** hyperlink.
   This opens the Wizard and you can view the wizard in read-only mode.
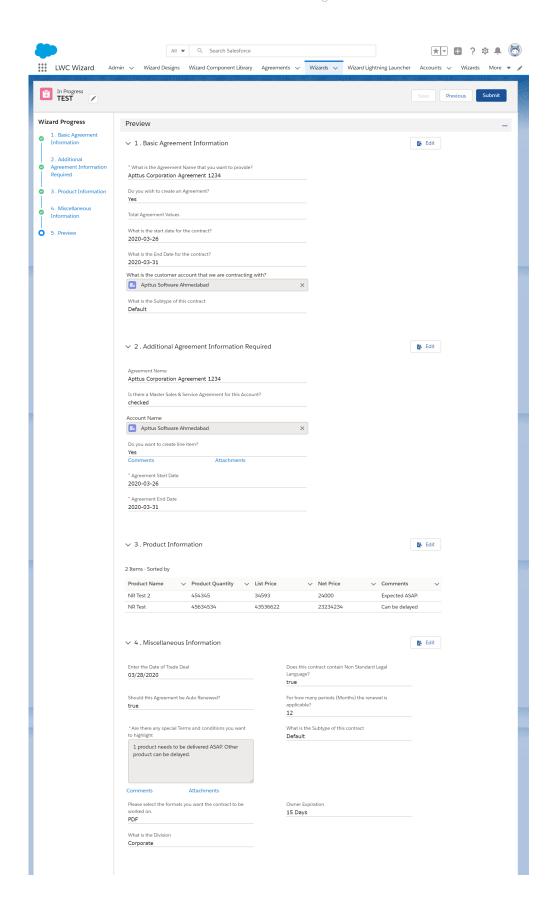
Previewing Wizards in Lightning

To provide more flexibility when running Wizards, a Wizard user can access the Preview Progress Bar, which tracks the Wizard as steps are completed. The Wizard user can use the Preview Progress Bar to navigate to other steps in the Wizard freely. Use the Preview Progress Bar to:

- Preview a future step in the Wizard if you had previously navigated to that step.
- 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.

Using the Preview Progress Bar

1. Launch a new Wizard from the Wizard Launcher tab.
2. On the Progress Bar, 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.

LWC Wizard

All ▾   Search Salesforce

Admin ▾   Wizard Designs   Wizard Component Library   Agreements ▾   Wizards ▾   Wizard Lightning Launcher   Accounts ▾   Wizards   More ▾

In Progress
TEST

Save   Previous   Submit

Wizard Progress

- ✓ 1 . Basic Agreement Information
- 2 . Additional Agreement Information Required
- ✓ 3 . Product Information
- ✓ 4 . Miscellaneous Information
- ◉ 5 . Preview

Preview   —

▾ 1 . Basic Agreement Information   Edit

* What is the Agreement Name that you want to provide?
Apttus Corporation Agreement 1234

Do you wish to create an Agreement?
Yes

Total Agreement Values

What is the start date for the contract?
2020-03-26

What is the End Date for the contract?
2020-03-31

What is the customer account that we are contracting with?
▦ Apttus Software Ahmedabad   ✕

What is the Subtype of this contract
Default

▾ 2 . Additional Agreement Information Required   Edit

Agreement Name
Apttus Corporation Agreement 1234

Is there a Master Sales & Service Agreement for this Account?
checked

Account Name
▦ Apttus Software Ahmedabad   ✕

Do you want to create line item?
Yes

Comments   Attachments

* Agreement Start Date
2020-03-26

* Agreement End Date
2020-03-31

▾ 3 . Product Information   Edit

2 Items - Sorted by

Product Name ▾	Product Quantity ▾	List Price ▾	Net Price ▾	Comments ▾
NR Test 2	454345	34593	24000	Expected ASAP.
NR Test	45634534	43536622	23234234	Can be delayed

▾ 4 . Miscellaneous Information   Edit

Enter the Date of Trade Deal
03/28/2020

Does this contract contain Non Standard Legal Language?
true

Should this Agreement be Auto Renewed?
true

For how many periods (Months) the renewal is applicable?
12

* Are there any special Terms and conditions you want to highlight
1 product needs to be delivered ASAP. Other product can be delayed.

What is the Subtype of this contract
Default

Comments   Attachments

Please select the formats you want the contract to be worked on.
PDF

Owner Expiration
15 Days

What is the Division
Corporate

- If the Wizard you are running contains any conditional steps, you will only see the current step and the "Preview" step. The preview Progress Bar will display additional steps as you complete the current step and conditions are satisfied to include the other steps in the Wizard.
3. Click **Previous** to return to the last step you worked with.
4. After you have completed all the steps, the Preview page is displayed. Click the **Edit** button to navigate back to that step and update the required details.

Limitation

If a step has a two-column layout then that step is not displayed on the Preview page. For more information on how to configure a two-column layout in the wizard, see *Creating Steps from the Wizard Designer* in *Contract Management on Salesforce Administrator Guide*.
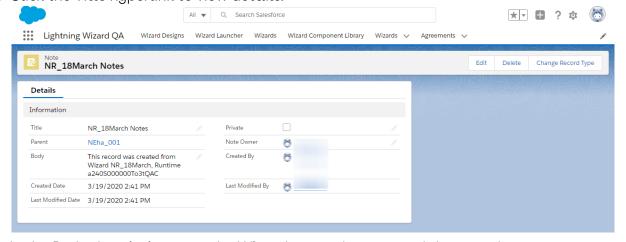
Tracking Wizard Activity in Lightning

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.

To view wizard details in an agreement

1. From the Agreement record page, scroll to **Notes & Attachments**.
2. Click the Title hyperlink to view details.

In the Body description, note the Wizard name that created the record.

Appendices

- Profile Settings and Security
- Agreement Fields
- Agreement Actions
- Apttus Status Categories and Statuses
- Supported File Sizes
- Supported File Formats

Profile Settings and Security

Use the following settings to make sure the profile settings correspond to the Apttus custom profile.

Profile	Requestor / Approver	Contract Creator/ Negotiator	Contract Manager	Apttus Administrator
Custom App Settings				
Apttus Contract Management	Yes	Yes	Yes	Yes
Enabled Apex Class Access				
Apttus.*	Yes	Yes	Yes	Yes
Enabled Visualforce Page Access				
Apttus.*	Yes	Yes	Yes	Yes
Standard Tab Settings				
Accounts	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting

Profile	Requestor / Approver	Contract Creator/ Negotiator	Contract Manager	Apttus Administrator
Contacts	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
Reports	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Apttus Custom Tab Settings				
Admin	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreement Protection	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreement Rules	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreements	Default On	Default On	Default On	Default On
Cycle Time Groups	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Document Output Formats	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Query Templates	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Retention Policies	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Templates	Tab Hidden	Tab Hidden	Default On	Default On

Profile	Requestor / Approver	Contract Creator/ Negotiator	Contract Manager	Apttus Administrator
Term Exceptions	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Administrative Permissions				
Manage Users	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)	Yes
View Setup & Configuration	Yes	Yes	Yes	Yes
Manage Public Reports	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)	Yes
Edit HTML Templates	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
General User Permissions				
Create and Customize Reports	Use Existing Setting	Use Existing Setting	Yes	Yes
Edit Events	Yes	Yes	Yes	Yes
Edit Tasks	Yes	Yes	Yes	Yes
Export Reports	Use Existing Setting	Use Existing Setting	Yes	Yes

Profile	Requestor / Approver	Contract Creator/ Negotiator	Contract Manager	Apttus Administrator
Run Reports	Use Existing Setting	Use Existing Setting	Yes	Yes
Send email	Use Existing Setting	Yes	Yes	Yes
Custom Object Permissions				
Admin	Read	Read	Read	Read, Create, Edit, Delete
Agreement	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Agreement Clause	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Document	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Document Output Format	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Agreement Line Item	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Lock	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Protection	Read	Read	Read	Read, Create, Edit, Delete
Agreement Rule	Read	Read	Read	Read, Create, Edit, Delete

Profile	Requestor / Approver	Contract Creator/ Negotiator	Contract Manager	Apttus Administrator
Agreement Rule Condition	Read	Read	Read	Read, Create, Edit, Delete
Agreement Term Exception	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
AsyncMergeCall	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Content Event	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Field	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Field Data	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Group	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Group Data	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Formula Field (Comply)	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Merge Event	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Query Template	Read	Read	Read	Read, Create, Edit, Delete
Query Template Filter	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Query Template Qualifier	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete

Profile	Requestor / Approver	Contract Creator/ Negotiator	Contract Manager	Apttus Administrator
Related Agreement	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Retention Policy	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Search Filter (Comply)	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Temp Object (Comply)	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Template	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Template Clause Reference	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Template Datasource Filter	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Template Dynamic Section	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Term Exception	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.	Yes	Yes	Yes	Yes

Agreement Fields

The following table contains a list of agreement fields along with its detailed description.

Field Label	Description	Data Type	Required	Default Value	Reserved
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 an agreement. A required field on activation, if the agreement is not perpetual.	Date	Yes		Yes

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
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, and more.	Auto Number	Yes		Yes. Not changeable by user.
Agreement Start Date	The effective date of the agreement. A required field on activation.	Date	Yes		Yes
Amendment Effective Date	The date from which the amendment is effective. If set during agreement creation, this field is auto-populated in the amended agreement.	Date			
Auto Renew	Indicates whether the agreement will auto renew.	Check box			

Field Label	Description	Data Type	Required	Default Value	Reserved
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 the 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		
Created By	User who created the record	Lookup(User)	Yes – System assigned		Yes
Description	Detailed description of an agreement.	Long Text Area(32000)	Yes		
Executed Copy Mailed Out Date	Date on which the final, executed copy was mailed out to the external party.	Date			

Field Label	Description	Data Type	Required	Default Value	Reserved
Executed Date	This is a date field that is auto-populated when a document is eSigned (Adobe Sign or DocuSign) by all the recipients. A user can manually enter the date when the document has wet signatures and when the signed document is uploaded manually.	Date			
Initiation Type	To indicate whether this record is being filed as an executed agreement or is being negotiated in the system.	Picklist	Yes - System assigned	Negotiate Contract	Yes. Not changeable by user.
Internal Renewal Notification Days	Notification period prior to Renewal Notice Date when notification is sent out internally to indicate 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. It is calculated as Issue Renewal Notice Date minus Internal Renewal Notification days.	Date	Yes – System assigned, changeable by user		
Last Modified By	User who most recently changed the record	Lookup(User)	Yes – System assigned		Yes

Field Label	Description	Data Type	Required	Default Value	Reserved
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 the signed agreement.	Date			
Other Party Sent Date	Auto populated with the Date on which agreement was first sent to other parties for review or 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			
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. Else number of days between returned and sent.	Formula(number)			

Field Label	Description	Data Type	Required	Default Value	Reserved
Owner	Assigned owner of the agreement record	Lookup(User)	Yes – System assigned, changeable by user	Login User	Yes
Owner Expiration Notice	To indicate the number of days prior to the expiration date that a notification needs to be sent to the owner.	Picklist		90 Days	
Parent Agreement	Reference to the parent agreement if the current agreement was created as a 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)			
Record Type	The agreement type for this record	Record Type	Yes	Agreement Type from selection screen	Yes
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)			

Field Label	Description	Data Type	Required	Default Value	Reserved
Renewal Consent	Indicates whether consent is required to extend or renew the agreement.	Checkbox			
Renewal Notice Date	It is calculated as Agreement End Date less Renewal Notice Days.	Formula(Date)			
Renewal Notice Days	The number of days before Agreement 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 when 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	Specifies the source of the agreement—Internal Paper or Other Party Paper.	Picklist		Internal Paper	Yes. Not changeable by user.
Special Terms	Identifies any special terms related to the agreement.	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, and more. These are reserved values.	Picklist		Request	Yes. Not changeable by user.
Subtype	The subtype of the agreement for a given agreement type. The user specifies the values based on their agreement types.	Picklist (Default)			
Term (Months)	Identifies the term of an agreement, in months, from the Agreement Start Date.	Number			

Field Label	Description	Data Type	Required	Default Value	Reserved
Termination Comments	Comments for the termination of an agreement.	Long Text Area(32000)			
Termination Date	Date when the agreement was terminated.	Date			
Termination Notice Days	Notice period, in days, prior to the termination of agreement.	Number			
Termination Notice Issue Date	Date when the termination notice for an agreement was sent or received.	Date			
Total Agreement Value	Total value of an 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

Agreement Actions

The Type and the actions vary according to the agreement status. The following table describes the Actions available at various stages of the Agreement and their significance:

Preview

Action	Preview Agreement

Description	Generates a *Draft* version of an agreement document based on the template set up for the agreement type. The draft agreement is rendered in the MS-Word format. If more than one agreement template is set up, you are prompted to pick a specific template.
Availability	If Status Category = Request
Post Status	N/A
Comments	This action does not place the generated document in the Notes & Attachments related list.

Generate

Action	Generate Agreement
Description	Generates the first version of an agreement document and attaches a copy of the same to the agreement record. When you initiate the Generate action, you are navigated to an intermediary screen to select additional information about the document to be generated. Select DOC for an MS Word document, RTF for Rich Text Format, or PDF for a PDF protected document. Additionally, if document protection has been enabled for you, you can generate a document with the appropriate protection options. The first draft version of the agreement is generated, rendered on the screen the in MS-Word format and attached to the system in the Notes & Attachment or Document Versions (if the document is Version Aware) related list on the agreement details page. You can: • Save it to the desktop, close the MS-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
Post Status	Sets the status for an agreement to Ready for Signatures.
Comments	

Regenerate

Action	Regenerate Agreement
Description	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. Because it is regenerated from template, any red lines made in previous version are not be carried into this version and must be manually applied.
Availability	If Status Category = In Authoring or In Signatures
Post Status	N/A
Comments	

Generate Supporting Document

Action	Generate Supporting Document
Description	Generates a document from a template of type "Supporting Document" and attaches the same to the agreement record. It can be used for Agreement Summary, Renewal Letter, Termination Letter, etc.
Availability	N/A
Post Status	N/A
Comments	This can be used to generate an agreement summary.

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
Post Status	Sets the status for an agreement to Other Party Review.
Comments	

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 it out as a final copy for Signatures.
Availability	If Status Category = In Signatures or In Authoring
Post Status	Sets the status for an agreement to Other Party Signatures.
Comments	

Import Offline Document

Action	Import Offline Document

Description	• Imports a third-party agreement document and attaches it to the agreement record. • Allows the user to use the attached document in the Apttus Author process.
Availability	If Status Category = Request or In Authoring or In Filing
Post Status	N/A
Comments	

Activate

Action	Activate
Description	• Marks the agreement as a finalized, executed agreement. • Prompts the user to select which attachment is the signed copy and records the same in activity history.
Availability	If Status Category = In Signatures
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	

Amend

Action	Amend
Description	Creates a new dot version of the Agreement (*nnnn.1, nnnn.2, and so on*) after doing a deep copy of the agreement fields and related objects.
Availability	If Status Category = In Effect

Post Status	Sets Status of Original Agreement to Being Amended, and Status Category of New Agreement to Request and Status to In Amendment
Comments	

Renew

Action	Renew
Description	Creates a new dot version of the Agreement (*nnnn.1, nnnn.2, and so on*) after doing a deep copy of the agreement fields and related objects.
Availability	If Status Category = In Effect
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.

Expire

Action	Expire
Description	Sets the Agreement to an Expired or Lapsed Status.
Availability	If Status Category = In Effect
Post Status	Sets Status Category to Expired and Status to Expired.
Comments	

Initiate Termination

Action	Initiate Termination
Description	Initiates the agreement termination process.
Availability	This is not a standard action. You must configure the Initiate Termination button in the Agreement Detail page layout and add the required customization.
Post Status	Sets Status Category to In Effect and Status to Being Terminated.
Comments	

Terminate

Action	Terminate
Description	Sets the Agreement to a Terminated state.
Availability	If Status Category = In Effect
Post Status	Sets Status Category to Terminated and Status to Terminated.
Comments	

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
Post Status	• 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	

Apttus Status Categories and Statuses

This section describes the purpose of status categories and associates statuses.

1. **Request**:
   This Status Category indicates that the Agreement is in the Request stage.

Stage	Description
Request	New request
Request Approval	Request being approved
Submitted Request	Request submitted
Approved Request	Request approved
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
Submitted Request	Request submitted
Approved Request	Request approved
In Amendment	Contract being amended

3. **In Signatures**:

   This Status Category indicates that the contract is in the Signatures stage.

Stage	Description
Internal Signatures	Contract sent for internal signatures
Third Party Signatures	Contract sent for other party signatures
In Reconciliation	Terms are being reconciled
Reconciled	Terms reconciliation completed

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 amended
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.

Stage	Description
Superseded	Contract superseded

9. **Cancelled**:

This Status Category indicates that the contract is in the Cancelled stage.

Stage	Description
Cancelled Request	Contract request cancelled

Supported File Sizes

The following table lists the maximum file sizes you can upload for each use case:

Use Case	File Size Limit
Uploading large files while importing or creating offline documents	10 MB *(Limited by* Force.com */ Classic-Apex)*
Importing an agreement document through Intelligent Import	200 MB (*Limited by Kira*)
Sending agreement documents for review, wet signature, or parallel review	10 MB (*Limited by Email template object*)
Emailing agreement attachments or emailing in-effect documents	300 MB

Use Case	File Size Limit
Sending an agreement document for Microsoft Teams Review	10 MB (*Limited by MS Teams*)
Activating an agreement	15 MB (*Limited by* Force.com *governor limits while copying a file*)
Merging documents	25 MB
Submitting for approval	7 MB
Searching agreement documents	10 MB
Uploading a document to Contract Management from KIRA (XAJS API)	25 MB

Supported File Formats

The following table lists the file formats supported for each feature in Contract Management.

Feature	Supported File Formats
Generating an Agreement	DOC, DOCX, RTF, and PDF.
Sending an Agreement Document for Review	DOC, DOCX, RTF, PDF, and all file types that Salesforce platform supports.
Sending an Agreement Document for Parallel Review	DOCX.
Sending an Agreement Document for Microsoft Teams Review	DOCX.
Sending Agreement Documents for Signatures	DOC, DOCX, RTF, PDF, and all file formats that Salesforce platform supports.
Activating an Agreement	DOC, DOCX, RTF, PDF, and all file formats that Salesforce platform supports.
Importing an Offline Agreement	DOC, DOCX, RTF, PDF, and all file formats that Salesforce platform supports.

Feature	Supported File Formats
Storing an Executed Agreement	DOC, DOCX, RTF, PDF, and all file formats that Salesforce platform supports.
Searching Agreement Documents	DOC, DOCX, and PDF.
Emailing Multiple Agreement Documents	DOC, DOCX, RTF, PDF, and all file formats that Salesforce platform supports.
Uploading Signed Documents in Lightning	DOC, DOCX, and PDF.
Intelligently Importing Large Files in Lightning	DOC, DOCX, PDF, RTF, JPG, JPEG, PNG, and TIF.
Merging Documents in Lightning	DOC, DOCX, and PDF.
Online Contract Collaboration	DOCX.

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quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Apttus is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

For additional resources and support, please visit https://community.conga.com.

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