Contract Management on Apttus Intelligent Cloud™

— Powered by Salesforce

Winter 2017 Administrator Guide

08 December 2017

Table of Contents

Bring Speed, Visibility, and Control To Your Contract Management Process 12

Key Benefits 13

Key Capabilities 14

Overview 15

About This Guide **17**

Key Terminology **17**

Installing Apttus Contract Management 19

Pre-installation Settings **19**
To enable Salesforce CRM content 19

Installation **20**
To install Contract Management 20

Post-installation Settings **21**
Creating or Verifying Admin Entries 21
Customizing the Comply System Properties Settings 22
Verifying Contract Management Package Objects 23
Indexing Agreement Number 23

Getting Started 25

In This Section **25**

Logging in to Contract Management **25**
To log in to Contract Management 25

About User Profile Management **26**
Contract Management User Roles & Tasks 27

Creating a User Profile **28**
To create a user profile 28

Adding a Single User **29**
Adding Multiple Users 29

Assigning APTTUS License to a User **29**
To assign an Apttus license to a user 29

Assigning Users to Queues **30**
To assign a user to a queue 30

Providing Users Unviewable Read Access **30**
To provide users unviewable read access 31

Setting Up Home Page Links **32**
To create new Agreement component 32
To create new home page layout 33
To assign new layout to appropriate user profile 33

Setting Up Opportunity Links **34**
To set up Opportunity links 34

Agreement Object 35

Defining a New Page Layout **35**

Creating New Record Type **35**

Creating Agreement Record Types **36**
To Create Agreement Record Types 36

Enabling Record Type for Template Authoring **37**
To Assign Agreement Record Types to Template Agreement Types 37

Populating Contract and Template Picklists **37**
Populating Picklist Values for Contract Object 38

Populating Picklist Values for Template Contract Types 38
Populating Picklist Values for Template Subcategory 39

Creating Formula Fields for an Agreement Rule Criteria 39
To create a formula field 40

About Is Transient Field 42

Customizing Agreement Actions 43

Setting Up Clone Specification 44
Clearing Cloned Agreement Field Values 45
Configuring APTS_ComplyConfig 45

Creating Validation Rules 51
To create a validation rule 51

Agreement Lifecycle Management 52

About Agreement Lifecycle Management Process 53
Agreement Actions and Corresponding Behaviors 54

Requesting and Drafting an Agreement 55
Setting Up Agreement Request Process 56
Setting Up Rule-based Agreement Request Process Parameters 58
Drafting an Agreement 61

Generating An Agreement 65
To generate an agreement document 66

Negotiating An Agreement 67
Key Tasks Associated With the Negotiation Phase 67
About Tracking Clauses in your Agreement 70

About Marking an Agreement Document as Private 86
Private Indicator Properties 87

Finalizing An Agreement 87
To finalize an agreement 88

Routing Documents to Content Libraries 89
Install Apttus Content Integration 89

Enable Salesforce CRM Content 90
Set Admin Properties 92
Set up Salesforce Files for Content 96
Configure the Libraries Tab 101
Using Agreement Rules to Route Content 104

Managing Templates 113
Setting up template object for Contract Management 115
Securing Documents 116
Setting Up Agreement Clause Categories and Subcategories 117
Creating Offline Agreements 120
Publishing 127
Document Generation for Templates with Nested Clauses 133
Query Template 133
About Template Datasource Filter 135
About Dynamic Document Assembly 139
Setting Up Template Filtering Rules 168
About Agreement Term Exception 170
About Template Versioning 173

About Agreement Phases 189
Amendment 189
Renewal 189
Termination 190
Expiration 190

About Obligation Management 190
New Task 191
New Event 191

Searching and Reporting 192
About Search 192
About Reports and Dashboards 194
Cycle Time Reporting 197
About Cycle Time Report Definitions 200
Agreement Explorer Reports for Searching and Reporting 201

Setting Up Agreement Document Protection 204

Enabling Document Protection **204**
To enable document protection 204

Defining Protection Password **205**
To define protection password 205

Setting Up Agreement Protection **205**
To setup agreement protection 206

About Contract Document Versioning 208

Understanding Document Versions **208**

Enabling Contract Document Versioning **210**
To configure Comply System Properties for Versioning 210
To add document version in document naming convention 213
To add Version-Related Merge Event Actions 214
To add the Document Version Related List to Agreement Layouts 215
To add the Version Aware field to Agreement Layouts 215
To make Agreements Version Aware using Workflow Rules 216
Example: Enable Version Aware Field for all Statement of Work (SOW) Agreements 216
Example: Disable Version Aware Field for Renewal of Non-Version Aware Agreements 217

Configuring Document Finder **218**
Enable Contract Document Versioning 218
Add Document Finder Visualforce Page to User Profiles 218
Add Document Finder to the Agreement Layout 219
(Optional) Configure Default Tags 223

Document Generation Capabilities 225

Document Generation Features List **227**

Generating on a Custom Object **237**
Template Setup: Object Type 237
Template Setup: Agreement Type 237
Template Setup: Business Object 238
Custom Object Setup: Generate Action 240
Creating Templates for your Custom Object 242

Setting Agreement Document Output Formats 243

To set agreements output to a desired format 243

Enabling PDF Security for Agreement Documents 245

Understanding PDF Security 245
To enable PDF security for generated agreement documents 246

Workflow 248

Creating New Workflow Rule 248

Automating the Process Through Workflow Rules 248
To create a workflow task 249
To create email alerts 250
To define field updates 251

Validating Workflows 252
To validate a workflow 252

Retention Policies 253

Creating Retention Policies 254
To create a retention policy 255
To edit a retention policy 255

Calculating Retention Date 257
To calculate a retention date 257

Record Retention Authorized Users 258

Sending Purge Notification 259
To create a public folder 260
To create a new report using the report builder 262
To edit report properties 263
To schedule a report 264

About Purge Agreements **266**

Agreement Explorer Reports 268

Understanding Agreement Explorer Report Types **268**

Adding Agreement Explorer Buttons to Page Layouts **269**

Contract Wizard 270

Getting Started with the Wizard Designer **272**

Creating a New Wizard Design **273**
Configuring Wizard Settings 273
Creating Steps from the Wizard Designer 277
Configuring Wizard Step Rules 292
Activating a Wizard Design 299
Deactivating a Wizard Design 304
Retiring a Wizard Design 307
Cloning a Wizard Design 309

Using the Wizard Component Library **310**
Creating Steps 312
Creating Inputs 315

Running Wizards **319**
To run a Wizard 320
Working with the Wizards Tab 327
Tracking Wizard Activity from a Record 329
Using the Preview Sidebar 330

Example Wizard Design: Sales Contract **333**
Example: Wizard Step Rule #1 334
Example: Step Input Rule #1 (Determine Focus Object) 340
Example: Step Input Rule #2 (Determine Record Type) 343
Example: Step Input Rule #3 (Modify Controls) 347
Example: Wizard Step Rule #2 354

Configuring Wizards as Self-Service with Salesforce Sites and Communities **358**

Configuring Salesforce Sites for Self-Service Wizards 359
Configuring Self-Service Wizards for Communities 370

Integrating the Contract Wizard with Other Applications 391

Configuring Meta Property Field Sets for Set Custom Value Rules 392
Prerequisites 393
To configure Meta Properties 393

Auto-Populating Wizard Fields at Runtime 394
Auto-populating Wizard Fields using Record ID 395
Auto-populating Wizard Fields using a Datasource Callback 396

Appendices 399

Admin Objects 399

Comply System Properties 405

Document Version Properties 412
Configuring document version properties 412

Apttus Contract Management Package Objects 414

Profile Settings and Security 421
Folder Security and Sharing Permissions 432

Agreement Web Service 434
Activating an Agreement 435
Selecting a Template for the Agreement Document 436
Publishing the Document to Chatter 436
Publishing the Document to Files and Attachments 437
Publishing Document Outside of Salesforce 438

Merge Web Service 438
Generating a Document 440
Generating a Document for a Standard Object 444
Generating a Supporting Document 445
Adding Text to a Header and Footer 448
Converting a Word Document into a given output format 450
Converting a Word Document into a given output format for Standard Object (Deprecated) 452

Converting a Word Document into a given output format (Deprecated) 454
Converting a Word Document into a PDF 456
Converting a Word Document into a PDF for Standard Objects 457
Applying Security Parameters to a PDF 458
Enabling Authoring for Agreement Documents 460
Generating a Document on Submit Request 460
Generating a Document on Submit Request for a Standard Object 462
Generating a Supporting Document on Submit Request 463
Package Multiple Documents 464
Merging Multiple Documents to a PDF 467
Merging Proposal Documents into a single PDF Document 472

Apttus Status Categories and Statuses 475
Apttus Status Category Map 478

Agreement Actions 480

Agreement Fields 488

Apttus Retention Policy Schema 501

Translatable Customizations 505

List of Objects supporting Document Generation 506

Document Search 510
To search a document 510

Temporary Email Template Cleanup 510
Step 1: Configure APEX Scheduler Job 510
Step 2: Configure Comply System Property 511

Using Contract Management with Salesforce Lightning 513
Enabling the Lightning Experience in Salesforce 513
To manage Comply System Properties 517
To Manage CLM Admin Properties 518
Enabling and Customizing Action Panel 518

Apttus Copyright Disclaimer 523

Bring Speed, Visibility, and Control To Your Contract Management Process

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Key Benefits

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Key Capabilities

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Overview

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

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

The common components of a contract are:

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

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

Contract Management Terms

- Term Start and End Dates
- Payment terms
- SLA terms
- Customer support levels

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- Line Item values
    - Product numbers
    - Descriptions
    - Quantities
    - Prices
    - Extended values
- Warranty period
- Agreement value

Contract Management Clauses

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Confidentiality	Execution
Default on commitments	Force Majeure
Dispute handling	Signatures

About This Guide

Apttus Contract Management (CM or CLM or Comply) Admin Guide is designed to provide administrators, involved with the contracting process in your organization, with information on configuring and setting up Apttus Contract Management. This guide is designed to cover the most common use cases for the Apttus CM Administration and assumes a level of familiarity with basic Salesforce. See Salesforce User Guide for details on standard Salesforce functionality.

Key Terminology

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Document	Generated through merging information stored in a record with an existing template. Output documents can be sent for review, approval or signature.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Installing Apttus Contract Management

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

Pre-installation Settings

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

To enable Salesforce CRM content

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

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

2. Click **Edit**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

Installation

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

To install Contract Management

You must have Apttus provided login credentials.

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

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

Post-installation Settings

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

- Admin Custom Object Entries
- Customize the Comply System Properties settings

If there are any issues with your installation, verify all of the objects were installed as expected.

If you have too many agreement records, you can index the agreement number.

Creating or Verifying Admin Entries

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To create or verify admin entries

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

Your new Admin entry is saved and added.

Customizing the Comply System Properties Settings

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

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

To customize the comply system properties settings

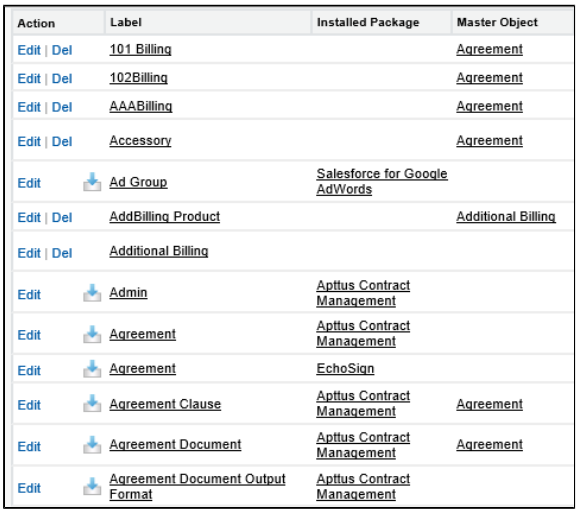
1. Go to **Setup > App Setup > Develop > Custom Settings**.
2. Click **Manage** for *Comply System Properties* and click **New**.
3. In **Name**, type *System Properties* as the data set name.
4. Enter details in one or more of the required fields and click **Save**.
   You have customized the comply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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Verifying Contract Management Package Objects

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

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



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

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

Indexing Agreement Number

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

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

By default, Salesforce indexes the following fields:

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- **Custom Fields**
  For example, *External ID*, *Unique*.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Getting Started

In This Section

- Logging in to Contract Management
- About User Profile Management
- Creating a User Profile
- Adding a Single User
- Assigning APTTUS License to a User
- Assigning Users to Queues
- Providing Users Unviewable Read Access
- Setting Up Home Page Links
- Setting Up Opportunity Links

Logging in to Contract Management

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

To log in to Contract Management

Apttus Contract Management package must have been installed.

You must have Apttus provided login credentials.

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

3. Type your **User Name** and **Password**, and click **Login in to Salesforce**.

You are successfully logged in to Apttus Contract Management.

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

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

About User Profile Management

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

- **Contract Management User Roles & Tasks**
- **Creating a User Profile**
  Profile is essentially a definition of a set of permissions granted to a group of users.
- **Adding a Single User**
  The maximum number of users you can create is determined by your Salesforce Edition.
- **Adding Multiple Users**
  The maximum number of users you can create is determined by your Salesforce Edition. Depending on the number of available licenses, you can create up to 10 users.
- **Assigning APTTUS License to a User**
  In addition to Salesforce licensing, a user profile must be assigned to the Apttus Contract Management license.
- **Assigning Users to Queues**
  Queues allow groups of users to manage a shared workload more effectively. A queue is a location where records can be routed to await processing by a group member. If the sharing model for all objects in the Queue is Public Read/Write/Transfer, you do not need to assign users to the queue, as all users already have access to the records for those objects.
- **Providing Users Unviewable Read Access**
  This allows preview and generate agreement actions to read the document password from the Admin object without allowing them to view it. You can set the permissions and page layouts for the selected profile. The permissions defined here control access at the object level. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators.

Contract Management User Roles & Tasks

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Role	Description
	• Legal admin, Internal counsel, External counsel
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

Creating a User Profile

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

To create a user profile

You must have administrative privileges.

1. Click **Setup > Manage Users > Profiles**.
2. Click **New**.
3. From **Existing Profile**, select a mandatory profile. For example: *System Administrator*.
4. Type a mandatory **Profile Name**.
5. Click **Save**. If this profile already exists, examine the settings or permissions.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

6. Click **Edit**.
7. Use the available settings to ensure the profile settings correspond to the Apttus custom profile.
8. If needed, repeat the steps for other Apttus profiles.

Adding a Single User

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

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

Adding Multiple Users

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

Assigning APTTUS License to a User

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

To assign an Apttus license to a user

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

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

The user has been assigned Apttus Contract Management license.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Assigning Users to Queues

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

To assign a user to a queue

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

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

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

Providing Users Unviewable Read Access

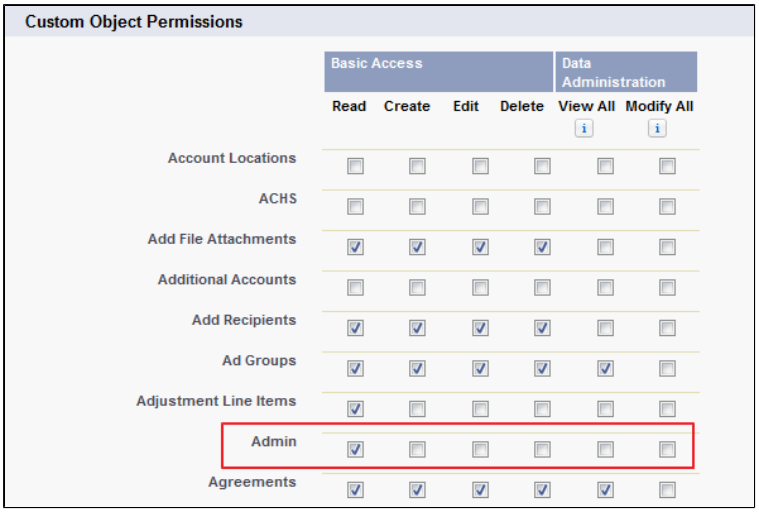
This allows preview and generate agreement actions to read the document password from the Admin object without allowing them to view it. You can set the permissions and page layouts for the selected profile. The permissions defined here control access at the object level. Set access levels based on the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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To provide users unviewable read access

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



3. Click **Save** and then click on the Requestor profile link. Scroll down to the Field-Level Security Settings and find the Admin object in the Custom Field-Level Security area.
4. Click **View**. Ensure that all the fields are visible and the read-only attributes for the Value field are set to the following fields:
    - Created By
    - Last Modified By
    - Value
5. Go to **Setup > Security Controls > Sharing Settings.**
6. Click **Edit** and locate the Admin entry to Public Read-Only for all the users in the organization.
    - This ensures the Contract Wizard can read the password from Salesforce and protect generated documents with it.
    - Other users can read the Admin password values but cannot set or see them when the Admin tab is hidden for that profile. Furthermore, layouts can be modified to hide the Value field, if required.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

7. To hide the Admin tab from all users except for Administrators, click the Requester profile and find the Tab Settings.
8. From the Admin drop down list, select the *Tab Hidden* option.

Setting Up Home Page Links

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

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

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

User Permissions Needed	
To create or change home page layouts:	Customize Application

To create new Agreement component

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To create new home page layout

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

A new Home Page layout has been created.

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

To assign new layout to appropriate user profile

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Setting Up Opportunity Links

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

To set up Opportunity links

User Permissions Needed	
To add custom links to the Opportunity page layout:	Customize Application

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Agreement Object

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

The following are some of the agreement record types:

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

To enable a new agreement type,

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

Defining a New Page Layout

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

To create a standard page layout, refer to the standard Salesforce Help.

Creating New Record Type

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

To create a standard record type, refer to the standard Salesforce Help.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Creating Agreement Record Types

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

To Create Agreement Record Types

User Permissions Needed	
To create record types for custom objects:	"Customize Application"

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- To apply a single page layout for all profiles, select **Apply one layout to all profiles** and choose the page layout from the drop-down list.
- To apply different page layouts based on user profiles, select **Apply a different layout** for each profile and choose a page layout for each profile.

13. Click Save to edit the values of the standard and custom picklists available for the record type. Optionally, click **Save & New** to create another record type.

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

Enabling Record Type for Template Authoring

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

To Assign Agreement Record Types to Template Agreement Types

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

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

Populating Contract and Template Picklists

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

Populating Picklist Values for Contract Object

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

Picklist values for the contract object is populated.

Populating Picklist Values for Template Contract Types

1. Go to **Setup** > **Create** > **Objects**.
2. Under the Label column, click **Template** to edit the custom Template object. The custom object definition is displayed.
3. Scroll down to the Custom Fields & Relationships related list and click the **Agreement Types** Field Label.
4. Click **New** to define a picklist value for each and every record type you have defined in the system. If you add a new contract record type, you must also add the type to this set of picklist values for the system to work properly. In other words, the values in this picklist and the record types defined for the system must be kept in sync. For example, if you have defined an NDA agreement record type, add it to the picklist values.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

5. Add one or more picklist values and click **Save**. You can reorder the picklist values and select one as the default value. The default value selected must be the same as the default record type. Also, you can sort and define the default.

Picklist values for the template contract types is populated.

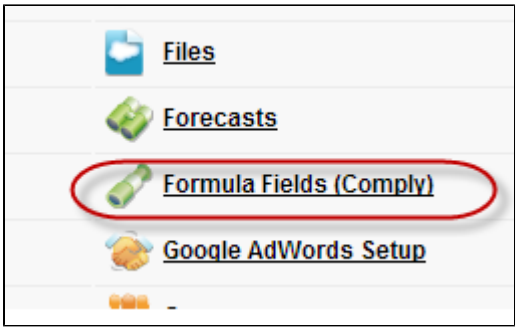
Populating Picklist Values for Template Subcategory

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

Picklist values for the template subcategory is populated.

Creating Formula Fields for an Agreement Rule Criteria

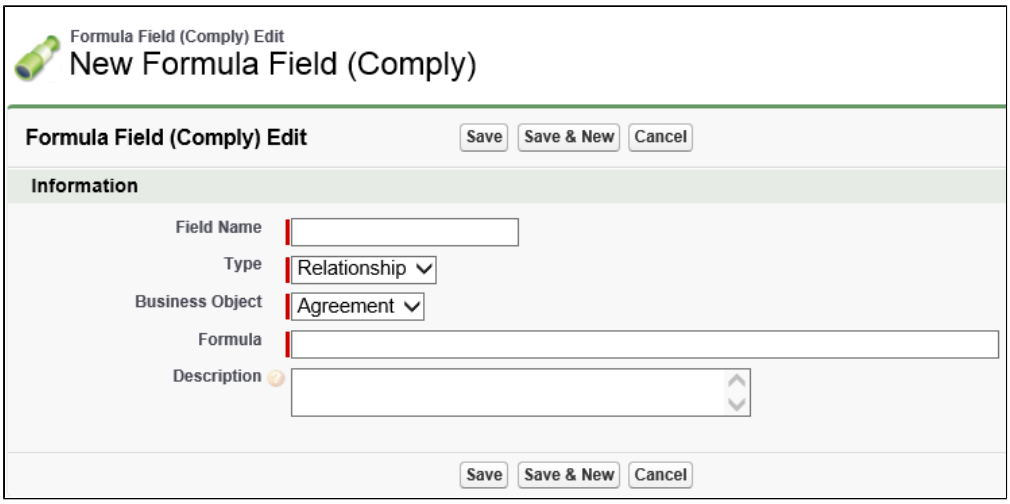
You may use the Formula Fields tab to create relationship fields which may be used in the Agreement Rule conditions.



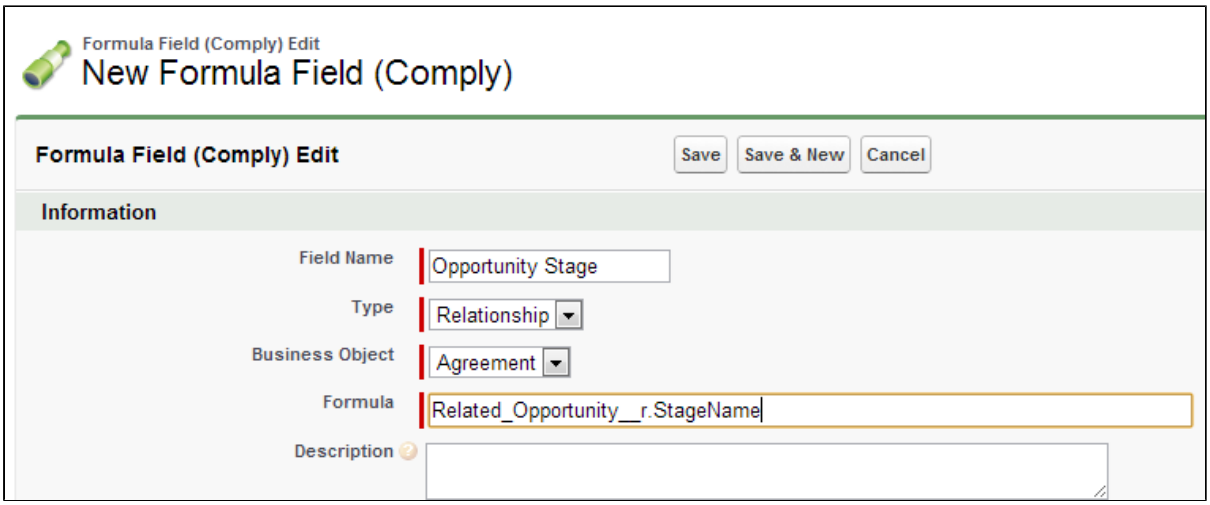
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To create a formula field

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

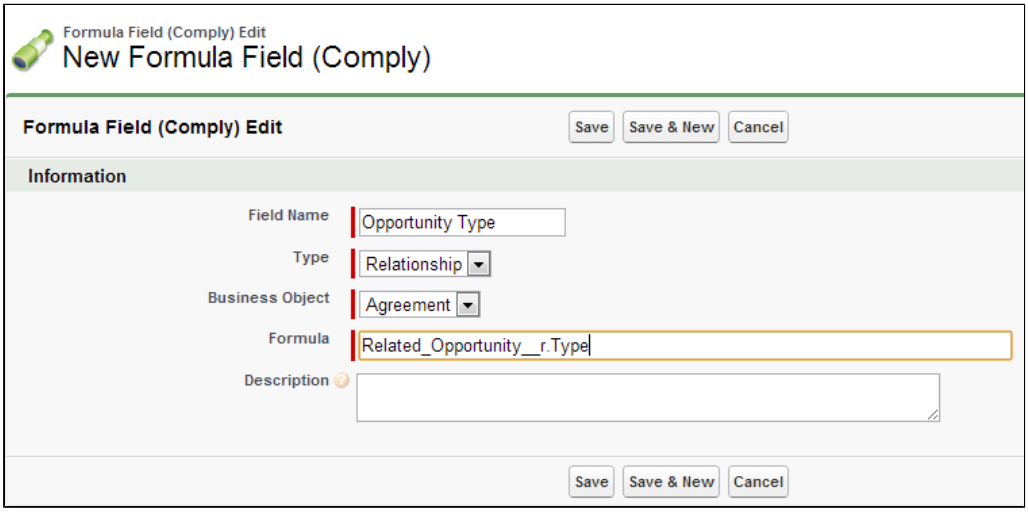


2. Type a mandatory **Field Name**, and select a mandatory **Business Object**. For example, to create a new Formula Field for the Opportunity Stage field from the Agreement object using the **Related Opportunity** lookup, type Field Name = Opportunity Stage, and select Business Object = Agreement.
3.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

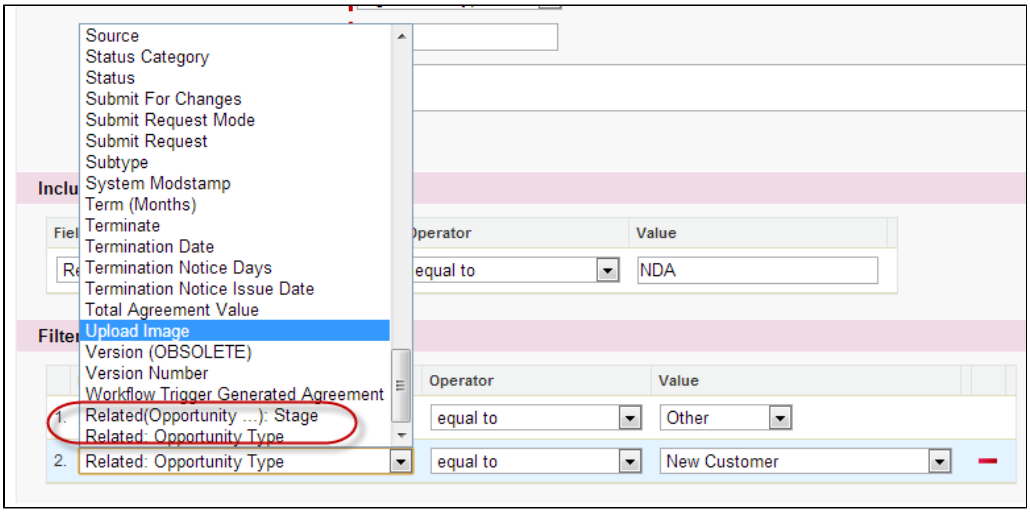


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

4. To create a new Formula Field for the Opportunity Type field from the Agreement object using the Related Opportunity lookup, type Field Name = Opportunity Type and Formula = **Apttus__Related_Opportunity__c.Type**.
5. Click Save.
   Info:



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



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

About Is Transient Field

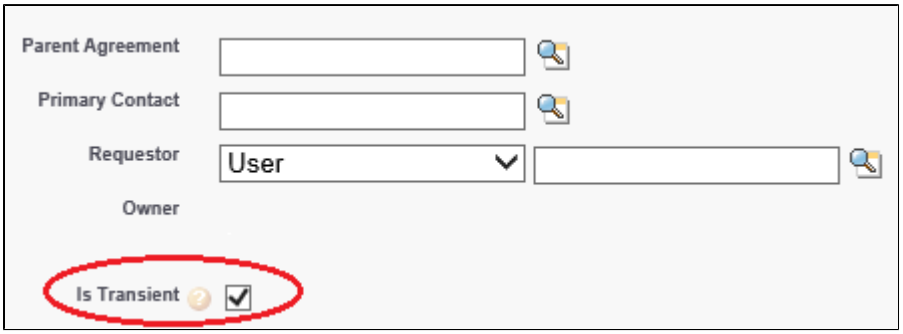
The *Is Transient* feature ensures the safety of your agreement data against the following unexpected events:

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

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

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

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

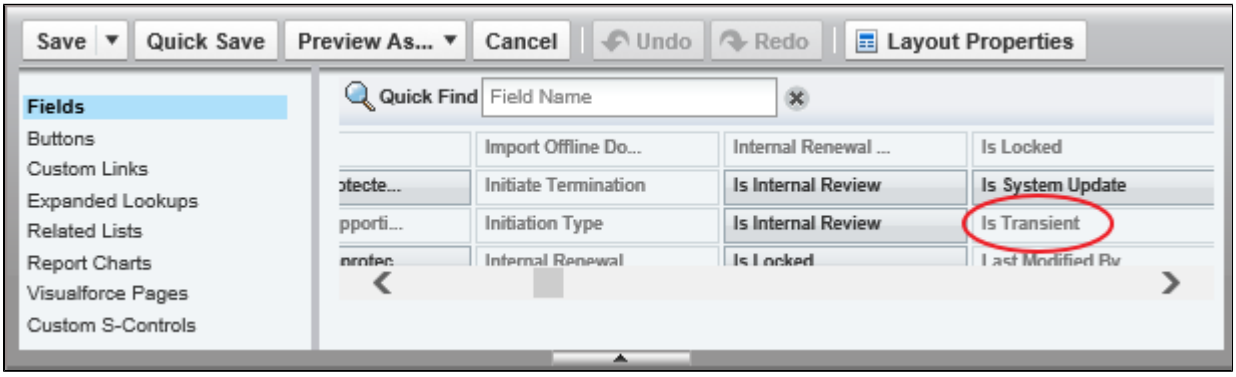


Apttus Contract Management application treats all such freshly created agreements as a transient data and displays the Is Transient check box as selected. This helps you (System Administrator) easily identify, run a report, and delete all the transient agreements (or such agreements which are not explicitly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

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Customizing Agreement Actions

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

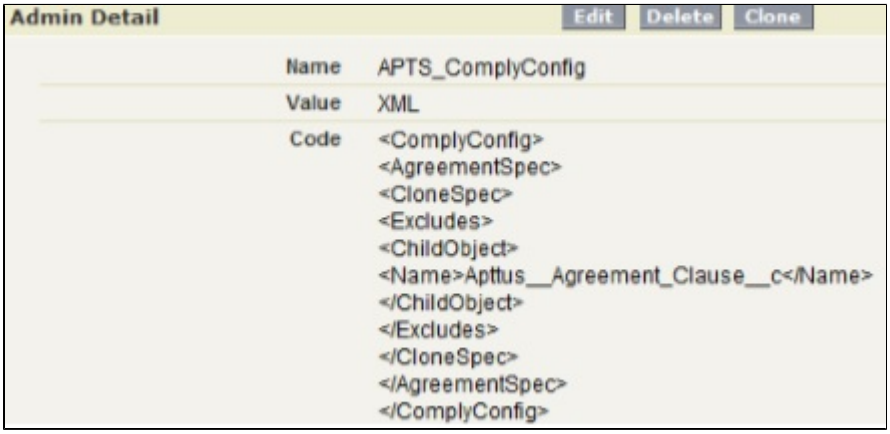
Customization is achieved by using the exisiting Visualforce page containing javascript code and configuring the action to invoke the javascript code in a new Visualforce page before displaying the agreement to the user for editing. Ajax javascript libraries supplied by Salesforce are available for use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

Setting Up Clone Specification

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

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

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



Overriding clone behavior of custom objects

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

Clearing Cloned Agreement Field Values

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

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

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

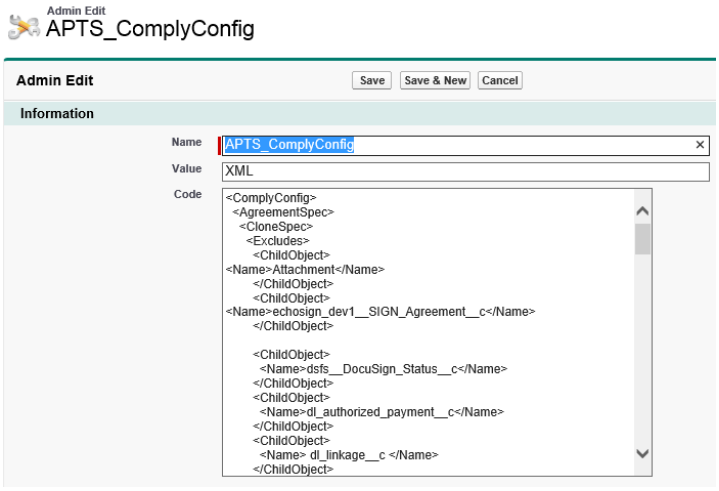
You must add code to APTS_ComplyConfig to indicate which fields you want to clear after cloning an agreement.

Configuring APTS_ComplyConfig

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

   Info:

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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

```
<ClearFields>
<ClearField>
<Name>Apttus__Company_Signed_By__c</Name>
</ClearField>
<ClearField>
<Name>Apttus__Company_Signed_Date__c</Name>
</ClearField>
</ClearFields>
```

The above code snippet example, the Company Signed By and Company Signed Date fields are be cleared from the Agreement record when you clone any agreement.Note: You can add various items that can be configured in the XML.

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


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

```
    <ChildObject>
      <Name>dsfs__DocuSign_Status__c</Name>
    </ChildObject>
    <ChildObject>
      <Name>dl_authorized_payment__c</Name>
    </ChildObject>
    <ChildObject>
      <Name> dl_linkage__c </Name>
    </ChildObject>
    <ChildObject>
      <Name>Apttus__AgreementLineItem__c </Name>
    </ChildObject>
  </Excludes>
  <ClearFields>
    <ClearField>
      <Name> Apttus__Company_Signed_By__c</Name>
    </ClearField>
    <ClearField>
      <Name>Apttus__Company_Signed_Date__c </Name>
    </ClearField>
    <ClearField>
      <Name>Apttus__Company_Signed_Title__c</Name>
    </ClearField>
    <ClearField>
      <Name>Apttus__Other_Party_Returned_Date__c</Name>
    </ClearField>
    <ClearField>
      <Name>Apttus__Other_Party_Sent_Date__c</Name>
    </ClearField>
    <ClearField>
      <Name>Apttus__Other_Party_Signed_By__c</Name>
    </ClearField>
    <ClearField>
      <Name>Apttus__Other_Party_Signed_By_Unlisted__c</Name>
    </ClearField>
    <ClearField>
      <Name>Apttus__Other_Party_Signed_Date__c</Name>
    </ClearField>
    <ClearField>
      <Name>Apttus__Other_Party_Signed_Title__c</Name>
    </ClearField>
    <ClearField>
      <Name>Test_Apicklist__c</Name>
    </ClearField>
    <ClearField>
      <Name>Test_Ccheckbox__c</Name>
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

```
        </ClearField>
        <ClearField>
          <Name>New_DateTime__c</Name>
        </ClearField>
        <ClearField>
          <Name>RichText1__c</Name>
        </ClearField>
        <ClearField>
          <Name>Apttus__Special_Terms__c</Name>
        </ClearField>
      </ClearFields>
    </CloneSpec>
  </AgreementSpec>
  <TemplateSpec>
    <CloneSpec>
      <Excludes>
        <ChildObject>
          <Name>Apttus__Agreement_Clause__c</Name>
        </ChildObject>
      </Excludes>
    </CloneSpec>
  </TemplateSpec>
  <SortSpec>
    <SortObjects>
      <SortObject>
        <Name>Apttus__Agreement_Clause__c</Name>
        <SortFields>
          <SortField>
            <Name>Apttus__Category__c</Name>
          </SortField>
          <SortField>
            <Name>Name</Name>
          </SortField>
        </SortFields>
      </SortObject>

      <SortObject>
        <Name>Invoice_Relay_Service__c</Name>
        <SortFields>
          <SortField>
            <Name>Name</Name>
          </SortField>
        </SortFields>
      </SortObject>

      <SortObject>
        <Name>AddBilling_Product__c</Name>
```

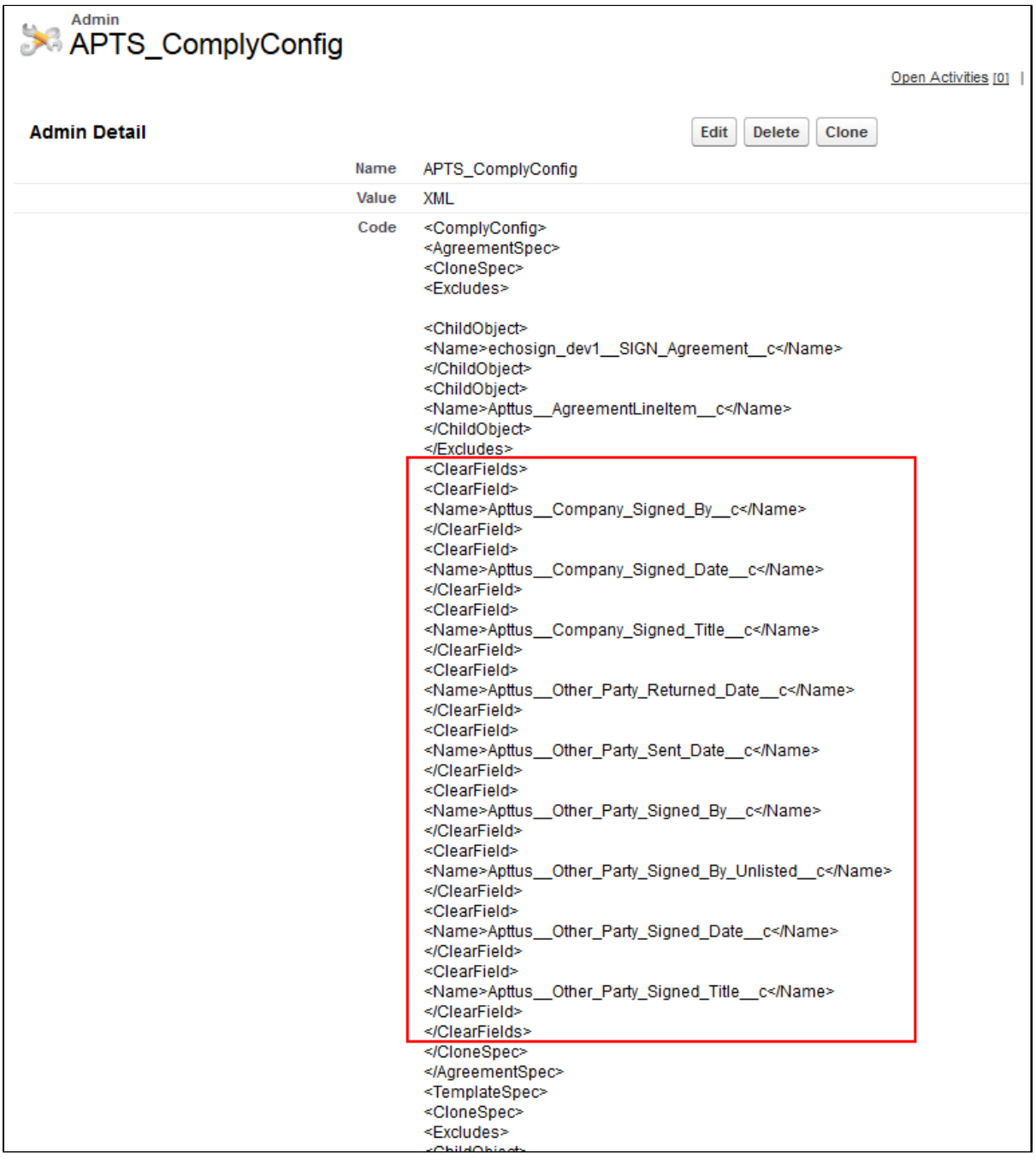

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

```
        <SortFields>
          <SortField>
            <Name>Name</Name>
          </SortField>
        </SortFields>
      </SortObject>

     <SortObject>
       <Name>Accessory__c</Name>
         <SortFields>
            <SortField>
               <Name>Accessory_Category_Type__c</Name>
            </SortField>
            </SortFields>
      </SortObject>

      <SortObject>
        <Name>Business_Diode__c</Name>
        <SortFields>
           <SortField>
            <Name>Diode_Number_N__c</Name>
          </SortField>
        </SortFields>
      </SortObject>

   </SortObjects>
  </SortSpec>
</ComplyConfig>
```

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Creating Validation Rules

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

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

To create a validation rule

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Agreement Lifecycle Management

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

Here is a brief summary of the following sections:

- **Requesting and Drafting Agreement**
  Requesting for an agreement is the first stage of the contract management process. At this stage, users initiate agreements and find apposite documents.
- **Generating An Agreement**
  Apttus enables you to generate an agreement using an existing template.
- **Configurable Wizard**
  This feature makes it possible to create your own agreement-creation wizards. These wizards can then be used by your sales representatives, purchasing agents, HR managers and other users to quickly create their own agreements.
- **Negotiating An Agreement**
  This stage is designed for you to manage the agreement negotiation process. You can manage redlined versions of agreements in various formats side-by-side, Lock / send document, insert clauses, respond, chat, and compare versions. This also allows you to quickly observe any discrepancies and reduce negotiation time.
- **Marking an Agreement Document as Private**
  Contract Management now allows you mark your agreement document as private.
- **Finalizing An Agreement**
  This stage covers the process for sending agreements for executing, gathering signatures and logging into the repository.
- **Routing Documents to Content Libraries**
  The Libraries tab has several publishing-related options at the top of the page that allows you to upload, classify, and publish files in the Salesforce CRM Content repository.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- **Managing Templates**
  Apttus template is a common set of sections, clauses, text, and placeholders for terms and conditions. Templates can be merged with structured data to generate agreements or proposals. Templates are stored within an Apttus template repository, and are used to create quotes and contracts. An Apttus template can be termed as a blueprint or mold for creating distributable documents.
- **Agreement Phases**
  The contract process goes through typical sequences of events, or *phases*.
- **Managing Obligations**
  Obligation management refers to email alerts and reminders that ensure internal and external obligations in connection to your agreements are properly fulfilled.
- **Searching and Reporting**
  Apttus provides the default set of capabilities for searching, views, dashboards, and reporting. This is one of the key benefits from a Contract Management system. The ability to get the key information out, for example, dates, amounts and number of contracts to make business decisions is crucial. Modifying the search and reports is based on standard Salesforce functionality.

About Agreement Lifecycle Management Process

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

Contract Management process includes the following stages.

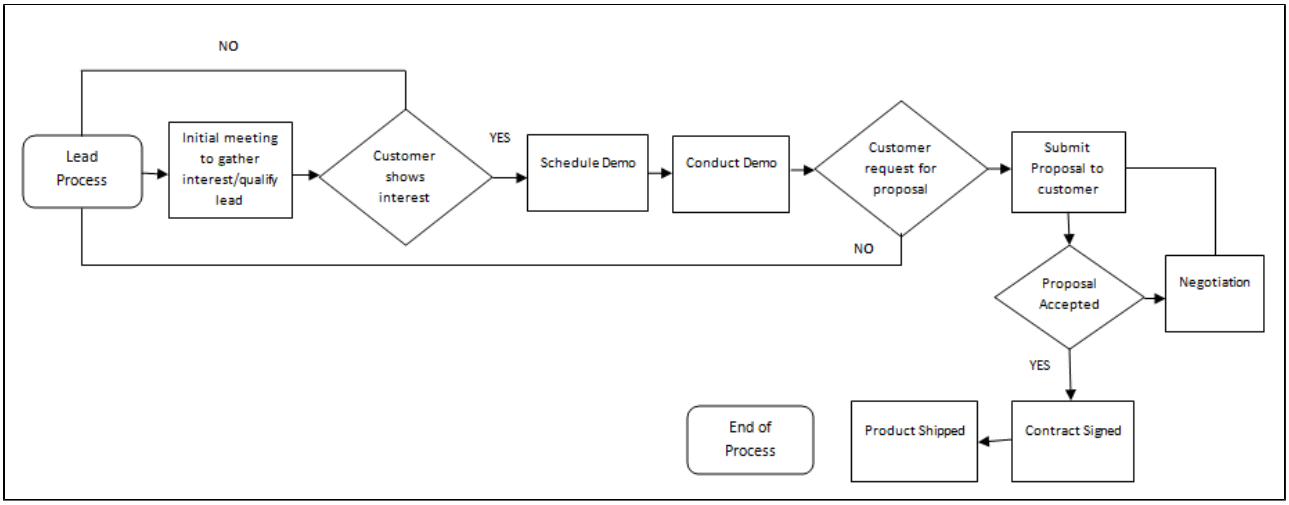
- Requesting and Drafting an Agreement
- Agreement Negotiation
- Agreement Finalization
- Agreement Phases
- Obligation Management
- Searching and Reporting

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Apttus Contract Management allows you to do the following actions.

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

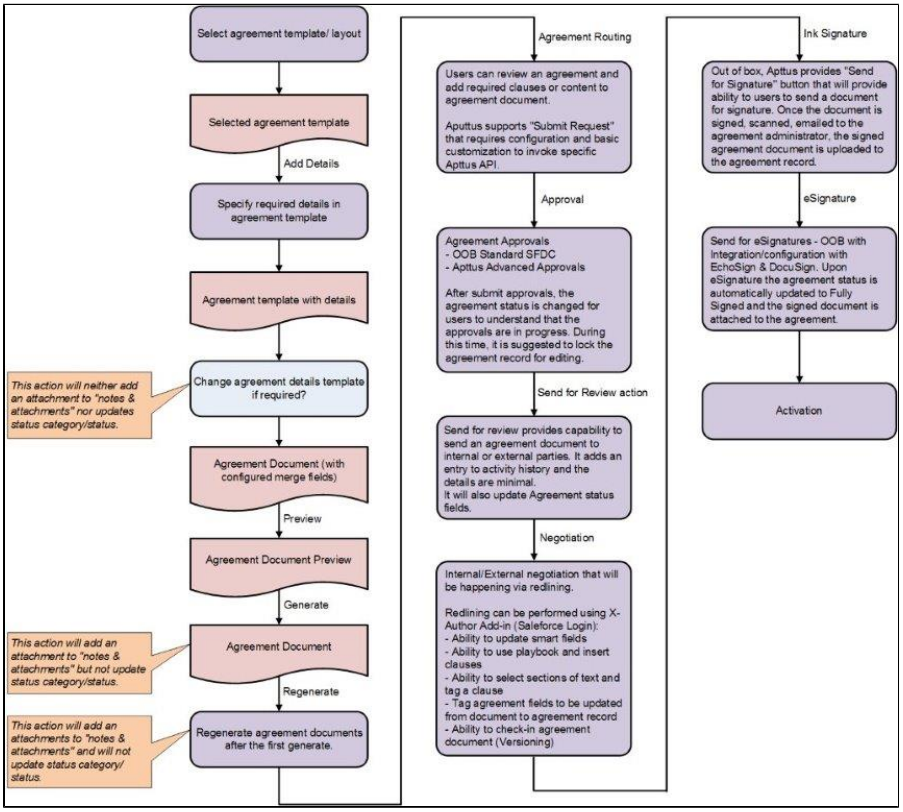
The following diagram provides an example of a typical agreement process flow.



Agreement Actions and Corresponding Behaviors

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Requesting and Drafting an Agreement

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

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

Setting Up Agreement Request Process

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

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To setup an agreement request process

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

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

```
<SubmitRequest>
<Defaults>
  <RequestMode>Manual</RequestMode>
  <SendEmail>true</SendEmail>
  <UpdateAgreementType>false</UpdateAgreementType>
  <AutoMode>
      <AgreementType>Other</AgreementType>
          <Template>ComplyAgmtTemplate</Template>
          <EmailTemplate>Agreement Review Notification (Auto)<
/EmailTemplate>
          <DocumentFormat>DOC</DocumentFormat>
  </AutoMode>
  <ManualMode>
        <Queue>Reviewers</Queue>
        <EmailTemplate>Agreement Review Notification<
/EmailTemplate>
  </ManualMode>
 </Defaults>
 </SubmitRequest>
```

The defaults specified in the above code is:

- Agreement Template = **ComplyAgmtTemplate**.
- Agreement Type = **Other**.
- Email Template(*sent when standard or self service contract is generated by system*) = **Agreement Review Notification**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- Queue to which request is sent in case of request for Non Standard Agreement = **Reviewers**.

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

Note

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

Setting Up Rule-based Agreement Request Process Parameters

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

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

Parameters (Rule Types) and respective description.

Submit Request Mode	If the value for this parameter is set to *Auto*, this mode triggers the automatic generation of agreement document. If the value for this paramter is set to *Manual*, the next Agreement Rule in the sequence is executed.
Agreement Type	This parameter is used to identify the type of agreement to be created for this request. In case the **Agreement Type** is already identified by the requester, this parameter can be skipped.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Agreement Template	This parameter is used to identify the agreement template to be used for automatic generation of the agreement document. This parameter can be skipped if there is no requirement for automatic agreement generation.
Queue	This parameter identifies the queue to which the agreement ownership is transferred to process the agreement request.
Email Template	This parameter is used to identify the template used for sending email with automatically generated agreement document to predefined set of recipients. In non-Auto mode of agreement request processing the template identifies the email format sent to the Queue members processing the agreement request. For example, if Agreement Category is Sales, send the Agreement Request to Legal – Procurement Queue.
Document Folder	The default repository to store executed contracts is Apttus Documents folder. If you want to use the custom folder to store published contracts, specify the folder name by selecting 'Document Folder' rule type with required conditions. In this way you can store your published contracts in multiple folders.

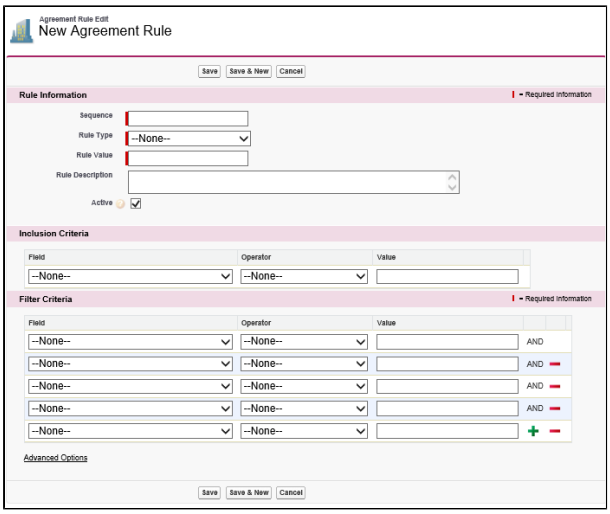
To setup Agreement Rules to identify Agreement Request Process parameters

User Permissions Needed	
To create, edit or delete an Agreement Rule:	Agreement Rule: Read, Create, Edit, Delete. Agreement: Read Template: Read

1. Click **+** and select **Agreement Rules**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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



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

> ## Note
>
> By default, the Active check box is selected.

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

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

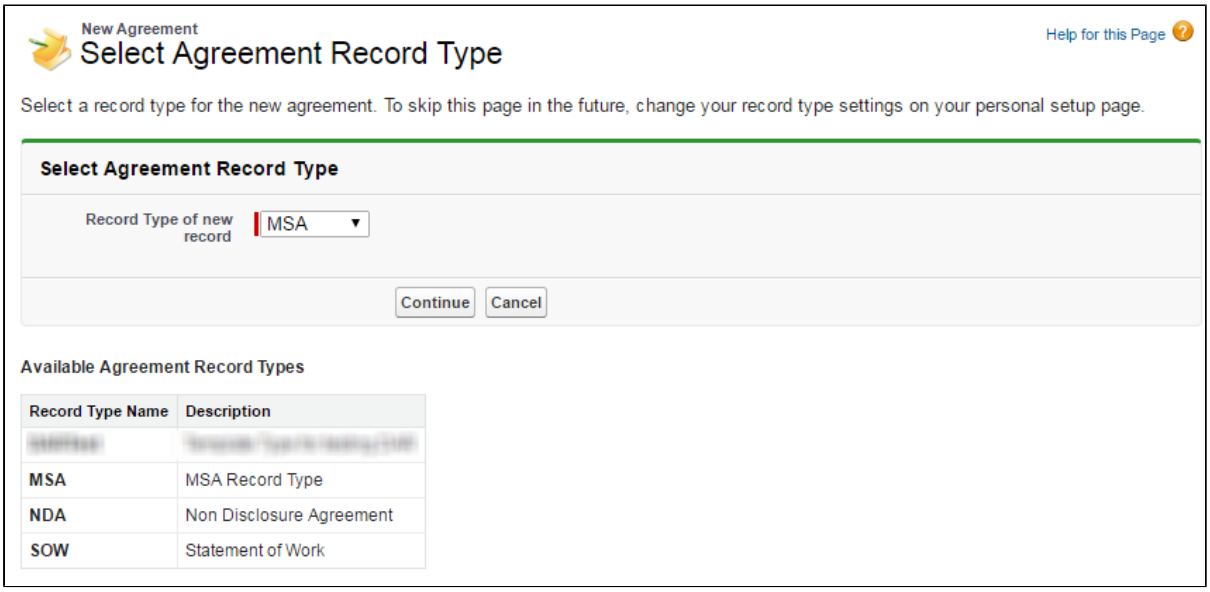
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

Drafting an Agreement

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

1. Click **Agreements > New**.

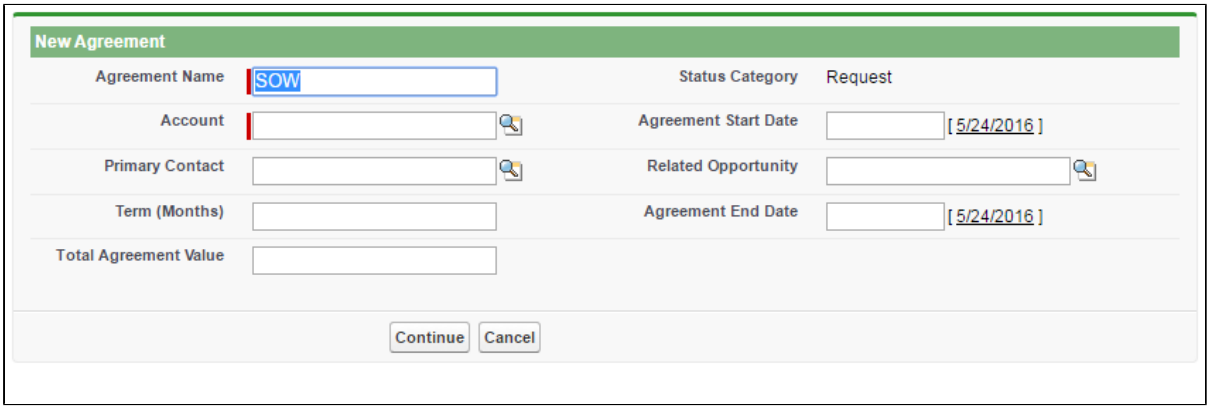


> **Note**
>
> If the default Agreement type is not set up for your org or you see only one agreement type, you will be navigated to the New Agreement page.

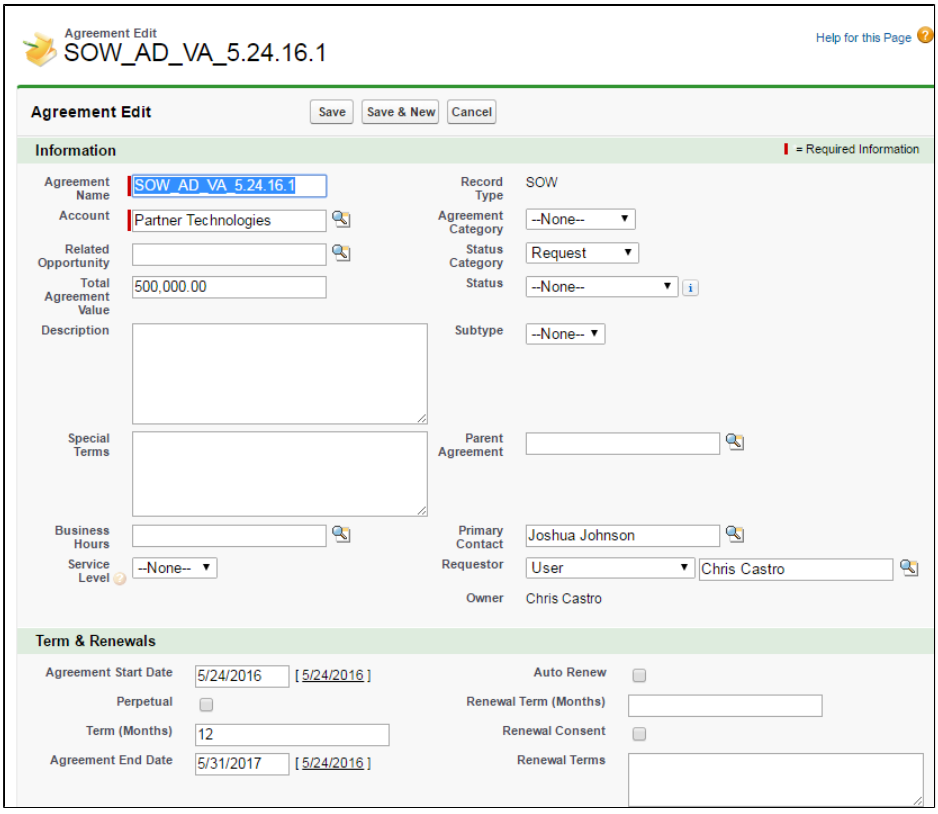
2. In the Select Agreement Record Type page, choose the desired Agreement Record Type and click **Continue**.
3. The New Agreement page is displayed. This is an intermediate page that allows you to enter values for certain important fields in your agreement record. Fill all the required fields (marked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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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



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



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Note

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

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

Button	Description
Save	Click **Save** to keep and retain your agreement details. If you need to change or modify the agreement details, click **Edit**, and continue working without any risk of losing your work until the point of your last save.
Save & New	Click **Save & New** to save your work and start creating a new Agreement Record. The system navigates you to the intermediary screen to select a new Agreement Type. *This is useful if you need to create a master and subordinate agreement or related agreements, such as the primary agreement and a related Non-Disclosure Agreement (NDA), and want to save time by jumping right from creating the first agreement record to creating another one.*
Cancel	Click **Cancel** to adjourn the process of editing the Agreement Record and discard all the changes made since the last edit. Click **Yes** to confirm your selection.

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

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

Generating An Agreement

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

User Permissions Needed	
To preview an agreement:	Agreement: Read Template: Read

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

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

To generate an agreement document

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

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 format for your agreement record:
    - DOC or DOCX: To generate a Microsoft Word document.
    - RTF: To generate an agreement document in Rich Text Format.
    - PDF: To generate a PDF protected agreement document.
4. To include a watermark across your agreement document, select the **Include Watermark** check box.
5. From the **Templates** section, select the template to generate your agreement document, and click **Generate**. If you have just one template checked-in for a record type or after applying query filters - one template is filtered for your agreement, the single template is Auto-selected. You can see the second row of action buttons at the bottom only when the number of templates associated with your agreement exceed five.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

6. Click the **Click here to view your file** link to view your agreement or click **Return** to return to the agreement detail page.

An agreement document is generated using the selected template and can be found in the **Notes & Attachments** related list. You may click the **Preview** button to preview the generated document.

You can now send the generated document to your customer for review. Make sure that *Track Changes* is enabled on the agreement document which you send to the customer for review.

Negotiating An Agreement

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

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

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

Key Tasks Associated With the Negotiation Phase

The following key tasks are involved to complete the negotiation:

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

You can secure documents during the negotiation cycle.

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

- Amend and save agreements/proposals in Salesforce

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

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

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

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

To negotiate an agreement

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

> **Note**

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

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

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

Tip

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

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

7. Click **View Refresh** in Apttus browser. This action updates the agreement version in the repository and activity history.
8. Go to X-Author Contracts in Microsoft Word and click **Compare**, and select two versions of the agreement that you need to compare. The two versions of the agreement are presented side by side and you can quickly see any differences.

About Tracking Clauses in your Agreement

Apttus Contract Management provides two solutions for tracking the clauses used in your agreement documents.

- Tracking Agreement Clause Activity – Track Agreement Clause activity using the Agreement Clause Related list. Whenever an agreement clause is inserted, modified or deleted during negotiation, agreement activity is recorded in the list at check-in and reconciliation. Use this data for reference or reporting purposes to track how non-standard language changes over the lifecycle of an agreement. *This is the default means for tracking clause activity in your agreement.*
- Tracking Agreement Clause Versions – Add the **Master Clause Listing** section to your agreement layouts to provide a comprehensive list of clauses referenced in the current/final agreement document, from first check-out to activation. Drill down into each clause listing to view a list of all Clause Iterations present in the document throughout negotiation, as well as **Clause Iteration Details**. Generate reports on agreements that contain specific clauses or clause language.

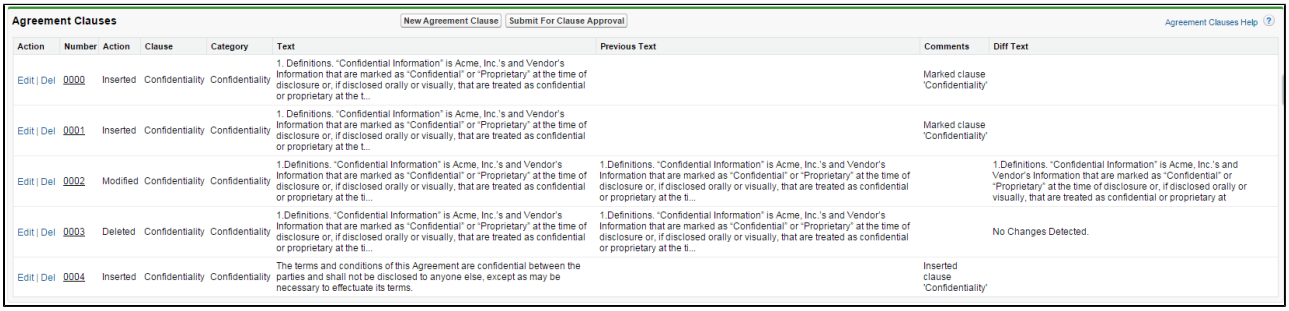
> **Note**
>
> Tracking of Agreement Clause Versions is only available in Contract Management version **8.359** or higher when using X-Author for Contracts version **8.5.1010**. Only agreement documents using FX2 format are supported.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Tracking Agreement Clause Activity

The Agreement Clauses related list on the Agreement record is used to capture clause activity for associated agreement documents during contract negotiation. When an agreement is checked out by a negotiator using X-Author for Contracts, changes can be made to the document that insert, modify or delete clauses. When the agreement document is checked back in, new records are created in the Agreement Clauses related list that reflect these changes. You can use this data for reference or reporting purposes to track how non-standard language changes over the lifecycle of an agreement.

Below is an example of Agreement Clause data recorded in the related list after several sessions of negotiation (NDA agreement):



Agreement Clauses — New Agreement Clause | Submit For Clause Approval — Agreement Clauses Help

Action	Number	Action	Clause	Category	Text	Previous Text	Comments	Diff Text
Edit | Del	0000	Inserted	Confidentiality	Confidentiality	1. Definitions. "Confidential Information" is Acme, Inc.'s and Vendor's Information that are marked as "Confidential" or "Proprietary" at the time of disclosure or, if disclosed orally or visually, that are treated as confidential or proprietary at the t...		Marked clause 'Confidentiality'	
Edit | Del	0001	Inserted	Confidentiality	Confidentiality	1. Definitions. "Confidential Information" is Acme, Inc.'s and Vendor's Information that are marked as "Confidential" or "Proprietary" at the time of disclosure or, if disclosed orally or visually, that are treated as confidential or proprietary at the t...		Marked clause 'Confidentiality'	
Edit | Del	0002	Modified	Confidentiality	Confidentiality	1.Definitions. "Confidential Information" is Acme, Inc.'s and Vendor's Information that are marked as "Confidential" or "Proprietary" at the time of disclosure or, if disclosed orally or visually, that are treated as confidential or proprietary at the ti...	1.Definitions. "Confidential Information" is Acme, Inc.'s and Vendor's Information that are marked as "Confidential" or "Proprietary" at the time of disclosure or, if disclosed orally or visually, that are treated as confidential or proprietary at the ti...		1.Definitions. "Confidential Information" is Acme, Inc.'s and Vendor's Information that are marked as "Confidential" or "Proprietary" at the time of disclosure or, if disclosed orally or visually, that are treated as confidential or proprietary at
Edit | Del	0003	Deleted	Confidentiality	Confidentiality	1.Definitions. "Confidential Information" is Acme, Inc.'s and Vendor's Information that are marked as "Confidential" or "Proprietary" at the time of disclosure or, if disclosed orally or visually, that are treated as confidential or proprietary at the ti...	1.Definitions. "Confidential Information" is Acme, Inc.'s and Vendor's Information that are marked as "Confidential" or "Proprietary" at the time of disclosure or, if disclosed orally or visually, that are treated as confidential or proprietary at the ti...		No Changes Detected.
Edit | Del	0004	Inserted	Confidentiality	Confidentiality	The terms and conditions of this Agreement are confidential between the parties and shall not be disclosed to anyone else, except as may be necessary to effectuate its terms.		Inserted clause 'Confidentiality'	

Clause activity during negotiation and subsequent check-in captured in Agreement Clauses include:

- Inserting a clause into an agreement document using Playbook
- Marking a clause in the document and replacing its content with clause content from Playbook.
- Marking a clause in the document to adopt the properties of a clause from Playbook.
- Modifying a clause in the agreement document.
- Marking a clause for deletion.

Agreement Clause Records

Two factors determine how Agreement Clause activity is recorded in the related list during negotiation:

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- The clause was inserted, modified or deleted in the initial session or a subsequent session. **A session can be defined as the time between Check-Out and Check-In of the same agreement document**.
- The clause was or was not **reconciled** to the agreement record.

> **Note**
>
> If you are using Contract Management **8.359** or higher with X-Author Contracts **8.5.1010** or higher: After the agreement document is generated and checked out *for the first time*, a record is created in the Related List for all smart clauses present in the generated document with the **Action** as *Original*.

The following tables describe how clause actions taken during a session affect Agreement Clause information on the Agreement record.

Initial Session (1st Check-Out)

Clause Actions before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
You insert a clause using the Playbook or Mark Clause, without making any changes to the clause content.	"Housing Rent Allowance" clause is inserted from the Playbook.	Creates a single record in Agreement Clause related list with **Action** as *Inserted*.	Creates a single record in Agreement Clause related list with **Action** as Inserted.
After inserting a clause using Playbook or Mark Clause, you make changes to the clause content.	Contract negotiator changes a warranty period from 1 year to 2 years in the same session “Housing Rent Allowance” is inserted.	Creates a single record in Agreement Clause related list with **Action** as *Inserted*.	Creates 2 records in Agreement Clause related list: • One with **Action** as *Inserted*.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Clause Actions before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
			• One with **Action** as *Modified*.
Once you insert a clause using the Playbook or Mark Clause, you decide to remove the entire clause or Unmark the clause from the Mark Clause Panel.	Contract negotiator decides that “Housing Rent Allowance” clause does not belong in the contract and chooses to remove it in the same session it has been inserted.	No record in the Agreement Clause related list.	No record in the Agreement Clause related list.

Subsequent Sessions

Actions taken on the Clause before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
You do not make any changes to the clause content.	"Housing Rent Allowance" clause is not modified in a session after it is inserted.	No update to the Agreement Clause related list.	No update to the Agreement Clause related list.
After checking out the same document, you make changes to the clause content.	"Housing Rent Allowance" is changed in a session after it has been inserted.	No update to the Agreement Clause related list.	

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Actions taken on the Clause before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
			Creates a single record in Agreement Clause related list with **Action** as *Modified*.
Once you Check-Out the same agreement document, you, as a Legal counsel, decide to permanently delete a clause from the document. You mark that clause for deletion from the Mark Clause Panel and Check-In the agreement document to Salesforce.	Contract negotiator decides that “Housing Rent Allowance” ought to be struck from the contract in a session after it had been inserted. Contract negotiator marks the clause for deletion.	No update to the Agreement Clause related list.	Creates a single record in the Agreement Clause related list with **Action** as *Deleted*.

Tracking Agreement Clause Versions

Agreement Clause Versioning enhances existing document control by introducing a solution framework of clause versioning at the Agreement record level. Using this feature, you can easily view a comprehensive list of clauses referenced in the current agreement document. Agreement Clause Versioning is intended to complement standard agreement clause tracking through the Agreement Clause Related List. The primary purpose of Agreement Clause Versioning is to give users a means to track negotiation of clauses through the entire lifecycle of an agreement up to and including activation.

Using Agreement Clause Versioning you can:

- add a **Master Agreement Clauses** section to the Agreement record layout that provides a listing of all clauses referenced in the primary agreement document from initial check-out to activation.
- drill down into the list to view all **Clause Iterations** for a specific clause.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- drill down into each clause iteration to **Clause Iteration Details** to review changes to clause language.
- customize reports (using standard Salesforce functionality) to locate agreements by clause and/or clause language.

What is the difference between the Master Clause List and the Agreement Clause Related List?

While the two lists seem to be tracking the same information, both lists are unique and used for different purposes:

List	Description	Deleted Clauses?	Changes to a single clause
Master Agreement Clauses (Clause Versioning)	Provides a "bird's eye view" of what currently exists in the agreement document	No	Multiple changes to a single clause are stored in **Clause Iterations**.
Agreement Clause Related List (Default Clause Tracking)	Captures *every* change made to every clause that ever existed in the agreement document.	Yes	Multiple changes to a single clause are represented as separate entries.

Note

Tracking of Agreement Clause Versions is only available in Contract Management version **8.359** or higher when using X-Author for Contracts version **8.5.1010**. Only agreement documents using FX2 format are supported.

- Adding Master Agreement Clauses to the Agreement Layout
- Viewing Master Agreement Clauses
- Viewing Clause Iterations
    - Clause Iteration Records
    - How Clause Iterations are Recorded

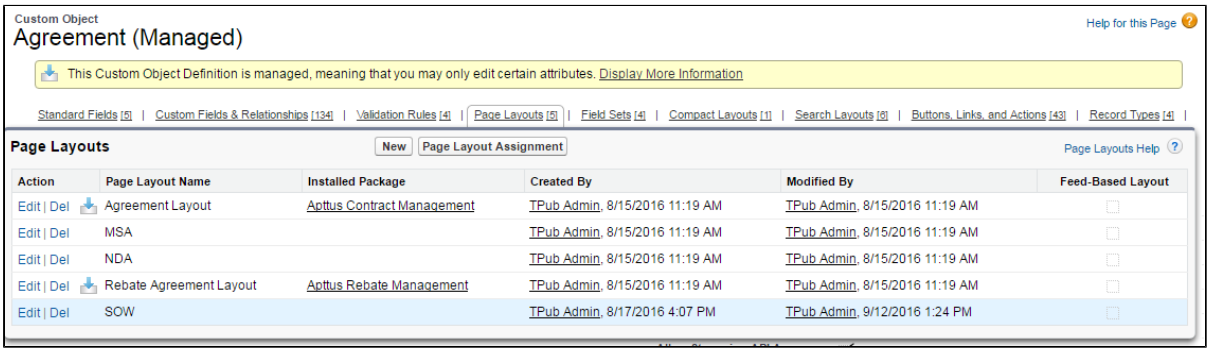
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Adding Master Agreement Clauses to the Agreement Layout

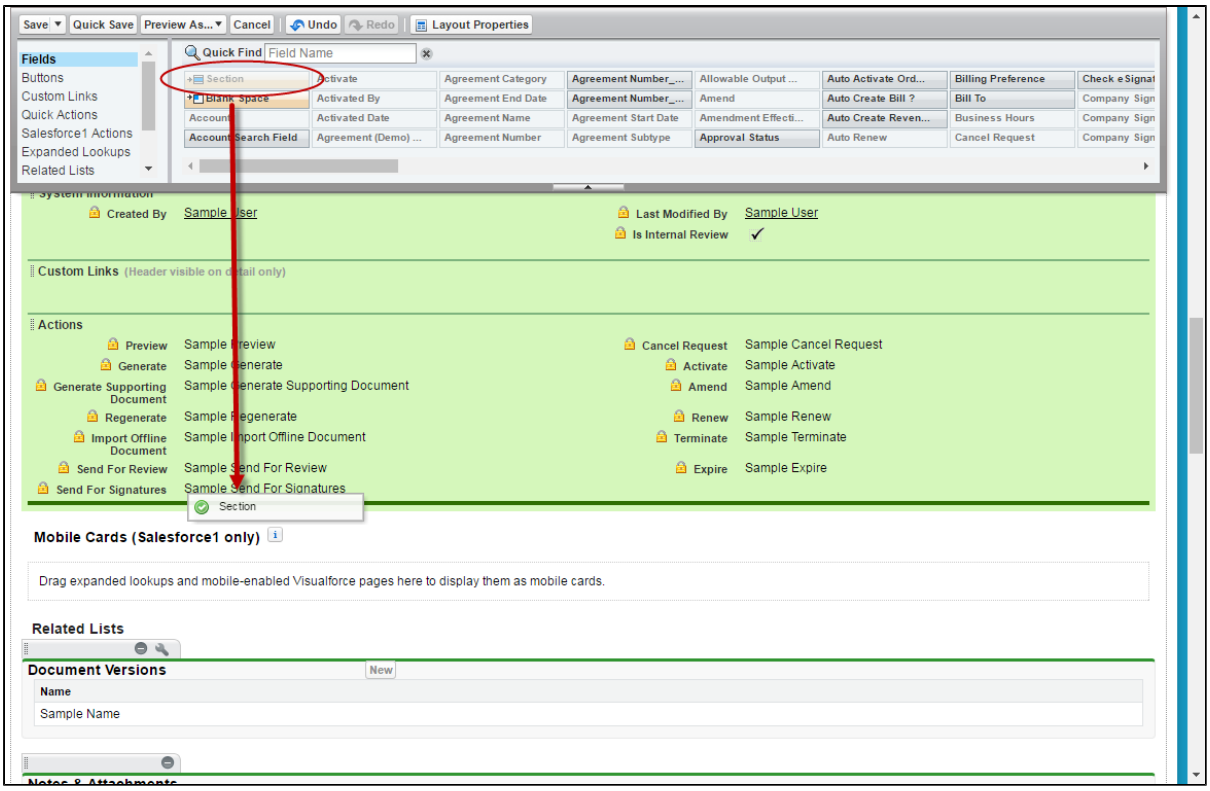
The Agreement Clauses Visualforce page is automatically enabled for all user profiles.

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

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

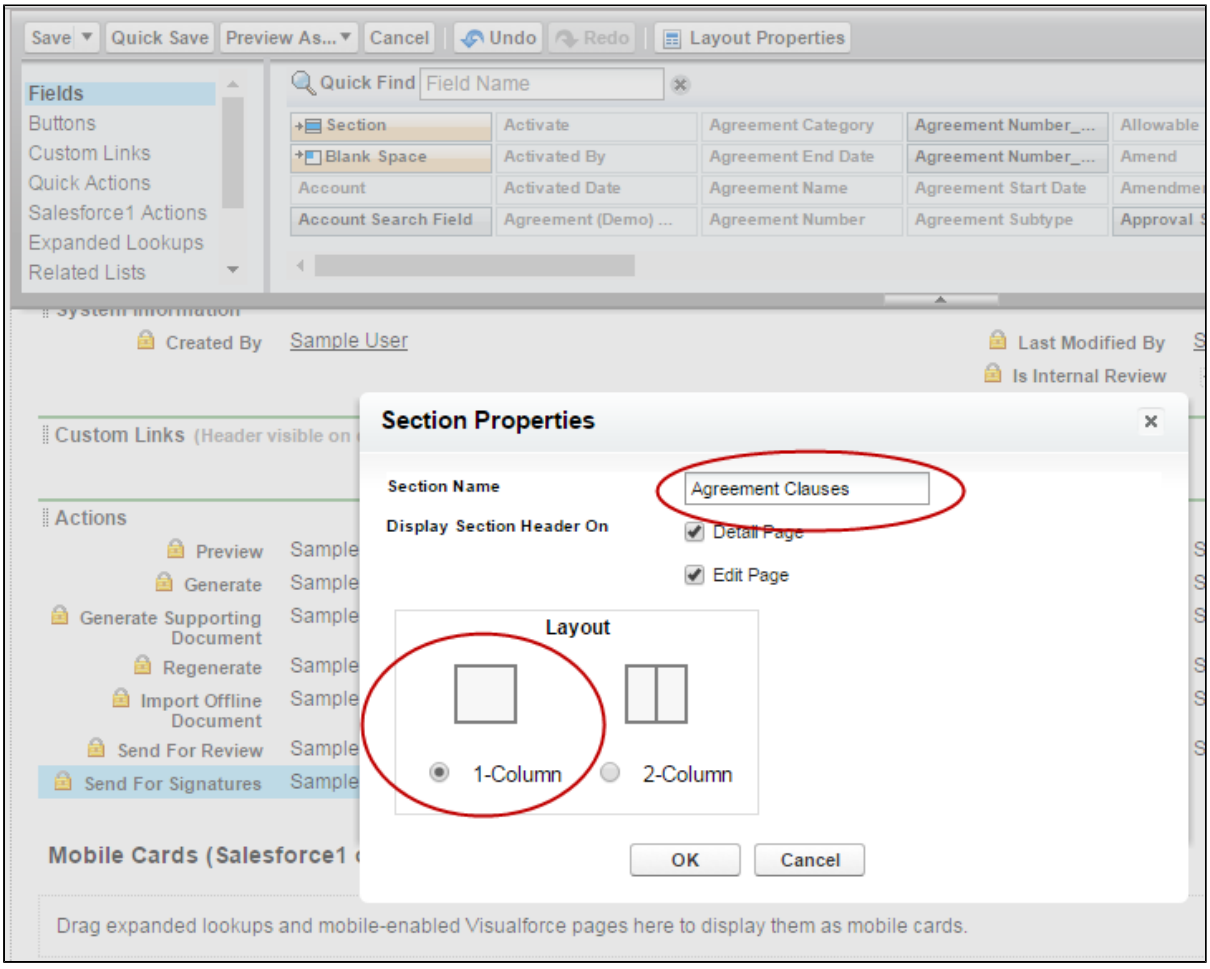


3. Drag-and-drop the **Section** field onto the area below the Actions section of the Agreement layout.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

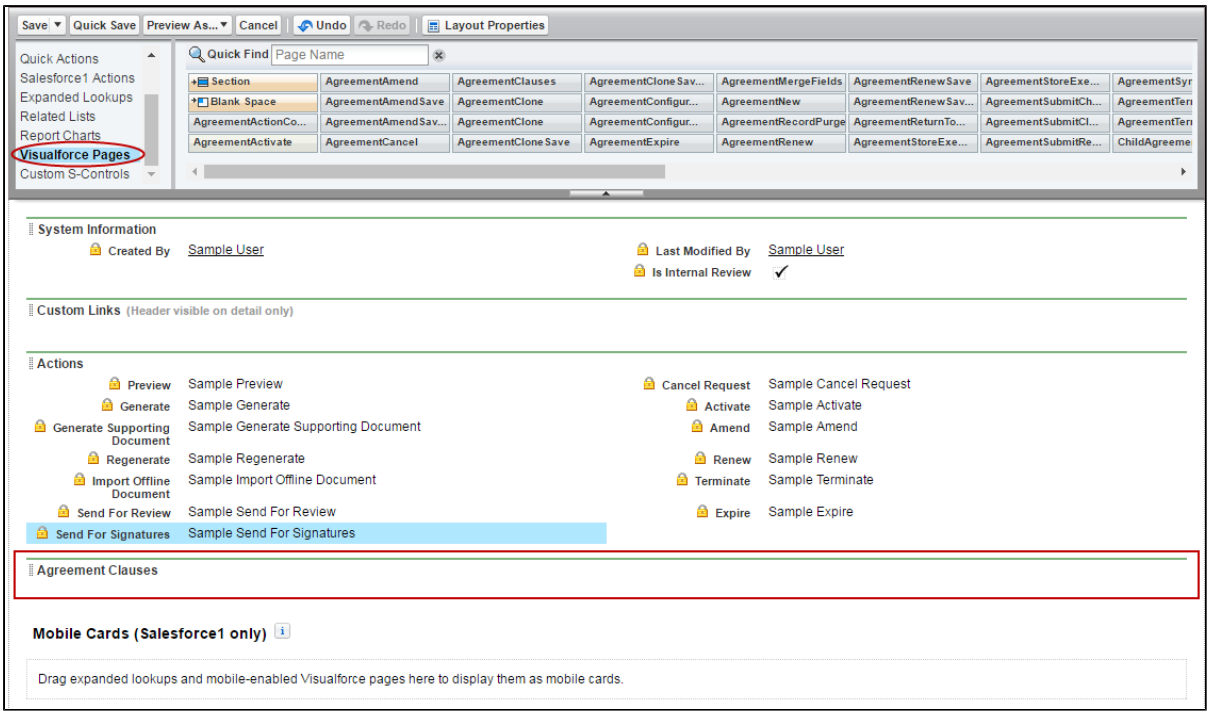
4. Enter **Agreement Clauses** as the section name and choose a **1-Column** layout.



5. Click **OK**. The Agreement Clauses section is created.

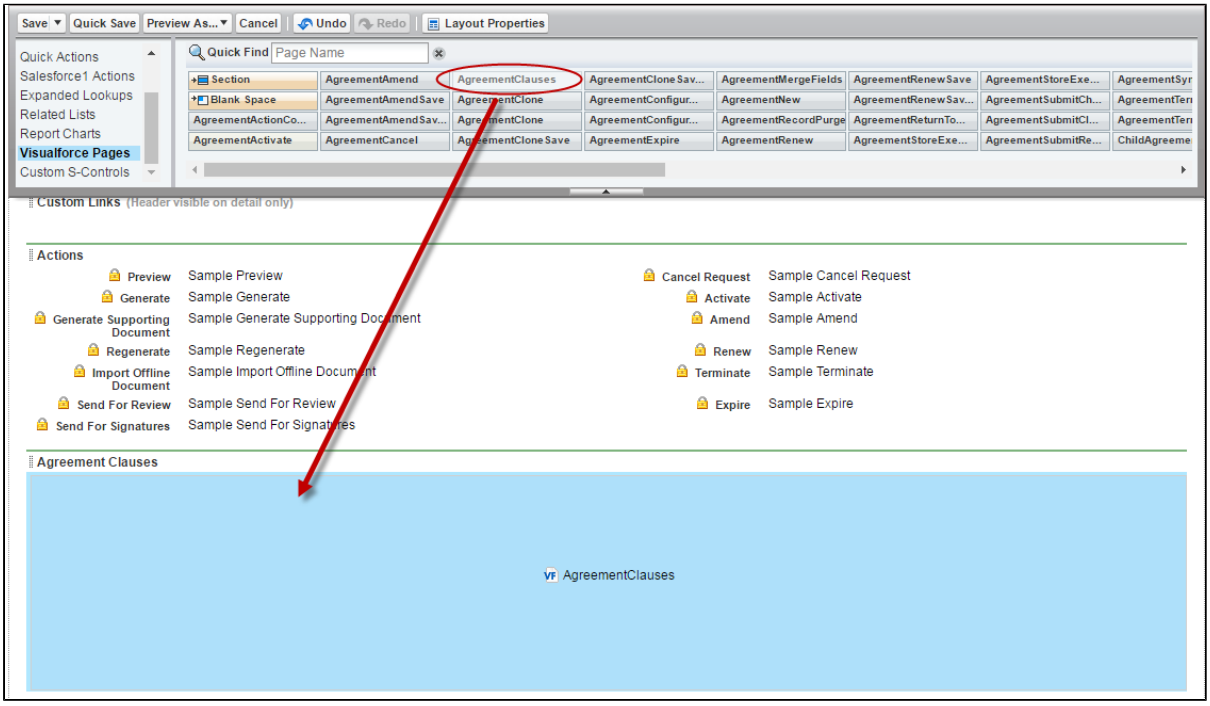
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

6. From the Layout Designer menu, choose **Visualforce Pages**.



7. Drag-and-drop the **AgreementClauses** Visualforce page onto the section you just created.

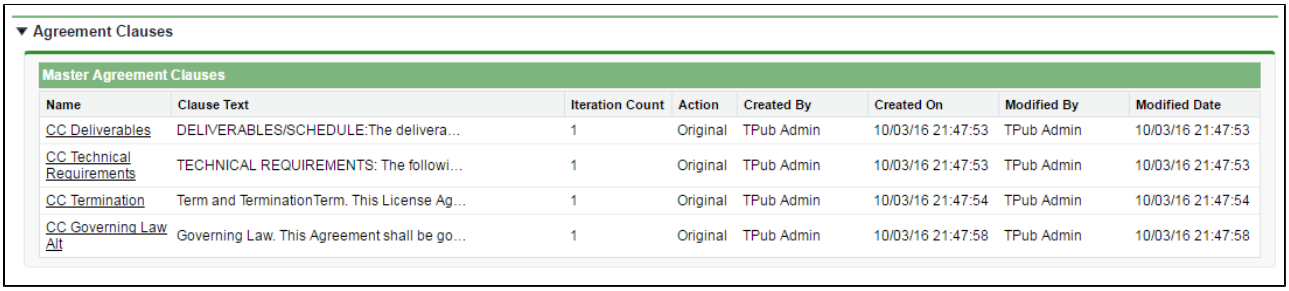
Copyright ©2011-2017 Apttus Corporation. All rights reserved.



8. In the upper-right hand corner of the AgreementClauses section, click the icon to change the Visualforce Page Properties. Select the **Show scrollbars** option and click OK.
9. Click **Save** to save the Agreement page layout.
10. Repeat these steps for all Agreement layouts that will use Agreement Clause versioning.

Viewing Master Agreement Clauses

You can view a snapshot of each clause used in the agreement on the **Master Agreement Clauses** section on the Agreement record. You can drill down to view clause iterations from each master agreement clause record.



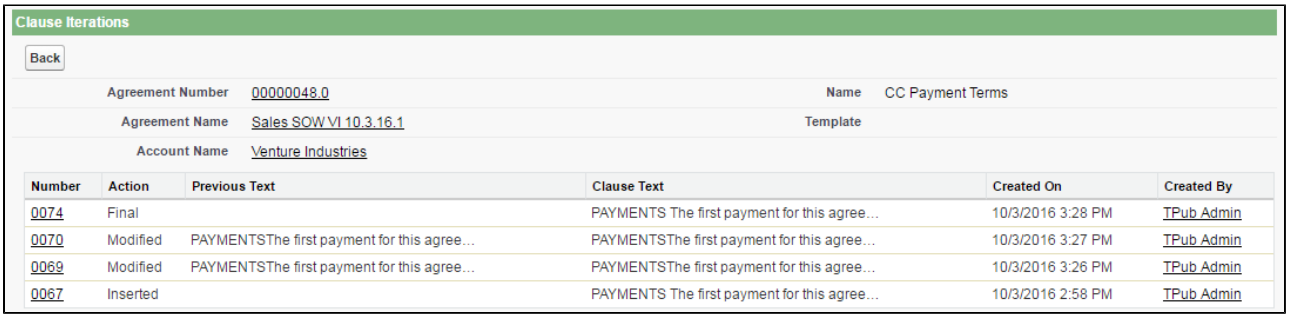
The important fields to note and what actions you can take are summarized in the following table.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Field Name	Description
Name	The name of the clause template OR the name given to the clause by the user if it was marked. Click on the link to view the **Clause Iteration** list for this clause.
Clause Text	A preview of the text of the Original clause (pre-activation) or Final clause (post-activation).
Iteration Count	The number of iterations the clause has undergone during negotiation.
Action	Original or Inserted (pre-activation); Final (post-activation).

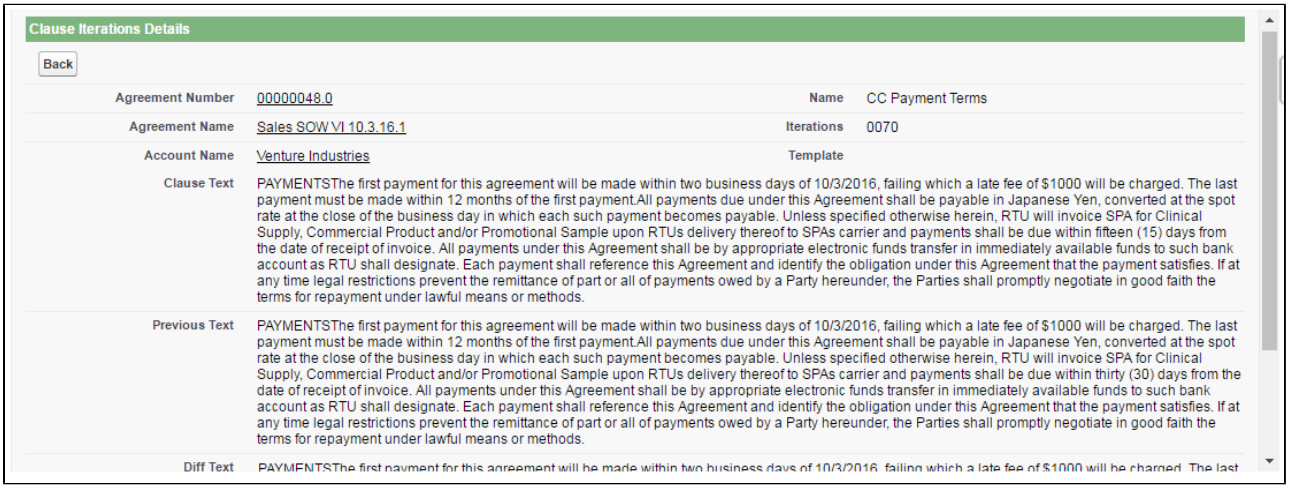
Viewing Clause Iterations

You can drill down into each master clause from the previous list to view a list of iterations the clause has gone through during negotiation. Sorted by action, if the agreement is activated, clause iterations will be listed from the "Final" version descending to the "Original" version. The following example shows a Payment Terms clause that has gone through several iterations, ending with the Final version.



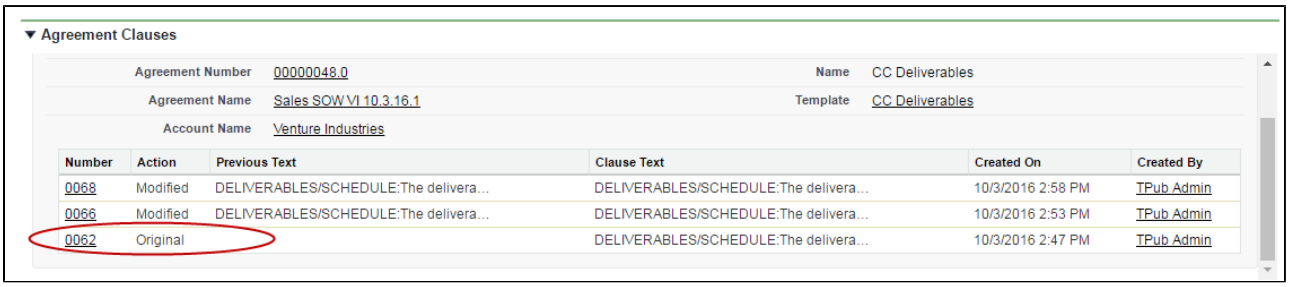
Click on any link under the **Number** column to view the **Clause Iteration Details** for a specific iteration. This allows you to review the full *Current Text* of the clause, the *Previous Text* and the *Diff Text* (redlined combination of current previous text).

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Clause Iteration Records

First Check-out: Iterations of a an agreement clause begin after the agreement document is generated and *checked out for the first time*. All clauses that exist in the document at this point are recorded as separate entries in the Master Clause Listing. The Action record in the Clause Iteration list is "Original" for these clauses. This helps you keep track of which clauses were present in the original version of the document.



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

Clause activity during negotiation and subsequent check-in includes:

- Inserting a clause into an agreement document using Playbook.
- Marking a clause in the document and replacing its content with clause content from Playbook.
- Marking a clause in the document to adopt the properties of a clause from Playbook.
- Modifying a clause in the agreement document.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- Checking in the document as "Final - to be signed."

> **Note**
>
> Deleted clauses are *never* recorded in the Master Agreement Clauses list or Clause Iterations because it is intended to represent the agreement document in its current state. All deleted clauses are tracked using the Agreement Clause Related List.

How Clause Iterations are Recorded

Two factors determine how clause activity is recorded during negotiation:

- The clause was inserted or modified in the initial session or a subsequent session. **A session can be defined as the time between Check-Out and Check-In of the same agreement document**.
- The clause was or was not **reconciled** to the agreement record.

The following tables describe how clause actions taken during a session affect Agreement Clause information on the Agreement record.

Initial Session (1st Check-Out)

Clause Actions before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
You insert a clause using the Playbook or Mark Clause, without making any changes to the clause content.	"Housing Rent Allowance" clause is inserted from the Playbook.	Creates a single record in Master Agreement Clauses & Clause Iterations with **Action** as *Inserted*.	Creates a single record in Master Agreement Clauses & Clause Iterations with **Action** as *Inserted*.
After inserting a clause using Playbook or Mark Clause, you make changes to the clause content.		Creates a single record in Master Agreement	

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Clause Actions before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
	Contract negotiator changes a warranty period from 1 year to 2 years in the same session “Housing Rent Allowance” is inserted.	Clauses & Clause Iterations with **Action** as *Inserted*.	Creates a single record in Master Agreement Clauses with **Action** as *Inserted*. Creates 2 records in Clause Iterations: • One with **Action** as *Inserted*. • One with **Action** as *Modified*.
Once you insert a clause using the Playbook or Mark Clause, you decide to remove the entire clause or Unmark the clause from the Mark Clause Panel.	Contract negotiator decides that “Housing Rent Allowance” clause does not belong in the contract and chooses to remove it in the same session it has been inserted.	No record in Master Agreement Clauses.	No record in Master Agreement Clauses.

Subsequent Sessions

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Actions taken on the Clause before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
You do not make any changes to the clause content.	"Housing Rent Allowance" clause is not modified in a session after it is inserted.	No update to Master Agreement Clauses.	No update to Master Agreement Clauses.
After checking out the same document, you make changes to the clause content.	"Housing Rent Allowance" is changed in a session after it has been inserted.	No update to Master Agreement Clauses.	Creates a single record in Clause Iterations with **Action** as *Modified*.
Once you Check-Out the same agreement document, you, as a Legal counsel, decide to permanently delete a clause from the document. You mark that clause for deletion from the Mark Clause Panel and Check-In the agreement document to Salesforce.	Contract negotiator decides that “Housing Rent Allowance” ought to be struck from the contract in a session after it had been inserted. Contract negotiator marks the clause for deletion.	No update to Clause Iterations.	Clause record is removed from Master Clause Listing ("Deleted" change recorded in Agreement Clause Related List)

Final clause version: After the agreement document is checked in as "Final - to be signed," a new clause iteration record with the action "Final" is created for each clause present in the final agreement document.

Use Case: Clause Versioning Scenario (SOW)

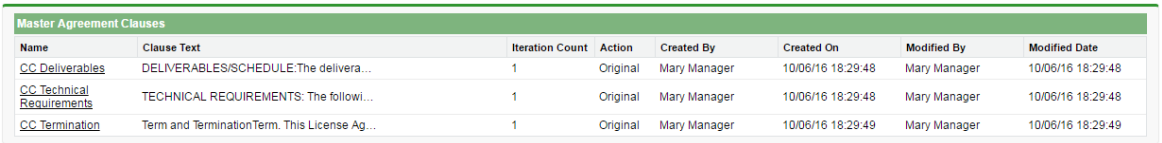
Sam Sales created a Statement of Work for his customer, Venture Industries.

The agreement contains all standard fields, and the SOW agreement contains standard language. He generates the SOW agreement.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Mary Manager, the contract manager for this agreement, logs in to X-Author and checks out the document.

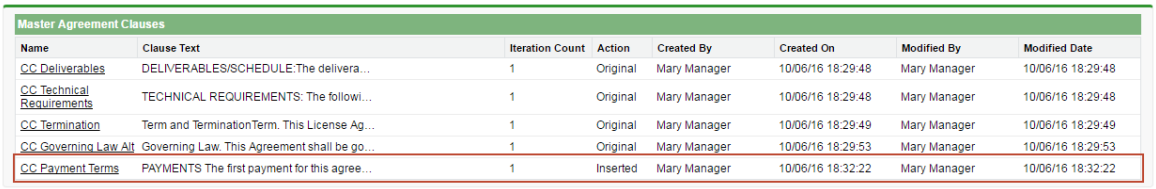
The **Master Agreement Clauses** listing on the agreement record is updated to list all smart clauses in the document. Because they were present in the document as of the first check-out, all clauses are listed as *Original*.



Master Agreement Clauses

Name	Clause Text	Iteration Count	Action	Created By	Created On	Modified By	Modified Date
CC Deliverables	DELIVERABLES/SCHEDULE:The delivera…	1	Original	Mary Manager	10/06/16 18:29:48	Mary Manager	10/06/16 18:29:48
CC Technical Requirements	TECHNICAL REQUIREMENTS: The followi…	1	Original	Mary Manager	10/06/16 18:29:48	Mary Manager	10/06/16 18:29:48
CC Termination	Term and TerminationTerm. This License Ag…	1	Original	Mary Manager	10/06/16 18:29:49	Mary Manager	10/06/16 18:29:49

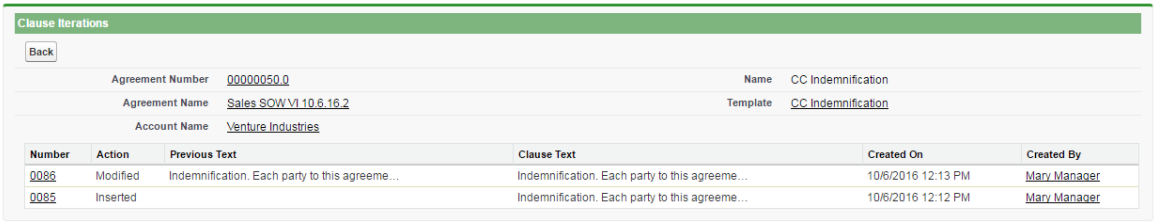
Mary decides to mark text in the agreement document as a Payment Terms clause. She then checks the document in and reconciles it to the agreement record. The marked clause is added to Master Agreement Clauses with the action *Inserted.*



Master Agreement Clauses

Name	Clause Text	Iteration Count	Action	Created By	Created On	Modified By	Modified Date
CC Deliverables	DELIVERABLES/SCHEDULE:The delivera…	1	Original	Mary Manager	10/06/16 18:29:48	Mary Manager	10/06/16 18:29:48
CC Technical Requirements	TECHNICAL REQUIREMENTS: The followi…	1	Original	Mary Manager	10/06/16 18:29:48	Mary Manager	10/06/16 18:29:48
CC Termination	Term and TerminationTerm. This License Ag…	1	Original	Mary Manager	10/06/16 18:29:49	Mary Manager	10/06/16 18:29:49
CC Governing Law Alt	Governing Law. This Agreement shall be go…	1	Original	Mary Manager	10/06/16 18:29:53	Mary Manager	10/06/16 18:29:53
CC Payment Terms	PAYMENTS The first payment for this agree…	1	Inserted	Mary Manager	10/06/16 18:32:22	Mary Manager	10/06/16 18:32:22

On a subsequent check-out, Mary Manger adds an Indemnification clause from Playbook and modifies the clause language in the same session. She checks the document back in to Salesforce and reconciles it. Two entries are created in the **Clause Iterations** listing, one for the initial insertion of the clause, and another for the modification.



Clause Iterations

Back

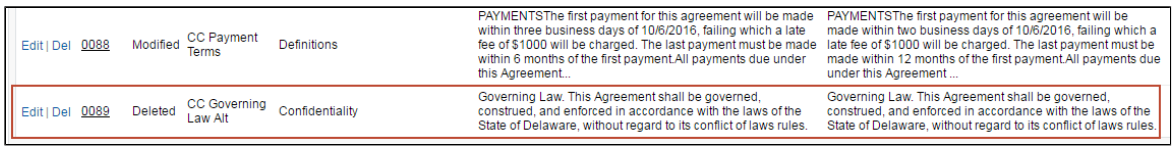
Agreement Number 00000050.0 — Name CC Indemnification

Agreement Name Sales SOW VI 10.6.16.2 — Template CC Indemnification

Account Name Venture Industries

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

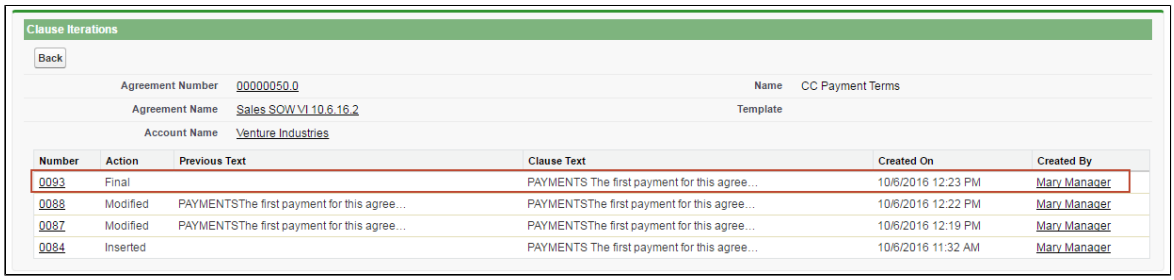
The agreement now goes to legal. During the process, the Governing Law clause is removed from the document. The clause is removed from Master Agreement Clauses, but the deletion is still tracked in the Agreement Clauses related list.



Edit | Del	0088	Modified	CC Payment Terms	Definitions	PAYMENTSThe first payment for this agreement will be made within three business days of 10/6/2016, failing which a late fee of $1000 will be charged. The last payment must be made within 6 months of the first payment.All payments due under this Agreement…	PAYMENTSThe first payment for this agreement will be made within two business days of 10/6/2016, failing which a late fee of $1000 will be charged. The last payment must be made within 12 months of the first payment.All payments due under this Agreement …
Edit | Del	0089	Deleted	CC Governing Law Alt	Confidentiality	Governing Law. This Agreement shall be governed, construed, and enforced in accordance with the laws of the State of Delaware, without regard to its conflict of laws rules.	Governing Law. This Agreement shall be governed, construed, and enforced in accordance with the laws of the State of Delaware, without regard to its conflict of laws rules.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

After negotiation concludes, Mary checks in the document as "Final - to be signed," and reconciles it. All clauses in the Master listing are updated with a "Final" iteration. The Payment Terms clause below demonstrates a complete tracking of versions, from initial insertion to Final check-in. Mary can drill down into the details for any iteration to view the Diff in clause text and other details.



About Marking an Agreement Document as Private

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

User Permissions Needed	
To enable agreements as private:	Agreement: Edit.

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

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

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

When you mark a document as private it sets the Is Private field for a specific record/action (Check In or Import Offline Agreement) of the **Merge Event** object to true. You can then use this flag to create custom triggers on the Agreement record for controlling permissions to your documents. You are encouraged to work with Apttus Professional Services to develop a solution for your private documents.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Private Indicator Properties

There are two Comply System Properties that control the availability and behavior of the option to make documents private from X-Author:

- **Auto Enable Private Indicator**– When this property is enabled, the **Make this document private** check box is automatically selected and cannot be deselected.
- **Allow Private Selection Override** – When this property is enabled, the **Make this document private** check box option can be overridden when Auto Enable Private Indicator is set to true.

Depending on how the above properties are configured, when you check-in or create offline agreements, you may notice the **Make this document private** option is already enabled and can or cannot be changed. The following table describes how the combination of properties affects your ability to make documents private during one of these actions.

Auto Enable Private Indicator	Allow Private Selection Override	Available Action
FALSE	FALSE	**Make this document private** is not automatically enabled. You can enable this option during check-in or creation of an offline agreement.
TRUE	FALSE	**Make this document private** is automatically enabled. You cannot override the option for any document version.
TRUE	TRUE	**Make this document private** is automatically enabled. You can override the selected option for each document version.

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

Finalizing An Agreement

This stage covers the process for sending agreements for executing, gathering signatures and logging into the repository.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

When the agreement is ready to be executed, user collects the required internal and external signatures and executes the agreement in the system. Note that an agreement record can either have a signed document scanned into the system, or it can be electronically signed, depending on whether a third party application has been purchased and your organization's configuration.

User Permissions Needed	
To send an agreement for signature:	Agreement: Edit
To activate an agreement:	Agreement: Edit

To finalize an agreement

1. From the browser view of an agreement, click **Edit**.
2. On the Key Dates section and add the relevant information related to signatures and click **Save**.
3. Once internal and external signatures are received, go back to the agreement record.
4. Close the Internal Signatures and External Signatures activity and click **Save**.
5. Scan the agreement, and save it to any location.
6. To attach the final scanned version, on the *Notes & Attachments* section of the Agreement form, click **Attach File**.
7. To locate your file, click **Browse**.
8. Click **Attach** and then click **Done**.
9. To store a link to the scanned image stored in an internal document repository or File server, go to the *Agreement Document* section.
10. Click **New Agreement Document**.
11. On the Agreement Document Edit form, enter the values for Name, Path, URL, Type, Version, Comments, and click **Save**.
12. Go to *Scan & Attach Activity* and close it. There is also a **Send for Signatures** button, which sends an email to a designated Contact record with a link to access the Agreement within Apttus. This will not electronically sign the document, for which a third party application is required. At this point the agreement is ready to be activated in the system. Activating an agreement record is very important since it ensures key dates and events will be monitored by the system, and that all *In Effect* agreements are included in appropriate searches,

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

reports and views. As part of the activation sequence, the system will ensure that your organization has identified and attached the proper, final executed version of the agreement. Click **Activate** in the *Actions* section to execute the agreement in the system. This action adds a audit entry in the *Activity History* and changes the agreement status category to *In Effect*.

Routing Documents to Content Libraries

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

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

To publish activated agreements to the Salesforce CRM content repository:

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

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

Install Apttus Content Integration

1. Navigate to the **Apttus Community Portal > Resources> Install Center.**
2. In the left hand navigation, click **Integrations** tab.

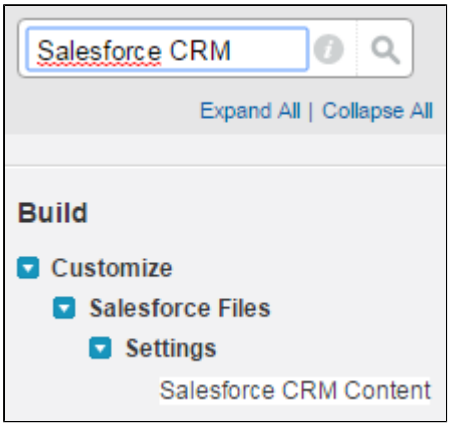
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

3. In the **Integrations** packages page go to **Apttus Content Integration**, click **Install Now** and follow the instructions to install the package in your org.
4. Choose the type of org where you will install the package (Production or Sandbox).

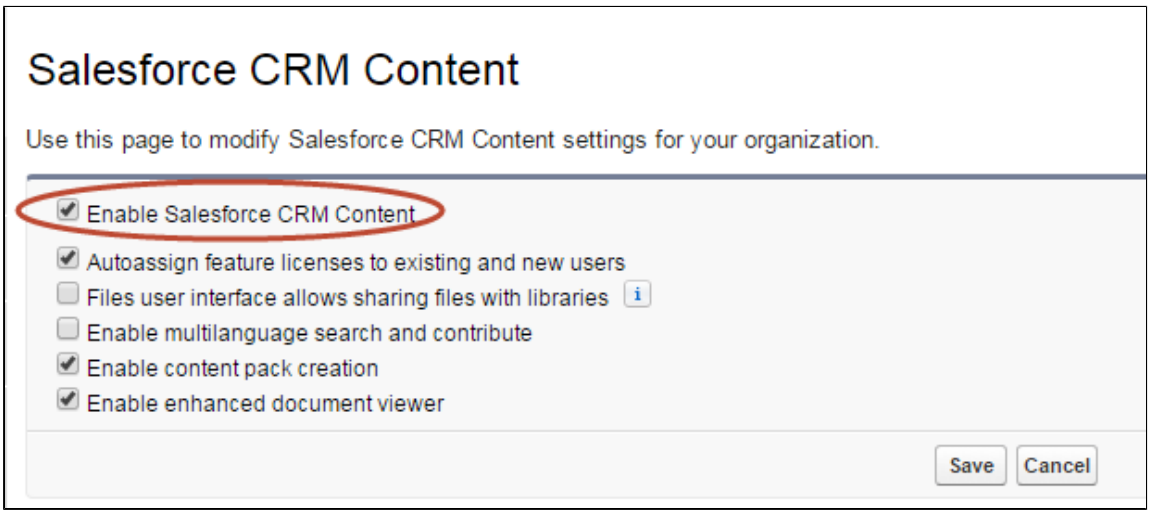
Enable Salesforce CRM Content

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

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



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



3. Click **Save**.

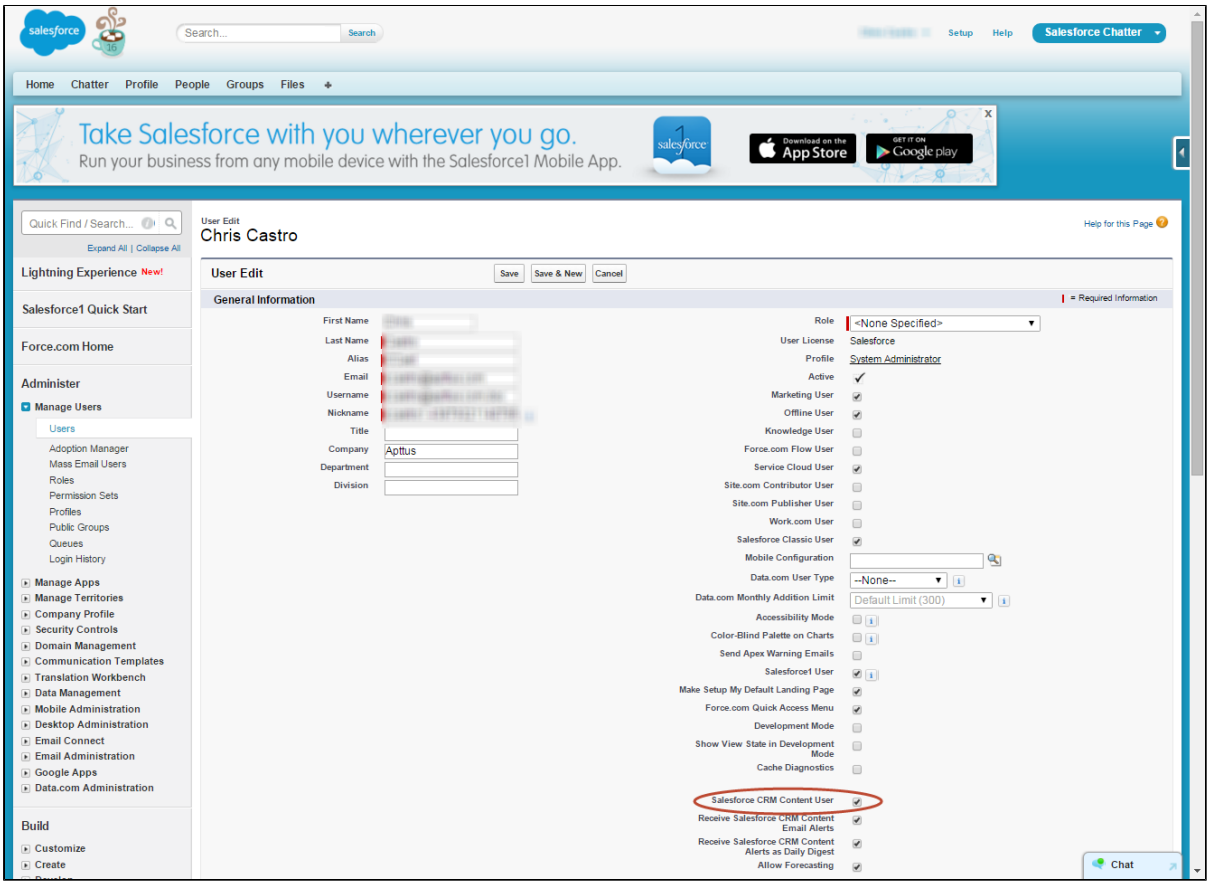
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

> Users

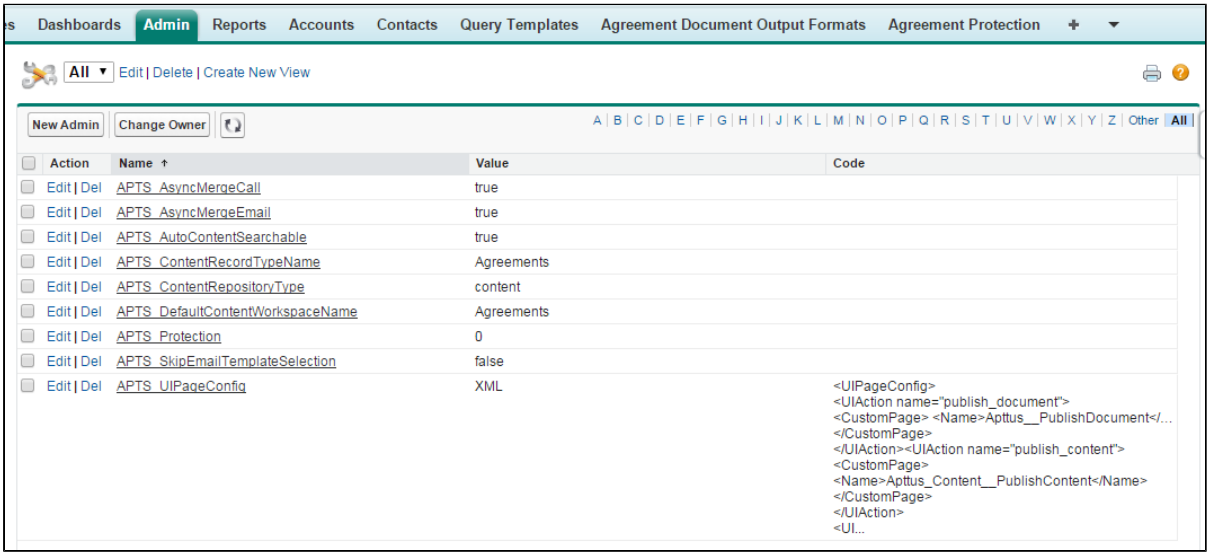


Set Admin Properties

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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

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

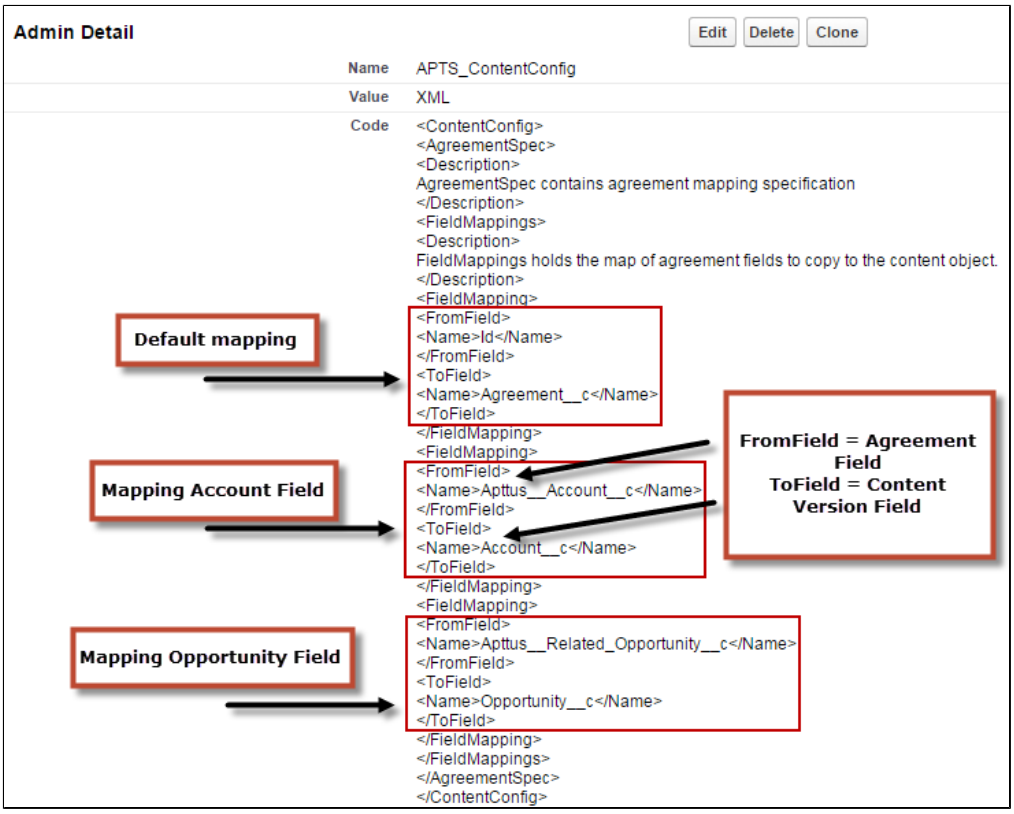
```
<UIPageConfig>
<UIAction name="publish_content">
<CustomPage>
<Name>Apttus_Content__PublishContent</Name>
</CustomPage>
</UIAction>
</UIPageConfig>
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

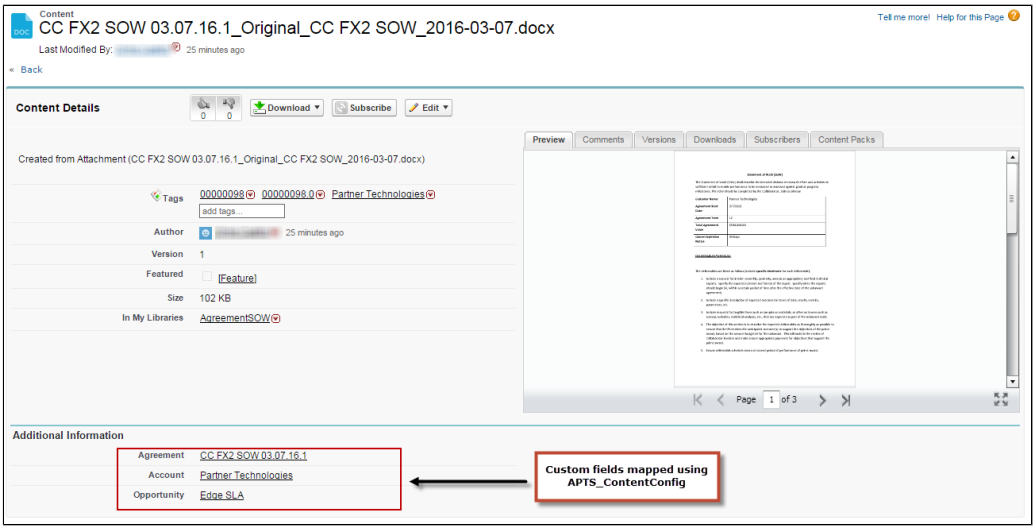
- **APTS_AutoContentSearchable** – **(Optional)** Set this property to "True" to skip the optional step when activating an agreement that allows a user to determine which agreement documents are available for content search. This property is not required, but recommended when you are rotuing content to ensure that all relevant agreement documents make it into the library and are searchable.
- **APTS_ContentConfig – (Optional)** Set this property to override the default field mappings used by the Apttus Content Integration package. The default field mapping only maps the Agreement name field to the same field in the Content Version object and is found as a Static Resource in the Contract Management package labeled "ContentConfig" (Go to Setup --> Quick Search --> Static Resources --> ContentConfig to view the static resource).
    a. Copy the XML contents from the ContentConfig static resource into your new Admin Object (APTS_ContentConfig).
    b. Any custom fields you add to the Content Version object and layout (detailed in the next section) which you want displayed in Content Version details for any stored agreement document must be mapped as part of this Admin property. For example, if you want the values of the Account and Opportunity for the

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

document's related Agreement automatically added to Content Version details, you would create the Admin Object and code as shown in the following image:



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



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

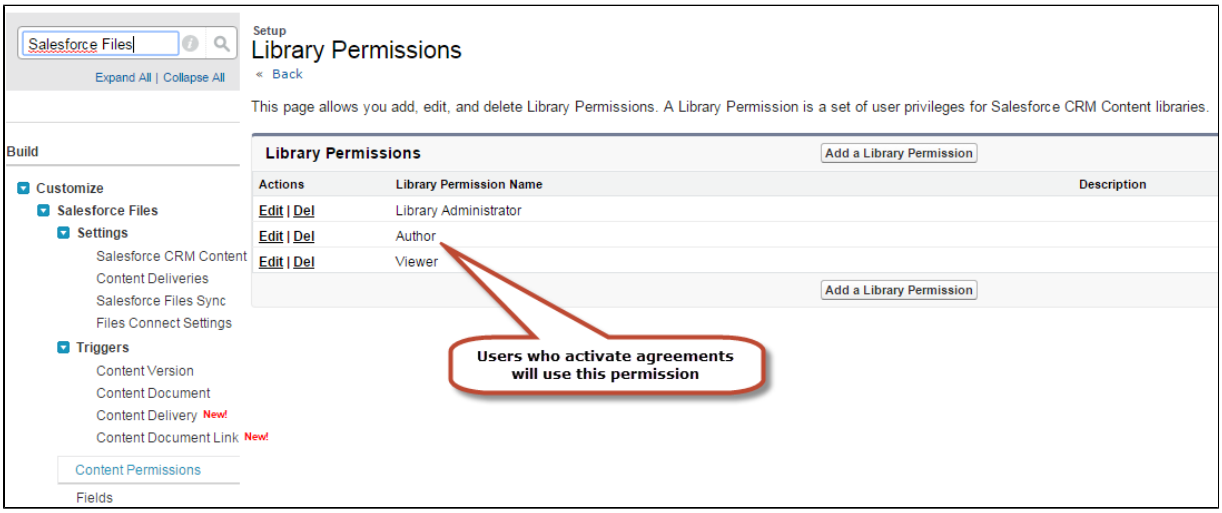
Set up Salesforce Files for Content

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

Configure Content Permissions for Libraries

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

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



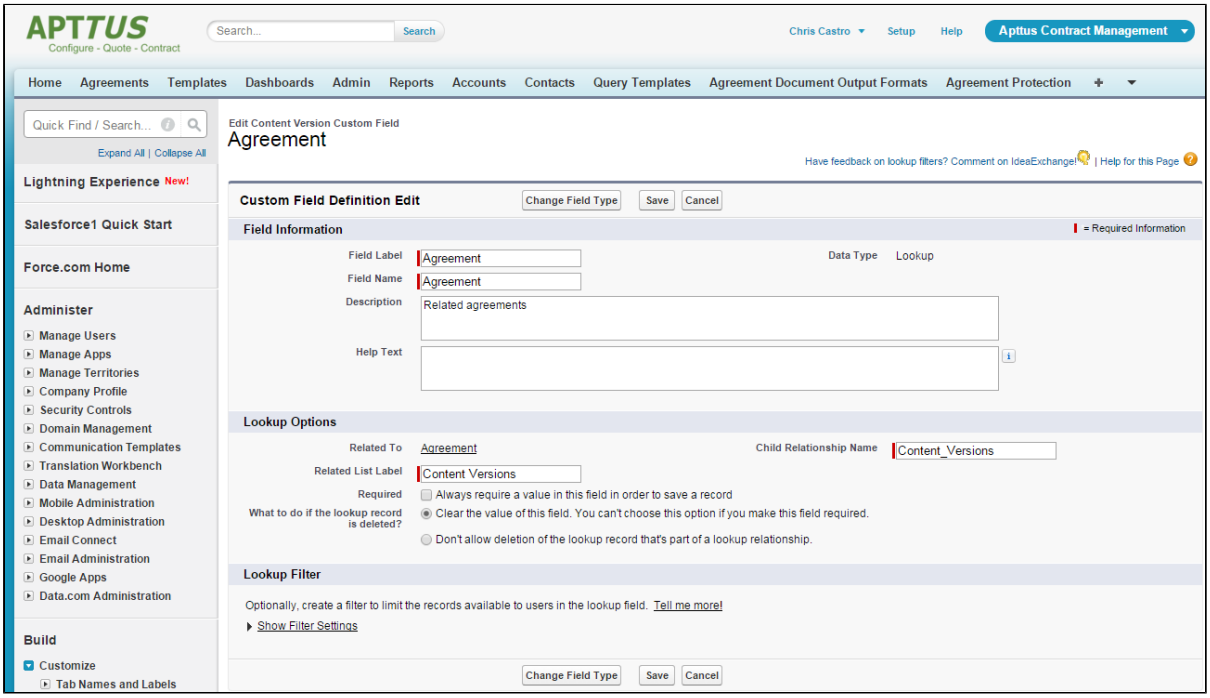
Users who will be activating agreements must have "Author" permission for content libraries. When you configure the libraries and edit members you will be able to assign permission to users.

Add Custom Fields to the Content Version Object

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

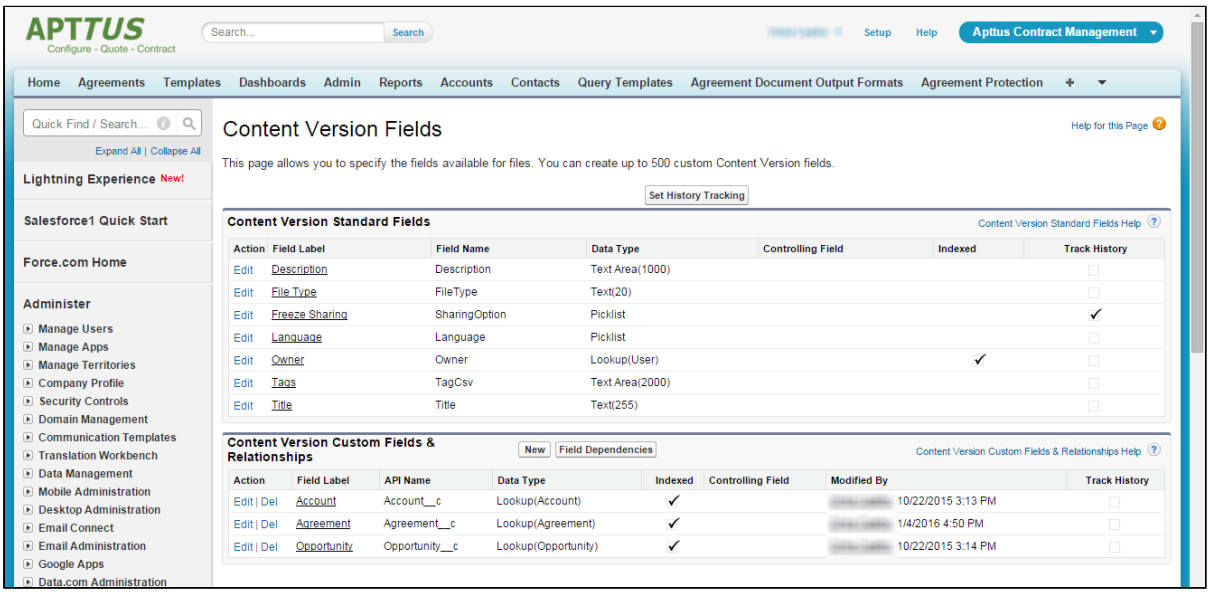
1. Go to **Setup > Customize > Salesforce Files > Fields**.
2. Click **New** under "Content Version Custom Fields & Relationships."
3. Enter information into the form to create the **Agreement** field.



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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

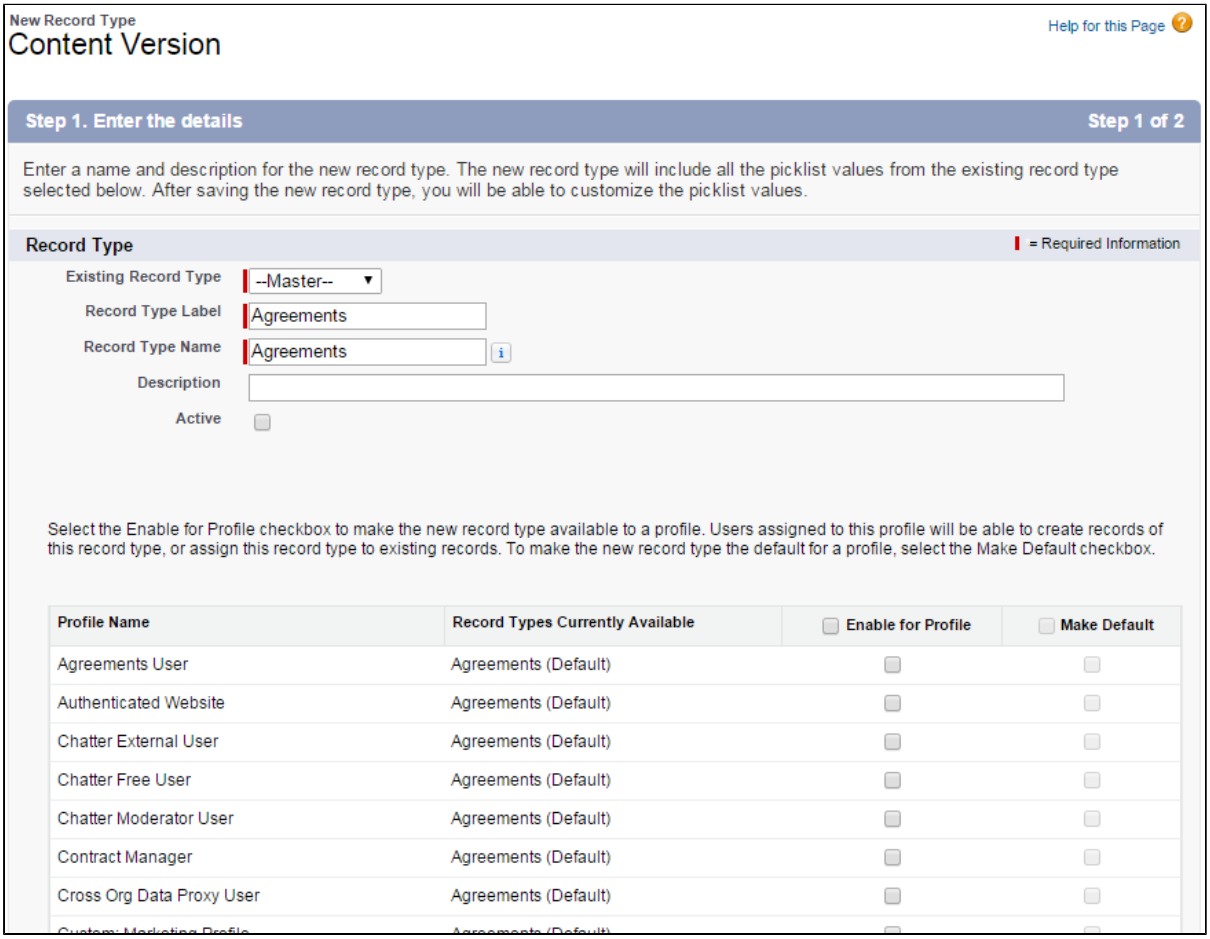


Assign Custom Fields to Page Layouts

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

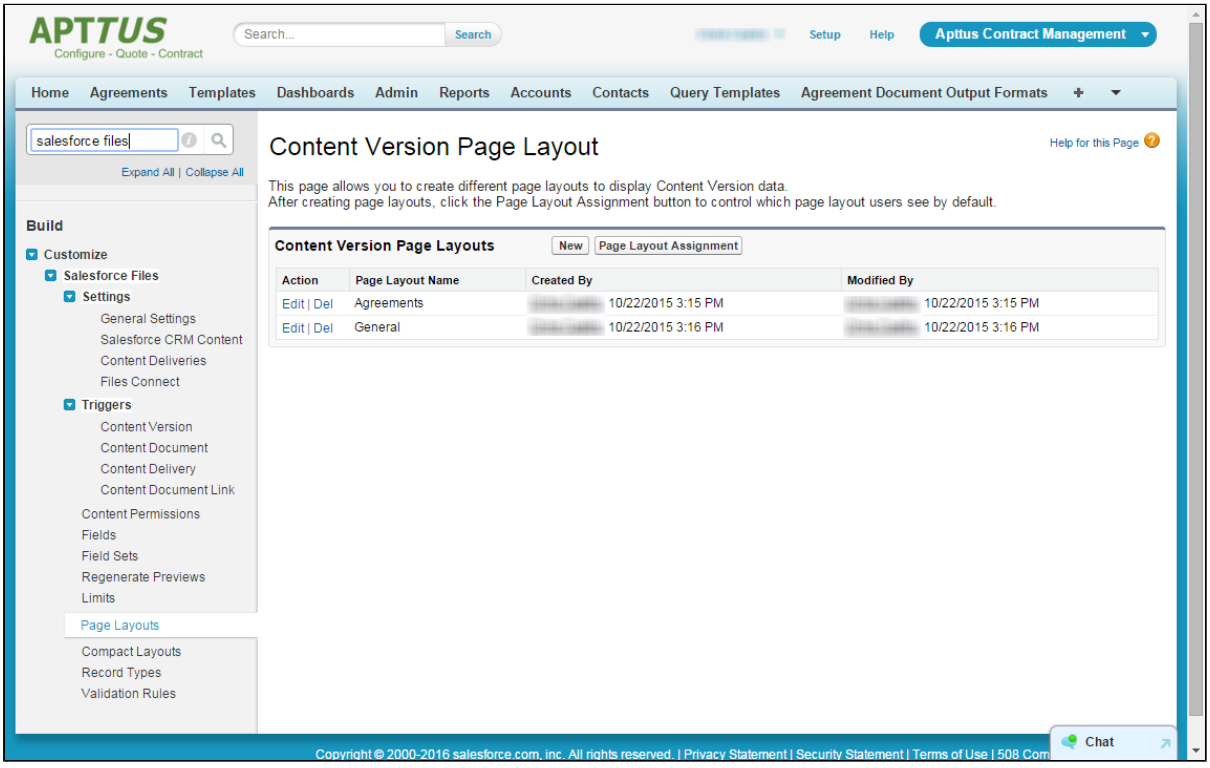
1. Go to **Setup > Customize > Salesforce Files > Record Types**.
2. Click **New** to create a new record type with its own Library Content Version Layout.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



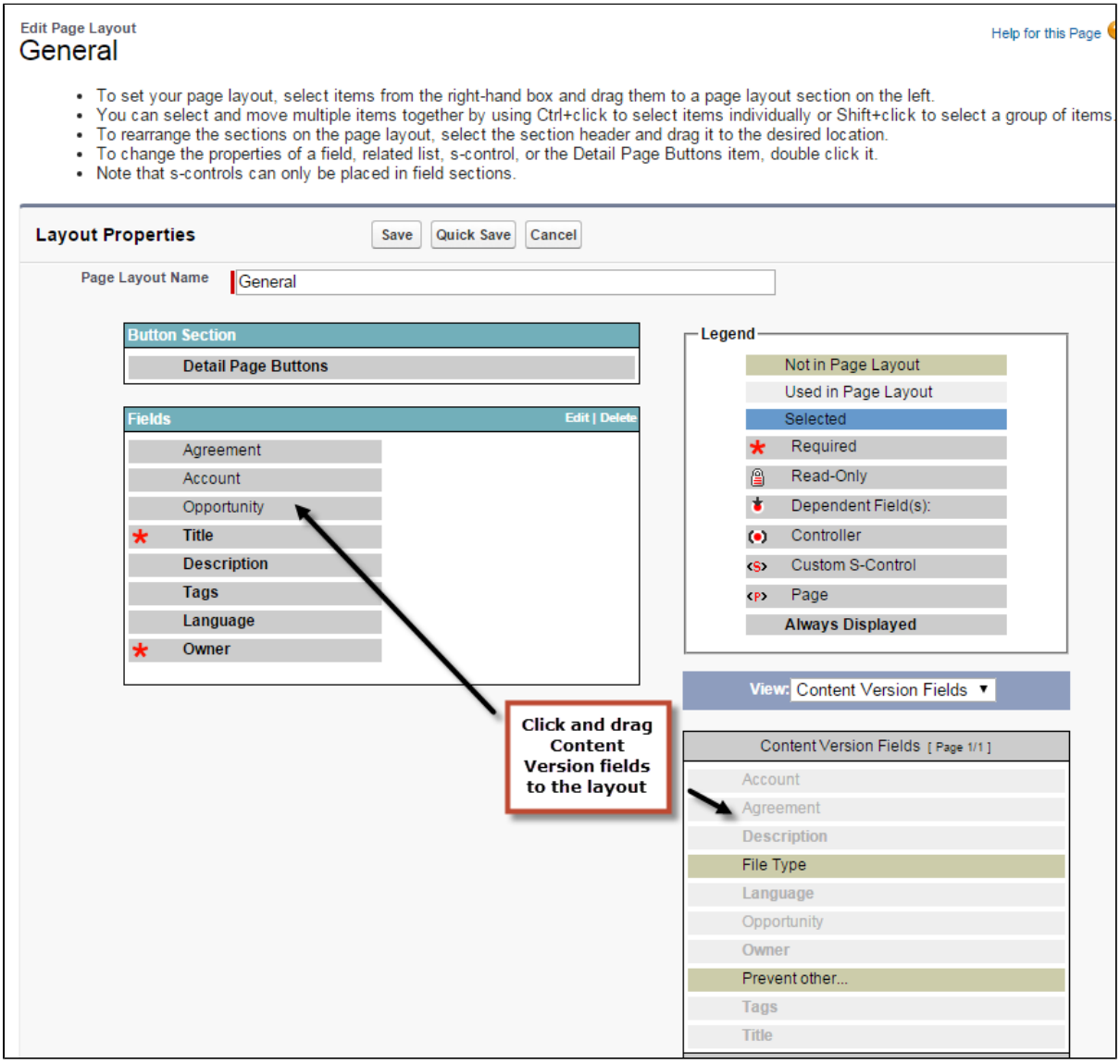
3. Create the record type "Agreements" and assign it to profiles you want to give access to Content Version data.
4. Repeat steps 2 – 3 to create additional Content Version Record Types as needed.
5. Go to **Setup > Customize > Salesforce Files > Page Layouts**.
6. Click **New** to create a custom layout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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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

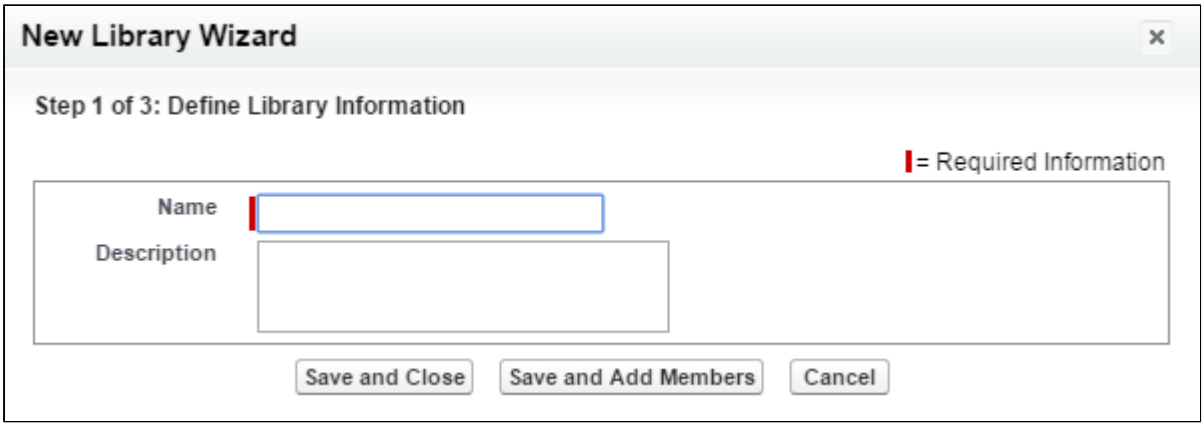
Configure the Libraries Tab

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

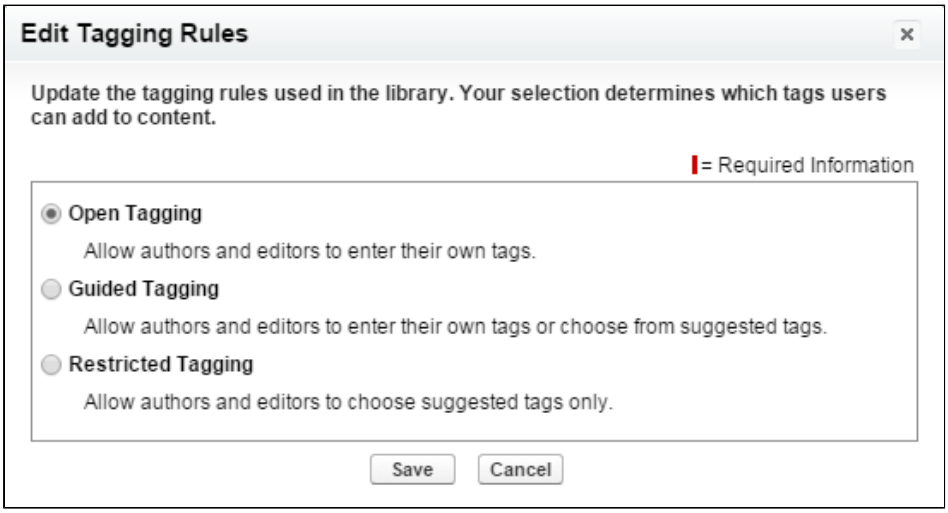
1. Go to the **Libraries** tab (click **+** and click **Libraries)**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

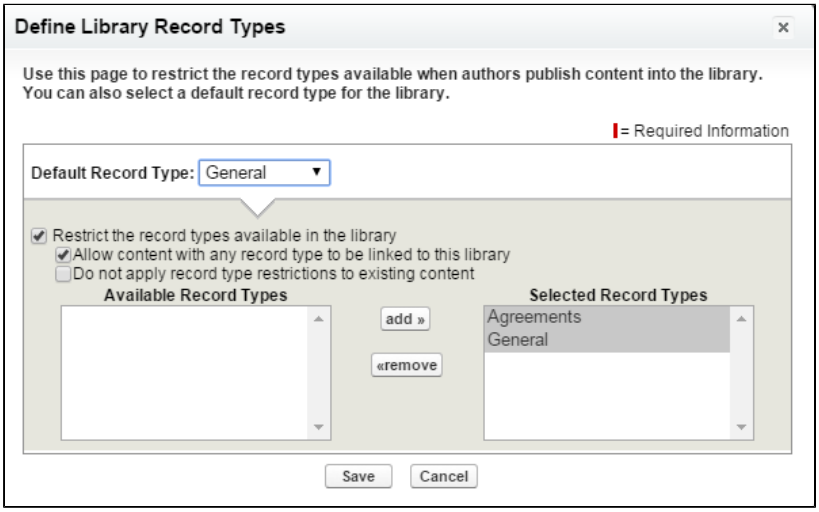


3. Enter the name you want to use for your library (e.g., "Agreements") and a description (e.g., "Activated Agreement Documents") and click **Save and Close**.
4. From "My Libraries," click on the library name.
5. Click **Tagging Rules** to edit tagging rules for your library. Click **Save** to save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

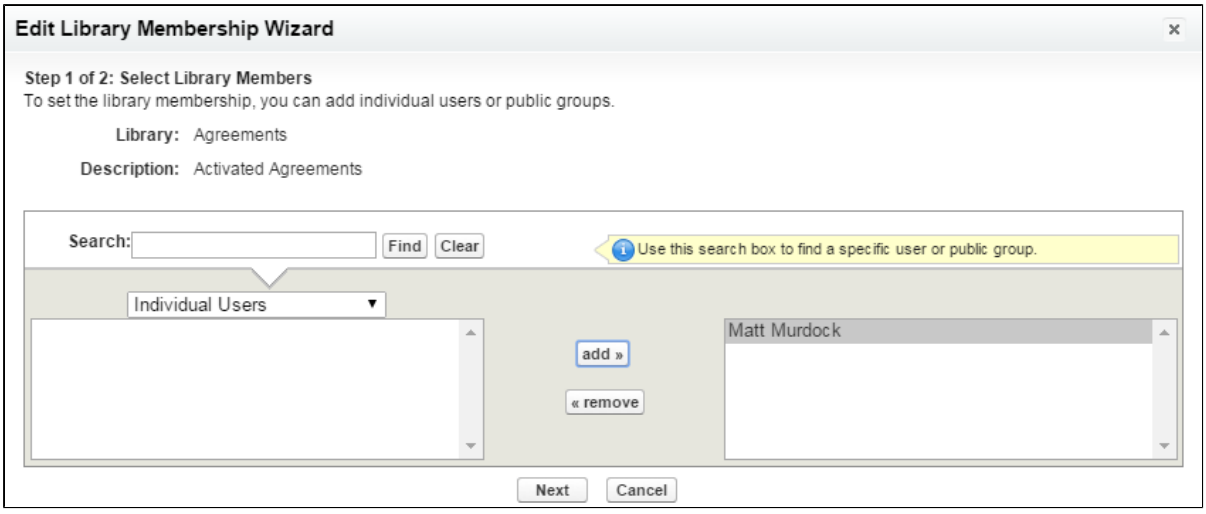


6. Click **Record Types** to assign content version record type restrictions to your library.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

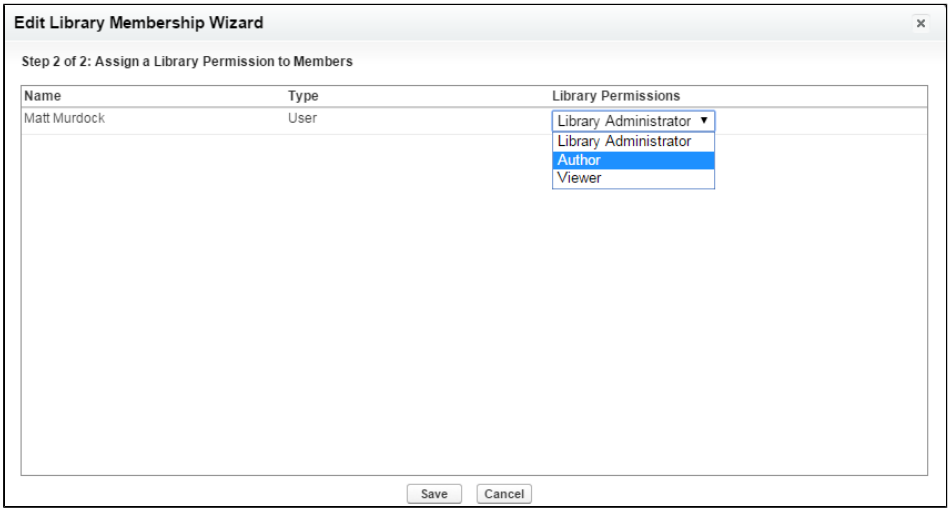


7. Choose which record types to restrict to your library. Be sure to add the Record Type you defined in the previous section.
8. Click **Save.**
9. Click **Edit Members** to choose which members have access to this library.



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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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

Using Agreement Rules to Route Content

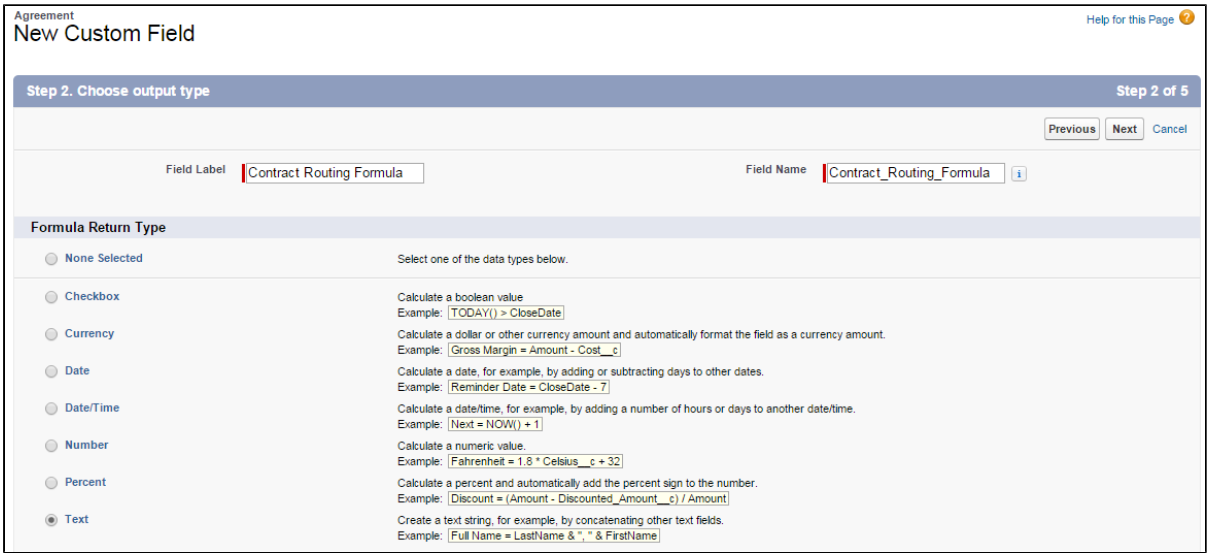
One of the advantages to setting up Content Libraries for your activated agreement documents is the ability to develop agreement rules to route your content to specific libraries. By default, when you have content repositories configured your content will all route to the default content library. You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

Set up a Formula Field on the Agreement Object

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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



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

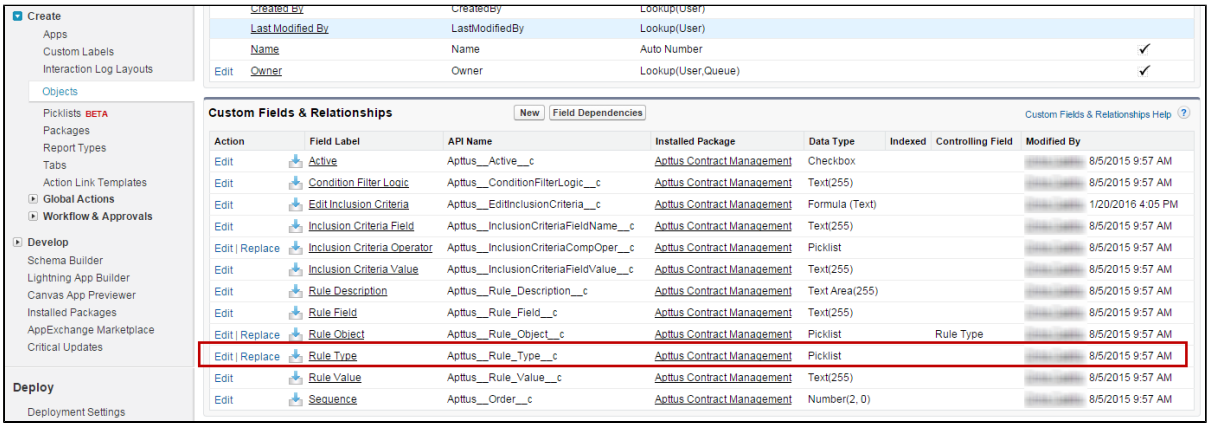
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

Extend the Agreement Rule Object to Include Content

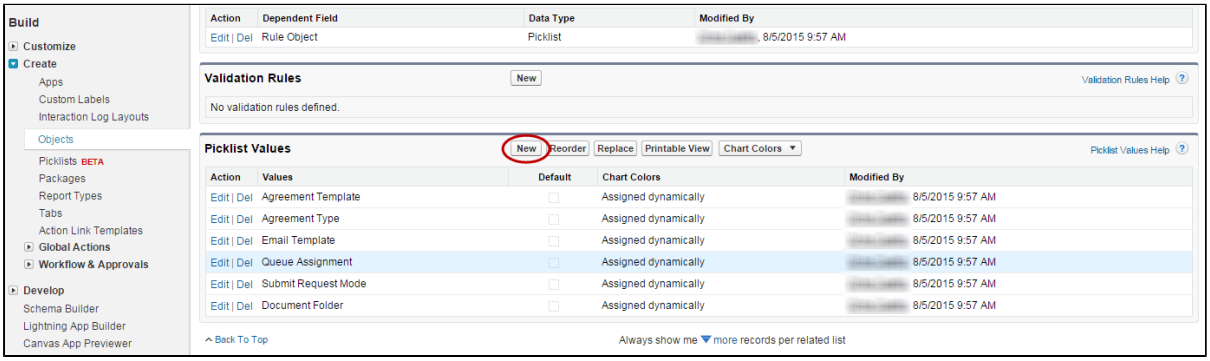
In order to allow users to create rules to route content to specific libraries, you must first extend the Agreement Rule object to create a new "Content Workspace" Rule Type.

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

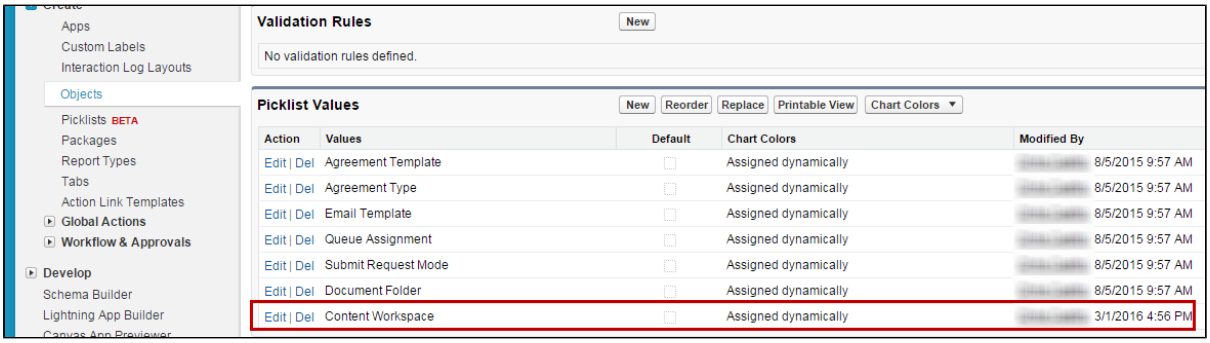


3. Scroll down to Picklist Values for the field and click **New**.

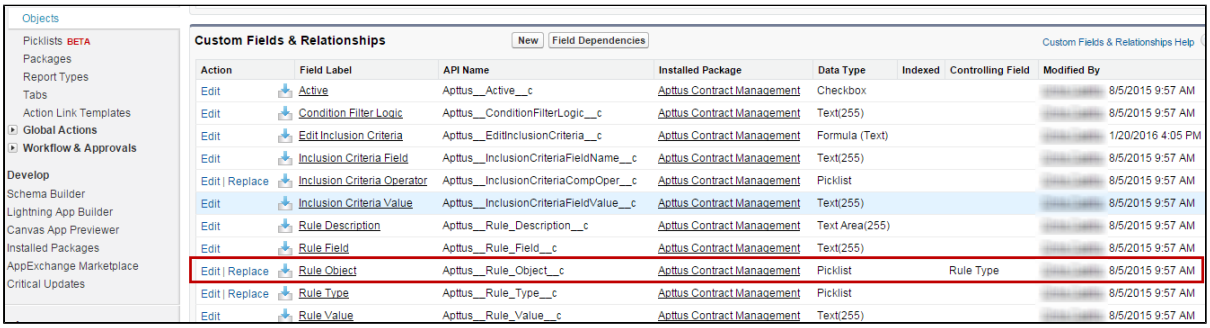
Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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

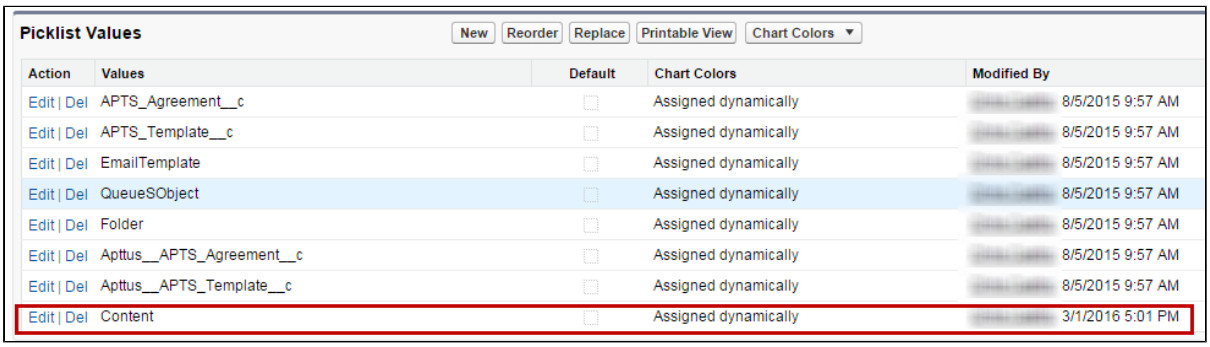


5. Return to the Agreement Rules Object Details page and click on the **Rule Object** Custom Field.

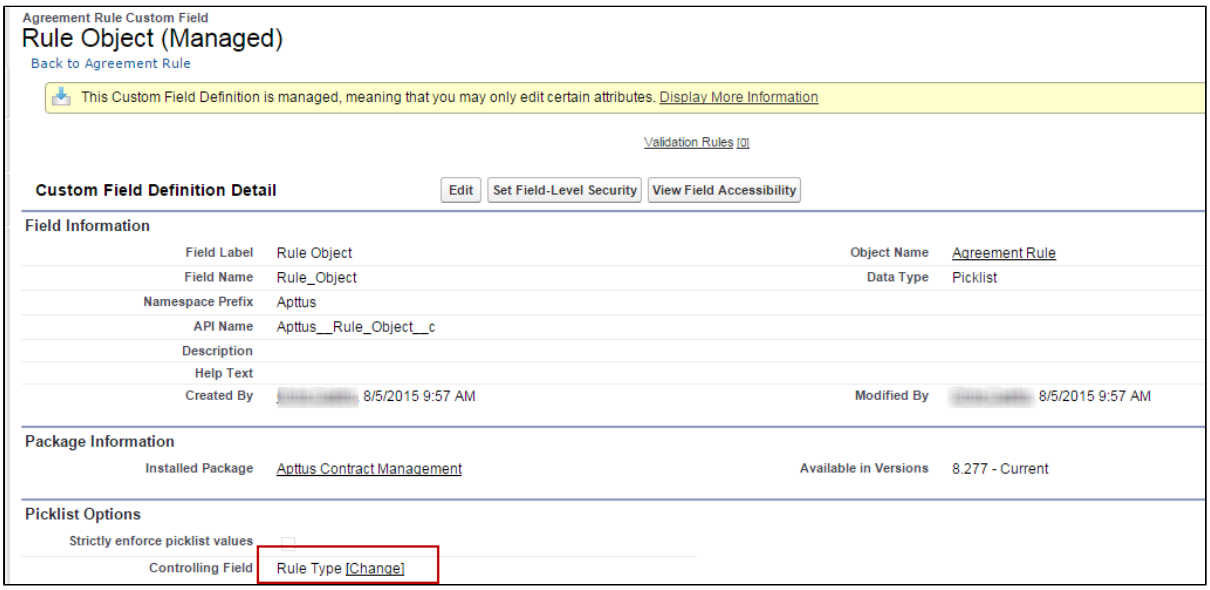


6. Add the value "Content" to the Rule Object picklist.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

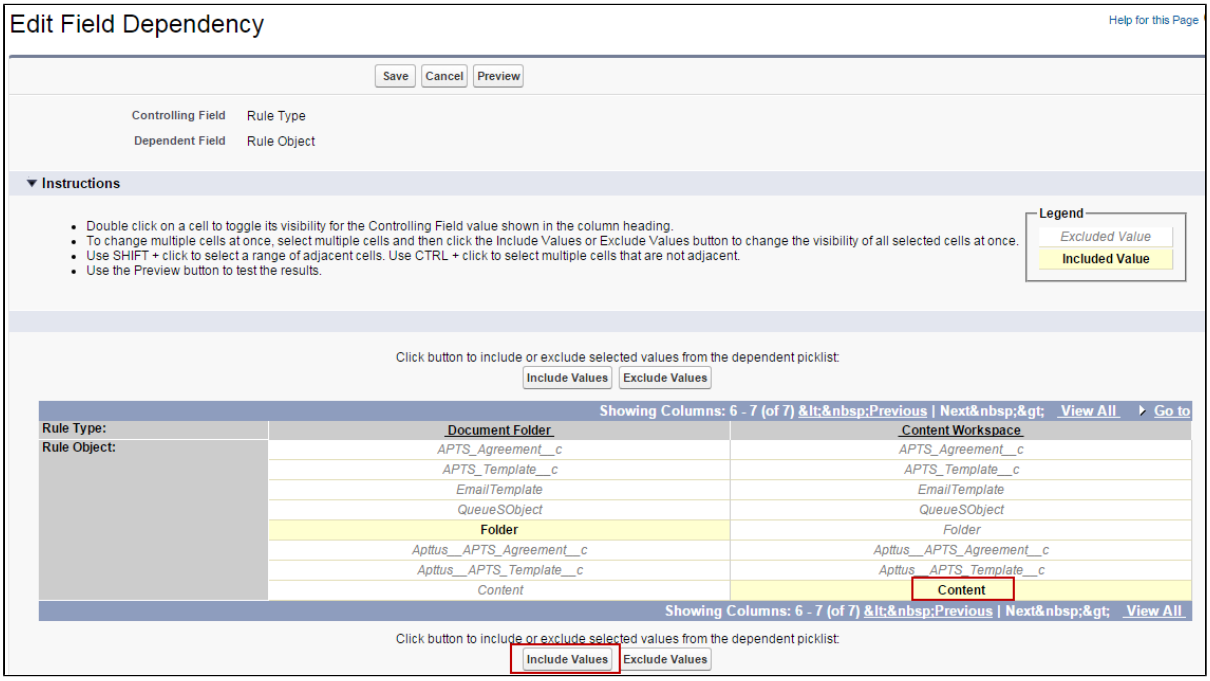


7. Now that you have added new picklist options, you need to edit field dependencies. From the Rule Object detail, click **Change** under Picklist Options.



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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



10. Click **Save**.

Create a Content Workspace Agreement Rule

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

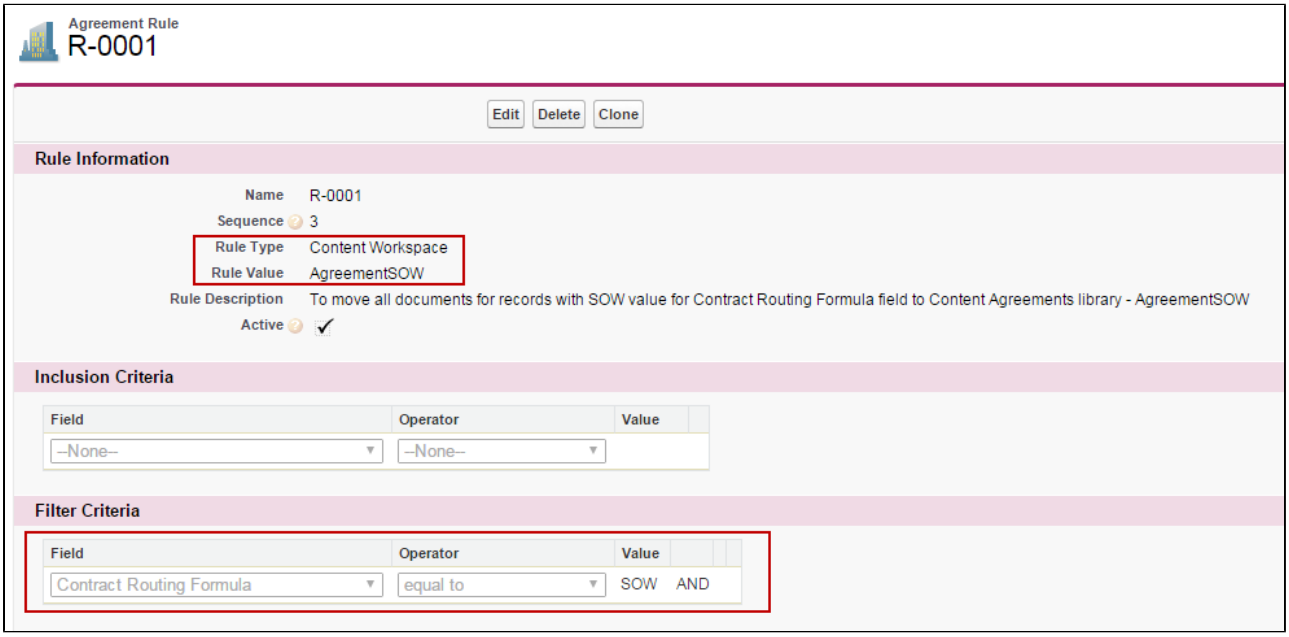
When you create a Content Workspace Agreement Rule, observe the following:

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

For full instructions on creating Agreement Rules, refer to Setting Up Rule-based Agreement Request Process Parameters.

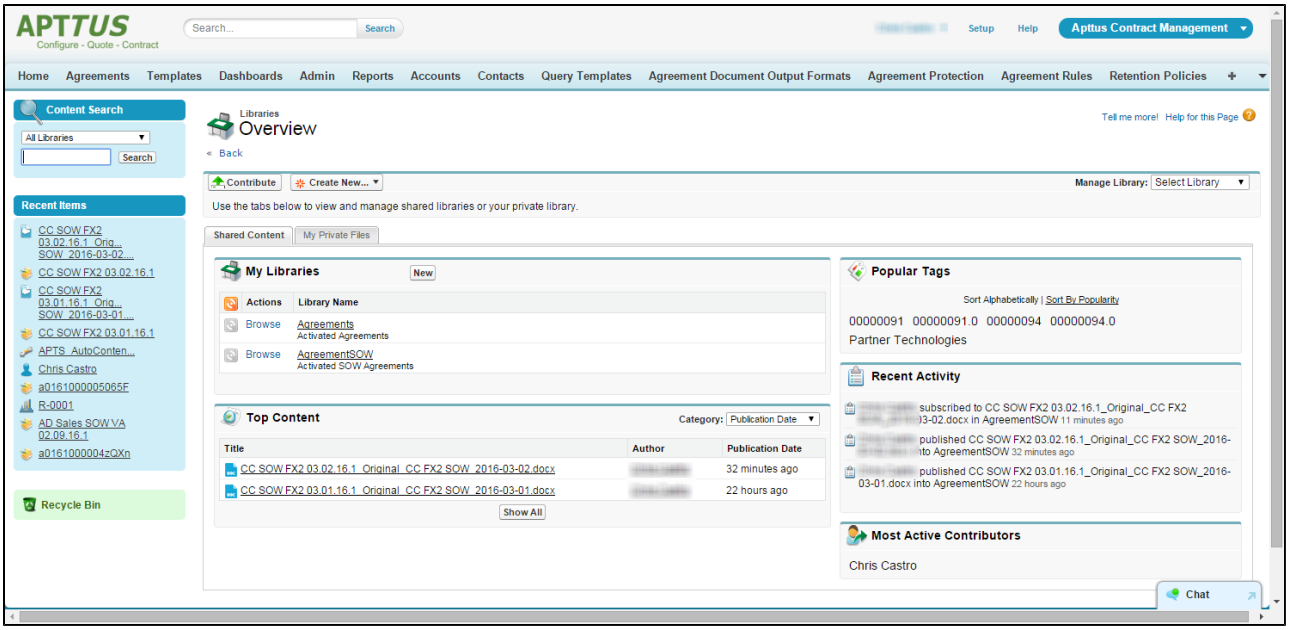
The following image shows an example of an Agreement Rule to route all SOW agreement documents to the appropriate library.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



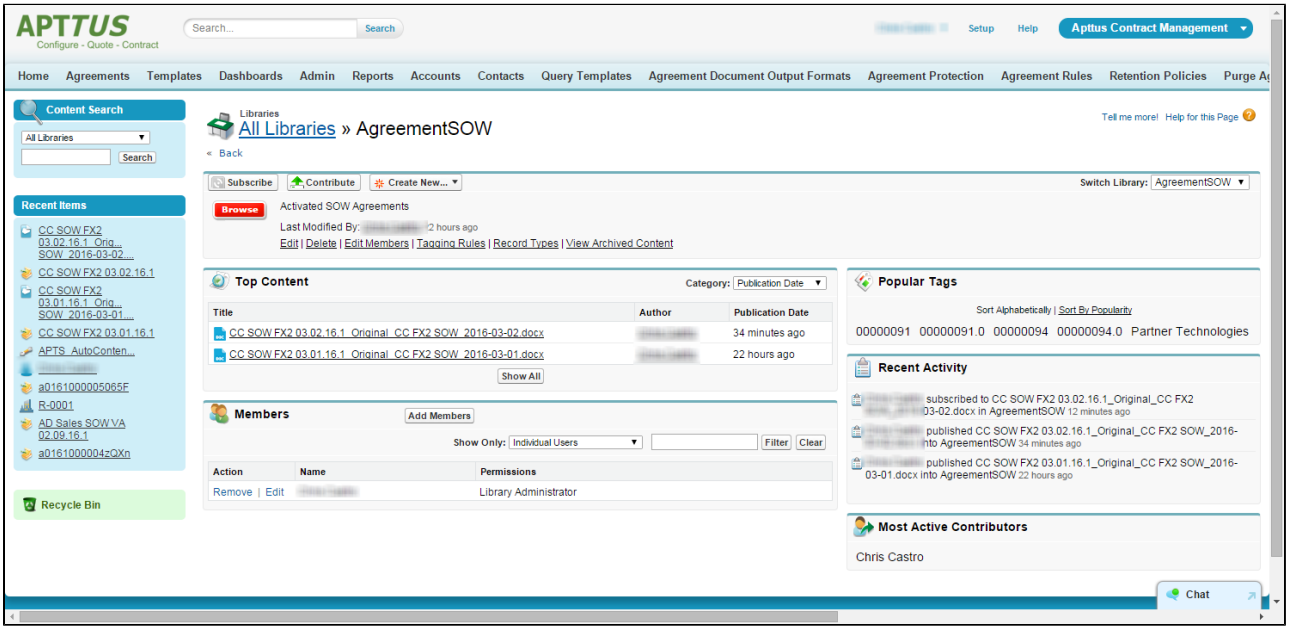
Finding Content After Activation

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

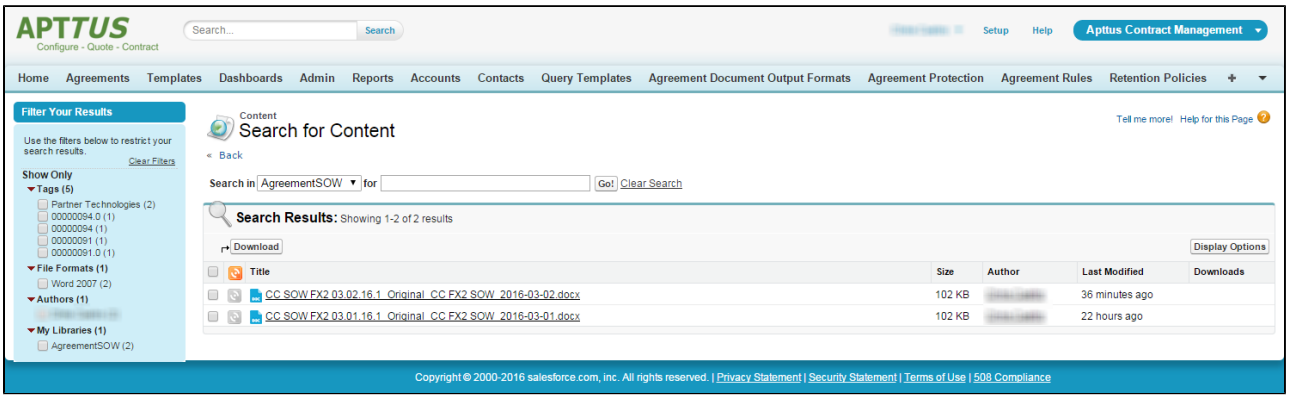


Click on a **Library Name** to view content stored in the library.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



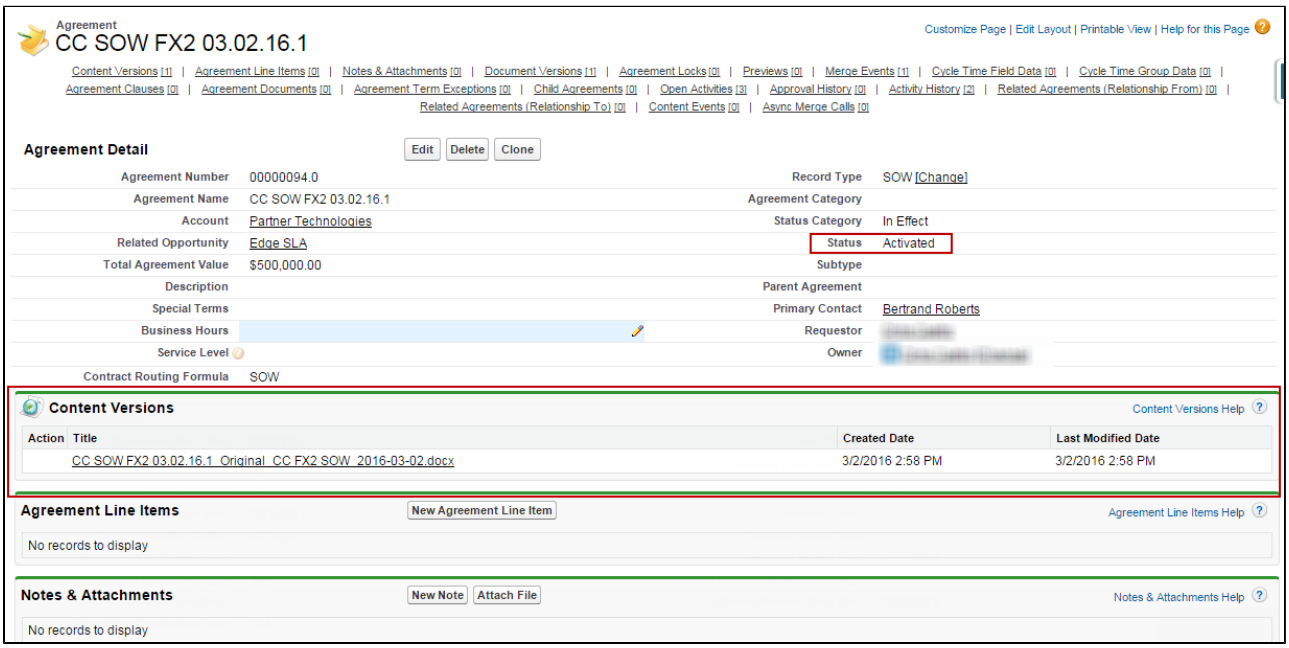
You can also search for your activated agreements by going to **Content**.



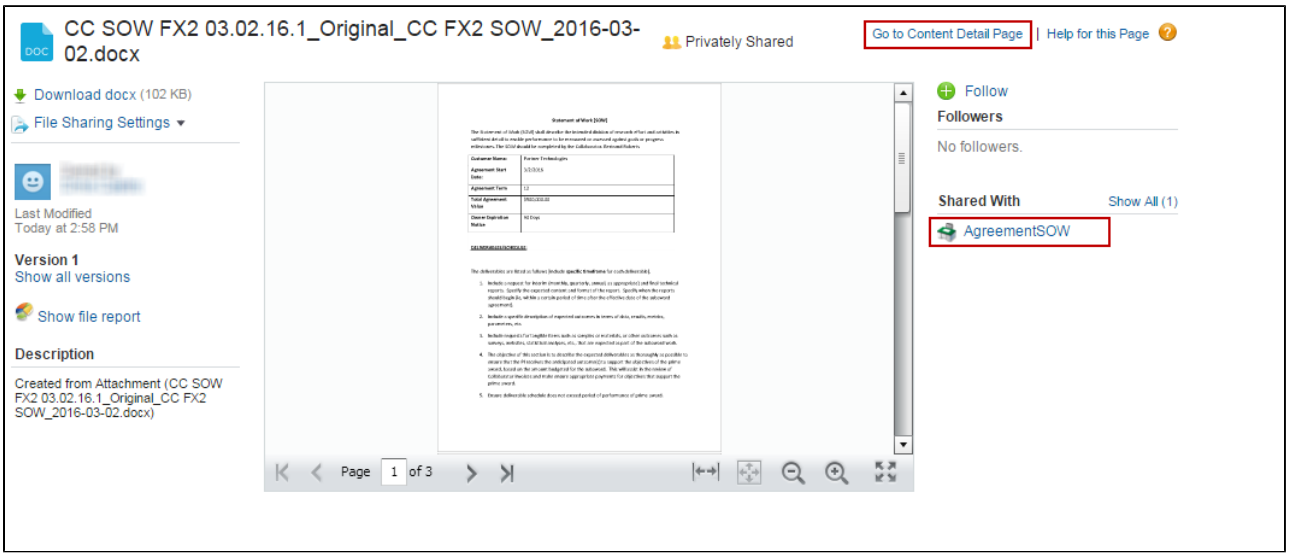
Content Versions Related List

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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



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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Managing Templates

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

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

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

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

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

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

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

- Setting up template object for Contract Management

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- Securing Documents
  Word Trust Center/Protected View options can impact your ability to see generated documents and should be disabled before you begin using X-Author Contracts.
- Agreement Clause
  Clauses have embedded merge fields contained within them that get auto populated during agreement creation time.
- Agreement Clause Subcategories
  Subcategory picklists display values based on what was selected in the Category picklist. The picklists also now behave the same for both the Playbook and Create Section dialog, in that they both have Category and Subcategory drop-down lists.
- Creating Offline Agreements
  You can create offline agreements directly in X-Author by taking an existing Word document that was created outside of Salesforce and has not previously been associated with an agreement.
- Auto Publishing
  Publishing templates improves document generation performance by taking referenced clauses in a template and 'publishing' them before the template is used to generate a document. This takes the content of the clause and enters it into the template body as static text, as if it was another part of the main template. Auto-publishing enhances this by enabling you to schedule a batch job, which will automatically complete the publishing task that previously needed to be completed manually.
- Document Generation for Templates with Nested Clauses
  The Autopublishing features improve document generation performance, but some Contract Management customers choose to generate documents without using the Autopublishing features.
- Query Template
  Using template filtering rules, you can set up user defined filters to narrow the list of templates that display for tasks that involve previewing or generating documents. For example, for agreement templates created for multiple regions, you should only be able to select templates for the region to which they belong. The template filter uses agreement fields and related child object fields to select the templates to display.
- Template Datasource Filter
  Template Datasource Filter enables you to filter the records of various business objects in your Agreement document based upon the filter criteria.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- Dynamic Document Assembly

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

- Setting Up Template Filtering Rules

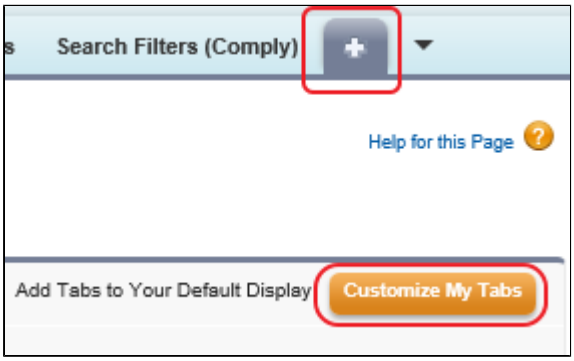
  By setting up the template filtering rules, the Template selection page can be configured to setup user defined filters to narrow the list of Templates displayed to the user for Preview /Generate/Generate Supporting Document/Regenerate tasks. The template filter is setup by an administrator and allows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

- Agreement Term Exception

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

Setting up template object for Contract Management

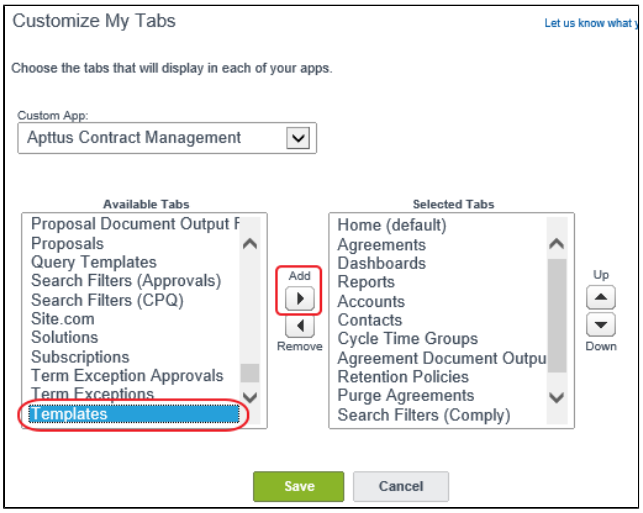
1. Click **+** > Customize My Tabs.



2. Scroll down the available options and select **Templates**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

3. Click **Add**.



4. Click **Save**.

The Templates tab is added to the Contract Management application selection.

Securing Documents

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

To secure and control documents

- You must have a valid Salesforce (SFDC) account with an Apttus Contract Management license.
- Apttus X-Author Contracts must be installed on your local machine with an Apttus X-Author license.

Note

You cannot use a Mac OS X operating system with X-Author Contracts. However, it can be used with a Mac running a Windows Virtual Machine in a Citrix environment.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

1. Start Word and click **File > Options** to display the Word Options dialog.
2. Select the Trust Center sidebar option and then click Trust Center Settings.
3. Select the Protected View sidebar option and then clear the three Protected View 3.options.
4. Click **OK** for each of the two dialog boxes to complete the procedure.

Setting Up Agreement Clause Categories and Subcategories

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

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

These picklists display when you perform the following actions:

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

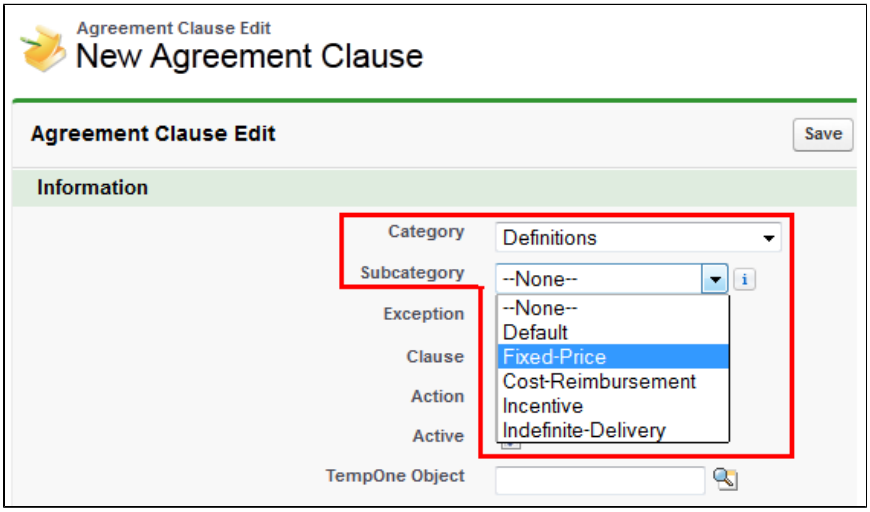
To set up a clause:

- Match Agreement Clause and Template categories and subcategories.
- Associate categories and subcategories.

Agreement Clause Subcategories

Subcategory picklists display values based on what was selected in the **Category** picklist. The picklists also now behave the same for both the Playbook and Create Section dialog, in that they both have Category and Subcategory drop-down lists.
Subcategories can be selected when you choose to save part of a document as an agreement clause in Author, as well as when you create a clause in Salesforce.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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

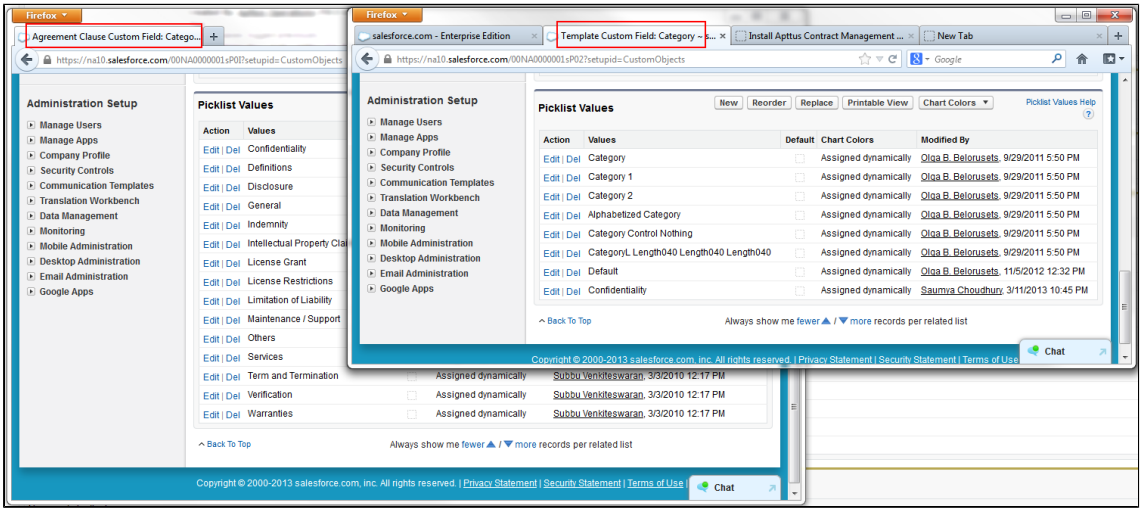
If the values do not match and you add an agreement clause to an agreement using the Playbook, an unexpected category and subcategory is added in Salesforce to the Agreement Clause related list's categories and subcategories.

To match Agreement Clause and Template Categories and Subcategories

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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

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

You must associate the same categories and subcategories.

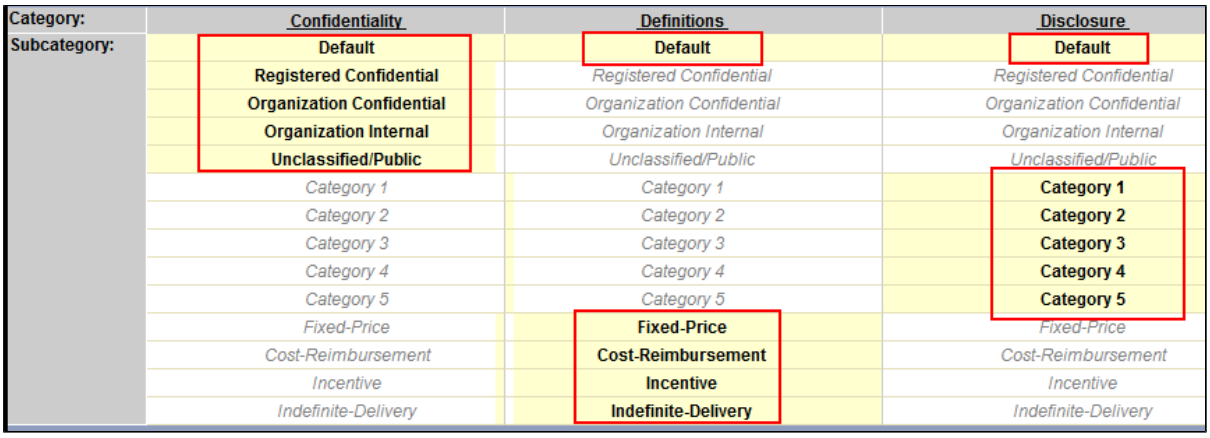
To Associate Categories and Subcategories

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

1. Navigate to **Setup > Build > Create > Objects > Agreement Clause** and click **Subcategory** to display the field details.
2. Click **New** in the Picklist Values section.
3. Enter all of the required picklist values for all of the categories and click **Save**.
4. Click **Back to Agreement Clause** and then click **Category** to display the field details.
5. Click **Edit** beside Subcategory in the Field Dependencies section.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

6. Double-click the sub-categories required for each Category column, when highlighted it indicates they will be associated with that category.



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

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

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

Creating Offline Agreements

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

When a document is open in X-Author Contracts and has not previously been kept in Salesforce, the Check-In option can be used for creating an offline agreement. There are some mandatory fields that must be completed before you generate a new agreement. The results are the same as creating an offline agreement from the Agreements tab in Salesforce.

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

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

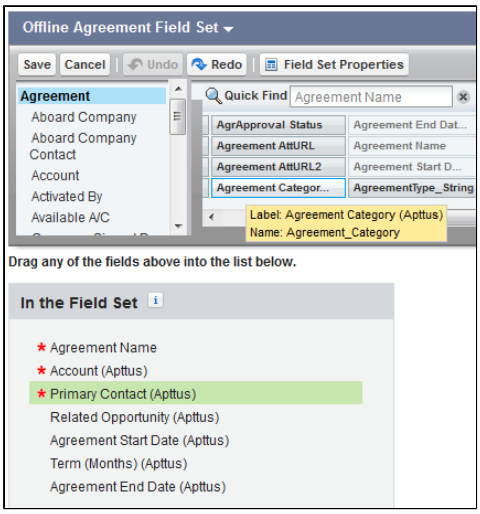
Agreement Name, Account, and Primary Contact can be removed from the field set, but when they are included they will be mandatory. You can make all other fields mandatory or optional.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

To configure offline agreement window fields

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



4. Click **Save**.

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

To create an offline agreement

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

1. Click the **Agreements** tab.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

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

Agreement Number/Header Configuration

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

> **Note**
>
> Please understand the following logic for this feature.

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

To set the date and time format for the footer

1. From **Setup**, go to **Develop > Custom Settings** and click **Manage** beside **Comply System Properties**.
2. Click **Edit** and for **Footer Datetime Format For Imported Docs** enter the format you want to use.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Note

Only the following date and time formats are supported:

Supported DateTime Format	Example
MM/dd/yyyy	08/22/2006
dddd, dd MMMM yyyy	Tuesday, 22 August 2006
dddd, dd MMMM yyyy HH:mm	Tuesday, 22 August 2006 06:30
dddd, dd MMMM yyyy hh:mm:tt	Tuesday, 22 August 2006 06:30 AM
dddd, dd MMMM yyyy H:mm	Tuesday, 22 August 2006 6:30
dddd, dd MMMM yyyy h:mm tt	Tuesday, 22 August 2006 6:30 AM
dddd, dd MMMM yyyy HH:mm:ss	Tuesday, 22 August 2006 06:30:07
MM/dd/yyyy HH:mm	08/22/2006 06:30
MM/dd/yyyy hh:mm tt	08/22/2006 06:30 AM
MM/dd/yyyy H:mm	08/22/2006 6:30
MM/dd/yyyy h:mm tt	08/22/2006 AM
MM/dd/yyyy HH:mm:ss	08/22/2006 06:30:07
MMMM dd	August 22
yyyy'-'MM'-'dd'T'HH':'mm':'ss	2006-08-22T06:30:07
yyyy'-'MM'-'dd HH':'ss'Z'	2006-08-22 06:30:07Z

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

dddd, dd MMMM yyyy HH:mm:ss	Tuesday, 22 August 2006 06:30:07

3. Click **Save**.

When a new document is imported into the system, it will include the Date in the bottom left corner of the footer on each page, in the format selected above.

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

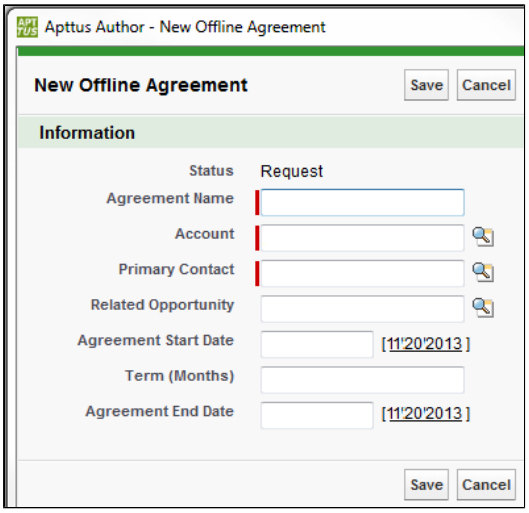
To create offline agreements (in X-Author)

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

4. Enter values for the mandatory fields.



5. Enter any remaining details for the agreement and click **Save**.

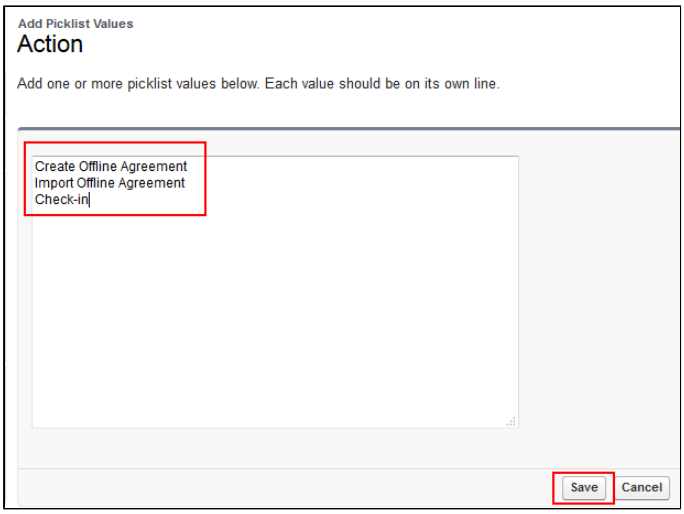
The agreement is added to the system, with the Word doc used to create the agreement available in the Notes & Attachments related list.

To add importing offline agreement actions

1. From **Setup**, go to **Create > Objects > Merge Event**.
2. Under **Custom Fields & Relationships**, click **Action** and for **Picklist Values** click **New**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

3. Enter *Create Offline Agreement* and *Import Offline Agreement* on separate lines and click **Save**.



4. From **Setup**, go to **Create > Objects > Agreement Protection**.
5. Under **Custom Fields & Relationships**, click **Action** and for **Picklist Values** click **New**.
6. Enter *Import Offline Agreement* and click **Save**.

Document protection can now be extended to documents that were imported.

Document Info Type Included at Check-in

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

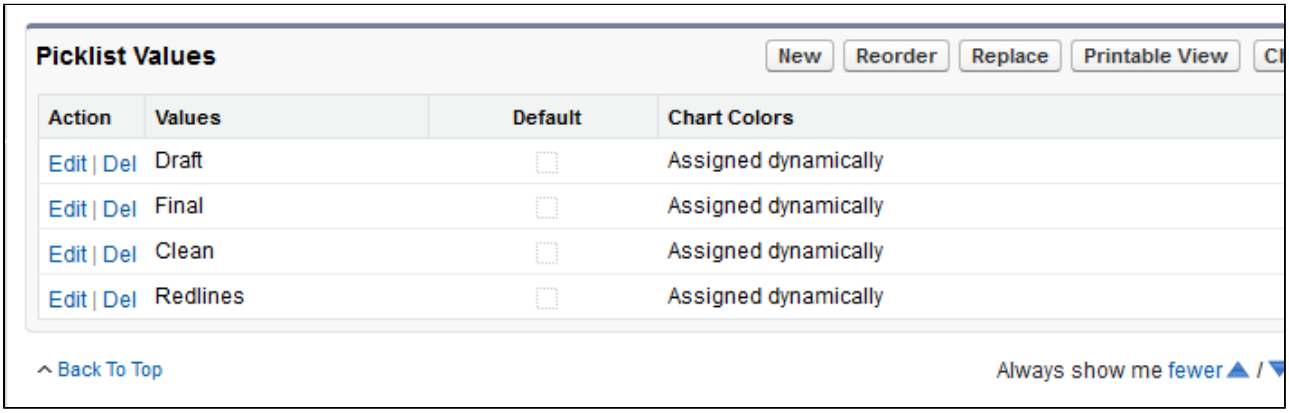
Please note that this document info is only applied when using X-Author Contracts and can only be used after your system administrator has included the *Import Offline Agreement Actions* and the *Check-in Action* within your Apttus Contract Management environment.

Note

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Publishing

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

Auto-Publishing

Auto publishing requires an apex scheduled job and then entering a username and password and selecting the *Enable Auto Publish* option on the *Publish Template* page to work. After that the system automatically handles the process. Even when you have auto publish enabled, you can always manually publish templates on an ad hoc basis.Auto Publishing automates an administrative task, that previously must have been completed manually.There are a number of new fields added to the Template object for this feature that you may or may not want to add to the templates page layout when upgrading. With new installations, by default the publish fields will be included on the page layout.

Note

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

The new fields are:

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

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

Note

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

- Publish
- Check-In

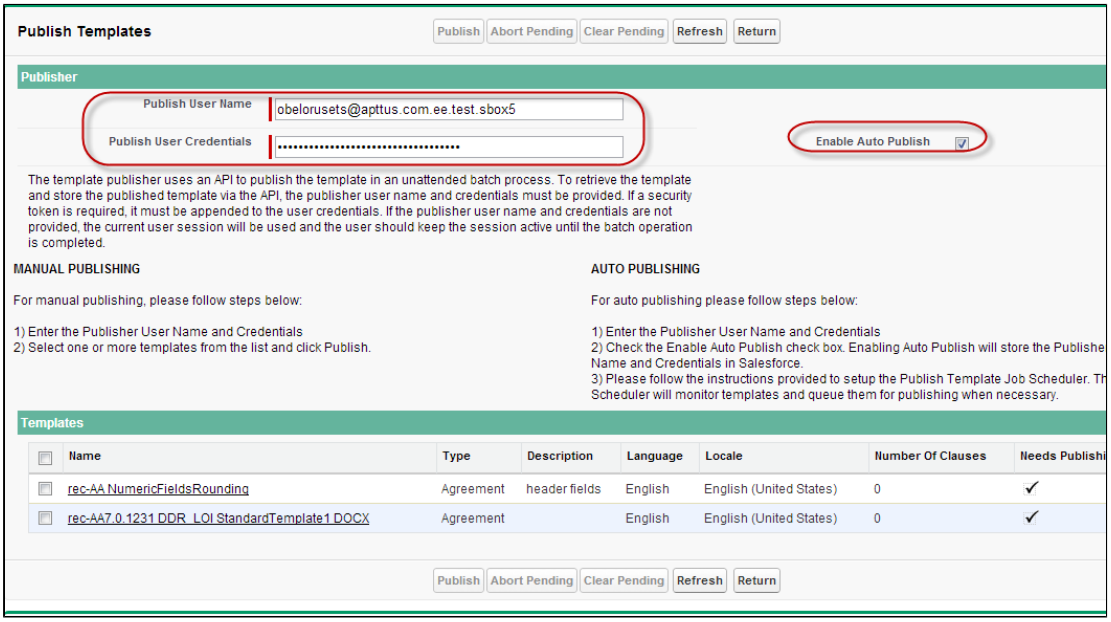
To auto-publish templates

1. Go to **App Setup > Develop > Apex Classes** and click **Schedule Apex**.
2. Enter a **Job Name** and then click lookup icon for Apex Class and enter *TemplatePublishJobScheduler*.

 Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

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



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

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

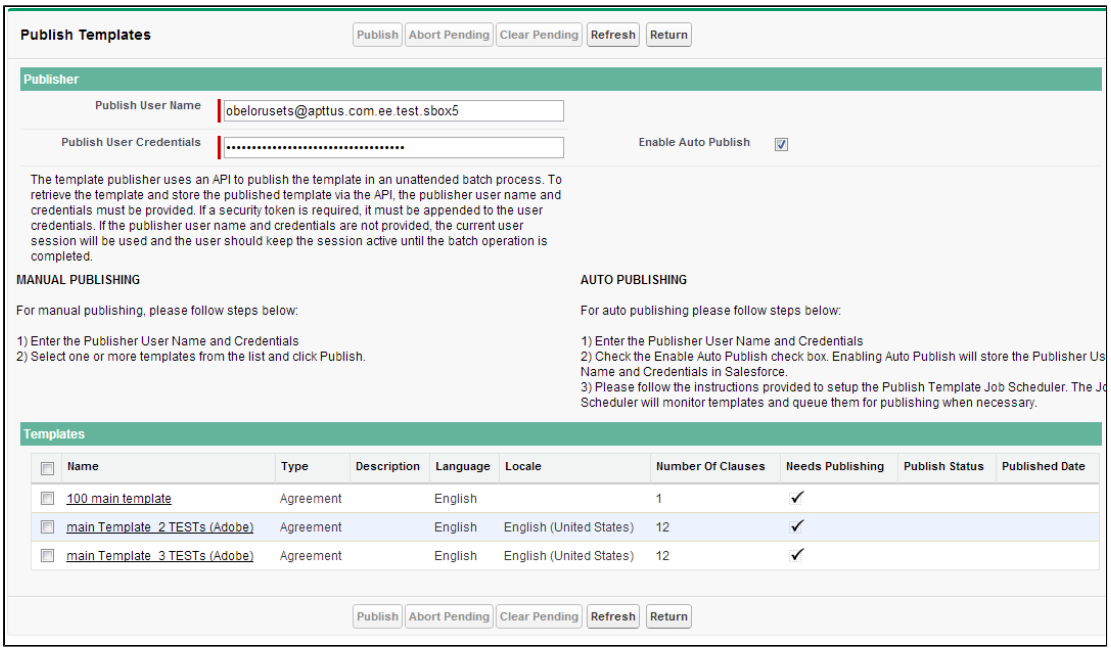
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

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

To manually publish templates using the Publish Templates tab

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



   If you are going to manually publish a template it does not matter if the **Auto-publish** option is checked.
   The manual template publish process does not store the credentials. The credentials are retained in memory and passed to the merge service which uses it to login and establish a session with Salesforce.

2. Select the templates you want to publish and click **Publish**.
   The status for the template changes to *Submitted* and an entry is added to the Batch Jobs list for each selected template that is published.

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

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

How Merge Service interacts with Contract Management

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

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

Note

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

How to Handle Auto Publishing Security Considerations

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

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

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

Security Handling Options

The typical solution for Salesforce integration jobs is to have a specific profile assigned to a small number of system administrator users, to carefully control who has access to the objects required to complete tasks. So there are three possible ways to approach this security challenge if running a publishing job is desired:

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Document Generation for Templates with Nested Clauses

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

The improvements to document generation resolve:

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

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

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

Note

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

Query Template

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

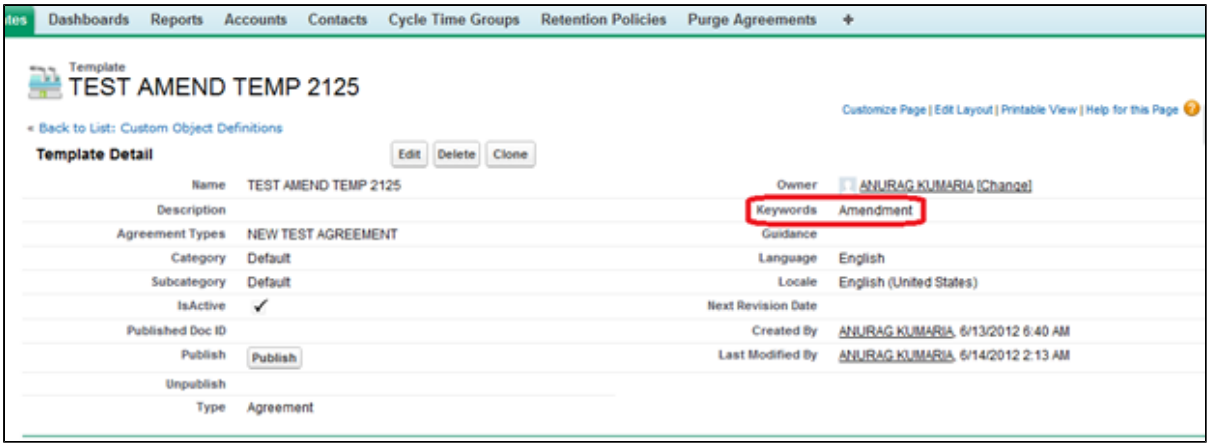
User Permissions Needed	
To create, edit or delete a query template:	Query Template: Read, Create, Edit, Delete Agreement: Read Template: Read

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

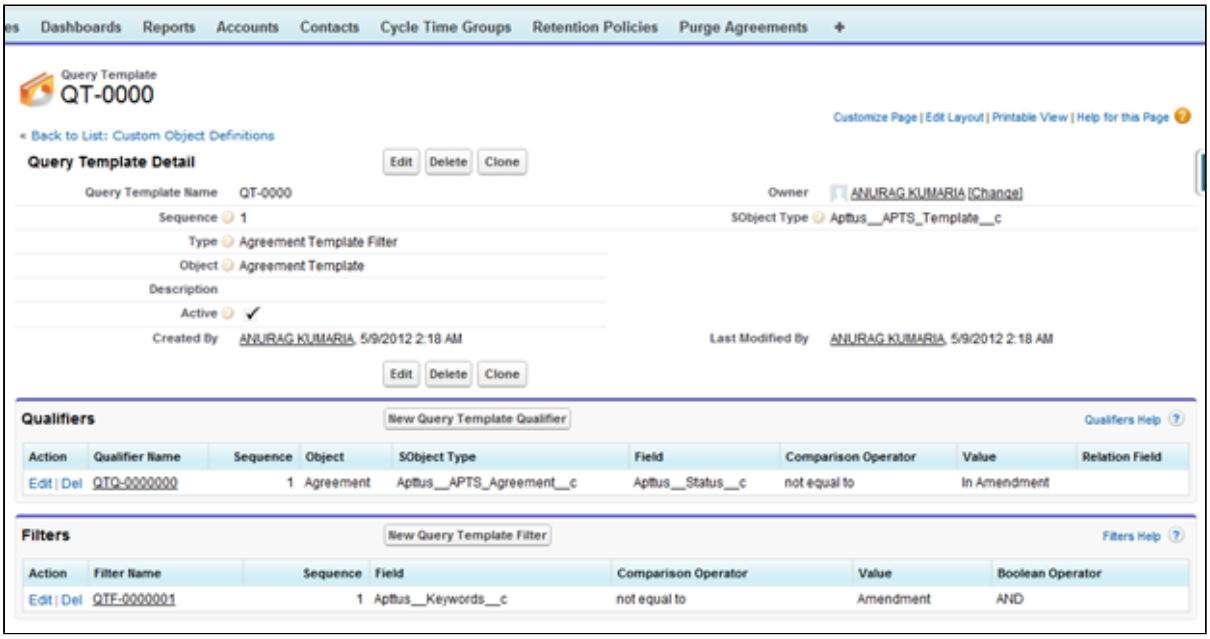
To insert an amendment template

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

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



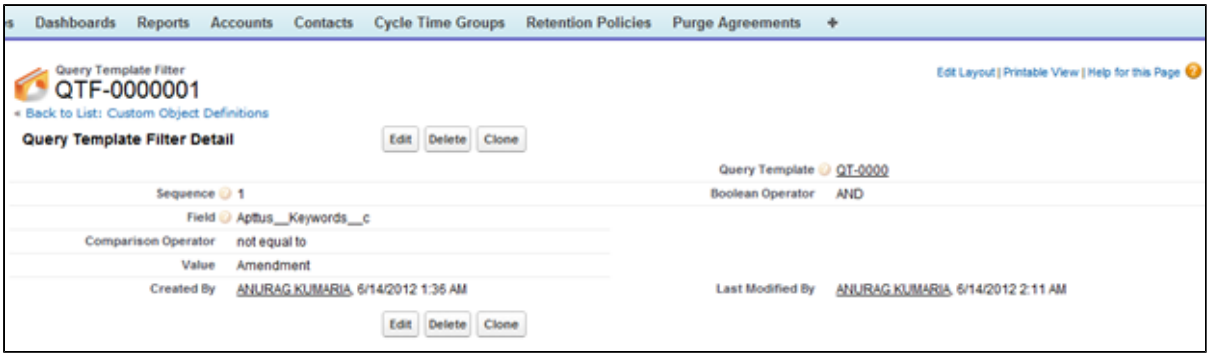
2. Using the **Query Template** tab, create a Query Template.
3. The Query Template has two Related Lists: **Qualifiers** and **Filters**.



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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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



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

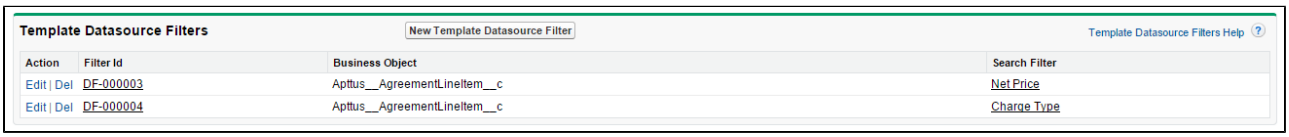
The desired Amendment template is displayed as one of the options along with other templates.

For more information on setting up Template filtering rules, refer to To setup template filtering rules .

About Template Datasource Filter

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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

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

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

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

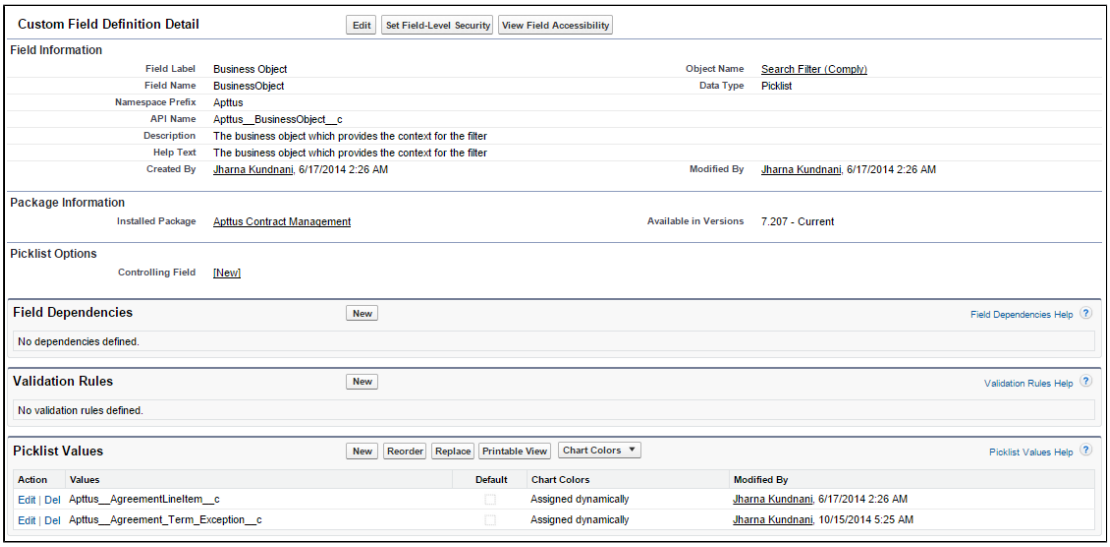
User Permissions Needed	
To create, edit or delete a search filter:	Search Filter (Comply): Read, Create, Edit, Delete Template: Read
To create, edit or delete a Template Datasource filter:	Template Datasource Filter: Read, Create, Edit, Delete Search Filter (Comply): Read Template: Read Agreement Term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

To define custom objects for Search Filter (Comply)

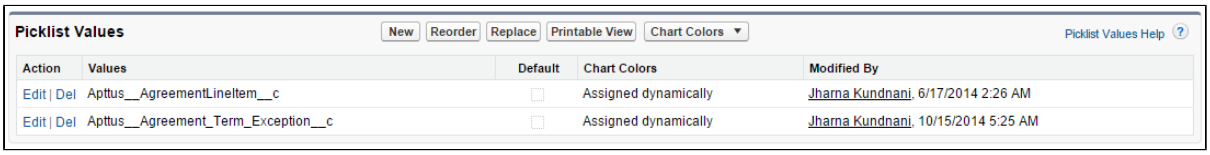
1. Navigate to **Setup > Create > Objects > Search Filter (Comply)**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

2. Click **Business Object**.



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



5. Click **Save**.

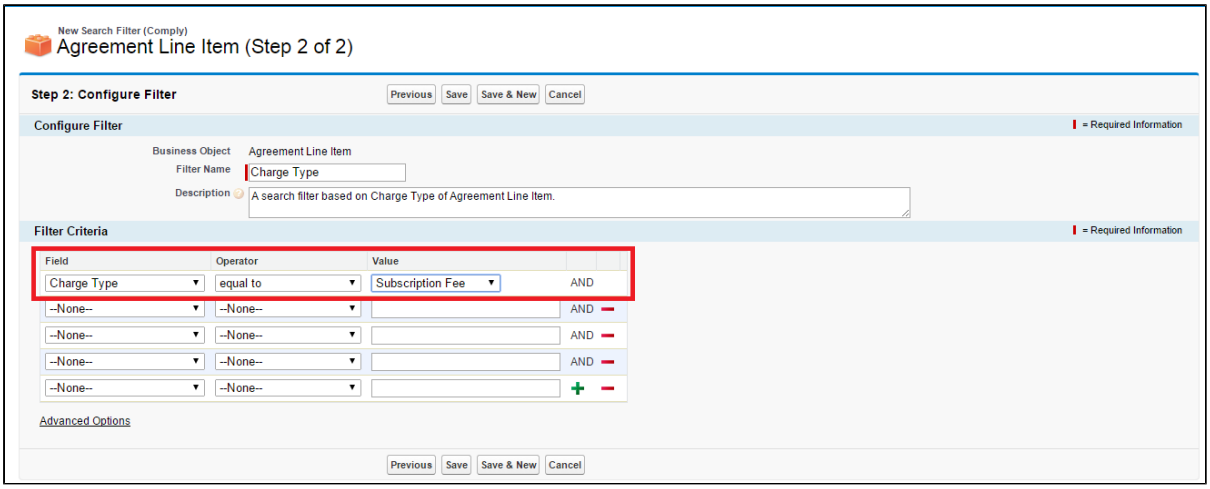
The various custom objects appear in the drop-down list for Business Object. You can now create **Search Filter (Comply)**.

To create a Search Filter (Comply)

1. Click and click **Search Filters (Comply)**.
2. Click **New** to create a new Search Filter (Comply).
3. Select the business object from the drop-down list and click **Next**.
4. Type a mandatory **Filter Name** and a description.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

5. In the **Filter Criteria** section, select the fields and expressions you want to use to control which records will be filtered in your agreement document.
   You can have a standard *AND* relationship between the expressions or use **Advanced Options** to the fields together in a more complex formula. The available fields are based on the *Business Object*.



6. Click **Save**.

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

To create a Template Datasource Filter

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

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

About Dynamic Document Assembly

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

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

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

> ⚠ Support for the the *Agreement* at the *line-item level* is only enabled for users of **Apttus Contract Management and X-Author Contracts November 2016 release** or later (versions **8.335 (CM)** and **8.508 (XAC)** respectively). Prior versions only support the Agreement object header level and clauses as dynamic components (not attachments). Support for the *Proposal* object at the Header (clause insertions) and *line-item level* (attachments) is only enabled for users of **Apttus Proposal Management November 2016** release or later (versions **8.104 (PM)** and the above mentioned versions of the CLM Product suite.

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

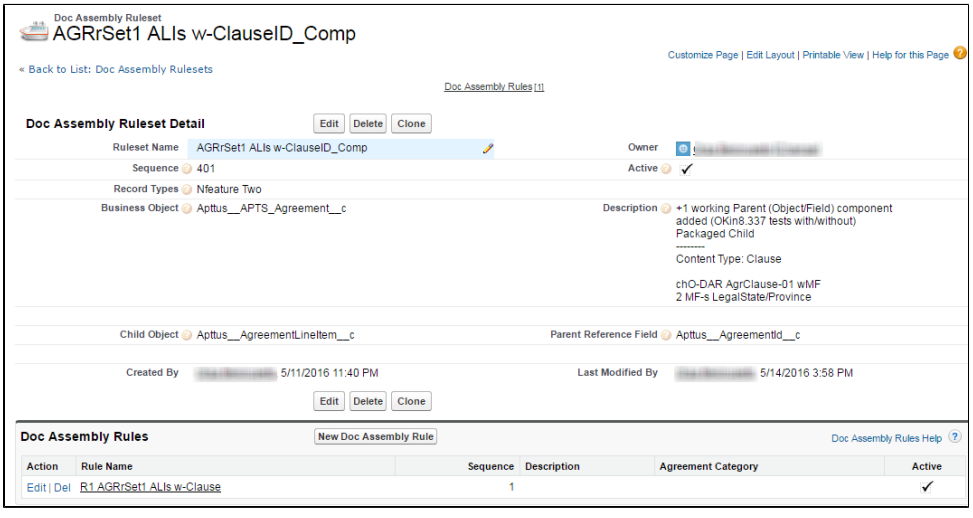
A note on Record Types: In the modeling of your system, it is recommended to make every effort to ensure that any Template Agreement Types that make use of dynamic segments also be included in the Document Assembly Ruleset object Record Types picklist. For example, if you have NDA templates that make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

Dynamic Document Assembly Elements

The following elements comprise Dynamic Document Assembly.

Doc Assembly Ruleset

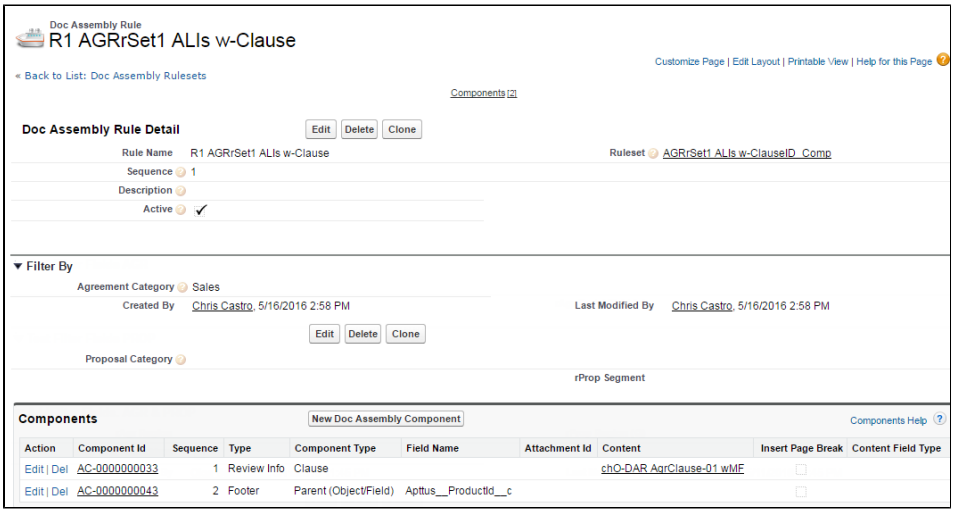
Dynamic Document Assembly uses the **Doc Assembly Ruleset** as the container object for the functionality as shown in the following figure:



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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Doc Assembly Rules



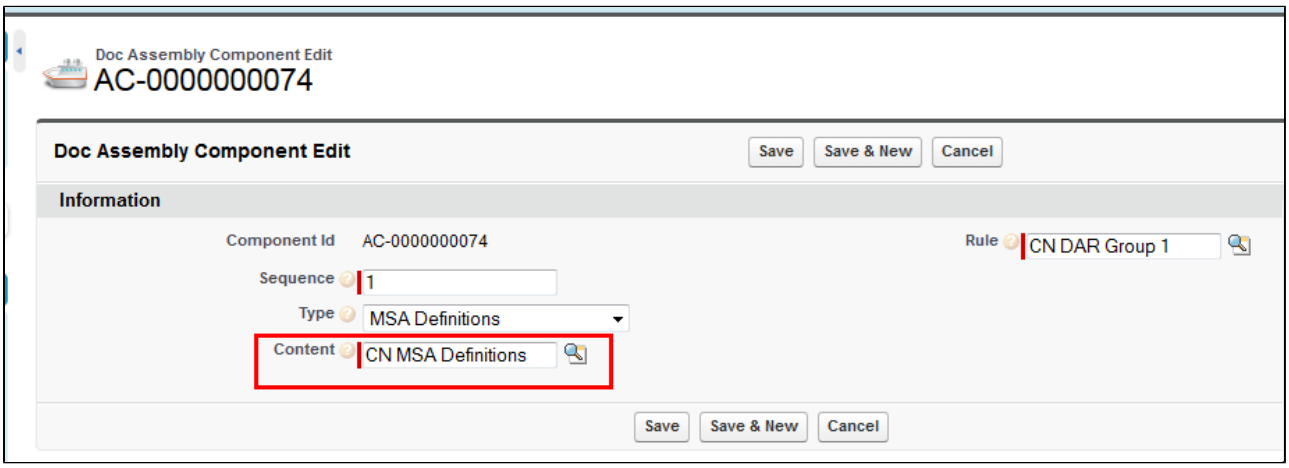
Doc Assembly Rules contain all of the components including all of the content that will be included in the document:

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

Document Assembly Components

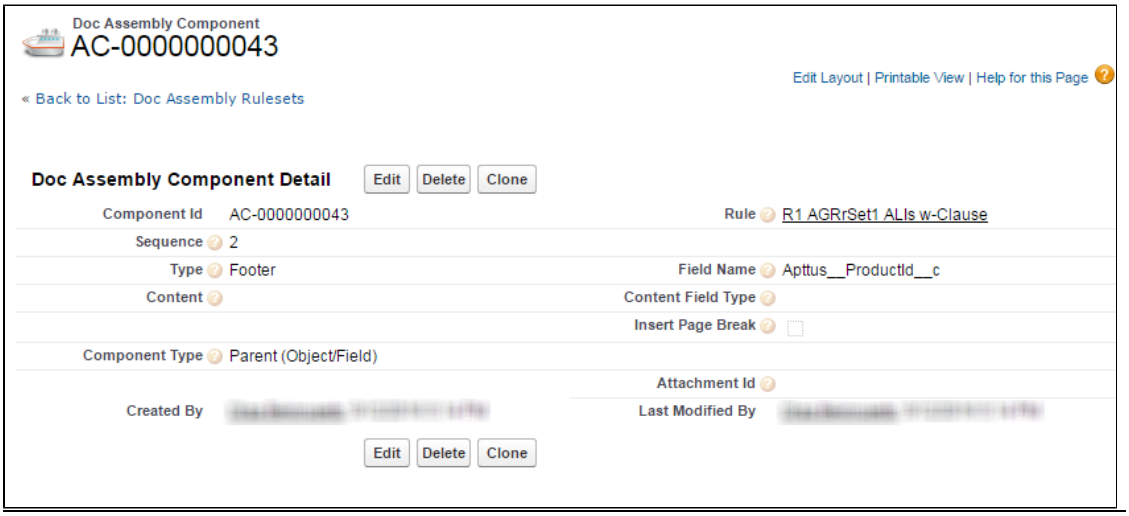
Clause

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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

Attachment



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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Dynamic Document Assembly Workflows

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

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

Dynamic Document Assembly Workflow: Clauses

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

> ⚠ Support for the *Proposal* object at the Header (clause insertions) is only enabled for users of **Apttus Proposal Management November 2016** release or later (versions **8.104 (PM)** and **Apttus Contract Management and X-Author Contracts November 2016 release** or later (versions **8.335 (CM)** and **8.508 (XAC)** respectively). Prior versions only support the Agreement object.

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Configure Dynamic Document Assembly

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

Create Dynamic Document Assembly Rulesets

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

Doc Assembly Rule Filter Logic

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

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

To create custom fields

1. From **Setup**, go to **Create > Objects > Agreement** *(Apttus Contract Management)*.
2. From **Custom Fields & Relationships**, click **New**. Dynamic Document Assembly supports custom fields of all data types, except *Picklist (Multi-Select)* and *Text Area (Long)*.
3. Follow the standard Salesforce instructions for creating a field.
4. After you have created all the fields on the **Agreement** object, go to **Create > Objects > Doc Assembly Rule**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

5. From **Custom Fields & Relationships**, click **New**.
6. Create the exact same fields that you did for the Agreement object and you must use the same API names to ensure the correct auto mapping of fields between the agreement object and the rule.

The fields required for auto mapping and the field set are available.

Create field sets to be used as static and dynamic field sets for the Doc Assembly Rule using the fields created in steps *4* to *6*. The fields in the static field set are a subset of the fields in the dynamic field set.

> Packaged fields cannot be added to a Field Set as custom fields pointing toward the same namespace (e.g., "Apttus"). Also, if you omit the namespace when you create the field, you will get an error on generate. If you want to include fields from a package you will need to create a custom formula fields that points to the packaged field.

To create a Document Assembly Fieldset

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

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

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Note

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

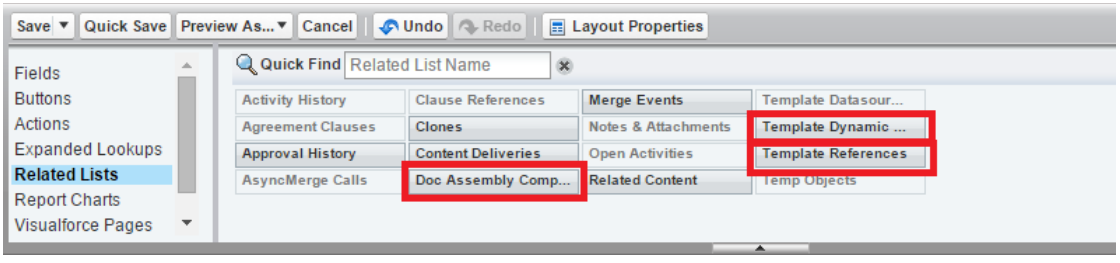
To populate Doc Assembly Component Type picklist

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

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

To include the Related Lists

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



4. Click **Save**.

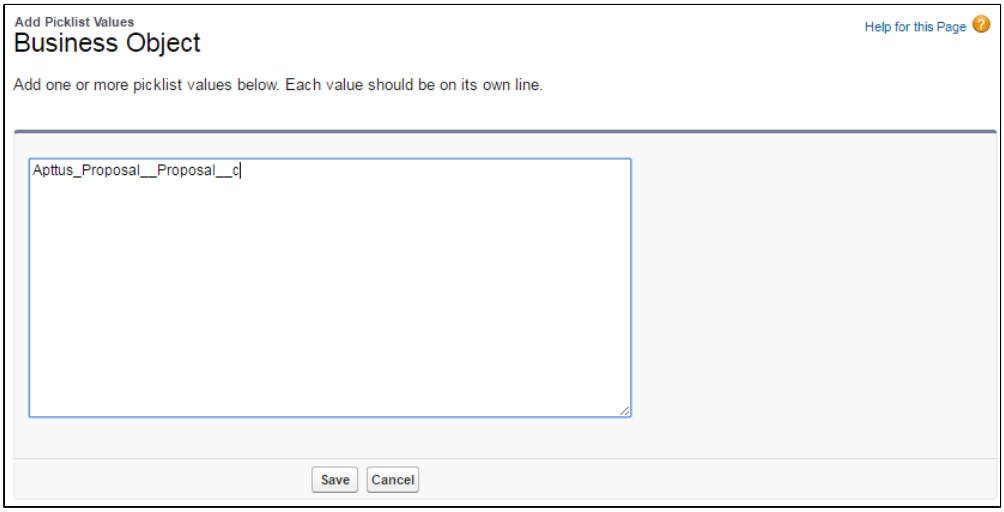
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

To Enable DAR for the Proposal Object

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

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



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

To create Doc Assembly Rulesets

User Permissions Needed	
To create a Doc Assembly Ruleset:	Doc Assembly Ruleset: Read, Create, Edit. Agreement: Read, Create, Edit. Template: Read, Create, Edit

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

User Permissions Needed	
	Doc Assembly Rule: Read Doc Assembly Component: Read

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

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

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

3. Once the settings are configured, click **Save** to display the Doc Assembly Ruleset record.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

4. Click **New Doc Assembly Rule** and enter values for the following options:

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

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

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

7. Click **Save**.

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

Dynamic Document Assembly Workflow: Attachments

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

> ⚠ Support for the *Agreement* at the *line-item level* is only enabled for users of **Apttus Contract Management and X-Author Contracts November 2016 release** or later (versions **8.335 (CM)** and **8.508 (XAC)** respectively). Prior versions only support the Agreement object header level and clauses as dynamic components (not attachments). Support for the *Proposal* object at the Header (clause insertions) and *line-item level* (attachments) is only enabled for users of **Apttus Proposal Management November 2016** release or later (versions **8.104 (PM)** and the above mentioned versions of the CLM Product suite.

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

Configure Dynamic Document Assembly

- Specify the API name of the **Child Object Types** for the Apttus Agreement and/or Quote /Proposal objects in Comply Custom Properties.
- Populate the Doc Assembly Component Type Picklist.
- Add Attachments fields to the Doc Assembly Ruleset and Doc Assembly Component page layouts.
- Add Related Lists to the Template Object page layout.
- Enable Document Assembly Rulesets for the Quote/Proposal object (optional).

Create Dynamic Document Assembly Rulesets

- Define a Doc Assembly Ruleset: Create a Ruleset that comprises the Rules that define the Components to be inserted in to the generated document.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

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

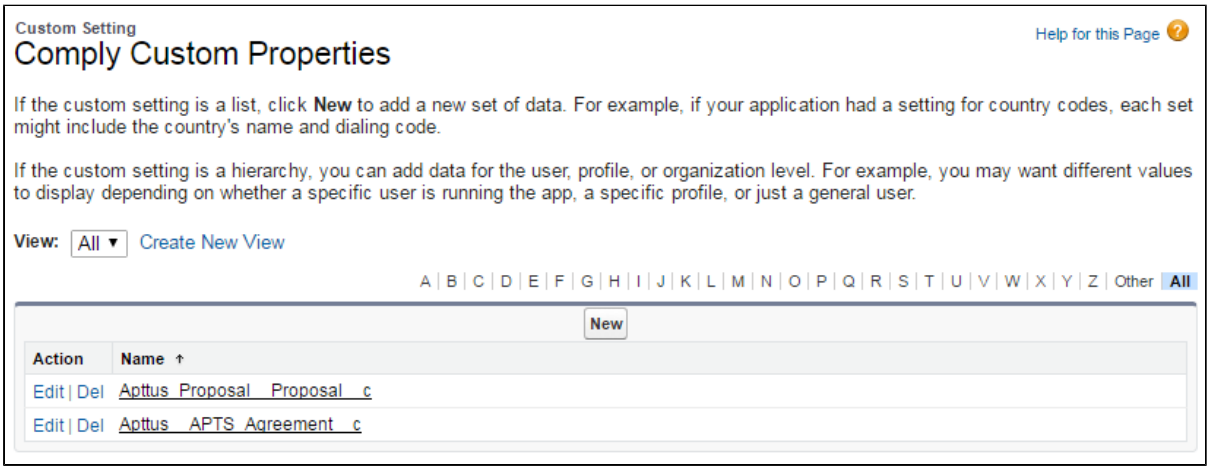
To configure Dynamic Document Assembly Custom Properties

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

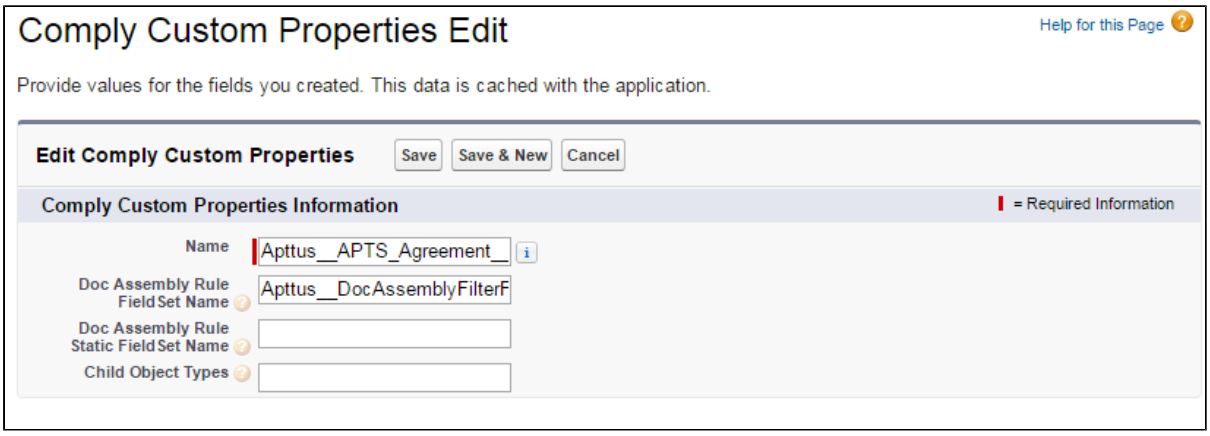
1. Go to **Develop > Custom Settings > Comply Custom Properties.**

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

2. Click **Manage** to display Custom Properties for Agreements and Proposals.



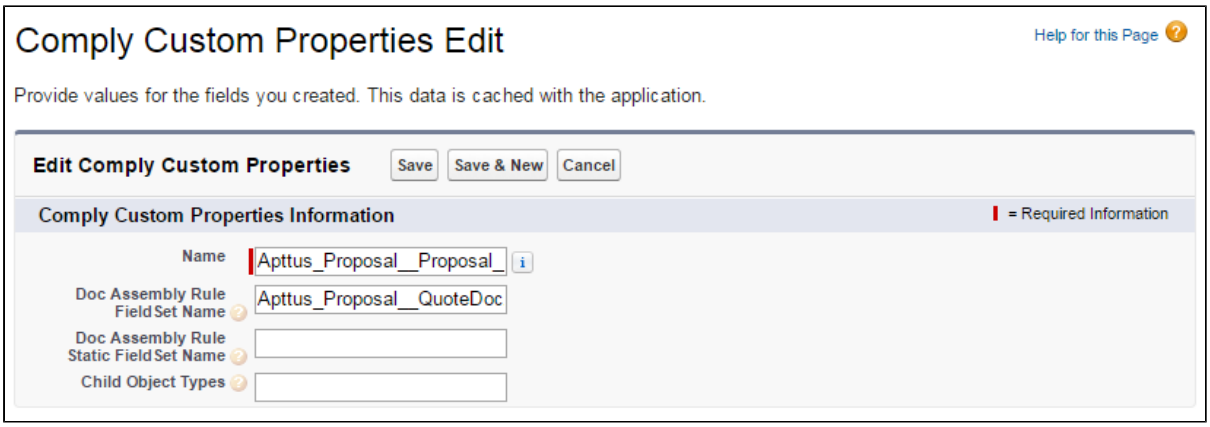
3. If the Properties displayed above appear in the list, continue to the next step. Otherwise, create the Custom Properties entries as shown above, then continue to complete the configuration.
4. Click **Edit** next to **Apttus__APTS_Agreement__c** to display the Custom Properties information form.



5. In the **Child Object Types** field, enter comma-separated values identifying the API name of the Child Objects you want to support in your Rulesets: "Apttus__AgreementLineItem__c, Agreement_Product__c"
6. Click **Save**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

7. If you have the Apttus Proposal Management package installed and want to create Rulesets for the Proposal object, click **Edit** next to **Apttus_Proposal__Proposal__c**.



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

Note

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

To populate the Doc Assembly Component Type Picklist

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

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

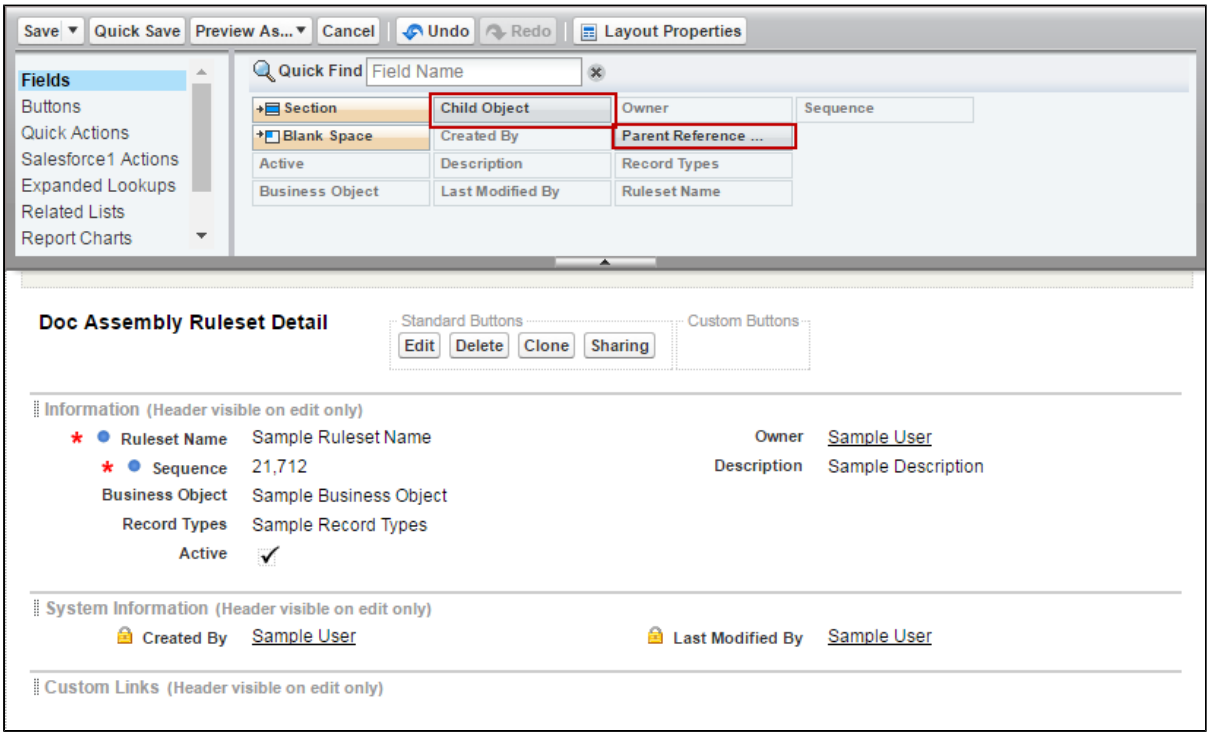
These values are now available from the *Type* picklist when creating a Doc Assembly Component.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To add Context Fields to the Doc Assembly Ruleset Page Layout

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

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



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

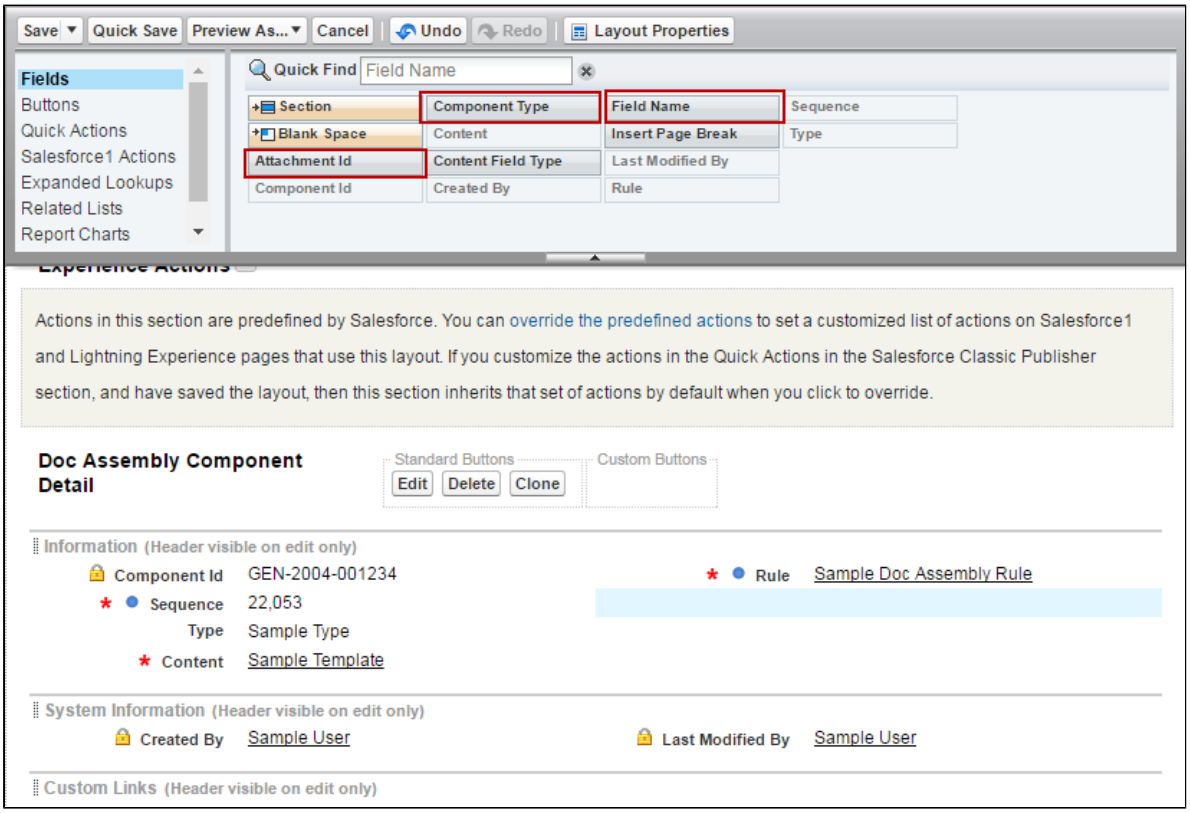
To add Attachment Fields to the Doc Assembly Component Page Layout

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

1. From **Setup**, go to **Create > Objects > Doc Assembly Component.**
2. From **Page Layouts**, click **Edit**.

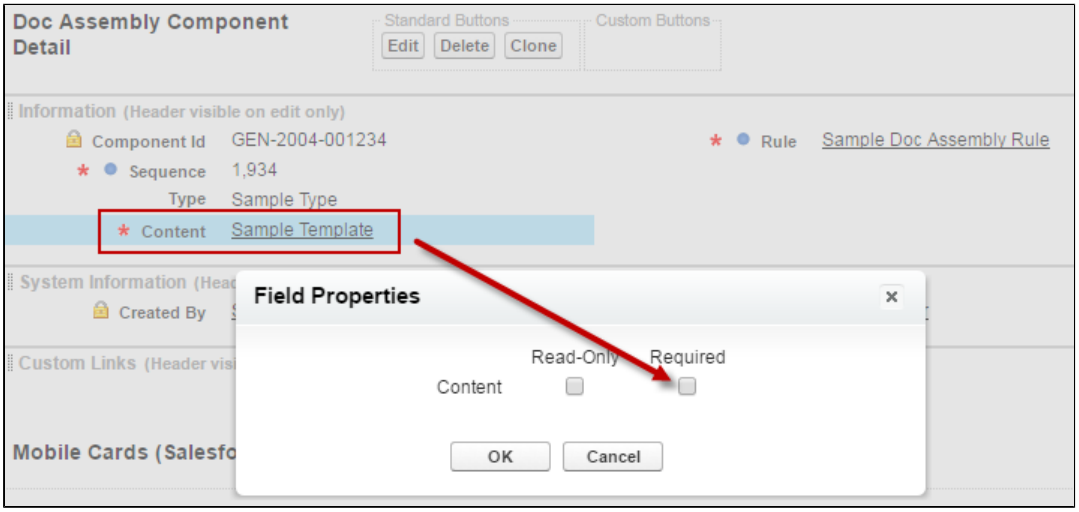
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

3. From the Layout editor, drag and drop the **Component Type, Field Name,** and **Attachment ID** fields into the Information section.



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

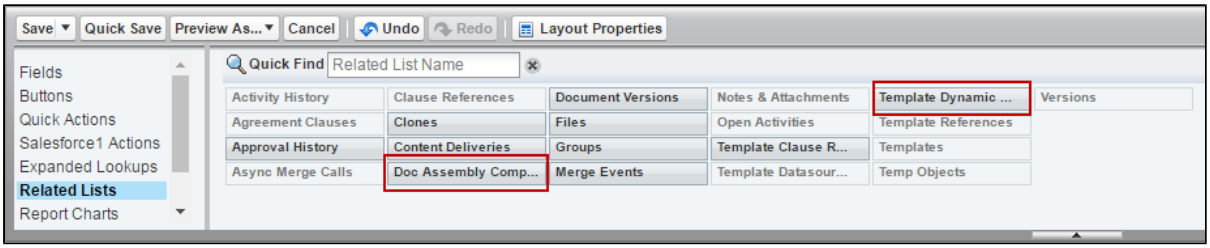
Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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

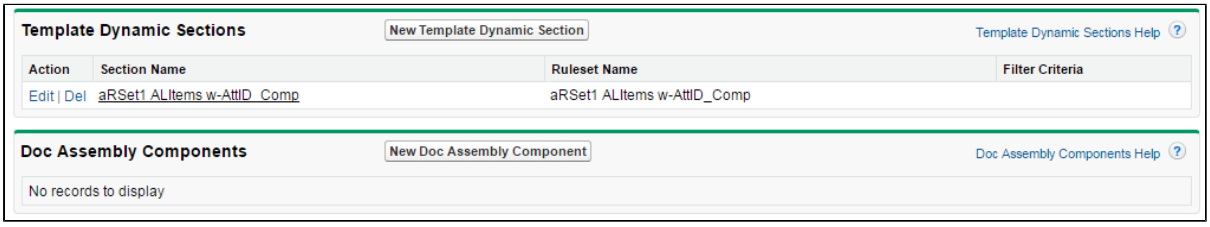
To include the Related Lists

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



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

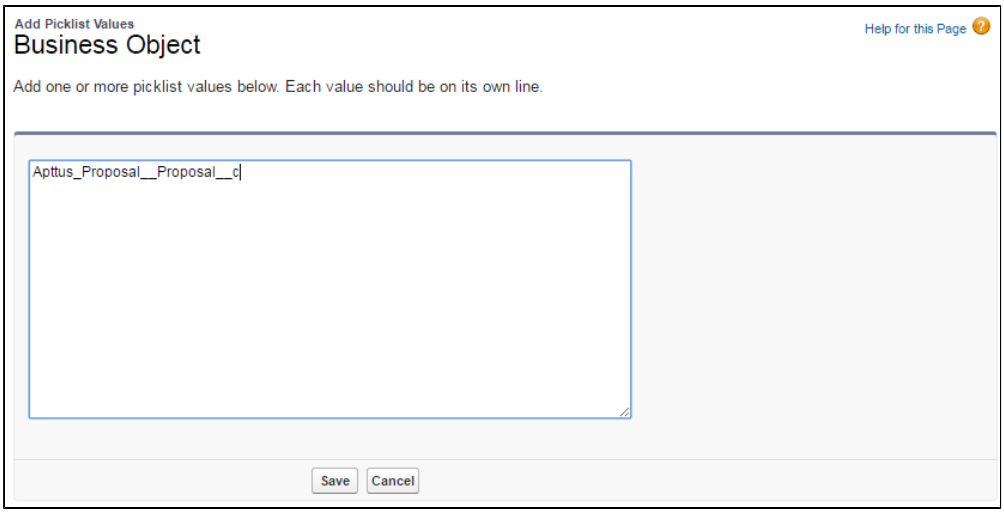
Copyright ©2011-2017 Apttus Corporation. All rights reserved.



To Enable DAR for the Proposal Object (Optional)

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

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



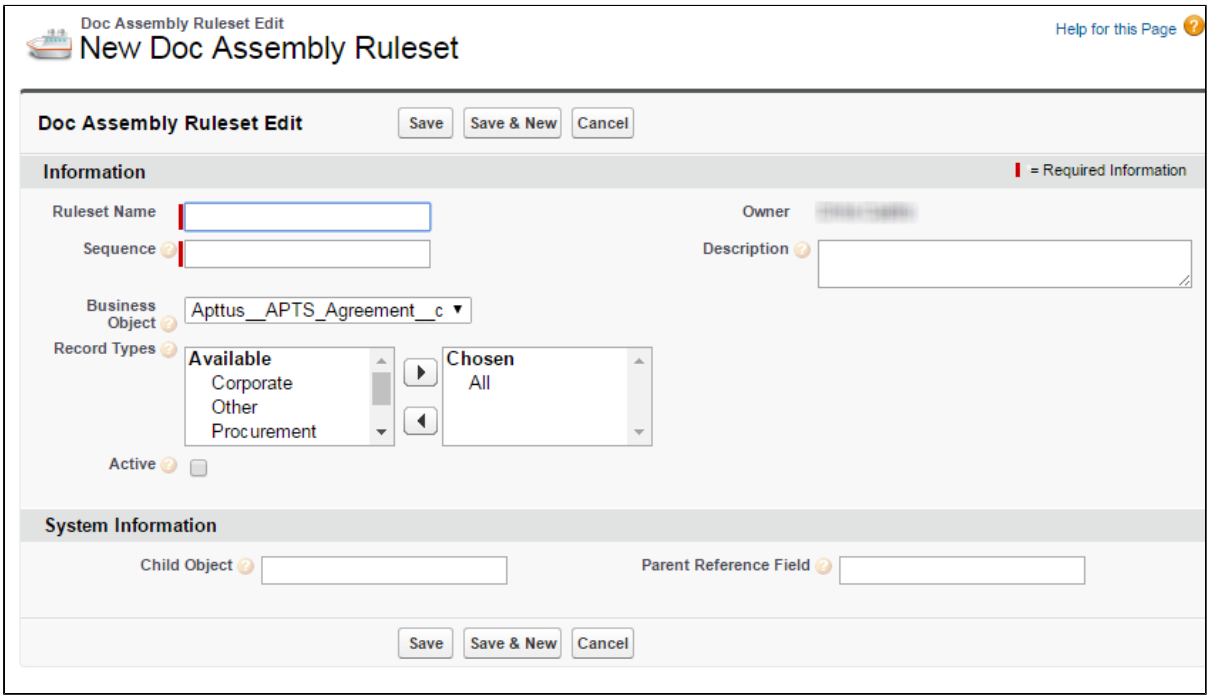
5. Click **Save**. The Proposal object is now available as an option when you are creating DAR Rulesets.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To create Doc Assembly Rulesets

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

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



2. Enter the following values for the Ruleset:

Option	Description
	Enter the name used to reference the Ruleset in the template.

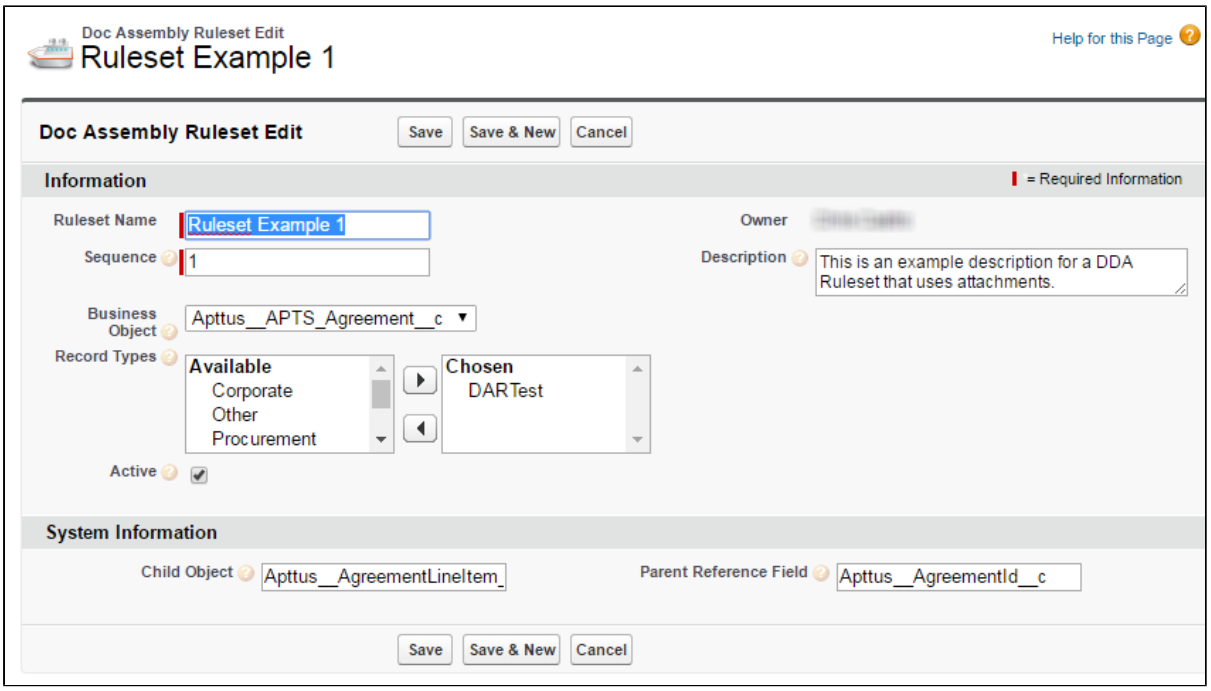
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Option	Description
Ruleset Name	
Sequence	Enter the order in which the Ruleset will be evaluated, when you Preview or Generate an agreement document.
Business Object	Choose the Business Object context for the Ruleset. Select *Apttus__APTS_Agreement__c* for Agreements, orApttus_Proposal__Proposal__c for Proposals.
Record Types	Choose one or more record types associated with the business object (Agreement or Proposal). To restrict the Ruleset to specific record types select them from the list and move them from *Available* to *Chosen*, otherwise leave the default of *All*.
Active	Select this checkbox to make the Ruleset available when you generate a document.
Description	Enter details about the Ruleset that describe its business purpose.
Child Object	Enter the child object API name of the specified Business Object to define as the Ruleset context. This will be a *line item* object and is restricted to the following Apttus objects; • *Apttus__AgreementLineItem__c* • *Agreement_Product__c* • *Apttus_Proposal__Proposal_Line_Item__c* These API names must also be represented in the Comply Custom Properties as described in the previous section on this page.
Parent Reference Field	

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Option	Description
	Enter the API name of the field on the Child Object you specified that references the parent. For example, if your Child Object is Agreement Line Item enter *Apttus__AgreementId__c* as the Parent Reference field. This is the API name of the Custom Field on the Agreement Line Item object that references its parent: Agreement.

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

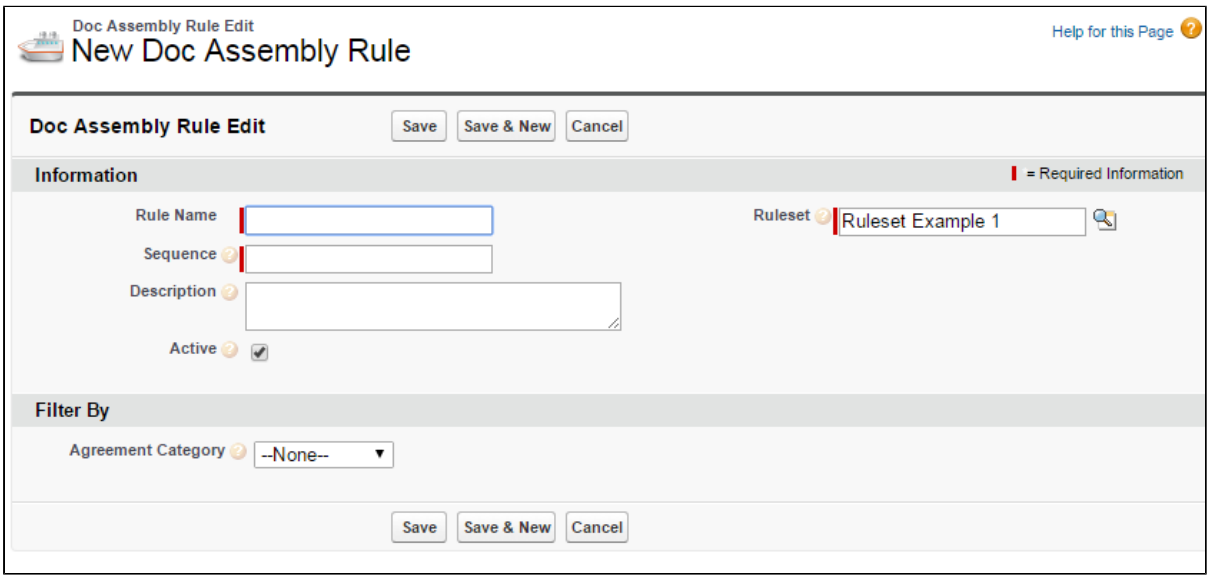


3. Click **Save** to display the Doc Assembly Ruleset record.

To create Doc Assembly Rules

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



2. Enter the following values for the Rule:

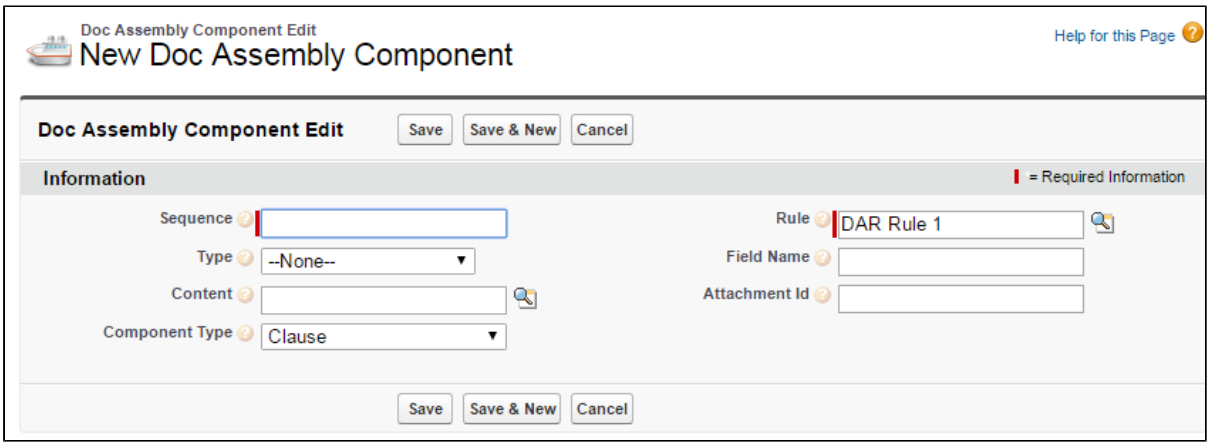
Option	Description
Rule Name	Enter the name used to reference the Rule in the template.
Sequence	Enter the order in which the Rule will be evaluated, when you Preview or Generate an agreement document.
Description	Enter details about the Rule in the context of your Ruleset.
Active	You must select this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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To create Doc Assembly Components

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



2. Enter the following values for the Component:

Option	Description
Sequence	Enter the order in which the component is inserted in the master agreement template, when you Preview or Generate an agreement document.
Type	Choose the Doc Assembly Component Type. Type is a configurable field that is used to help indicate what the component is used for; however, it is only an indicator and does not have any impact on the generation process.
Content	*Only applicable if the Component Type = Clause*. Use the lookup to choose the clause template that will provide the content for the document. This is referenced when you *Insert Dynamic Section* in X-Author.
Component Type	Choose the Component Type to determine the specific content that is inserted into the generated document for this component. Component Types can be: **Clause** – use this Component Type when you want the inserted content to be the clause specified by the *Content* field.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Option	Description
	Attachment (Id) – use this Component Type when you want the inserted content to be an attachment with a specific Attachment ID into the generated document. The Attachment ID can be from any Header or Line Item-level object. Use the **Attachment ID** field to identify the specific Attachment ID. **Attachment (Object/Field)** – use this Component Type when you want the inserted content to be an attachment specified through a field on the context record or through one of its relationships. This can be a formula field that returns the Attachment ID as a text string, or a field relationship from the context object that holds an Attachment ID string. Use the **Field Name** field with this Component Type (see below). **Parent (Object/Field)** – use this Component Type when you want the inserted content to be an attachment residing in the Notes & Attachments related list of a lookup from the context object (e.g. an attachment on a Product lookup from Agreement Line Item). Use the **Field Name** field with this Component Type (see below). **Note:** This Component only brings the first attachment on the lookup record and is determined by *Last Modified Date*.
Field Name	*Only applicable if the Component Type = Attachment (Object/Field) or Parent (Object/Field).* Enter the API Field Name that refers to an attachment on a line item through a field on the line item record, a Salesforce relationship, or a parent record. • **Attachment (Object/Field)** – Field Name can refer to an attachment through a field on the context record (e.g. Agreement Line Item) or through a relationship. Examples: • • *ProductId__r.ShortDescription__c,* where *ShortDescription__c* is a field on the Product that points to an attachment.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Option	Description
	• *ProductSpec__c* is a formula field on the Agreement Line Item object. The Attachment ID is pulled from the formula field value (the formula value can be a relationship, as above, or any other formula that returns text in the form of an Attachment ID). • **Parent (Object/Field)** – Field Name should be the API name of the Parent Reference field that points to the record where the attachment resides. For example, if the context object for the Ruleset is Agreement Line Item, then the parent reference field could be *Apttus__ProductId__c*
Attachment Id	*Only applicable if the Component Type = Attachment (Id)*. Enter the Attachment ID of a specific attachment on any object.

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

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

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

Dynamic Document Assembly Cloning

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

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

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

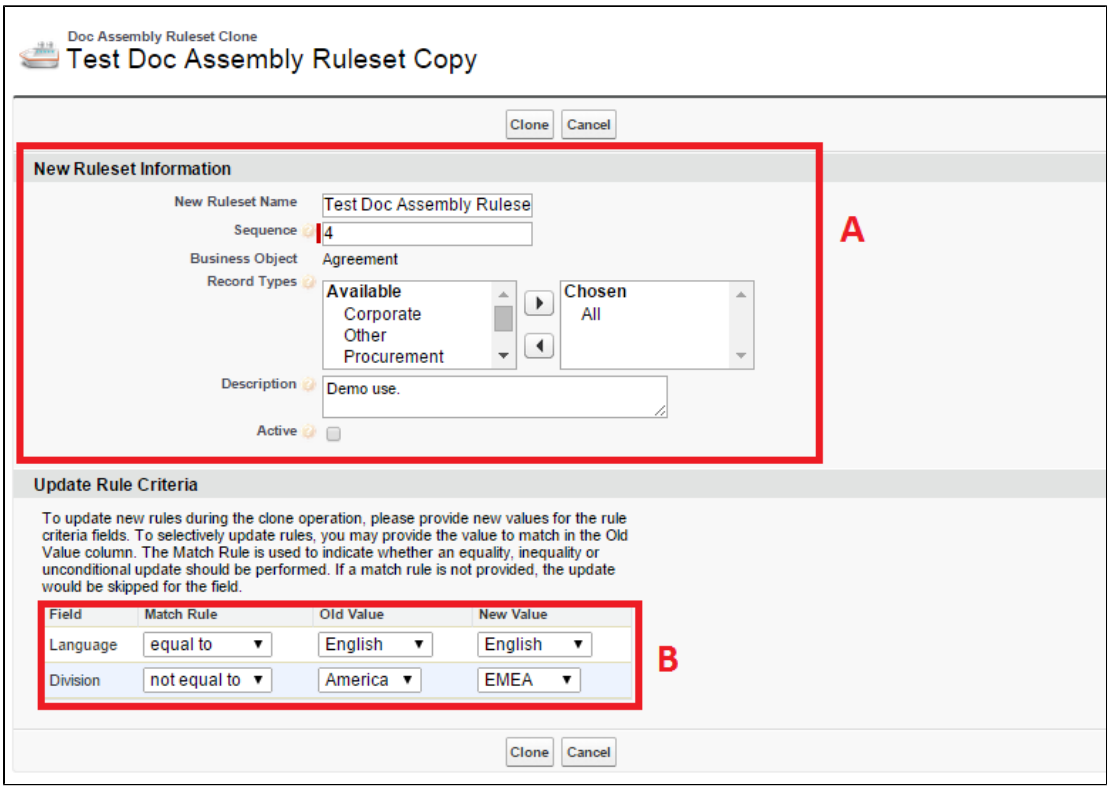
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Note

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

Cloning Doc Assembly Ruleset

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



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

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

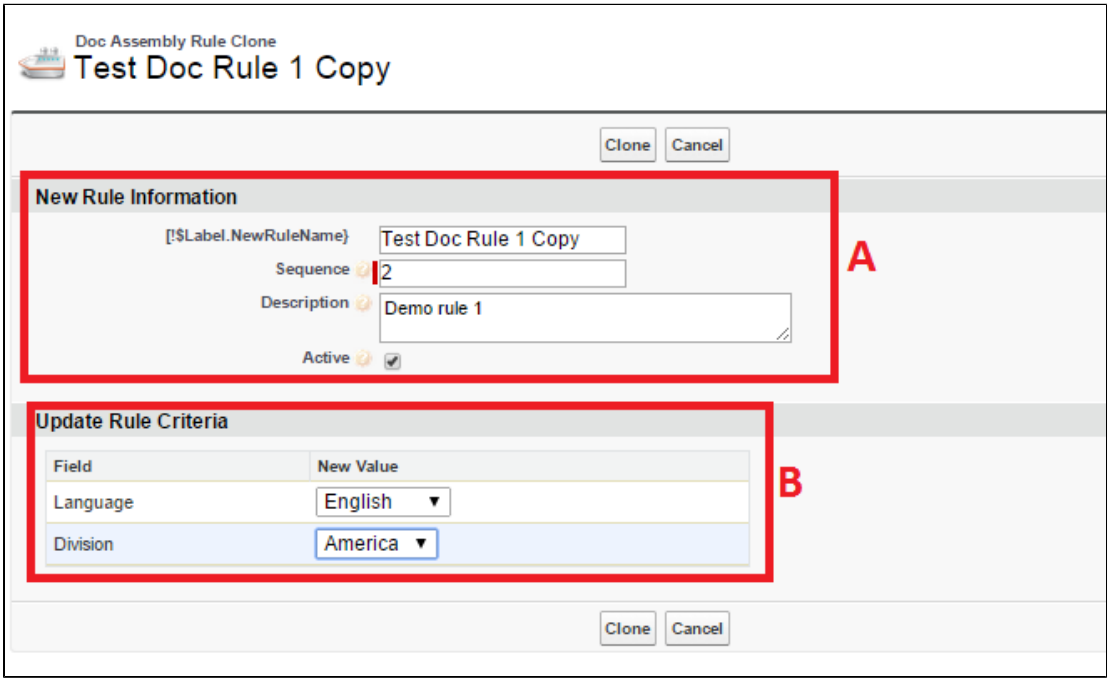
- If the field contains **equal to**, the Match Rule updates the new value of that field if the current value for that particular field matches the old value.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

Cloning Doc Assembly Rule

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



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

Cloning Doc Assembly Component

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

If you clone a clause template to replace an existing clause template with the Clone functionality of X-Author Contracts, while the original clause template is used as a component on the Doc Assembly Rule, then the system will identify the UUID of the new clone template on the original cloned clause template record.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

Setting Up Template Filtering Rules

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

The template selection page for the agreement generation actions displays only the templates that are applicable for the agreement. For example:

For the Agreements of Type Other, show the templates that are defined for a region.

- To setup template filtering rules
- To get the ID of a template used to generate a document
- Universal Unique IDs to support Migrating Templates

To setup template filtering rules

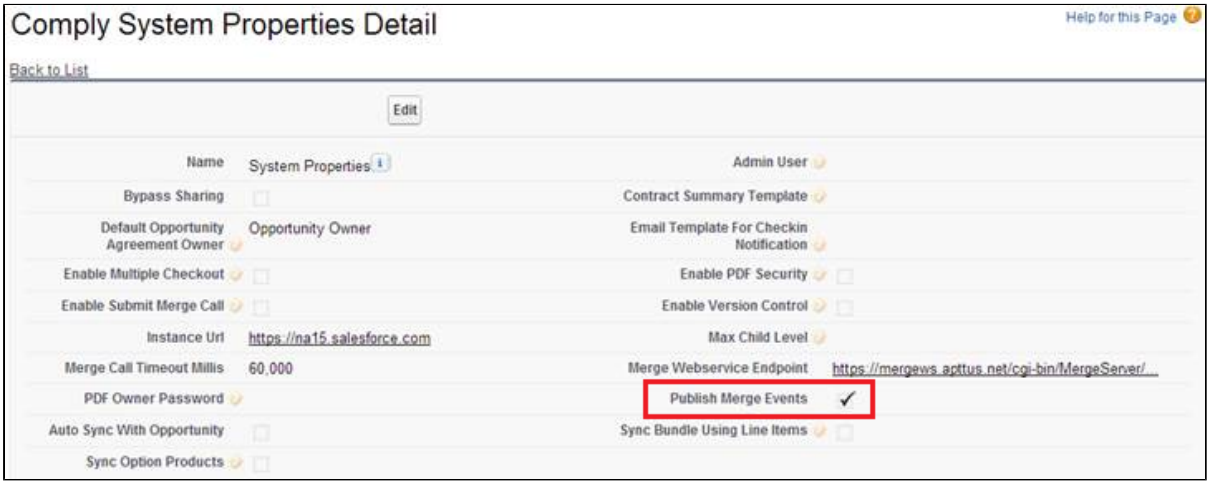
1. Click and click **Query Templates**.
2. Click **New**.
3. To create a query template sequence, enter the Sequence (numeric). If there is more than one query template defined for a template object then sequence is the order in which the query templates are applied.
4. Enter the description for the query template and click **Save**.
5. To create a qualifier, click **New Query Template Qualifier**.*Qualifier* is as a condition on the Agreement object.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

6. Enter the Sequence. If there are several template qualifiers, then the qualifiers are applied in the order of the sequence number.
7. Enter the API name of the agreement Field. For example, **RecordType.Name**.
8. Select the Comparison Operator. For example, **equal to**.
9. Enter the Value. For example, **Other**.
10. Click **Save**.
11. To define Query template Filter, click the associated query template link next to the Query Template. The Query Template Details page is displayed.
12. Click **New Query Template Filter**.
13. Enter appropriate values in the Sequence, Field, Comparison Operator, and Value fields and click **Save**.

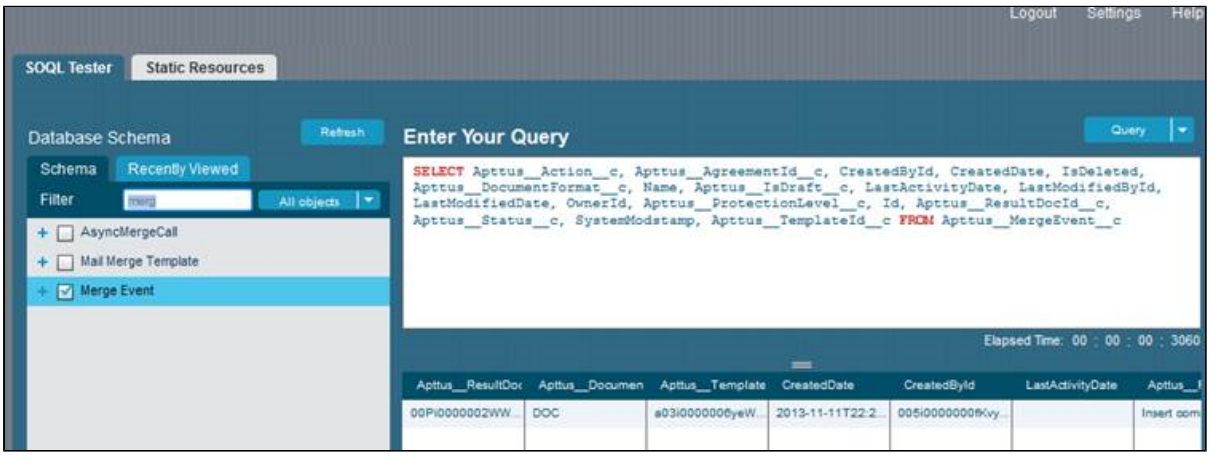
To get the ID of a template used to generate a document

1. Go to **Setup > Build > Develop > Custom Settings > Comply System Properties > System Properties** and click **Edit**.
2. Select **Publish Merge Events**.



3. After generate, select the rows in Merge Event based on agreement id & timing to get the template id.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



4. Perform a query on the Template object and get the template information based on template id.

The template ID is received.

Universal Unique IDs to support Migrating Templates

Universal unique identifier (UUID) fields of the agreement templates, clause templates, and term exceptions in Contract Management support the functionality available with the X-Author Migration Manager .

The UUIDs help provide the ability to update and migrate templates from one org to another. These IDs are unique and once an ID is assigned to a template or term exception object record, it cannot be changed.

To use the templates with the UUID field, you must have X-Author Contracts 7.0 or higher.

About Agreement Term Exception

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

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

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

 Copyright ©2011-2017 Apttus Corporation. All rights reserved.

1. Create an admin entry.
2. Create a term exception record.
3. Associate your term exception record with a clause.

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

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

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

To create an admin entry for term exception

User Permissions Needed	
To create a new admin entry or edit an existing entry:	Admin: Read, Create, Edit

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To create a term exception

User Permissions Needed	
To create, edit an Agreement term exception:	Agreement Term Exception: Read, Create, Edit Agreement: Read, Edit

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

Option	Description
Is Active	This checkbox enables you to set the term exception record as active. By default, it is set to true.
Exception Type	None, Corporate, Other, Procurement, Sales. This indicates the type of exception record.
Approval Required	This checkbox indicates whether an approval process should be associated with this term exception record. By default, it is set to true.
Exception	This textbox indicates the title for which this term exception record is created. For example, if your customer requires a different clause for payment terms, you may enter *Extended Payment Terms* in this field.
Agreement Types	This is a multi-select picklist field. Selecting different values from this picklist enables your term exception record for multiple agreement record types. You may have to navigate to **Setup > Create > Objects > Term Exception > Agreement Types** picklist and add new values like NDA, MSA, and more to map the **Term Exception > Agreement Types** with your **Agreement > Record Types.**
Description	Type a description for your term exception record to give a brief idea about the usage of this record.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

4. Click **Save**.

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

To associate a term exception with a clause

- You must ensure that you have an existing term exception record in your Salesforce org.
- You must also ensure that you have a clause record checked in using **X-Author Templates** in Microsoft Word.

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

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

About Template Versioning

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

In short, template versioning allows template admins to:

- Survey older contracts by viewing their associate template version to understand what was in the template at generation.
- Revert to previous template versions.

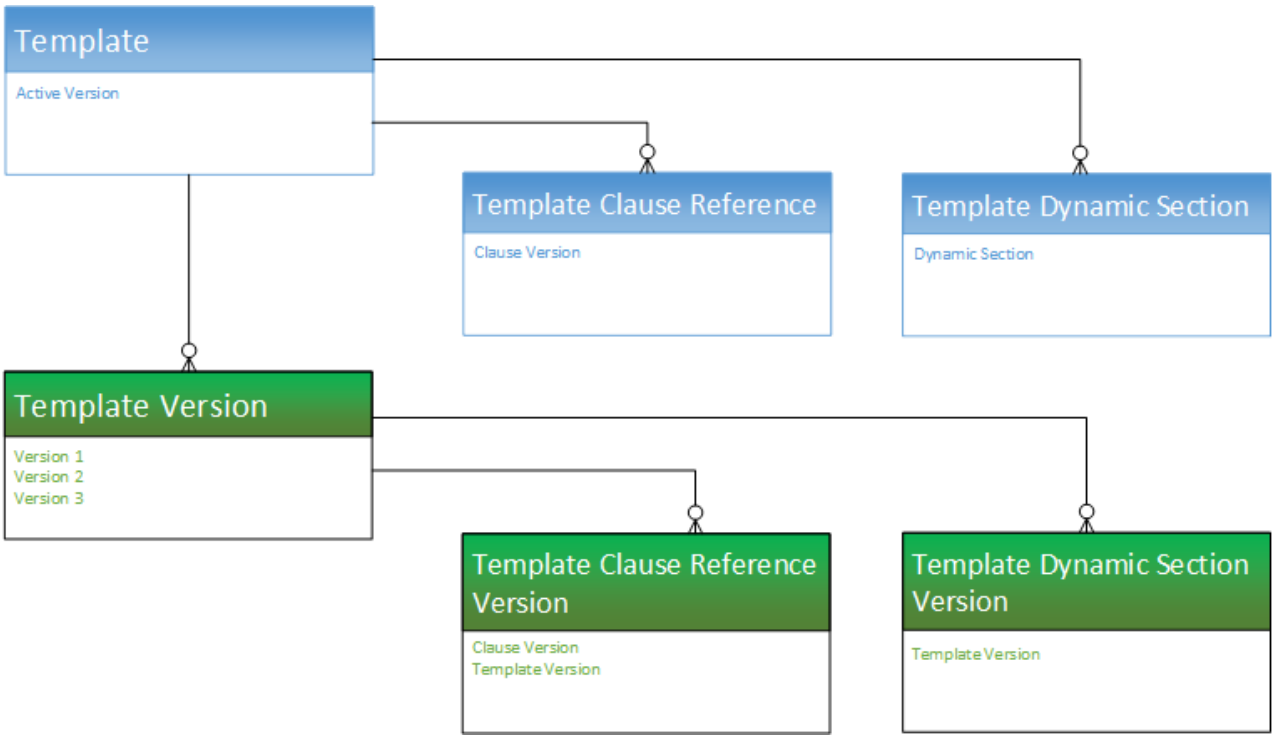
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- Clone template versions to begin a new template lifecycle.
- Publish updated clauses and nested clauses across specific template versions.
- Understand the growth and evolution of a given template.

How Template Versioning Works

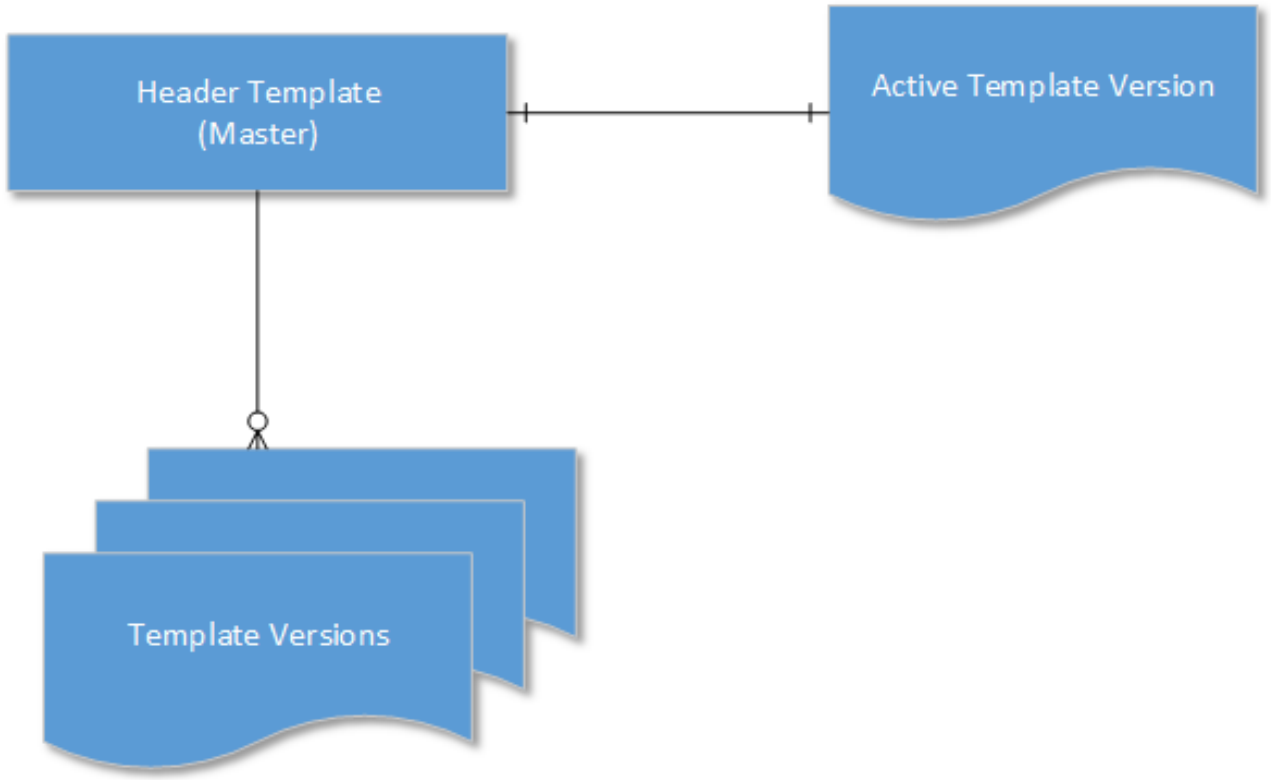
Each agreement or clause template in your org (with or without template versioning enabled) always consists of one template, and multiple child references to clauses and sections contained in that template. For every instance of that template, there is always only one template which can be considered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

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



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

What Template Versioning does is preserve the same template, we'll call it the "**Header Template** ," which has a one-to-one relationship with the Active Version of the template and its child objects, and a one-to-many relationship with other versions of the template, which also have versioned clause and section references, but are considered inactive.



Template Versioning introduces three new objects:

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Enabling Template Versioning

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

The following steps are required:

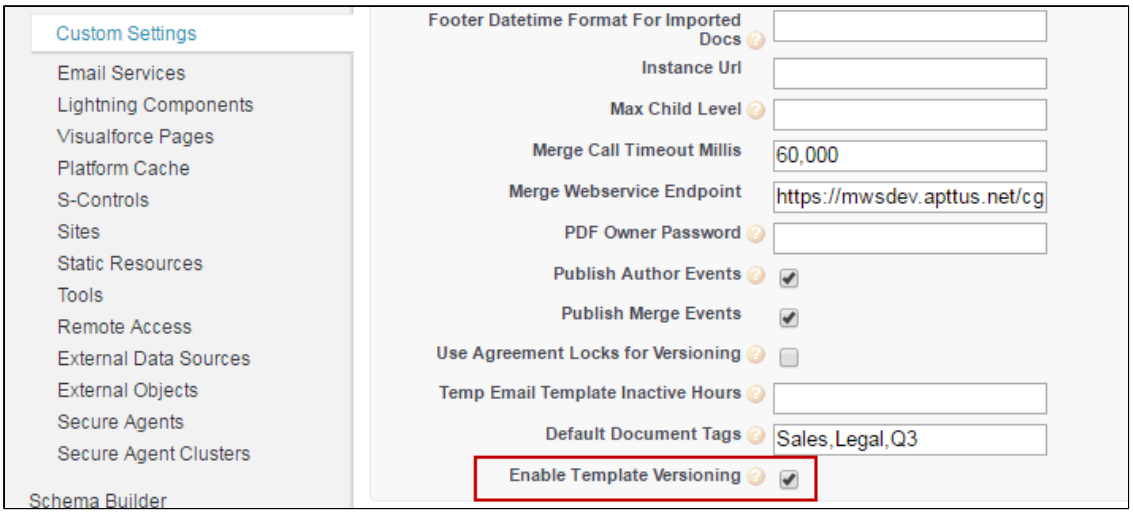
- Enable Template Versioning in Comply System Properties
- Add the Versions Related List to the Template Layout.

The following steps are optional:

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

To enable Template Versioning

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



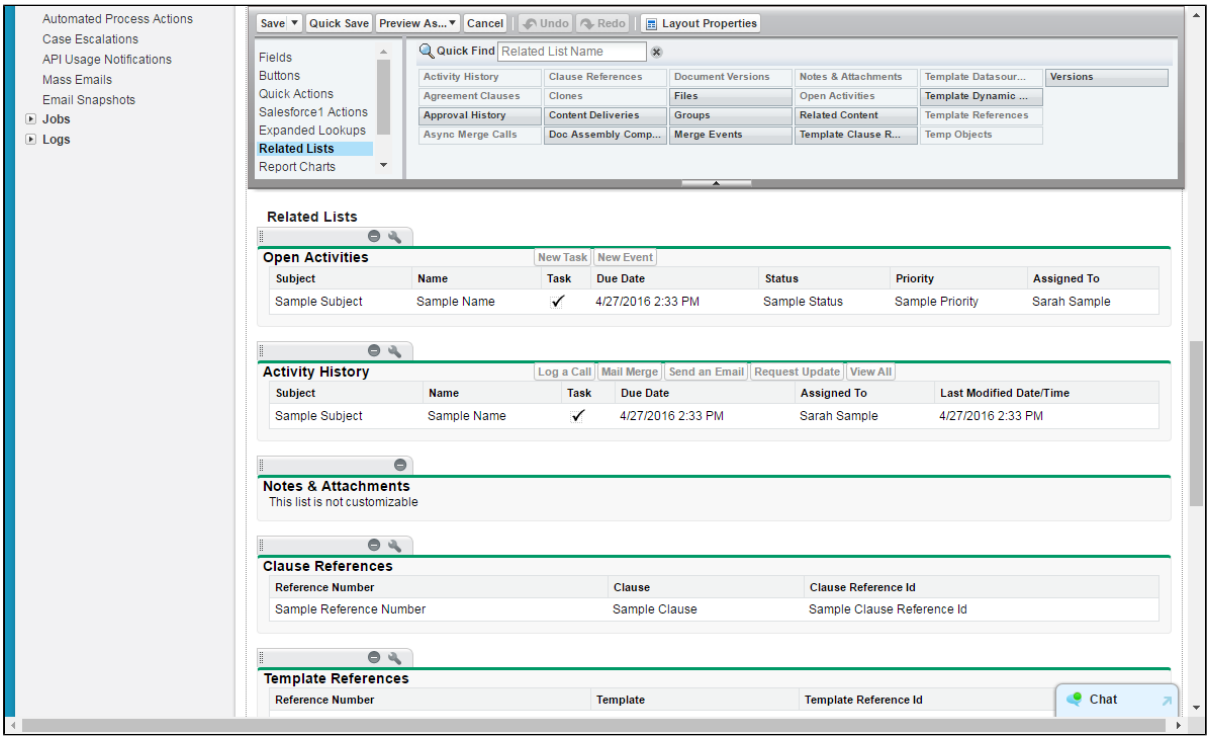
4. Check **Enable Template Versioning.**
5. Click **Save**. Template Versioning is now enabled in your org.

To add the Version Related List to the Templates Layout

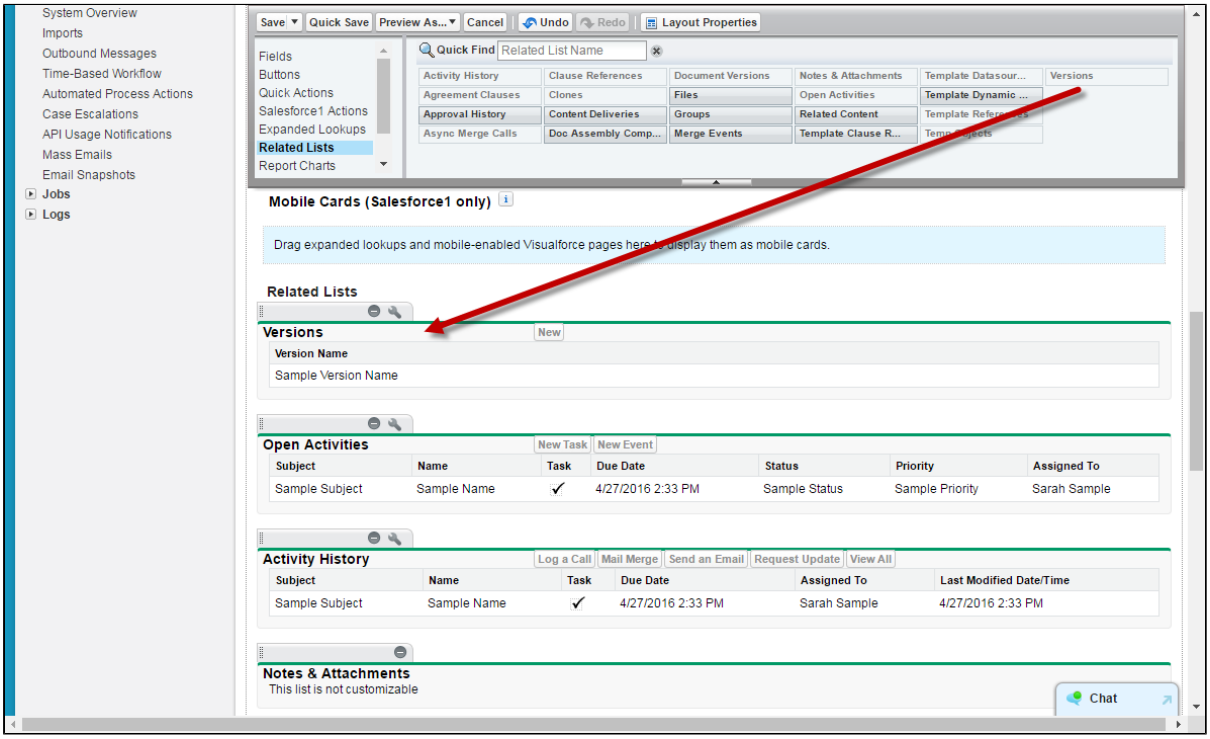
1. Follow standard Salesforce instructions for editing the Template object layout (e.g., click "Edit Layout" from the Template details page).

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

2. From the Template layout console, click on **Related Lists**.



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

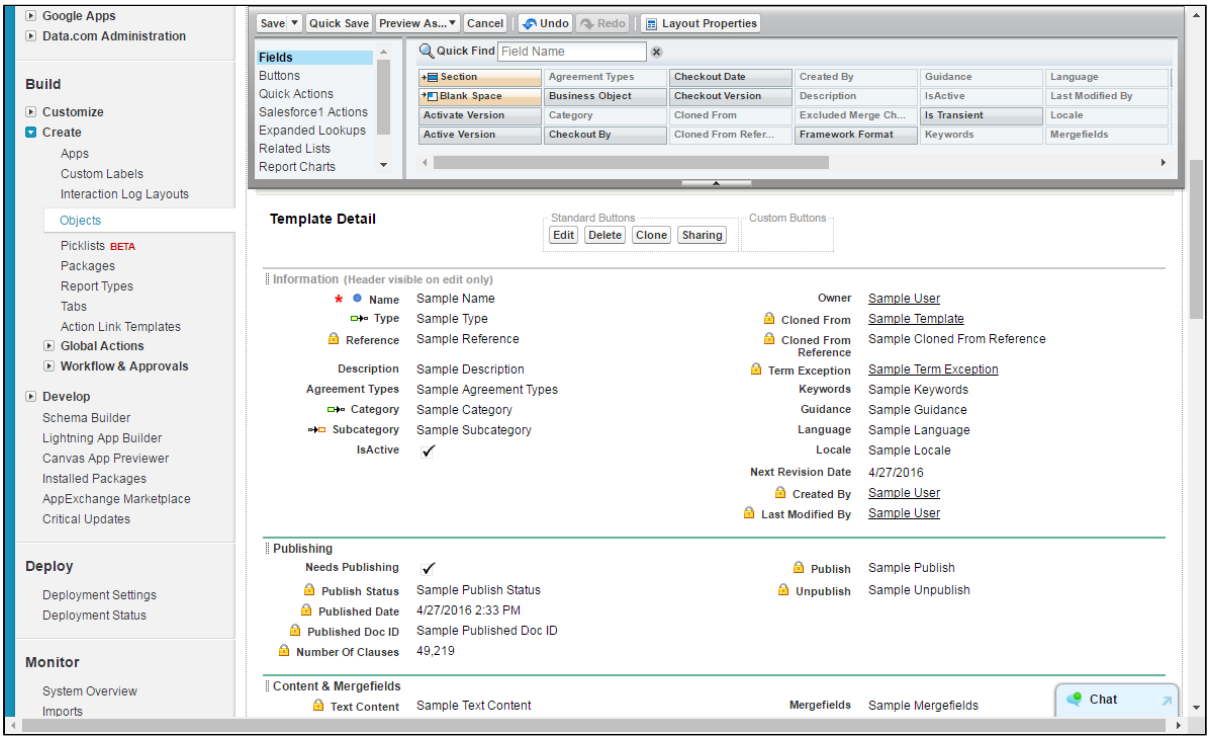


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

4. Click **Save.**

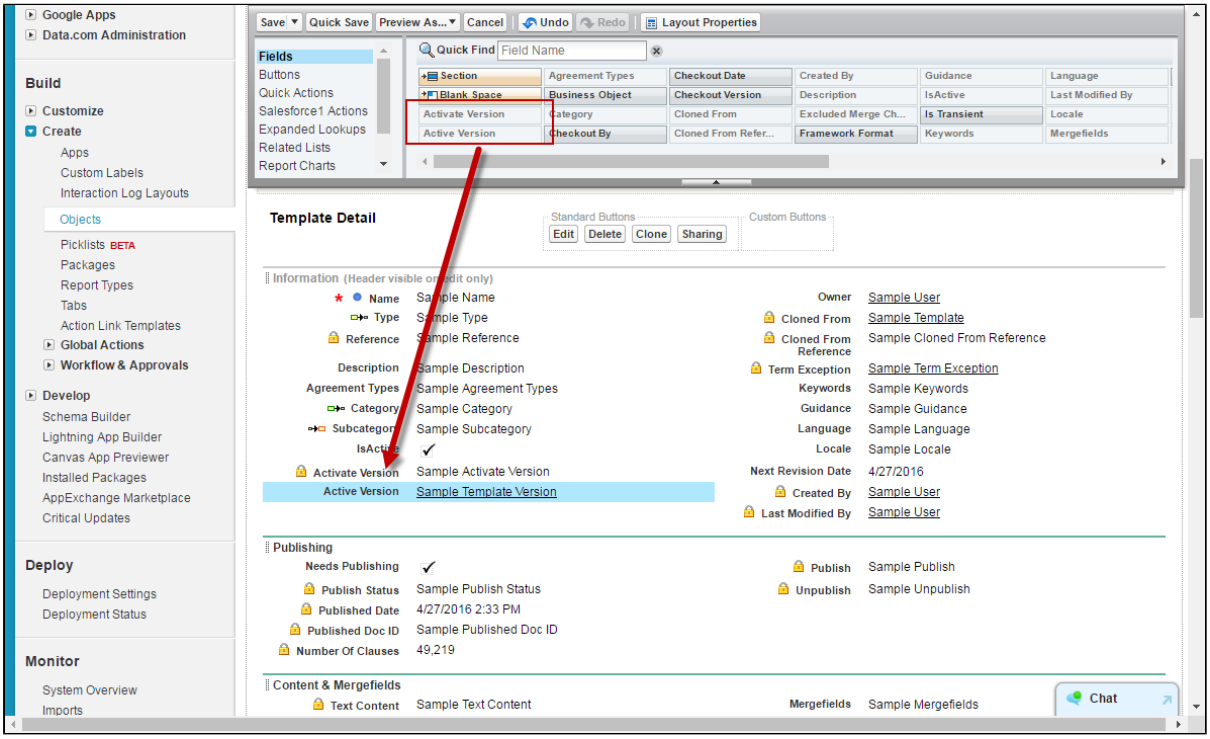
To add optional Activate fields to the Template layout

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



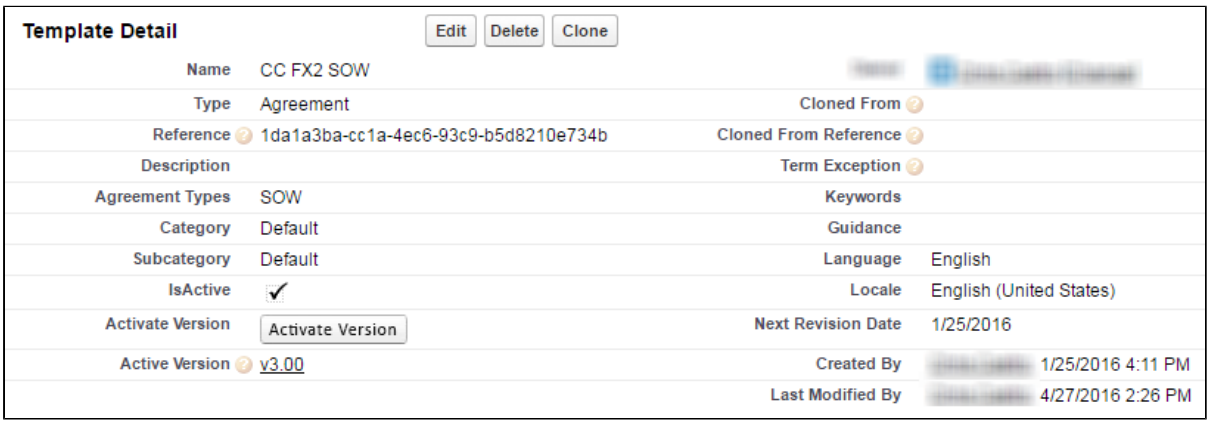
3. Drag the **Activate Version** and **Active Version** fields into your Template layout.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



4. Click **Save**.

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



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Managing Template Versions

Managing Template Versions in X-Author Contracts

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

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

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

Managing Template Versions in Contract Management

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

Activating Template Versions

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

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

Prerequisites

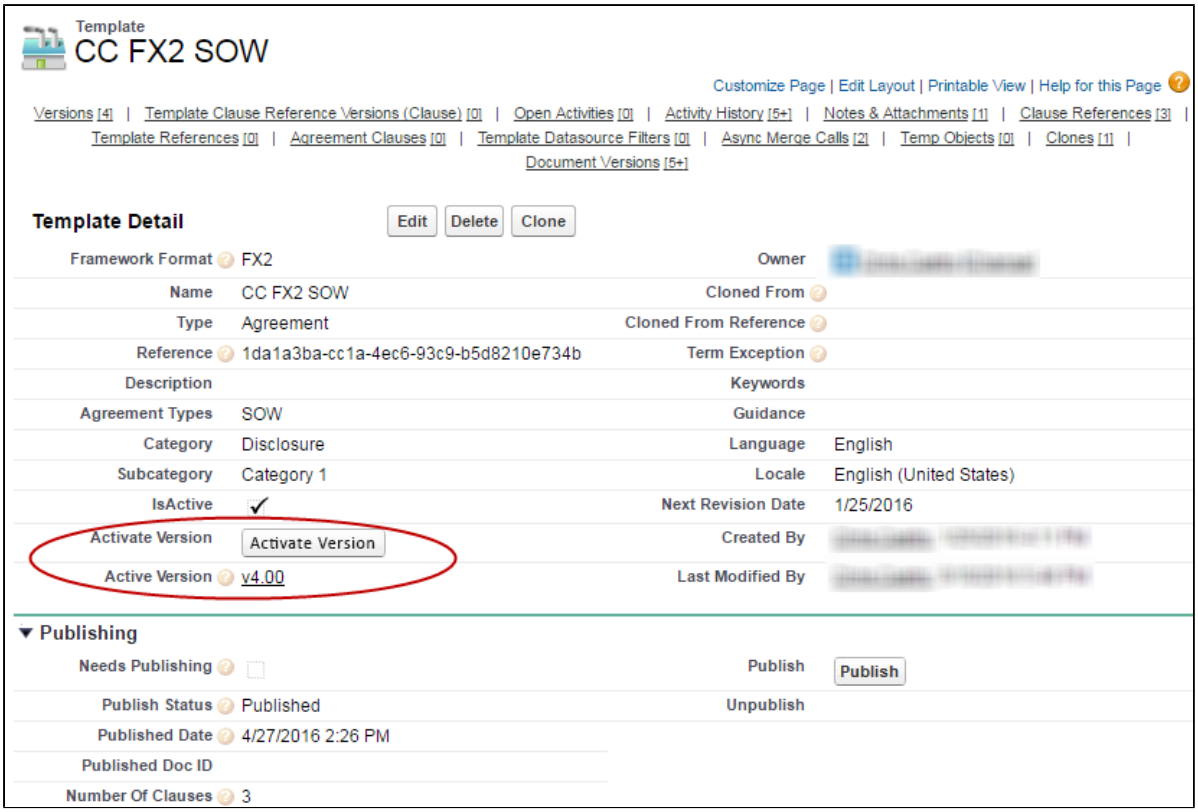
Before you can activate a template version from the Template record:

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

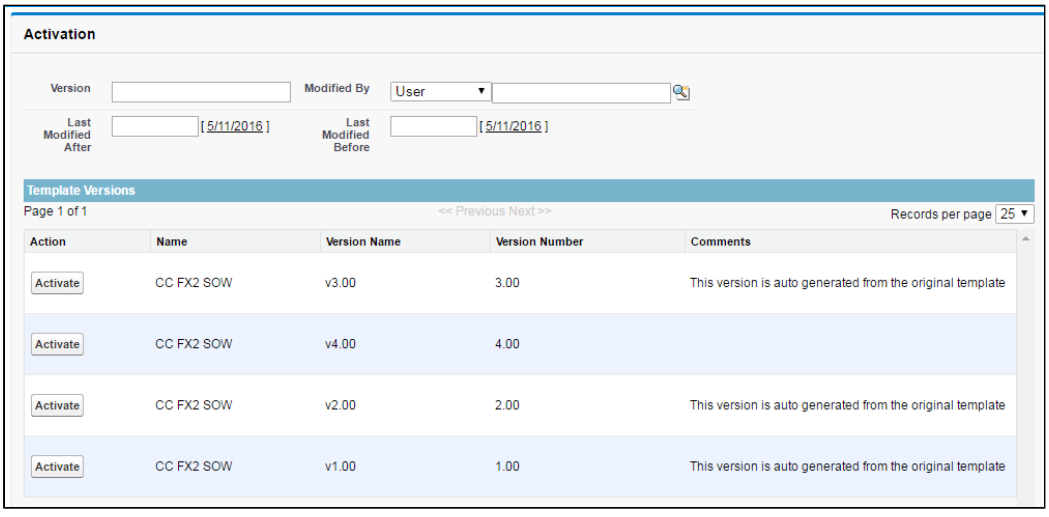
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To activate a template version

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

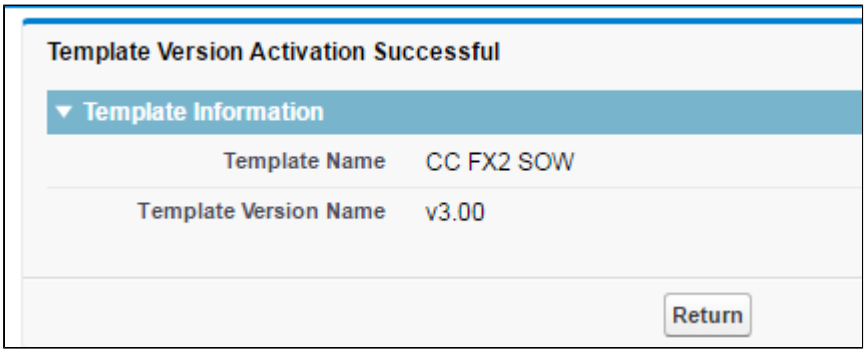


2. Click **Activate Version**. The Activate page is displayed.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

3. Search for a template version using any of the following filters:
    - Version number
    - Modified by (User)
    - Last modified after Date
    - Last modified before Date
4. Click **Activate** next to the version you want to activate. The following page is displayed on successful activation.



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

Cloning Template Versions

Hint: Click on an image to enlarge the view.

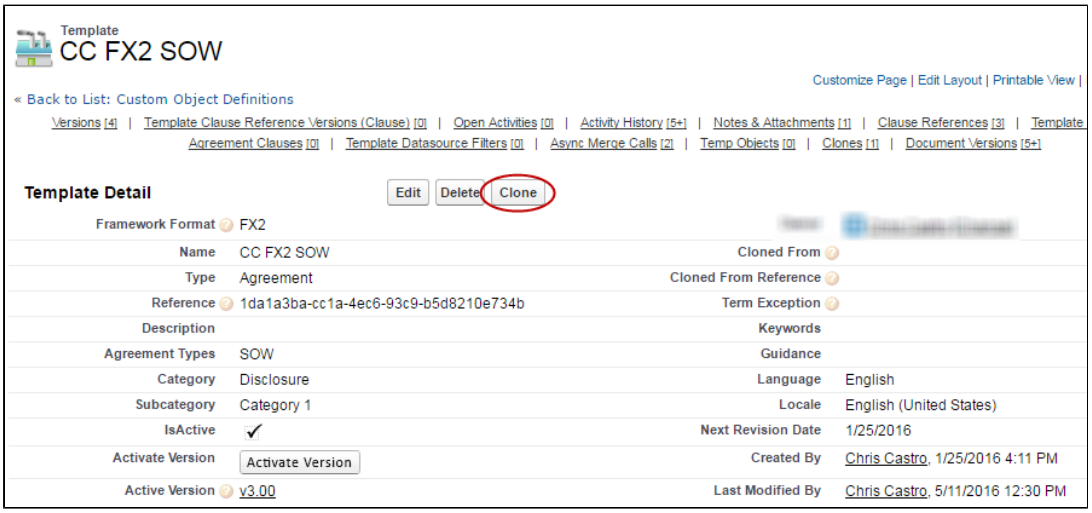
You can clone a template when the need arises to have a template with similar language or elements. When you clone a template version, a new template record is created as version 1.0. Remember the following when cloning a template version:

- You can only clone the *active version* of a template.
- Cloning a template record is just like creating a new one except a copy of the document you are cloning is attached to the new record as the first version.

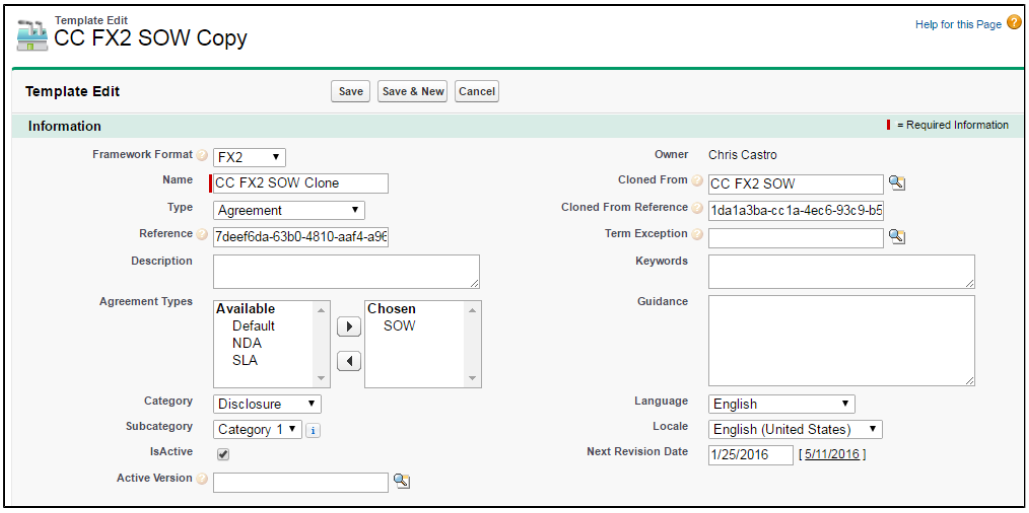
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To clone a template version

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

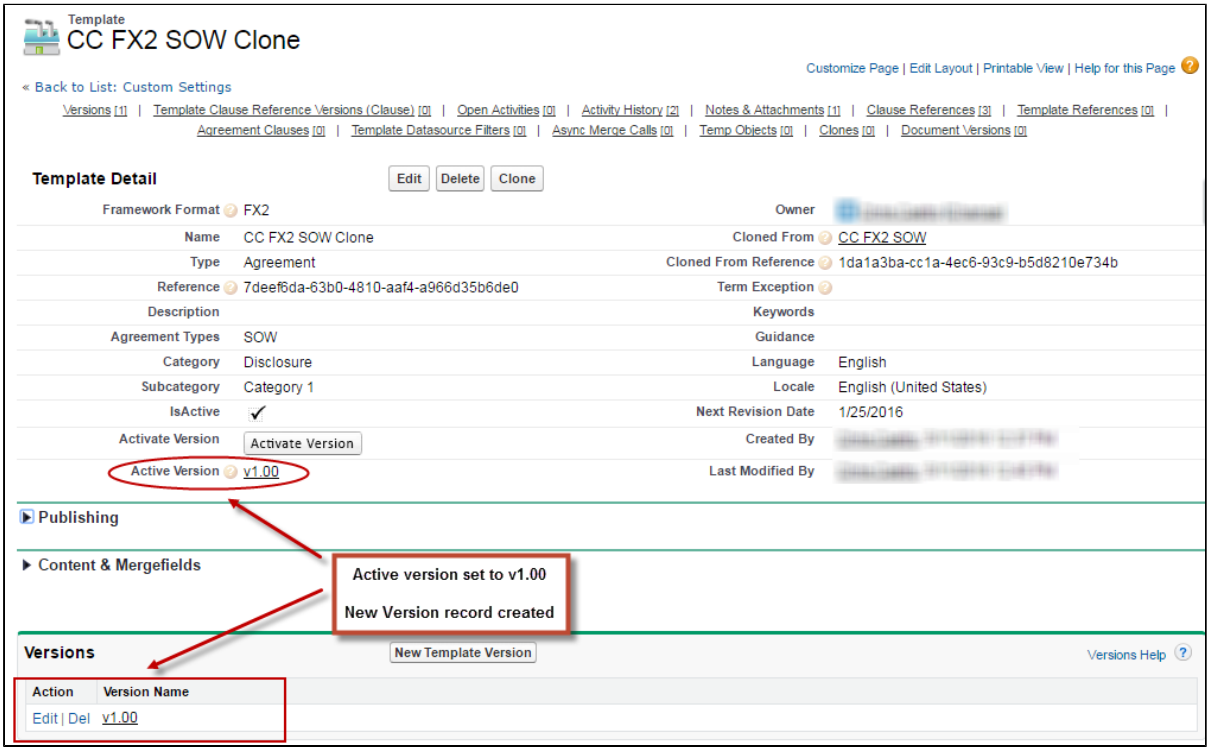


3. On the next screen, click **Continue**.
4. Make changes as needed to Template header information.

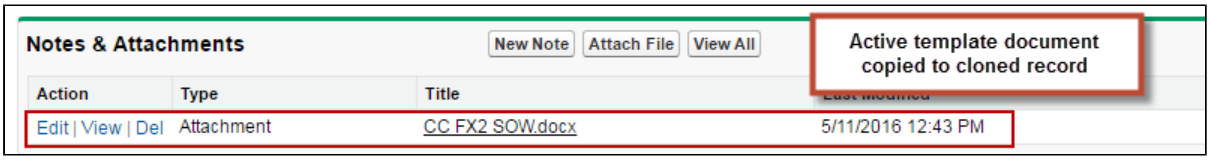


5. Click **Save**. The Template record is cloned.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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

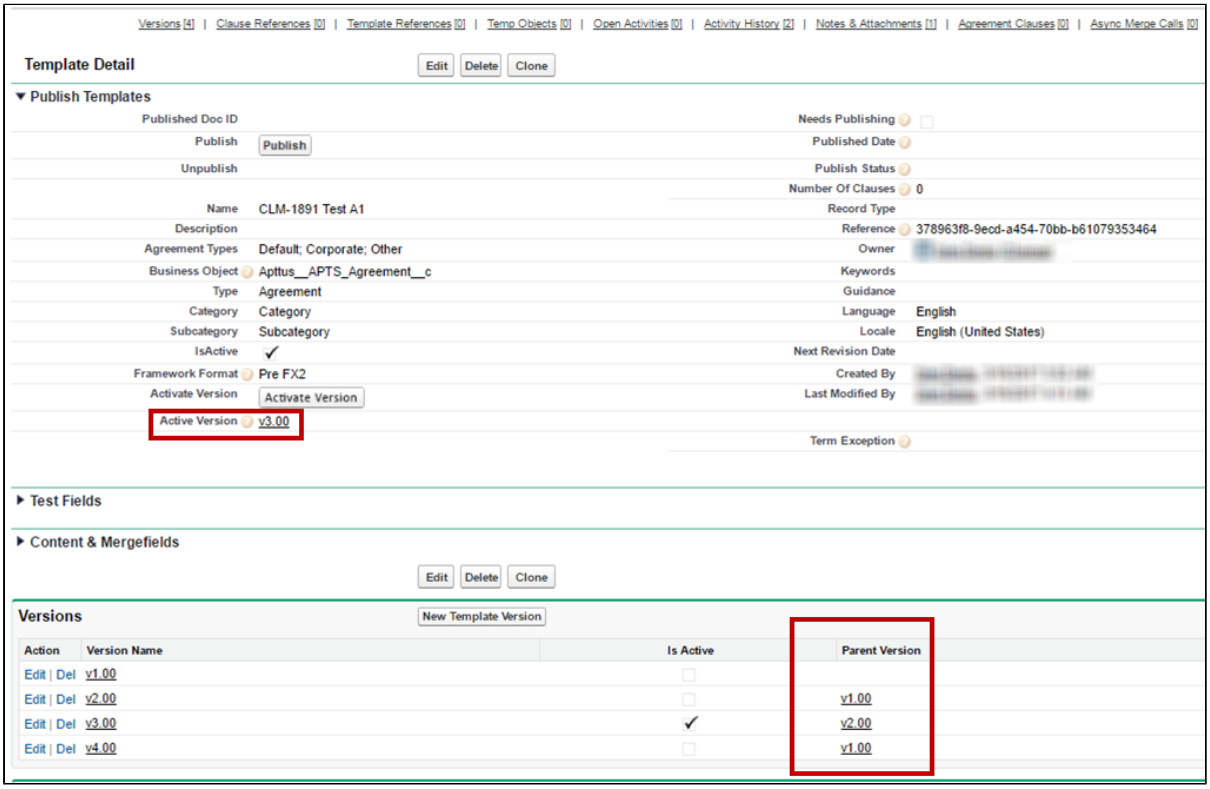


To View Parent Template Version

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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

Publishing Template Versions

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

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

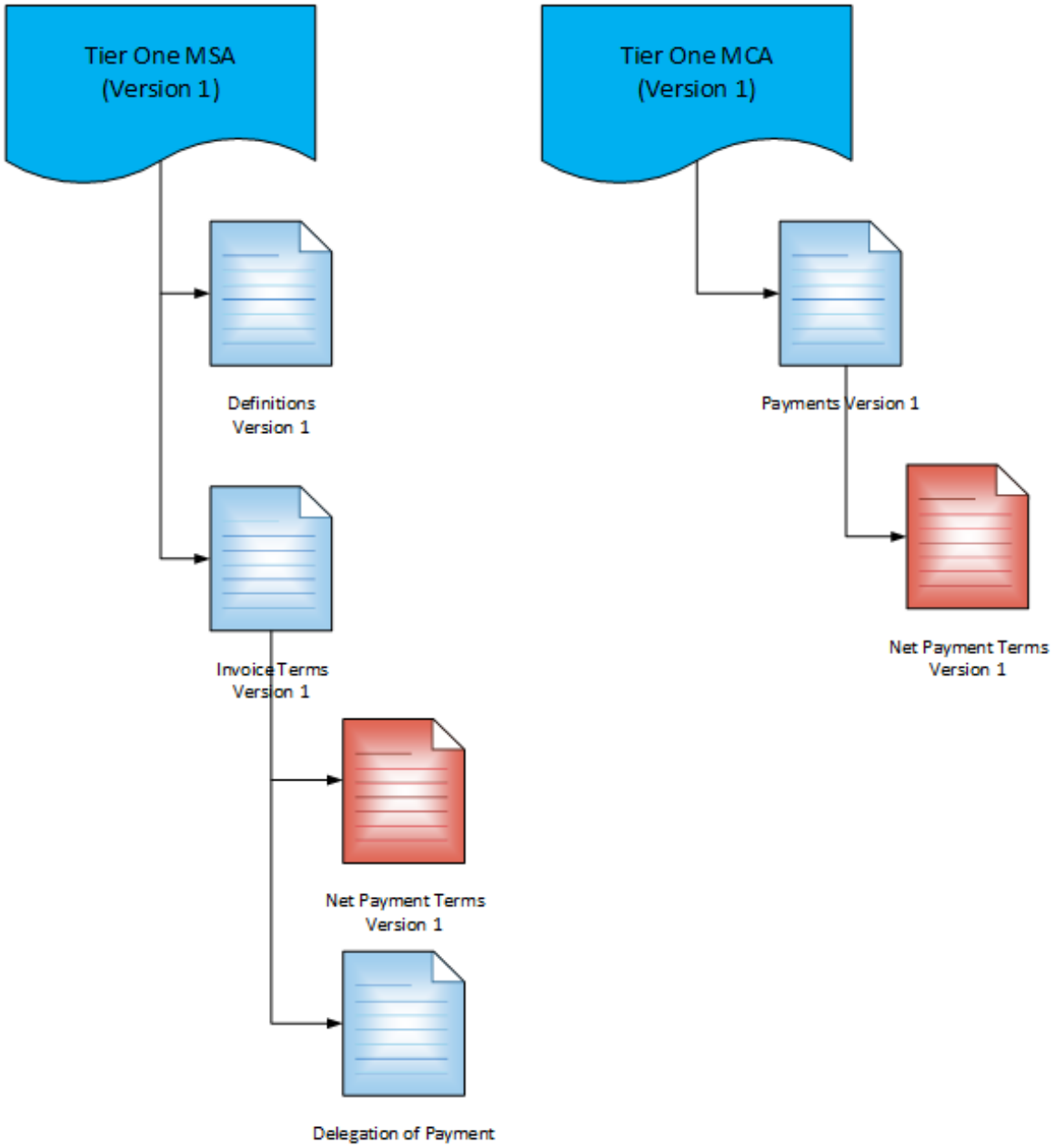
⚠ If a template has note yet been versioned and is published, the template is published with two versions: a pre-published version and the published version.

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

Use Case: MSA Payment Terms Publish Scenario

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

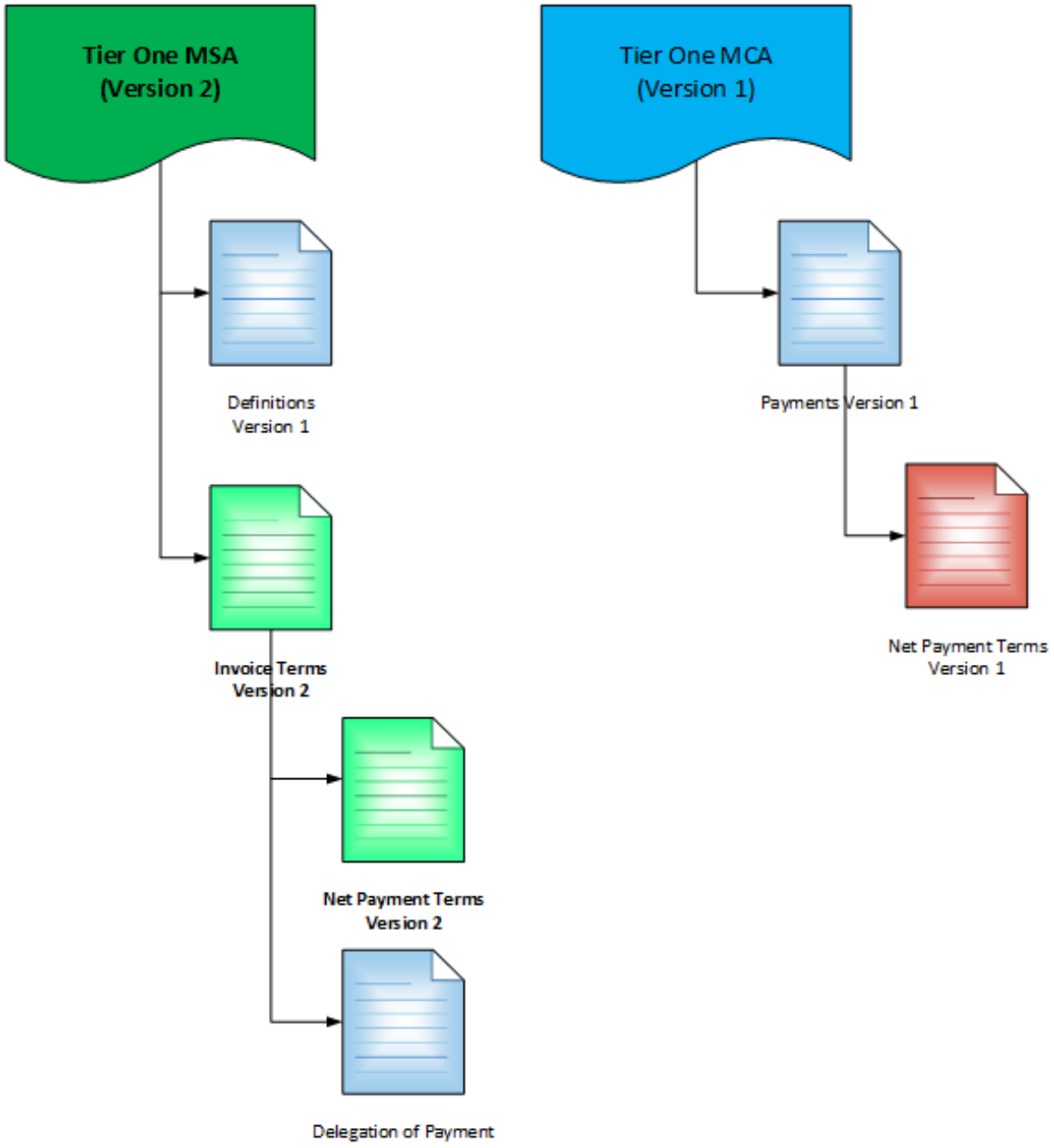
Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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



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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

About Agreement Phases

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

- Amendment
- Renewal
- Termination
- Expire

For details, refer to Apttus Status Categories and Statuses.

Amendment

User Permissions Needed	
To amend an agreement:	Agreement: Create, Edit

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

Renewal

User Permissions Needed	
To renew an agreement:	Agreement: Create, Edit

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

Termination

User Permissions Needed	
To terminate an agreement:	Agreement: Edit

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

Expiration

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

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

About Obligation Management

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

The Obligation Management stage ensures that deliverables must be met. This includes:

- Maximize contract value with fulfillment tracking
- Alerts linked to expirations, renewals, and key events, post-execution work flows
- Searching and reporting

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Organizations typically set up common business rules that allow groups and users to receive email alerts 30, 60 and 90 days before agreements expire. Other rules can be configured based upon your needs. Check with your system administrator for more details. You can also set up tasks and events for specific agreements on a case-by-case basis. An example of another common business rule is a pricing change, where modifications to pricing and financial terms trigger a notification to interested parties.

New Task

The New Task feature is available within an Agreement Record and allows you to create a new task related to a specific agreement. Click **New Task** to enter key pieces of information that need to be tracked in connection with a date, event or milestone. The key fields are as follows:

- **Assigned to** – Allows you to identify the recipient. Use the lookup icon to identify this individual.
- **Subject** – A pre-defined list is available through a lookup icon and can be configured for your organization.
- **Status** – The status field is a drop down or picklist and provides visibility into whether the task has not been started, is in progress, has been completed, etc.
- **Comments** – Add any comments about the date, event or milestone that requires action.
- **Send Notification Email** – The send notification email is critical to ensure timely notification of relevant individuals and make sure the task is properly managed.

  Once you have completed the New Task window, click Save to complete the process. Other options include **Save & New Task** or **Save & New Event** if you want to create another Task or Event.

New Event

The New Event process is the same as the New Task process *except* that instead of assigning a task to an individual, the event is logged and managed as an Event on the individual's Apttus and regular corporate email calendar. A status category is not included to manage whether the task has been completed or not, since for an event, status is not relevant.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Searching and Reporting

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

This includes the following topics:

About Search

Search enables all contracts to be retrieved via a keyword search that searches all the key elements, and is extremely easy to use.

> **Note**
>
> Global search and feed search are automatically enabled when Chatter is enabled. However, enabling Chatter disables sidebar search and advanced search.

This is a search functionality which enables you to quickly search for various items like Agreement, Templates, Accounts, Contacts, and so on.

You can further refine your search for specific objects by clicking on the Advanced Search link.You can search for records and tags using the following search options:

Sidebar Search	Advanced Search	Global Search
• You can search a subset of Agreement objects and fields and use wildcards and filters to refine your search. • Sidebar search depends on the following: • **Search options**	• Advanced Search allows more granularity, enabling you to search for *Exact Phrases* and against specific elements.	• Global search finds more record types, including articles, documents, products, solutions, and Chatter feeds, files, groups, topics, and people. Global search also searches more field types, including custom fields and long text fields such as descriptions, notes, and task and event comments. Global search keeps track of which

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Sidebar Search	Advanced Search	Global Search
Sidebar search searches only a subset of records and fields. If the sidebar search drop-down list is available, you can limit your search to only tags or the records for a single object. If the sidebar search Limit to items I own check box is available, you can select this box to limit your search to records you own. • **Search Terms** Searches are conducted as a phrase search and match terms in the exact sequence that they appear. For example, searching for agreement_1 returns items withagreement_1in a single string. • **Wildcards and Operators**	For example, Agreements, Suppliers or Contacts. • Use Advanced Search option in the sidebar to search a subset of objects in combination and more fields than sidebar search, including custom fields and long text fields such as descriptions, notes, and task and event comments. You can use wildcards, operators, and filters to refine your search.	objects you use and how often you use them, and arranges the search results accordingly. Search results for the objects you use most frequently appear at the top of the list. If global search does not have enough information about which objects you use, you see results for all objects until it has more information. • **Contextual Feed Search** Global search is helpful when you want to look for information in feeds posts and comments across the organization. Use feed search (feed search icon) to find information in a feed in a specific context. Click feed search magnifying glass above the feed to look for information in that feed. For example, use the feed search on a group's page to find information in that group. You can search for information in feeds on a user's profile, a record, in a public or private group (if you are a member), and on the Chatter and Home tabs. A contextual feed search is helpful when you want to confirm or check if something was once discussed in that specific feed. You can search for hashtag topics, mentions, and files

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Sidebar Search	Advanced Search	Global Search
Use the * (asterisk) and ? (question mark) wildcards to refine results. Use * to match one or more characters, or ? to match a single character. An * is automatically appended to your search string. You cannot use operators to refine results in sidebar search.		posted in the feed, or refine your search using wildcards, operators, and quotation marks to match on exact phrases.

About Reports and Dashboards

Salesforce enables you to create reports and dashboards.

Reports

You can access the reports through the Reports Tab. Apttus provides standard reports based upon the most common reporting needs for Contract Management.

You can find contracts by the following parameters:

- Renewal date
- Value
- Stage
- Risk

The default reports included with Contract Management are:

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Reports	Description
Agreement Expiration - This Quarter	Lists all agreements expiring in current fiscal quarter
Agreement Expiration - This Year	Lists all agreements expiring in current fiscal year
Agreement Search	Helps you easily find your agreements
Agreement Value by Type	Lists all agreements by the type along with contract value
Agreement Value Report	Lists all agreements by their contract value along with the account
Agreements by Account	Lists all agreements by the account name
Agreements by Stage	The present stage of agreements
Agreements of High Value due Renewal	Time when the high-value agreements are due for renewal
Agreement with Non-Standard Terms	Lists all non-standard Agreements
Contract Activity Report	Shows recent contract activity report
Contracts Expiring This Year by Value	Expiring contracts with values
Contracts with Non Standard Language	Lists all agreements containing non-standard language
High Risk Contracts	List highly risky agreements

You can create new reports by either starting from scratch or taking a report containing the desired results, modifying it, and changing the reports name using the Save As feature.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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 you a set of out-of-the-box reports. You may create new reports or customize existing reports. To modify an existing report, run the report and click **Customize**. For more information, see Create a custom report.

Dashboards

Dashboards organize and present rich and enhanced information in a format that is easy to read and interpret. Dashboards give you a real-time snapshot of corporate metrics and key performance indicators. A dashboard is a group of different charts (or components) that graphically display your custom report data.

Dashboards help you identify trends, sort out quantities, and measure the impact of the activities.

Apttus provides dashboard views for the following three most common profiles:

1. Contract Performance Dashboard
2. Executive Dashboard
3. Legal Performance Dashboard

Apttus provides a robust Dashboard capability at your fingertips, adding an edge to your business solutions. Navigate to the Dashboards tab to customize the page by designating which dashboard type you would like to see from a list. For more information, see Working with Dashboards.

Structure

A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. The components provide a snapshot of key metrics and performance indicators. A report returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access. A report type defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type. As an Administrator, you can control access to reports and dashboards by storing them in folders, which can be public, hidden, or shared.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Here's a typical representation of the relation between Report Type, Report and Dashboard. *Source: Visualforce*.

Unleashing Reports and Dashboards

The *Unleashing Reports and Dashboards* section provides you the basic concepts and an understanding to enable you to use data to create dashboards and reports.

Use the available facts to present the information important to you—from the big picture to the data point. Let us consider a few use cases that suggest what reports and dashboards can do for you and how you can take advantage of built-in tools to share the information with others. This section also introduces you to some cool features, like combination charts and custom table components, conditional highlighting, cross filters, buckets, and custom summary formulas.

You can also try hands on more advanced topics, such as merging multiple reports into joined reports and embedding report charts in record detail pages.

Cycle Time Reporting

The system does not provide the UI to select just fields for tracking time. You have to select a field and setup a dummy cycle time group. Once a group is setup for a field the system will start capturing duration every time the field value changes.

To access, go to the Cycle Time Group Tab. If tab does not exists, select the Admin tab and click the Cycle Time Group link.

Ensure the following Admin settings are created.

Name	Value
APTS_CycleTimeReportingEnabled	TRUE

Cycle Time Groups must be with the following details:

Field Label	Name	Description	From Value	To Value	Active
Status Category	Request to In Effect	This will measure time from request being created in the system, to the time it went to 'In Effect' status	Request	In Effect	√

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Status Category	Request to In Signatures	This will measure time it took from record being created in the system to status 'In Signatures'	Request	In Signatures	√
Status Category	Request to In Auhoring	This will measure time it took a user from creating Request to 'In Authoring' (Generating a contract)	Request	In Authoring	√
Status Category	Authoring to Signatures	This will measure time it took from status 'In Authoring' to 'In Signatures'	In Authoring	In Signatures	√
Status Category	Authoring to In Effect	This will measure time it took from 'In Authoring' (generating contract) to 'In Effect'	In Authoring	In Effect	√
Status Category	Signatures to In Effect	This will measure time from 'In Signatures' to 'In Effect'	In Signatures	In Effect	√

Note

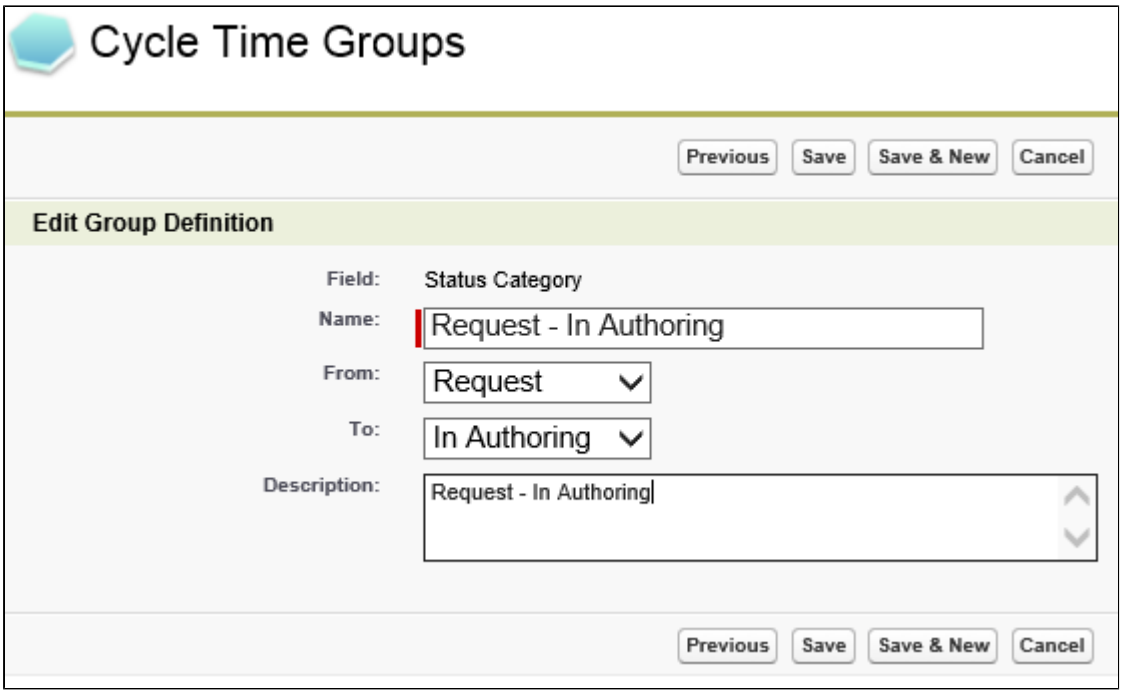
Make sure all the groups are in the Active state.

To maintain Cycle Time Groups

1. Click **Cycle Time Group > New**.
2. Select the agreement field and click **Next**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

3. Enter **Name**, **From**, **To** and **Description** and click **Save**. Optionally, click **Save & New** to save the current groups and create a new group.



To view, edit, activate, or delete Cycle Time Group

- Groups must be in the Active state for the system to start capturing time.
- Groups must be in the Inactive state, to be eligible for deletion.

1. On the Cycle Time Group tab, access the saved Cycle Time Group.
2. As required, use Edit, Delete or Activate options.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To view, edit, or deactivate Cycle Time Group

Deactivating a group deletes all existing summary (CycleTimeGroupData) data for the group. Also, if this happens to be the last active group for the field, then the system deletes all detail (CycleTimeFieldData) data also for the field.Groups must be in the Active state.

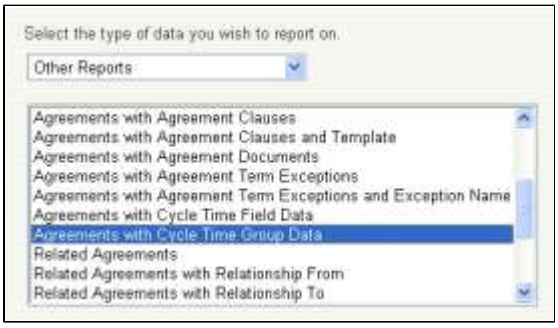
1. On the Cycle Time Group tab, access the saved Cycle Time Group.
2. As required, use Edit, or Deactivate options.

About Cycle Time Report Definitions

You can define Cycle Time Report using the two options- **Using Summary Data** or **Using Detail Data**.

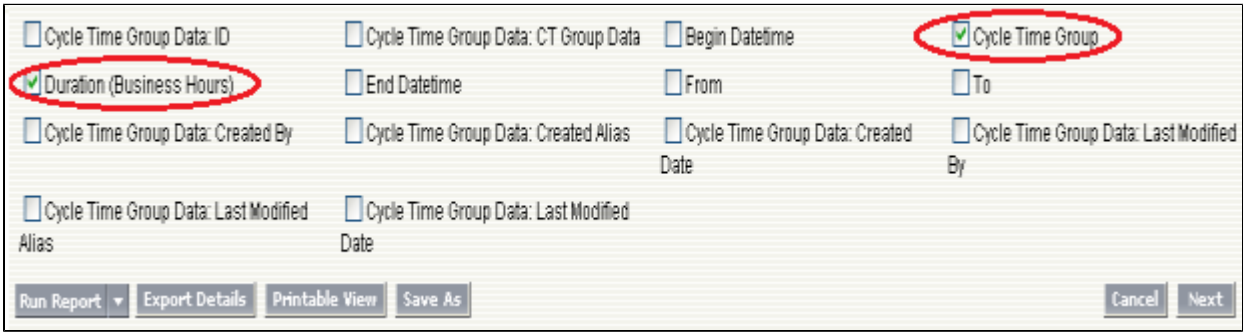
Using Summary Data

Select Agreements with Cycle Time Group Data object to define reports.



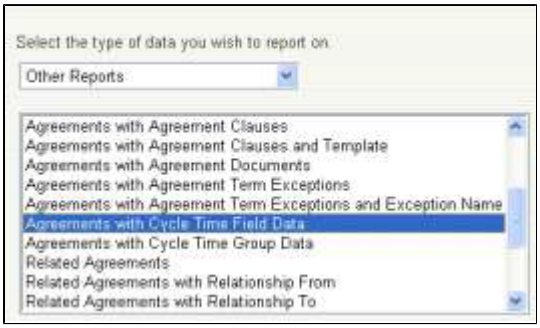
Also, select Cycle Time Group and Duration fields.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

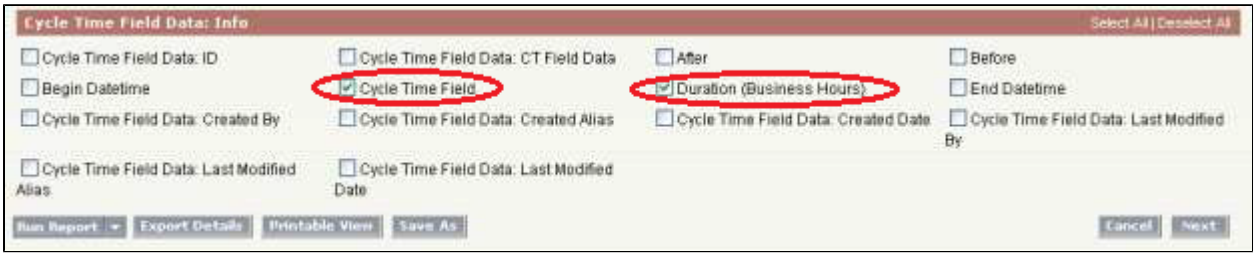


Using Detail Data

Select Agreement with Cycle Time Field Data object to define reports.

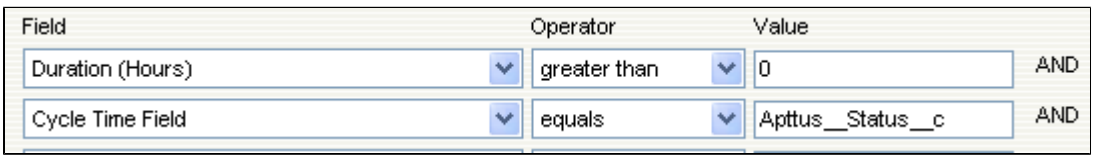


Also, select Cycle Time Field and Duration fields.



Excluding work-in-progress Records

Keep the following filter criteria for all of the reports:



Agreement Explorer Reports for Searching and Reporting

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Agreement Explorer is a powerful search and reporting feature that allows you to search for records in the Agreement object through the use of configurable and reusable search reports. This feature complements standard reporting views to satisfy the demands of many Apttus customers who require more powerful, specific search results and related exports to Excel to satisfy their business needs. Agreement Explorer expands your access to agreements by providing reusable searches with configurable field sets and filtered lists for multiple contexts associated with agreements. You can use these reports to discover and expose record lists for agreement searches, the hierarchies of agreements and accounts, and a combination of account hierarchies and the individual account's related agreement hierarchies. Users can create published lists of available reports, which can then be complemented by users creating and saving their own public or private ad-hoc reports. The resulting reports can be exported to Excel.

Understanding Agreement Explorer Report Types

The key to understanding how to create and use Agreement Explorer reports effectively is to understand the application types assigned to each report. When you create an Agreement Explorer report as an administrator, you are required to define the context (type). The type determines the list of records and hierarchy displayed in the results available to the user. There are three types available for reports:

Report Type	Report Location	Description
Agreement Search	Agreement Explorer Tab	Returns a filtered list of agreement records. For example, return all the agreements filtered by Status Category and Status. These results do NOT display Agreement Hierarchy.
Agreement	Agreement Record, Agreement Explorer Tab	Returns a filtered, hierarchical list of agreements with the current record highlighted. Records in this list represent a hierarchy of parent and child agreements with the current record as context.
Agreement Hierarchy by Account (s)	Agreement Record, Account Record, Agreement Explorer tab	Returns a filtered, hierarchical list of agreements associated with one or more chosen account records. Records in this list represent a hierarchy of parent and child agreements for all specified accounts.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

For more detailed information on how to run, use and maintain Agreement Explorer reports, please refer to Agreement Explorer section in the *Contract Management User Guide*.

Link

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Setting Up Agreement Document Protection

- **Enabling Document Protection**
  To enable document protection, you must first create a custom object record. A custom object record stores information that is unique and important to you and your organization. For example, your organization may use a custom object called *Quotes* to store data for your company's sales quotes.
- **Defining Protection Password**
  Create a custom object record to define password protection for your document.
- **Setting Up Agreement Protection**
  To restrict what specific profiles can and cannot do with generated documents, you can protect it either by making it read-only or enabling track changes to capture any updates on the generated document. For example, specify a Sales User who can generate or re-generate a document but when editing or forwarding it to a customer, track changes are enabled.

User Permissions Needed	
To enable document protection:	Admin: Create, Edit
To create an agreement protection:	Agreement Protection: Create, Edit

Enabling Document Protection

To enable document protection, you must first create a custom object record. A custom object record stores information that is unique and important to you and your organization. For example, your organization may use a custom object called *Quotes* to store data for your company's sales quotes.

To enable document protection

1. Click **+** and click **Admin**.
2. Click **New** and type *APTS_Protection* in the name field.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

3. In the **Value** field, enter *1* and click **Save**.

A new custom object record *APTS_Protection* is created. After you have created a new custom object record, you can automatically associate the new custom object with another record if your administrator has defined relationships to other types of records.

When using Agreement Document Protection, inserting a clause via the Playbook will not be tracked as a redline in the document. However, when the document is checked in and reconciled, the added clause will be tracked via the Agreement Clauses related list.

Defining Protection Password

Create a custom object record to define password protection for your document.

To define protection password

1. Click **+** and click **Admin**.
2. Click **New** and type *APTS_Password* in the **Name** field.
3. In the **Value** field, enter the password that you want to set to protect the document and click **Save**.

A new *APTS_Password* custom object record is created with the password that you entered as its value.

Setting Up Agreement Protection

To restrict what specific profiles can and cannot do with generated documents, you can protect it either by making it read-only or enabling track changes to capture any updates on the generated document.

For example, specify a Sales User who can generate or re-generate a document but when editing or forwarding it to a customer, track changes are enabled.

When the protection levels are setup at for different actions, the document is protected according to the protection type and the specified level.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Note

To enable Agreement Protection, ensure that you set up the Admin entries for *APTS_Protection* and *APTS_Password* prior to defining the Agreement Protection.

To setup agreement protection

1. Click **+** and click **Agreement Protection**.
2. Click **New**.

3. Enter **Description** and **Profile Name**.
4. Select an Action from the picklist.
5. Select one of the following protection types:
    - **Ignore:** With this option, protection settings can be by-passed.
    - **Prompt:** With this option, protection level can be selected at the generation time.
    - **Automatic**: With this option, protection level has to be selected at the configuration time.You can define protection level for the Automatic option. Following are the protection levels for the Automatic protection type:
        - Full access: This option provides complete access to a user's profile to perform the selected action.
        - Insert comments and tracked changes only: This option allows a user's profile to insert comments in the agreement document along with tracking the changes made by any other user.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- Insert comments only: This option allows a user's profile to insert only comments in the agreement document.
- Fill in form fields only: This option allows a user's profile to only fill in the form fields inside the agreement document.
- Read only: This option gives only the read access to the user of the entered

- **Unprotect:** With this option for the selected action, the password protected document can be unprotected for certain actions, provided the password is same as the one set in the admin object properties.

> **Note**
>
> This option is not available for Generate/Regenerate actions.

6. Click **Save**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

About 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).

With Document Versioning enabled for your organization, rather than all the documents being attached to an agreement's Notes & Attachments Related List, each major version of a document is instead populated in the Document Versions Related list, with individual version information tracked using Document Version Details.

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

Understanding Document Versions

Contract Document Versioning divides the version of an Agreement document into three parts: Major, Minor and Revision. Each version of an agreement document is represented as a period-delimited numeric value in the Document Version Details object (e.g., "1.0.0"). Version values are numerically incremented as various actions are taken on the document by different users. The following table describes each version type represented by the version value and how it is created.

Version Type	Document Action	User Role	Example Value
Major	A major version type is created every time a user: • Generates a document. • Regenerates a document.	Contract Requestor / Owner	1.0.0 2.0.0 3.0.0

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Version Type	Document Action	User Role	Example Value
	• 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		
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
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 X-Author Contracts User Guide for more information on Send for Review using X-Author.	Reviewer	1.0.1 2.0.2

To enable Contract Document Versioning for your organization, refer to Enabling Contract Document Versioning.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To learn how to work with Contract Document Versioning, refer to **Contract Document Versioning** section in the *Contract Management User Guide*.

Enabling Contract Document Versioning

To enable Contract Document Versioning for your org, consider the following implementation options:

- Enable Comply System Properties for Versioning
- Add Version-Related Merge Event Actions
- Add the Document Version Related List to Agreement Layouts
- Add the Document Version to Document Naming Convention

To enable Contract Document Versioning for select agreements or based on conditions (without applying versioning globally):

- Add the Version Aware field to Agreement Layouts
- Add Workflow Rules to make Agreements Version Aware (optional)

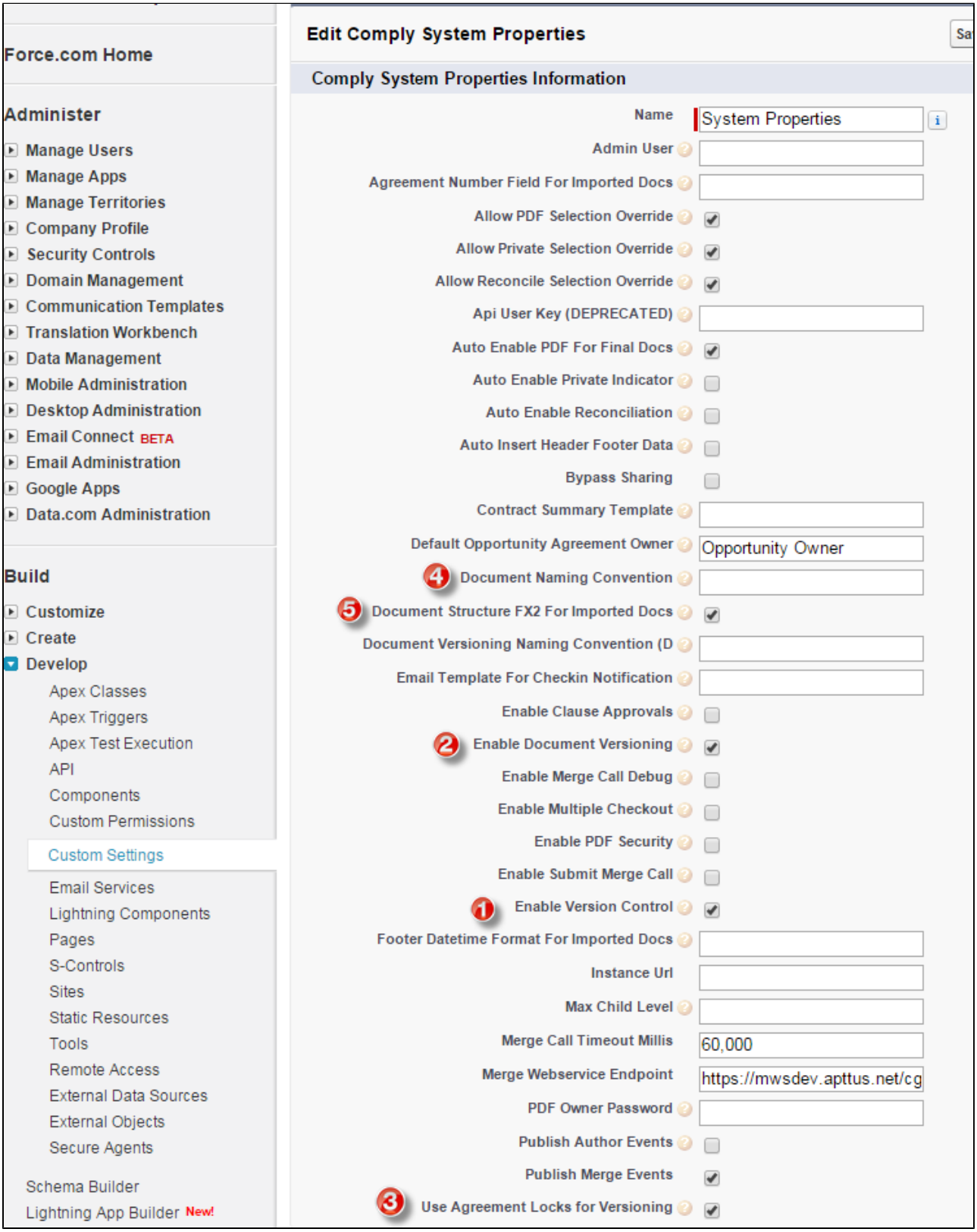
To configure Comply System Properties for Versioning

Use Comply System Properties settings to enable Contract Document Versioning for agreements in your Org.

1. Navigate to Setup > Develop > Custom Settings.
2. Click on the **Manage** link next to Comply System Properties.

Click **Edit** to edit System Properties. The System Properties form is displayed.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Configure the System Properties described in the following table.

#	Property	Description
1	Enable Version Control	Check this box to enforce a check-in/check-out policy for agreement documents. This setting must be enabled when "Enable Document Versioning" is checked. Note: This property existed in CLM versions prior to 8, so this property may already be enabled.
2	Enable Document Versioning	Check this box to enable Document Versioning. ***All new agreement records created in your org will use Document Versioning after this setting is enabled***. Enable Version Control must be enabled for Document Versioning to work properly. Enabling Document Versioning changes the value of the **Version Aware** Agreement field to TRUE for all new agreements after the property is activated. The **Version Aware** field is a flag that tells Apttus Contract Management to use Document Versioning for a specific record. **Important Note**: It is recommended that once a record is flagged as Version Aware, you do not disable this field, as versioning wil become undefined for the agreement record in question. Instead, ensure that records which should not use Document Versioning do not have the field enabled when they are created (see the section on Workflow Rules below.) To enable/disable Document Versioning for specific Agreement records, see To add the Version Aware field to Agreement Layouts.
3	Use Agreement Locks for Versioning	Check this box to use Agreement locks for versioning instead of document-level locking: • If enabled, all agreement documents are locked (by the user checking out) when ***any one of them*** is checked out. • If disabled, only checked out documents are locked (by the user checking out)–any other agreement documents which have not yet been checked out can be checked out for editing.
4	Document Naming Convention	Specify a value to apply a custom naming convention for all agreement documents at generation, check-in and signature events.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

#	Property	Description
		The following attributes permitted when formulating a document naming convention are: • %checkintype% • %action% • %templatename% • %user% • %timestamp% • %version% • Agreement attributes such as %:Name%. Note: any variable prefixed by ':' represents a field on the Agreement object. If the property contains a null value (i.e., if left blank), the current default naming convention will be used: %:Name%_%action%_%templatename%_%timestamp% Example agreement document name using the default naming convention: *SOW_Regenerated_SOW ABC_2015-08-07*
5	Document Structure FX2 For Imported Docs	Check this box to make document structure FX2 format for all Offline documents (created or imported). If not checked, all offline documents are created in the "pre-existing" format. ⓘ This property only applies to Offline agreements created from the Agreement or user Home page links in Salesforce. The format of Offline agreements created using X-Author for Contracts will still depend on user-input from X-Author.

To add document version in document naming convention

You can append the document version to the document name by leveraging the *%version%* attribute of the document naming convention property. To configure this:

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

1. Navigate to Setup> Develop> Custom Settings> and click **Manage** link next to **Comply System Properties.**
2. Click **Edit**.
3. Configure the document naming convention field value as: %:Name%_%templatename%_%timestamp%_%version%
4. Click **Save.**

An example agreement document name using above setting would be: *Apttus NDA_NDA_2017-05-14_1.0.0*. Here the '1.0.0' appended at the end refers to the document version.

If you have configured %version% attribute in the Document Naming Convention property but the Enable Document Versioning property is disabled, the agreement document name shall contain an empty string in place of the version attribute.

For example- If you have configured Document Naming Convention field as %:Name%_%templatename%_%timestamp%_%version%, but you have disabled Enable Document Versioning property, the generated sample agreement name shall be Apttus NDA_NDA_2017-05-14.

To trim the third decimal and number from the document version attribute in the Document Naming Convention property, select **Trim Document Version** checkbox in Document Version Properties. For more details on Trim Document Version, refer to Document Version Properties.

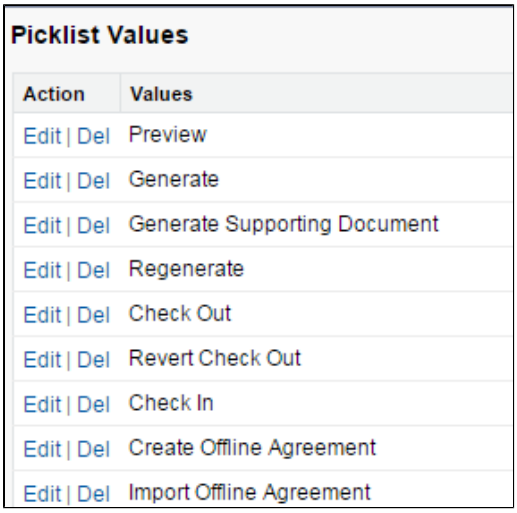
To add Version-Related Merge Event Actions

For Document Versioning to work properly, the picklist values for the Merge Event Action must be updated.

1. Navigate to Setup > Create > Objects > Merge Event.
2. Go to the **Action** Custom Field.
3. Add the following two values to the picklist:
    - Check Out
    - Revert Check Out

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

After adding values, your Merge Action picklist should appear as shown in the following image:



Picklist Values

Action	Values
Edit | Del	Preview
Edit | Del	Generate
Edit | Del	Generate Supporting Document
Edit | Del	Regenerate
Edit | Del	Check Out
Edit | Del	Revert Check Out
Edit | Del	Check In
Edit | Del	Create Offline Agreement
Edit | Del	Import Offline Agreement

To add the Document Version Related List to Agreement Layouts

To view Document Version details for your agreement documents, the **Document Version** Related List must be added to your Agreement Page Layouts. To add the Related List to your page layouts, refer to Salesforce documentation for Edit Page Layouts for Custom Objects.

The Document Version Related List is included in the default Agreement Layout included with the Apttus Contract Management package.

To add the Version Aware field to Agreement Layouts

The **Version Aware** field is a flag that tells Apttus Contract Management if a specific record is using Document Versioning. When the Comply System Property **Enable Document Versioning** is enabled, the value of the Version Aware field is set to TRUE for all new agreements org-wide at the time of record creation. You can add the Version Aware flag to your Agreement layouts as a field which allows agreement editors to turn Document Versioning on or off for a specific agreement record.

Important Note: It is recommended that once a record is flagged as Version Aware, you do not disable this field, as versioning wil become undefined for the agreement record in question. Instead, ensure that records which should not use Document Versioning do not have the field enabled when they are created (see the section on Workflow Rules below.)

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To add this field to your custom Agreement layout, refer to Salesforce documentation for Edit Page Layouts for Custom Objects.

> The Version Aware field is included in the default Agreement Layout included with the Apttus Contract Management package.

To make Agreements Version Aware using Workflow Rules

You can create one or more Workflow Rules to set the Version Aware flag value in certain records based on the value of other record fields.

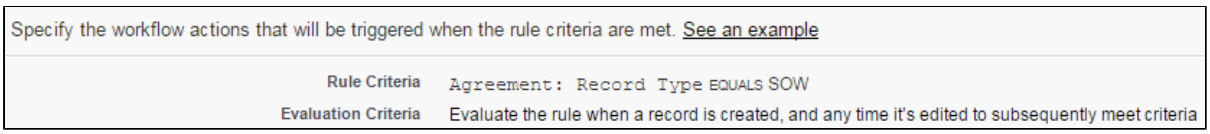
1. Create a new **Workflow Rule** for Document Versioning. See the section on Workflow for assistance with setting up a Workflow Rule in Salesforce.
2. Specify your Workflow Rule Action as a "Field Update" (the rule will update the Version Aware field).
3. Use **Apttus__APTS_Agreement__c.Apttus__VersionAware__c** as the field value in your rule.

Example: Enable Version Aware Field for all Statement of Work (SOW) Agreements

Scenario: Your organization has decided not to enable Contract Document Versioning globally. However, you do want all new SOW agreements to be Version Aware.

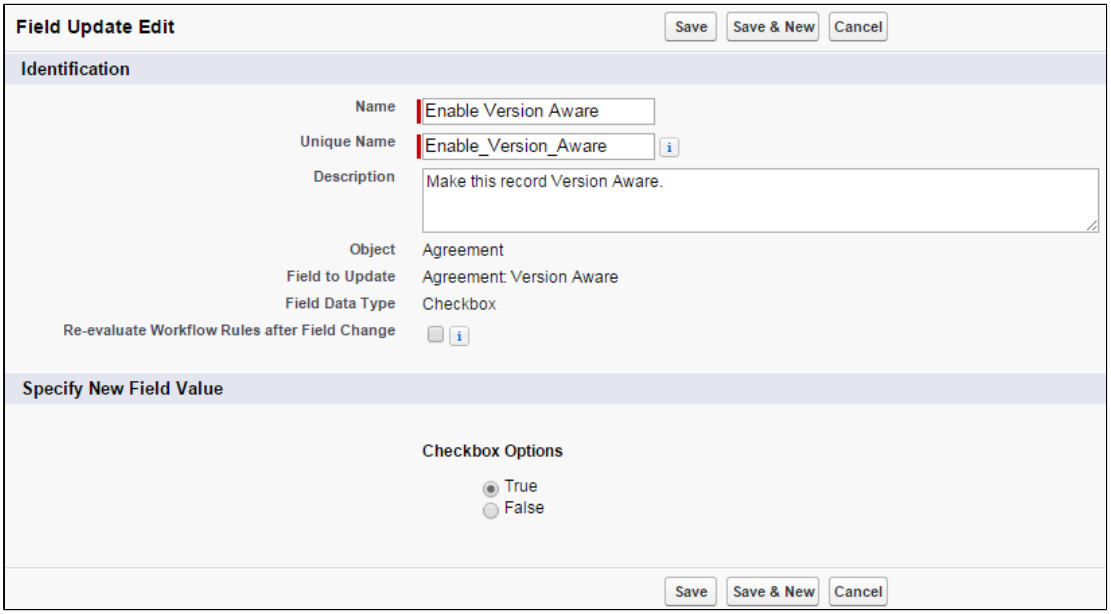
Solution: Create a new Workflow Rule as detailed above.

1. Define your criteria as "Agreement: Record Type equals SOW."



2. Specify your Workflow Rule Action to make the Version Aware flag *true* when the criteria are met.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



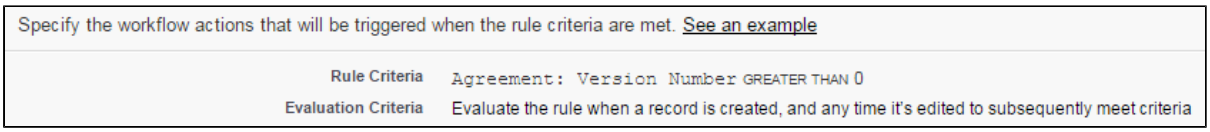
3. Validate your rule. When you create a new SOW, the Version Aware field should be checked.

Example: Disable Version Aware Field for Renewal of Non-Version Aware Agreements

Scenario: Your organization has decided to enable Contract Document Versioning globally. As versioning will only apply to new agreements going forward, you have many agreements that are not Version Aware. By default, when an agreement is renewed and Document Versioning is enabled, the renewed agreement is automatically made Version Aware. You would prefer non-Version Aware documents remain non-Version Aware upon renewal.

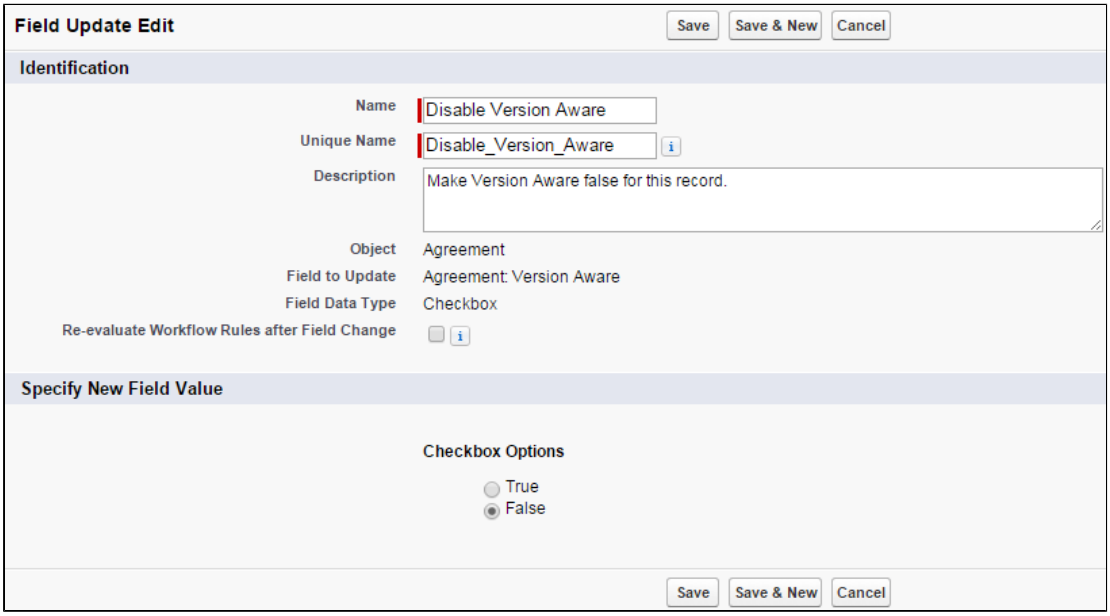
Solution: Create a new Workflow Rule as detailed above.

1. Define your criteria as "Agreement: Version Number GREATER than 0."



2. Specify your Workflow Rule Action to make the Version Aware flag *false* when the criteria are met.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



3. Validate your rule. When you renew an agreement, the Version Aware field should NOT be checked.

Configuring Document Finder

Document Finder helps your contract managers, salespersons and legal teams to easily filter and find agreement documents directly from an agreement record. Follow the instructions on this page to set up Document Finder for use with your agreements.

Enable Contract Document Versioning

To use keywords/tags defined in your org or created from check-in actions in X-Author Contracts requires Contract Document Versioning be enabled. When you are working with version aware records, you can take full advantage of search by keywords/tags and by document versions.

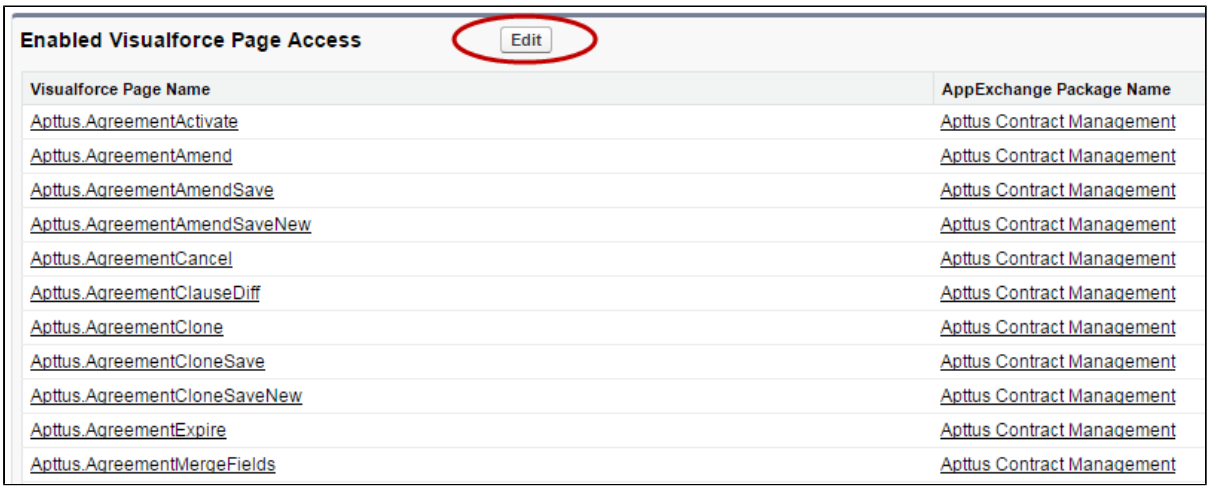
To learn how to enable Contract Document Versioning, refer to Enabling Contract Document Versioning.

Add Document Finder Visualforce Page to User Profiles

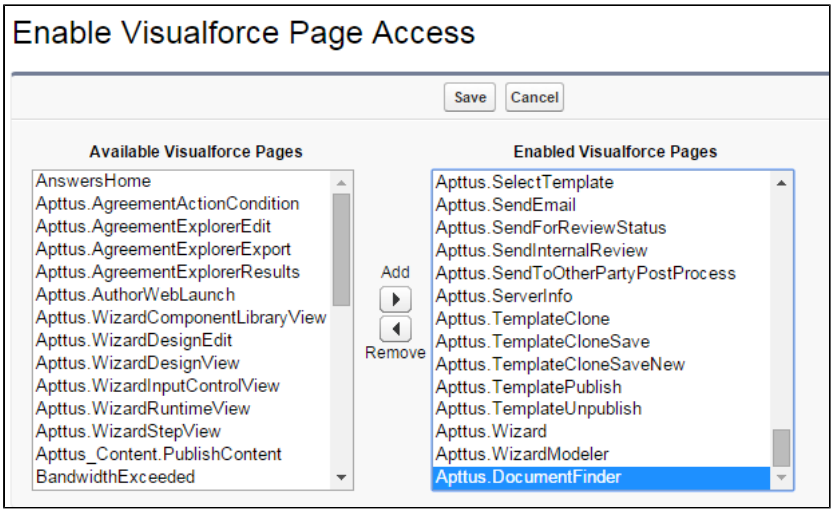
To grant Document Finder access to a user, you must add the Visualforce Page to the list of Enabled Visualforce Pages on their corresponding User Profile.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

1. Go to **Setup > Administer > Manage Users > Profiles**.
2. Click on the Profile corresponding to the user who needs access.
3. Click **Edit** under Enabled Visualforce Page Access.



4. Add *Apttus.DocumentFinder* to the list of Enabled Visualforce Pages.



5. Click **Save**.

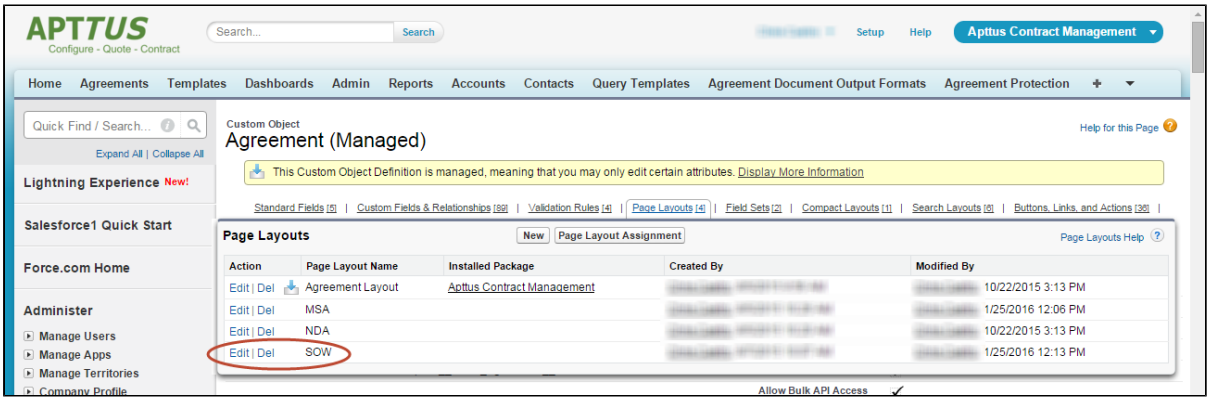
> You can do this more quickly for multiple profiles by going to **Setup > Build > Develop > Visualforce Pages** and changing the **Security** for the Document Finder Visualforce page.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

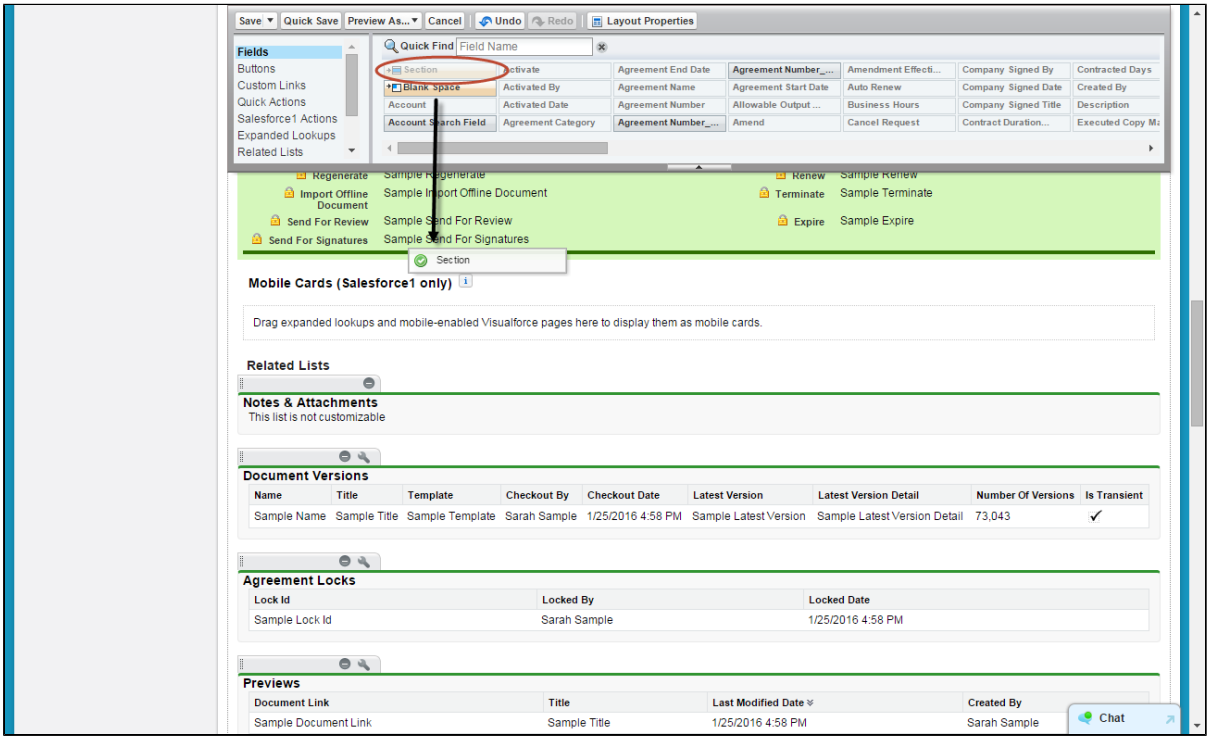
Add Document Finder to the Agreement Layout

As Document Finder is a custom Visualforce page, it must be added to the Agreement layout inside of a section.

1. Go to **Setup > Create > Objects > Agreements.**
2. Hover over Page Layouts and click **Edit** next to the layout you want to modify. In this example, we will modify the Agreement layout page for the SOW record type.

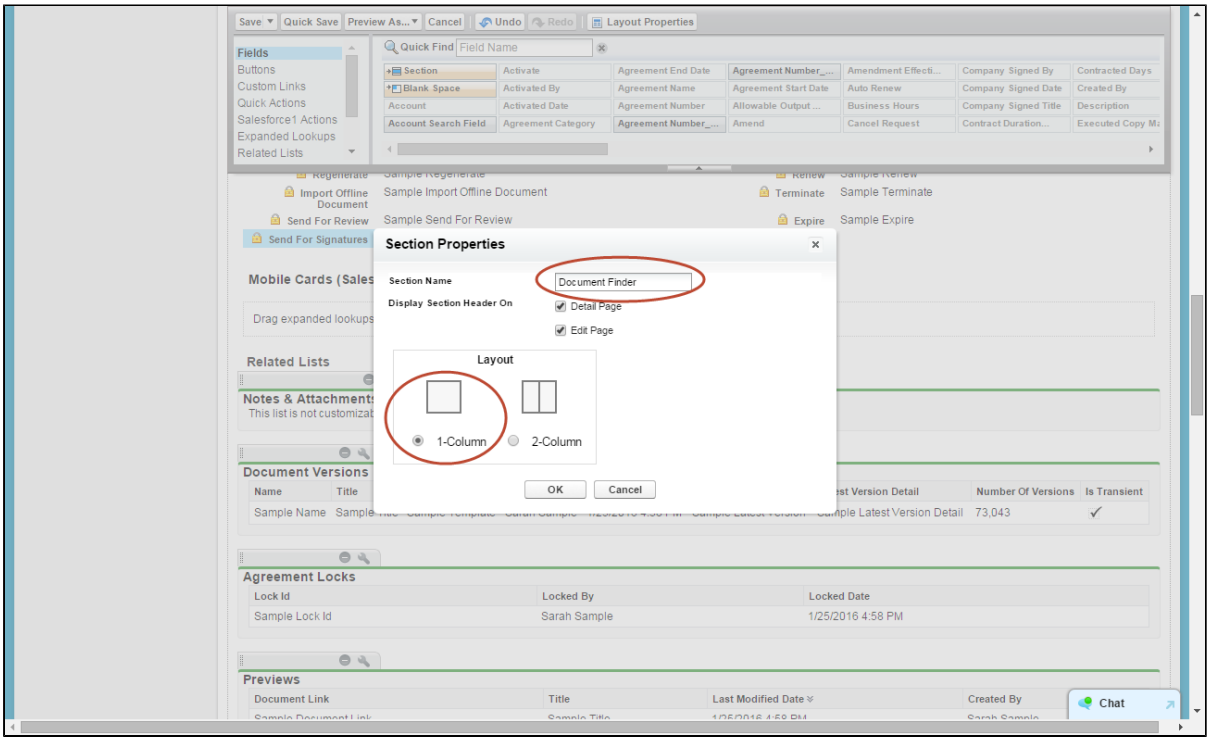


3. Click-and-drag the **Section** field to the area below the Actions section of the Agreement Layout.



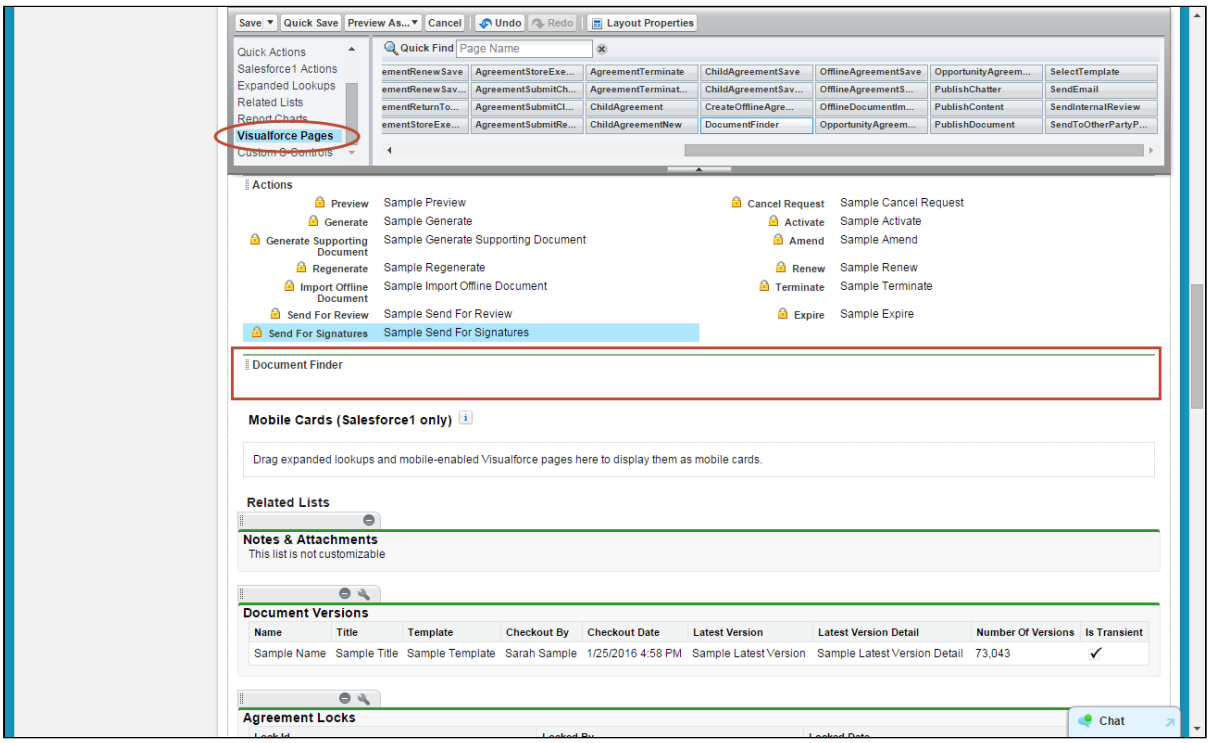
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

4. Enter "Document Finder" as the **Section Name** and choose a **1-Column** layout.

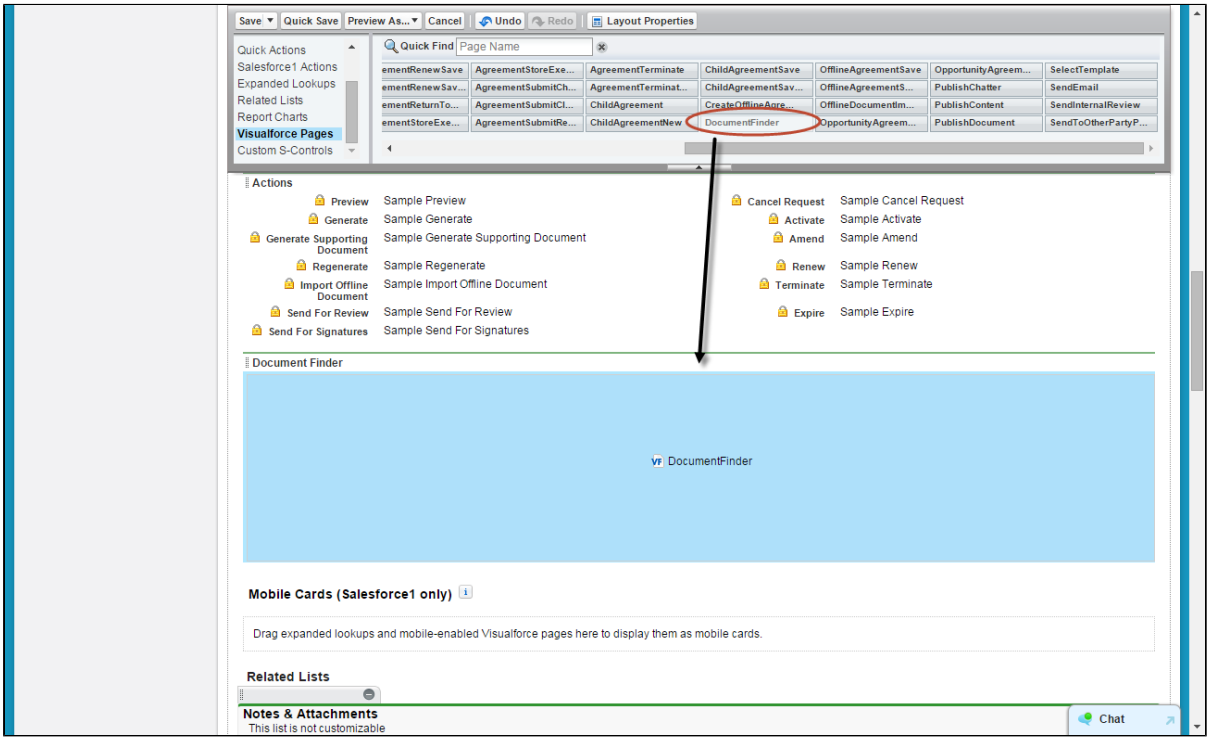


5. Click **OK**. The Document Finder section is created.
6. From the Layout Designer menu, choose **Visualforce Pages**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



7. Click-and-drag the **Document Finder** Visualforce Page onto the section you just created.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

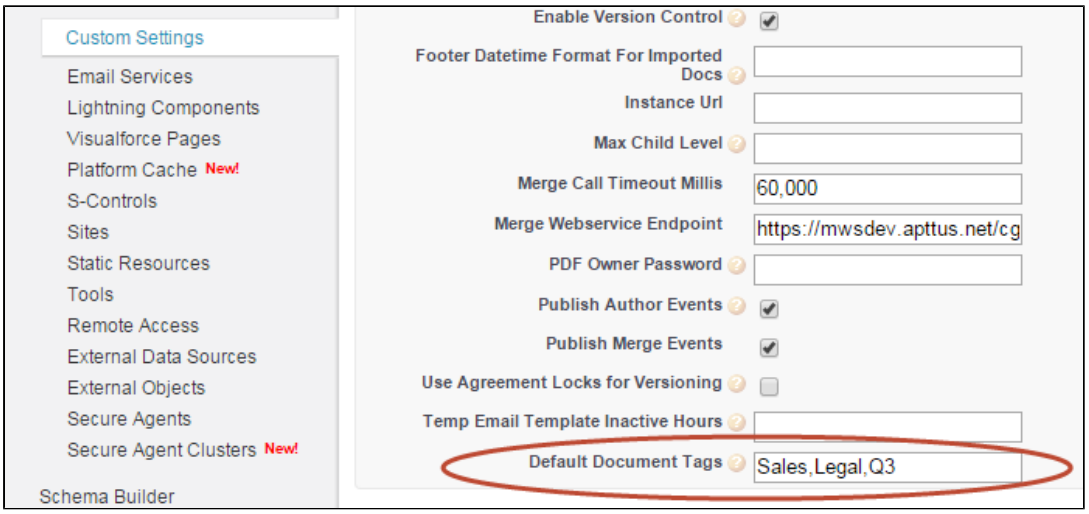
8. Click **Save** to save the Agreement page layout.
9. Repeat these steps for all Agreement layouts that will use Document Finder.

(Optional) Configure Default Tags

You can configure the Comply System Property **Default Document Tags** to define a set of comma-separated tags which will be automatically available to users who perform a search in Document Finder. X-author users can also choose from the same set of tags at document check-in, applying any of these default tags to an agreement document as part of the check-in process.

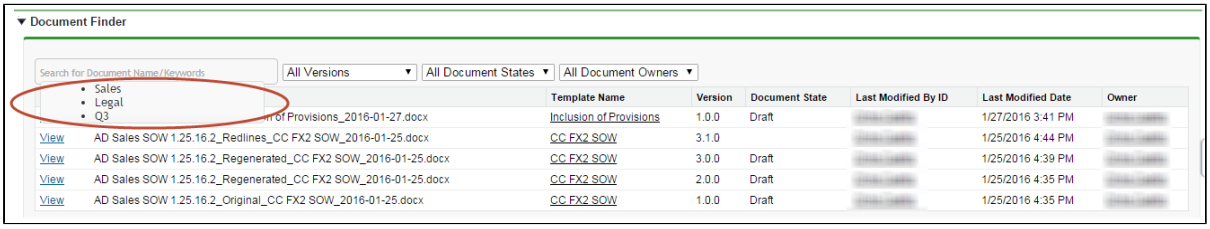
To configure the Default Document Tags system property:

1. Go to **Setup > Develop > Custom Settings**.
2. Click **Manage** next to Comply System Settings.
3. Click **Edit** next to System Properties.
4. Enter your desired default tags as comma-separated values for the **Default Document Tags** system property.



5. Click **Save** to update the system with your default tags. Now, when you place your cursor into the Document Name/Keywords search in Document Finder, you can choose from a list of default tags defined by the property.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



X-Author users can also make use of these tags during check-in. Refer to the *X-Author Contracts User Guide* for more information.

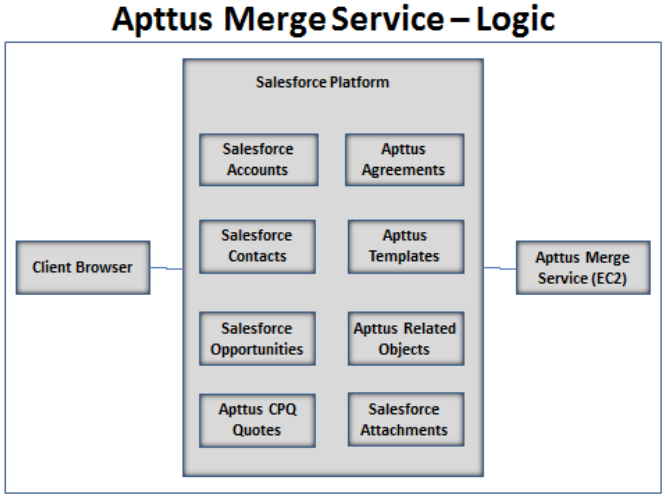
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Document Generation Capabilities

The capabilties of Document Generation, or *DocGen*, are made completely visible in Contract Management. We have extended document generation beyond the *Agreement* and *Quote/Proposal* object to cover the standard Salesforce objects and custom objects.

The Apttus CLM Suite uses the following components in the generation of documents:

- **Apttus Contract Management application is 100% native on the Salesforce platform** – Includes custom objects, tabs, Apex classes and Visual force pages on the Salesforce platform.
- **Apttus Merge Web Service hosted on Amazon EC2 (Elastic Compute Cloud) stacks** – A stateless service which includes .NET components for generating Word and PDF documents using data from Salesforce. No data is persistent in this component.
- **Apttus X-Author for Contracts Add-in to Microsoft Word** – A .NET-based add-in to Microsoft Word used for creating and managing merge templates and for generating and managing contract documents throughout the negotiation stage of the cycle.



The following steps are performed during the document generation process:

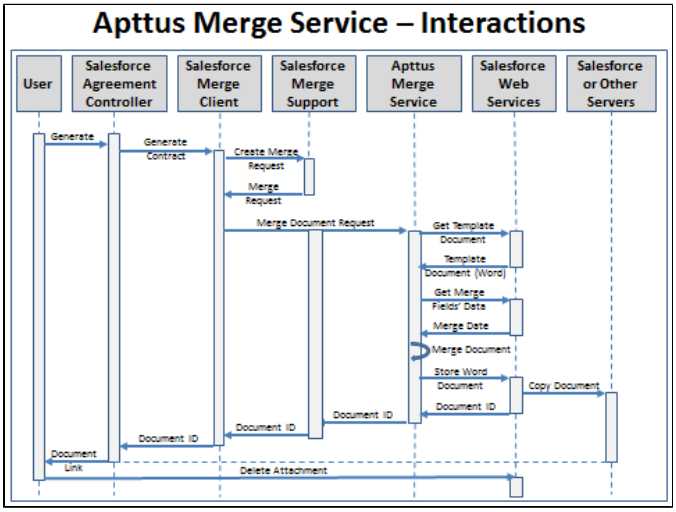
1. The document generation process is initiated when you use the Apttus Contract Management application in the following scenarios.
    - Select the document attributes, such as output format, protection type, and a template (including defined structured data fields in clauses with terms and conditions).

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- Click Generate for the supported objects. To view the list of supported objects, refer Document Generation Features List.

2. The Apttus Contract Management application uses Apex code in Salesforce to make an HTTPS Web Service call to the Apttus Merge Service endpoint using the REST API .
3. The Apex controller passes to the Apttus Merge Service the current user's session ID and the endpoint server URL obtained using the {!$Api.Session_ID} and {!$Api. Partner_Server_URL_250} Visualforce variables.
4. No logging occurs on the Apttus Merge Service which would capture the information, such as SessionId or agreement details, moving through the Merge Service.
5. The Apttus Merge Service uses the session ID and endpoint server URL to establish a session with Salesforce. The mechanism is similar to Salesforce Workflow Outbound Messaging, allowing session information to be passed for a callback.
6. The Apttus Merge Service retrieves from the Apttus Contract Management application the contract object record's user-selected Microsoft Word template and the data for the merge fields embedded in the template.
7. The Apttus Merge Service merges the data and produces the contract document in the user-selected format: DOC, RTF, DOCX, or PDF.
8. The generated contract document is stored in Salesforce as an attachment to the agreement record.
9. Errors encountered in the document generation process are displayed to the user from the contract management application in Salesforce, where you initiated the generation command for the document.
10. All details are removed from the Amazon EC2 web servers when the document generation process has been completed. No data is stored in the Apttus Merge Service since all data is stored only in Salesforce.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Document Generation Features List

The following table includes a list of functions that are related to document generation, or "DocGen". Each column in this table represents either the Agreement, Quote/Proposal, standard Salesforce, and Custom objects. While every function is completely supported for the Agreement object, there are limitations for the Quote/Proposal, standard Salesforce, and Custom objects.

This list is a representation of all document generation features by Object Type.

The following list is a representation of the notation used:

- X = supported out of the box
- NSP = not supported
- CSP - Comply System Properties
- PSP - Proposal System Properties

Note

The table below provides the required setup, if there is a necessary configuration for a document generation feature. In order to see what you must configure for a particular object, the configuration settings are noted under that corresponding object in the table.

For example, to use the *Merge Service Endpoint* feature for document generation on a custom object, you must configure *Remote Site - Salesforce Admin Setting* and *CSP Endpoint*.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

	Setup required for a Feature	Agreement Object	Quote /Proposal Object	Std. Salesforce Objects	Other Custom Objects
1	Merge Webservice Endpoint Setup Steps: 1. Salesforce Admin setting: Remote Site Settings > ApttusMergeServer 2. Comply System Properties > Merge Webservice Endpoint 3. Proposal System Properties > Merge Webservice Endpoint For more information, refer Appendix B > Custom Settings > Proposal System Properties in *CPQ Admin Guide*. *Admin - for backward compatibility	Setup 1 & 2	Setup 1 & 3	Setup 1 & 2	Setup 1 & 2
2	Controlling Merge Call Time-out (default 60 secs) Setup Steps: 1. Comply System Properties > Merge Call Timeout Millis 2. Proposal System Properties > Merge Call Timeout Millis For more information, refer Appendix B > Custom Settings > Proposal System Properties in *CPQ Admin Guide*. *Admin - for backward compatibility Max 60,000; Recommended 30,000	Setup 1	Setup 2	Setup 1	Setup1
3	Publish Merge Events	X	NSP	NSP	NSP

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

	Setup required for a Feature	Agreement Object	Quote /Proposal Object	Std. Salesforce Objects	Other Custom Objects
	Comply System Property > Publish Merge Events				
4	Generation Document from Record Generate Action button setup: 1. Create action formula field on the Object, and then add it to the layout. Refer to Generating on a Custom Object.	X	X	Setup 1	Setup 1
5	Generation PDF Security Setup steps: 1a. Select Comply System Properties > Enable PDF Security 1b. Enter a password value for Comply System Properties > PDF Owner Password 1c. Create/Modify *APTS_ComplyConfig* Admin object for PDF security defaults (optional) See Enabling PDF Security for Agreement Documents for details. 2a. Proposal System Properties > Enable PDF Security 2b. Proposal System Properties > PDF Owner Password 2c. Create/Modify *APTS_ProposalConfig* Admin object for PDF security defaults (optional)	Setup 1(a,b, c)	Setup 2 (a,b,c)	Setup 1 (a, b, c)	Setup 1 (a,b,c)

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

	Setup required for a Feature	Agreement Object	Quote /Proposal Object	Std. Salesforce Objects	Other Custom Objects
	See **Enabling PDF Security on Generated Quote/Proposal Document** in *CPQ Admin Guide*.				
6	Generation Word Document Protection Setup steps: 1. Create Admin > APTS_Protection 2. Create Admin > APTS_Password 3. Create Agreement Protection table entries for the following pairs: User Profile / Preview User Profile / Generate User Profile / Regenerate User Profile / Generate Supporting Document	Setup 1, 2, & 3	NSP	NSP	NSP
7	Versioning Word Document Protection Setup steps: 1. Create Admin > APTS_Protection 2. Create Admin > APTS_Password 3. Create Agreement Protection table entries for the following pairs: User Profile / Save Initial Version User Profile / Save External Version User Profile / Save Final Version	Setup 1,2, & 3	Setup 1,2, & 3	Setup 1,2, & 3	Setup 1,2, & 3

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

	Setup required for a Feature	Agreement Object	Quote /Proposal Object	Std. Salesforce Objects	Other Custom Objects
8	Async Mode of Merge Setup steps: 1. Create Admin > APTS_AsyncMergeCall 2. Create Admin > APTS_AsyncMergeEmail Calls over 60 seconds are processed. *Custom objects with related lists are not supported	Setup 1 & 2	Setup 1 & 2	*Setup 1 & 2	*Setup 1 & 2
9	Template setup for default system filtering on Generate and other Template functionality from X-Author Contracts Setup steps: 1. Agreement Object > Record Types picklist values 2. Template Object > Agreement Type picklist values 3. Template Object > Business Object picklist values *Template Object setup - For internal use only	1. X 2. Add Object record types Values 3. X	1. X 2. Add Object record types Values 3. X	1. Add Object Value 2. Add Object record Types Values 3. X	1. Add Object Value 2. Add Object record types Values 3. Add API name of Custom Business Object
10	Auto Enabling Checking In for Final version in PDF formatSetup steps: • Comply System Properties > Auto Enable PDF Final Docs	X	NSP	NSP	NSP

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

	Setup required for a Feature	Agreement Object	Quote /Proposal Object	Std. Salesforce Objects	Other Custom Objects
	• Comply System Properties > Allow PDF Select Override				
11	Auto Enable Reconciliation Setup steps: • Comply System Properties > Auto Enable Reconciliation • Comply System Properties > Allow Reconcile Override	X	NSP	NSP	NSP
12	Header / Footer Stamp Setup steps: • Comply System Properties > Auto Insert Header Footer • Comply System Properties > Agreement Number Field For Imported Docs • Comply System Properties > Footer Datetime Format For Imported Docs	X	NSP	NSP	NSP
13	Enabling Term Exceptions in Author • Create Admin > EnableTermExceptionsInAuthor * Available for all Template types (valid association with TE - only for Agreement Clause Template)	X	NSP	NSP	NSP
14	Create New Template & Check-In Template	X	X	X	X

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

	Setup required for a Feature	Agreement Object	Quote /Proposal Object	Std. Salesforce Objects	Other Custom Objects
	Setup #9 required prior				
15	Check-out Template Setup #9 required prior	X	X	X	X
16	Clone Template Setup #9 required prior	X	X	X	X
17	Template Playbook: default Search, Select, Insert Clause inline or as a reference Setup #9 required prior	X	X	X	X
18	Insert Merge Fields for corresponding Objects - Header - Lookups - Related - In Section - Related - In Table Setup #9 required prior	X	X	X	X
19	Insert Smart Merge Fields for corresponding Objects - Header - Lookups - Related - In Section - Related - In Table Setup #9 required prior	X	NSP	NSP	NSP

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

	Setup required for a Feature	Agreement Object	Quote /Proposal Object	Std. Salesforce Objects	Other Custom Objects
20	Document Assembly Rules Insert Dynamic Sections in X-Author for Contracts *Available for Agreement object only	X	NSP	NSP	NSP
21	Filtered Rows Apply Filter in X-Author	X	X	X	X
22	Conditional Content Make Conditional in X-Author for Contracts	X	X	X	X
23	Auto-publish	X	X	X	X
24	Generate. Output Format and add Watermark Support DOC, DOCX, PDF, RTF	X	X	X	X
25	Support Controlled Preferences for Output Format and Watermark *pairs: Record Type / User Profile 1. Agreement Output Format Tab 2. Proposal Output Format Tab	X	X	NSP	NSP
26	Check-in Third Party Document. Import Offline - Create record and attach	X	NSP	NSP	NSP
27		X	NSP	NSP	NSP

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

	Setup required for a Feature	Agreement Object	Quote /Proposal Object	Std. Salesforce Objects	Other Custom Objects
	Check-in Third Party Document. Import Offline - Attach to existing record				
28	Check-in Document, attachment of the record - With Redlines - Without Redlines - Final to be Signed - Watermark - Naming Override	X	NSP	NSP	NSP
29	Check-out Document, attachment of the record	X	NSP	NSP	NSP
30	Compare Documents, attachments of the record	X	NSP	NSP	NSP
31	Locking Refresh Lock	X	NSP	NSP	NSP
32	Create Section Save selection as Agreement Clause	X	NSP	NSP	NSP
33	Playbook: Insert Clause into the Document on the records	X	NSP	NSP	NSP
34	Reconcile Documents - Highlight Smart Fields	X	NSP	NSP	NSP

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

	Setup required for a Feature	Agreement Object	Quote /Proposal Object	Std. Salesforce Objects	Other Custom Objects
	- Reconciliation of the values				
35	Tag Smart Fields	X	NSP	NSP	NSP
36	Update Document from Salesforce	X	NSP	NSP	NSP
37	Multi-currency support by the products of the system 1. Merge - Comply - Proposals 2. X-Author Contracts *Functionality related to Smart Field: Reconciliation, Tagging currency fields is affected	1. X 2. X	NSP	NSP	NSP
38	Chatter with Record Setup steps: 1. Select Enable Chatter Feeds for the object	Setup 1	NSP	NSP	NSP
	Admin > AutoContentSearchable *for activation only	X			
	eSignature support	X	NSP	NSP	NSP
	- EchoSign	X	NSP	NSP	NSP
	- DocuSign	X	NSP	NSP	NSP

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

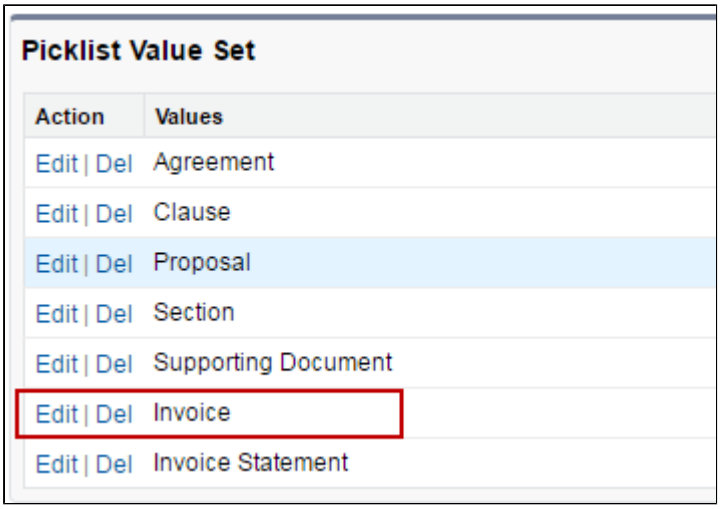
Generating on a Custom Object

Apttus Contract Management provides a solution for configuring document generation on Custom Objects. Configuration for this feature creates a slightly different flow than for Agreements and utilizes a separate Visualforce page and class to facilitate document generation. Follow the steps in this section to configure your custom object for document generation. On this page we use the Custom Object "Invoice" in our examples.

Template Setup: Object Type

Before you can generate on any object, it must first be associated with the Template object.

1. Go to **Setup > Create > Objects**
2. Click on the link for the **Template** object.
3. Under "Custom Fields & Relationships", click on **Type**.
4. Under "Picklist Value Set", click **New**.
5. Enter the label name of the custom business object you want to associate with the template (e.g., "Invoice").
6. Click **Save**. On the next page, check the picklist values to verify your entries were saved.



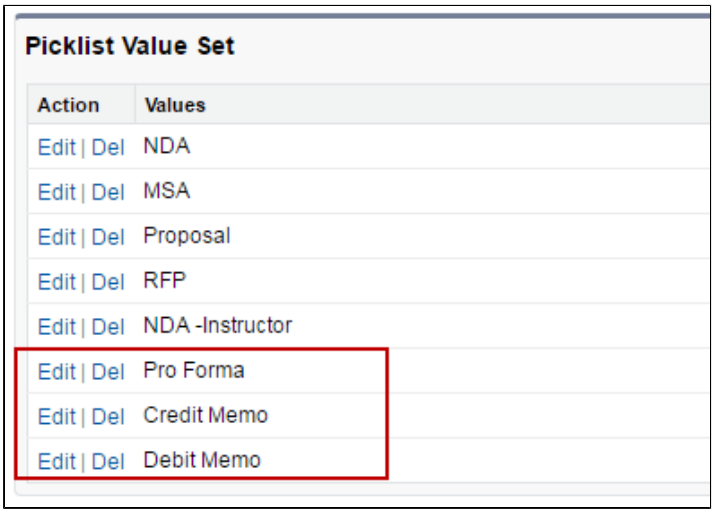
Template Setup: Agreement Type

The next step requires you to create record types for your custom object.

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

2. Click on the link for the **Template** object.
3. Under "Custom Fields & Relationships", click on **Agreement Types**.
4. Under "Picklist Value Set", click **New**.
5. Enter record types for your custom object templates, with each entry on a separate line. In this example, we will create 3 record types for Invoice: Pro Forma, Credit Memo, and Debit Memo.
6. Click **Save.** On the next page, check the picklist values to verify your entries were saved.

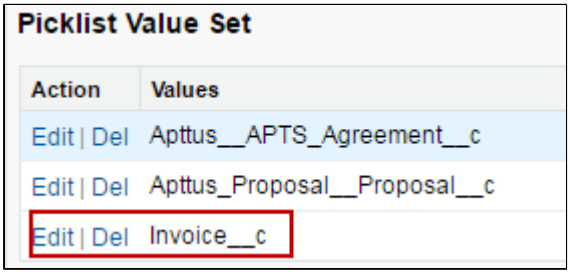


Template Setup: Business Object

Complete template setup by finalizing the association of your custom object with the template.

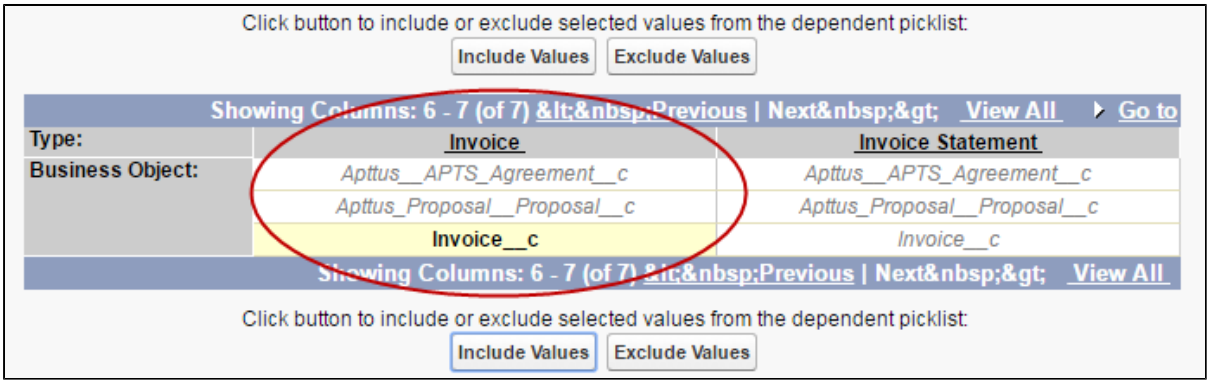
1. Go to **Setup > Create > Objects**.
2. Click on the link for the **Template** object.
3. Under "Custom Fields & Relationships", click on **Business Object**.
4. Under "Picklist Value Set", click **New**.
5. Enter the API name of your custom object as a new picklist entry. (e.g., "Invoice__c")
6. Click **Save**. On the next page, check the picklist values to verify your entries were saved.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



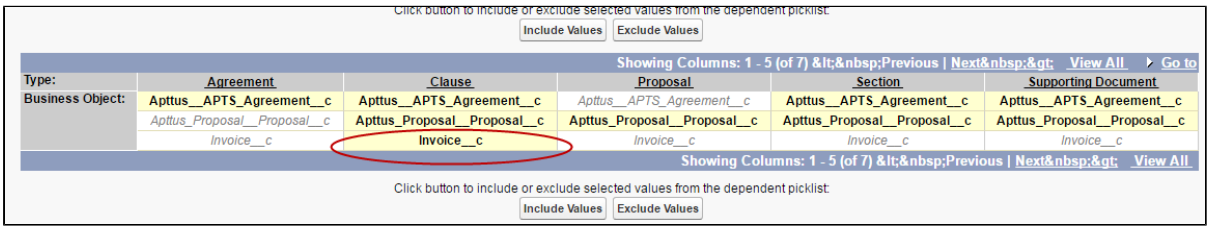
7. Next, create associations between your new Business Object and template Types using dependent picklists. Go back to the **Template** object and click on the **Type** field.
8. Under "Field Dependencies," click **Edit** next to the "Business Object" dependent field.

9. Create a dependency between the Template Type for your custom object and the Business Object you defined in Step 5. Click on the Business Object API name in the list under your custom object type and click **Include Values**. In the below example, "Invoice__c" is included in the "Invoice" dependent picklist.



10. If you intend to define clauses to use in your custom object templates, you also need to add your custom business object to the Clause dependent picklist. Click on the Business Object API name in the list under "Clause" and click **Include Values**. In the below example, "Invoice__c" is included in the "Clause" dependent picklist.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



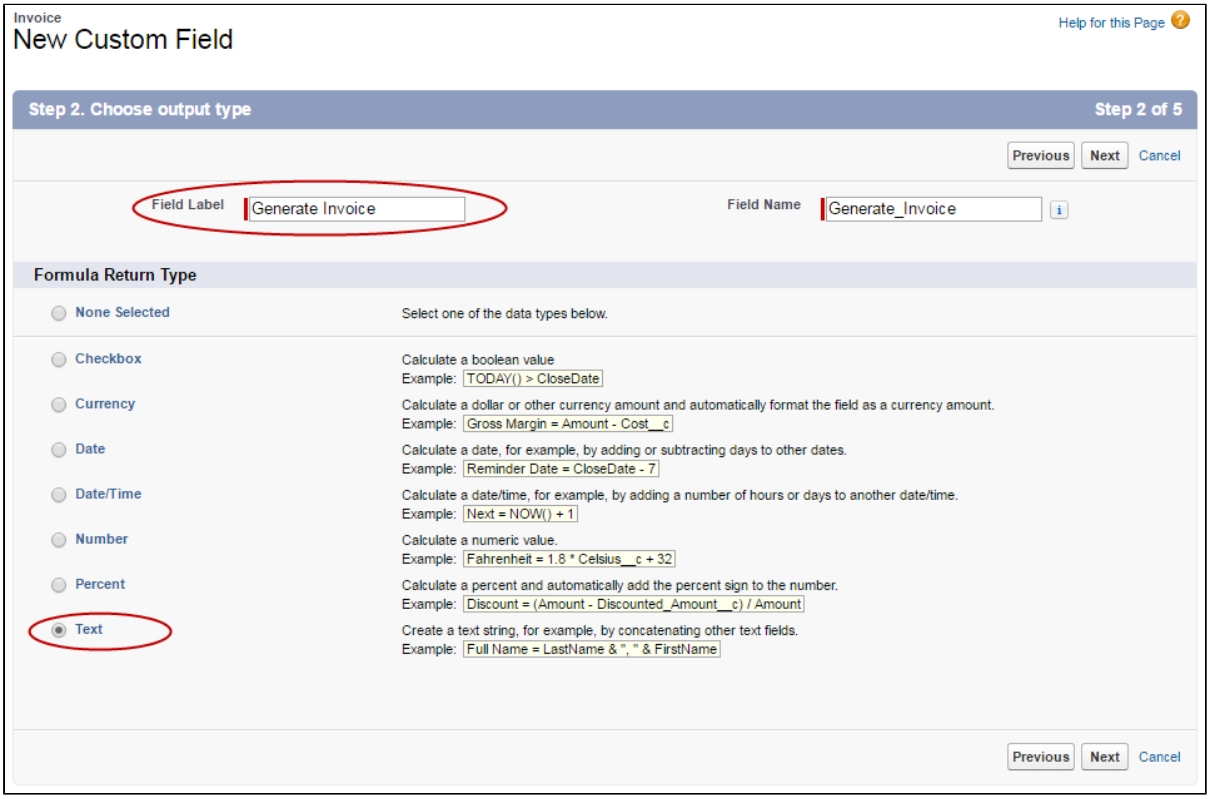
11. Click **Save** to save your dependencies.

Custom Object Setup: Generate Action

The final step required to configure your custom object for document generation is to create the field or button on your custom object and add it to the object layout. Custom objects use a specific Visualforce page and controller class for generating documents. Pay attention to the format in the steps below. In the following example, a custom "Generate" field is created for the Invoice object. You can also make this a button or a link if you want–the action is controlled by a formula in every case.

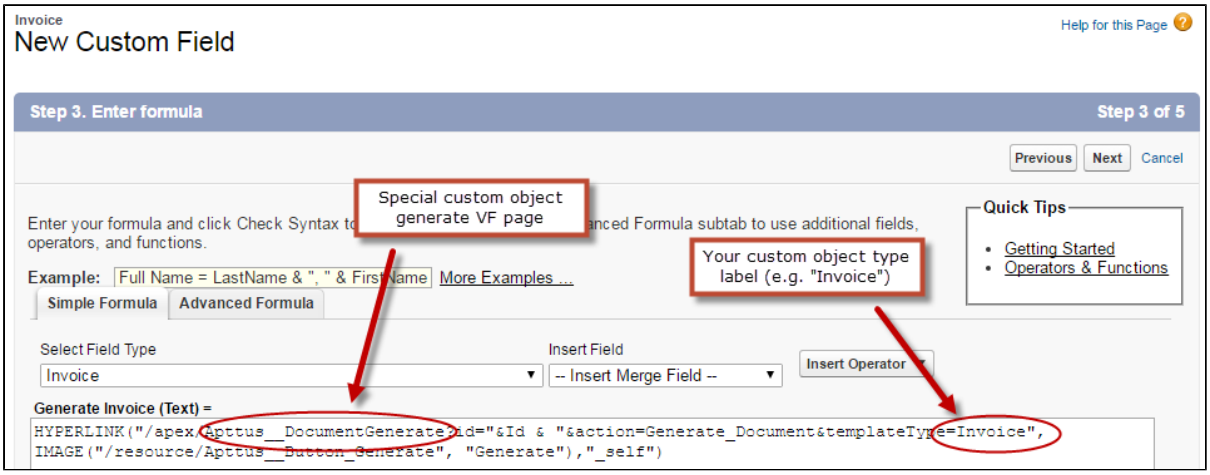
1. Go to **Setup > Create > Object > Your Custom Object**. (In this example, we are using "Invoice")
2. Under "Custom Fields & Relationships," click **New**.
3. For "Data Type," select **Formula**. Click **Next**.
4. Enter the label you want to use for your Generate action ("Generate Invoice" is used here). For "Formula Return Type," choose **Text**. Click **Next**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



5. Enter the formula for your custom Generate action. In your formula, define the template type as the label for your custom object (e.g., "Invoice"). Be sure to check your syntax. The following is an example:

   HYPERLINK("/apex/Apttus__DocumentGenerate?id="&Id & "&action=Generate_Document&templateType=Invoice", IMAGE("/resource /Apttus__Button_Generate", "Generate"),"_self")



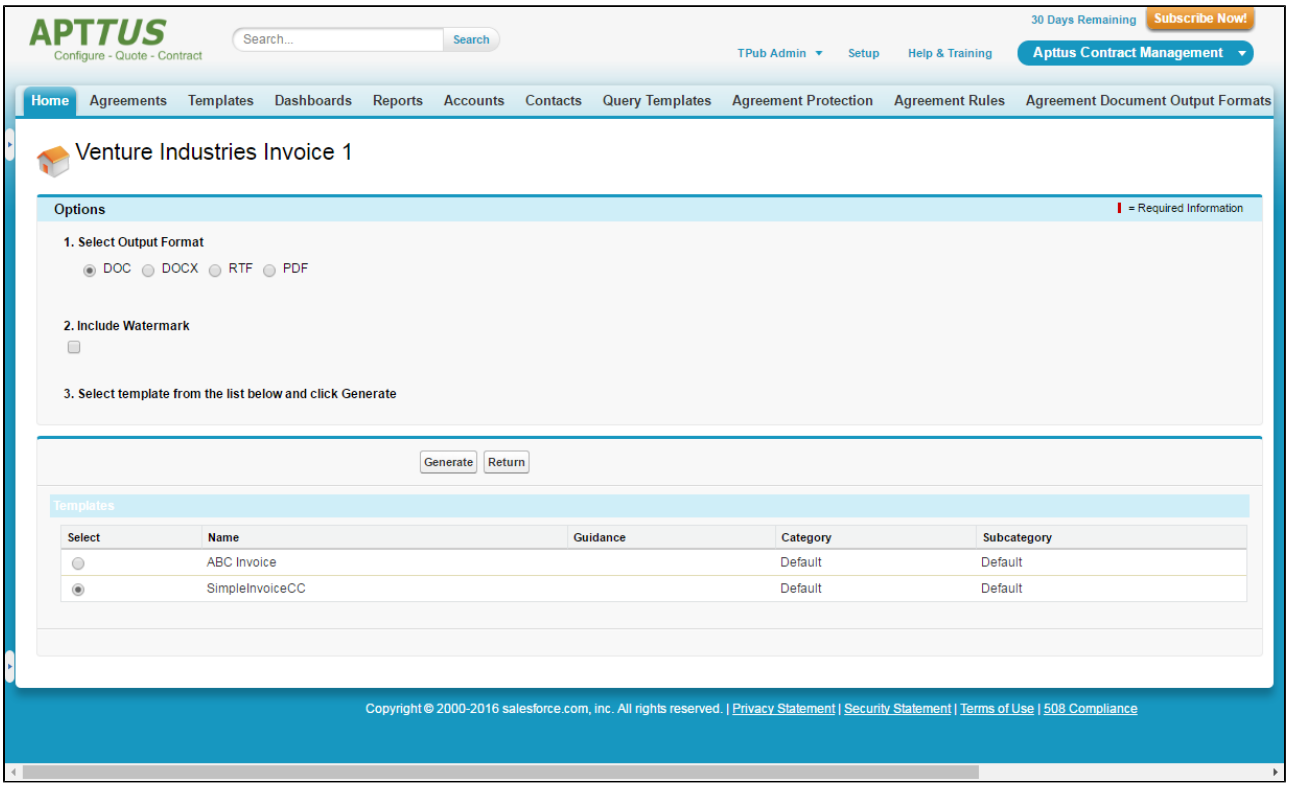
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Click **Next** when you are satisfied with your formula.

6. On the next page, specify field-level security for profiles to use the Generate action. Click **Next**.
7. Specify which page layouts should include this field. You can always add the field to new layouts as you need to in the future.
8. Click **Save**. You are finished!

Creating Templates for your Custom Object

Follow the same instructions found in the *Contract Management Administrator Guide* and *X-Author Contracts User Guide* to create and check-in your custom object templates for document generation. Remember that Rules and Document Protection are not supported for any object other than Agreements. The Generate flow for your custom objects will have a single step and resemble the page displayed in the below image.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Setting Agreement Document Output Formats

Documents are often setup to allow you the option of specifying a document output format upon generation. In some cases, you may want to restrict these options.

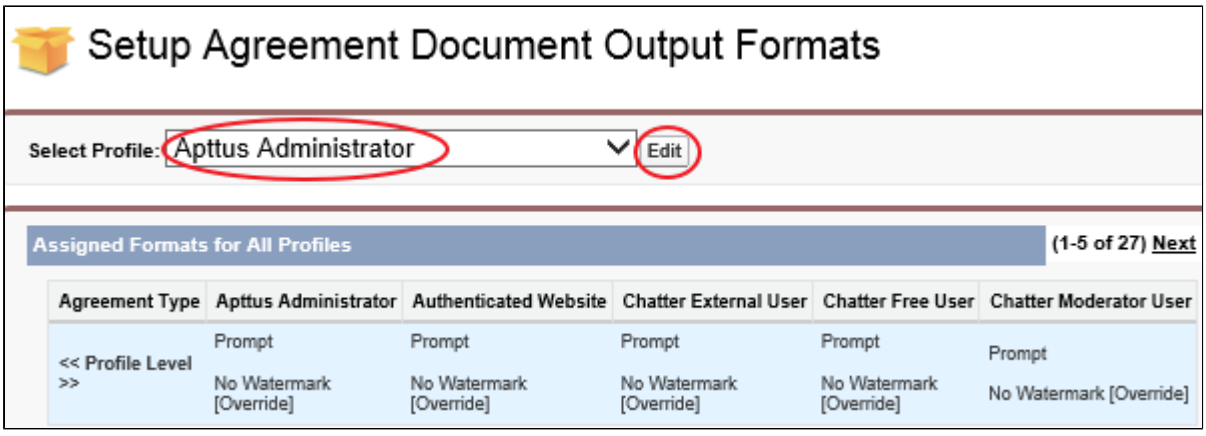
You can setup company-wide default formats to be used for generating document, at User Profile and Agreement Type levels. Along with specifying the format, one can also indicate whether the end user can override the default format. This is indicated by the Allow Override check box shown in the setup UI. Supported formats are: DOC, DOCX, PDF, RTF. If you select *Prompt* option, you will be prompted to select a format at the time of document generation/preview.

> ⚠ Agreement document output format specified at Agreement record level takes precedence over profile level setting.

To set agreements output to a desired format

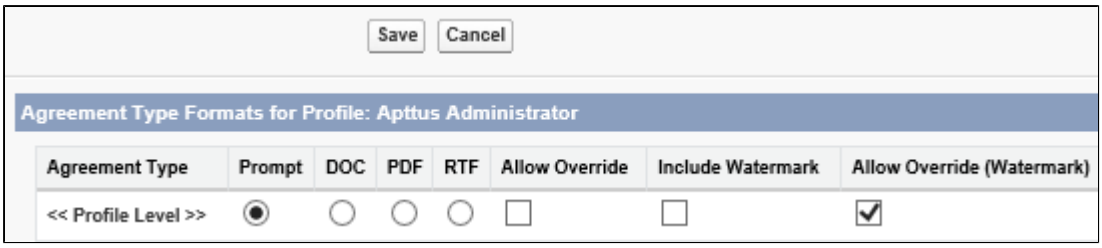
You must have the Apttus Administrator profile.

1. Click ⊞ and click **Agreement Document Output Formats**.
2. Select a profile and click **Edit**. For example, Apttus Administrator.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

3. For agreement type, select the required output format option.



Note

- When you select the document format and any of the other settings at the <<Profile Level>>, it is saved as the setting for any record type where you select Prompt.
- The setting at <<Profile Level>> does not override record types where a specific format is selected as default.

4. To add or remove a watermark, select or clear **Allow Override (Watermark)**.
5. Click **Save**.

You have configured the output-controlling parameters to generate an agreement document in a required format.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Enabling PDF Security for Agreement Documents

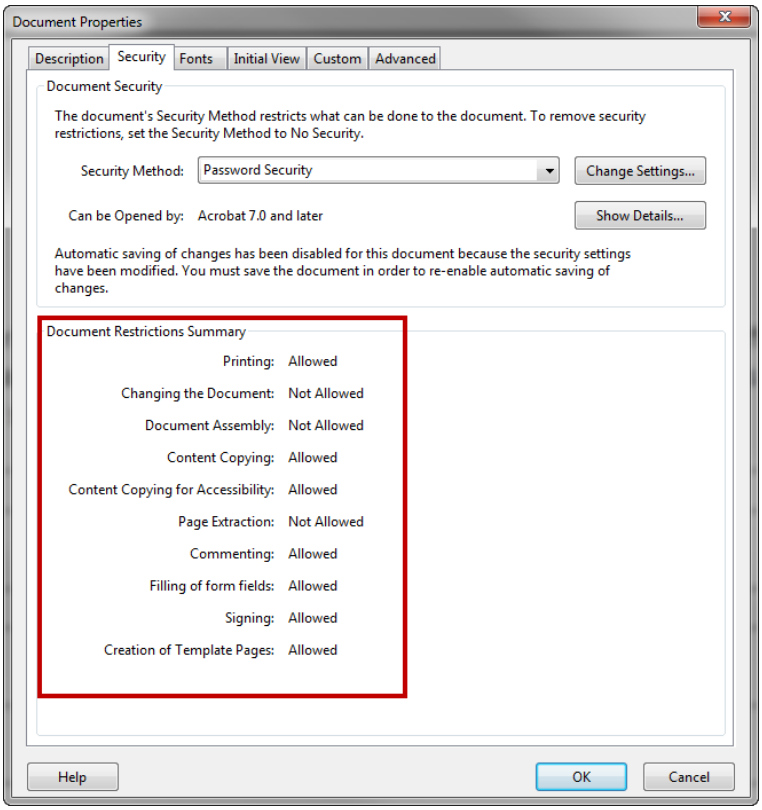
Apttus uses Agreement Document Protection to help you protect your documents when they are generated in Microsoft Word format, but when you need to generate a PDF you may also wish to restrict editing. Fortunately, you can use a combination of Comply System and Admin properties to finely control restriction for agreement documents generated in PDF format.

Note: PDF Security cannot be enabled for PDFs created during check-in from X-Author. The following instructions only apply to *generated* PDFs,

Understanding PDF Security

When you enforce security on a PDF document, you typically have the option of enabling or disabling certain restrictions. To view the set of possible restrictions for a PDF from Acrobat Reader, go to **File > Properties**. You can view the current restrictions under "Document Restrictions Summary."

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



You can control the following document restrictions for PDFs generated in Apttus Contract Management:

- Printing
- Changing the document
- Content Copying
- Document Assembly
- Commenting
- Filling of form fields

> All generated PDFs user 128-bit AES encryption.

To enable PDF security for generated agreement documents

1. Go to **Setup > Develop > Custom Settings**.
2. Click **Manage** next to *Comply System Properties*

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

3. Click **Edit** next to *System Properties* and do the following:
    a. Select **Enable PDF Security**.
    b. Enter a desired value for **PDF Owner Password**.
    c. Click **Save.**

    All generated PDFs will now have security enabled. Consult the following table to understand which restrictions are enforced with this setting.

Restriction	Description	Enable PDF Security Default
Printing	Allows user to print the document.	True
Changing the Document	Allows the user to edit the document (edit pictures and text).	False
Content Copying	Allows the user to copy text and graphics from the document.	True
Document Assembly	Allows the user to assemble the document	False
Commenting	Allows user to add comments.	True
Filling of form fields	User can fill in form fields	True

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Workflow

- **Creating New Workflow Rule**
  Workflow rules give you the ability to enforce key business processes easily without needing to write any code. You can automate your organization's standard processes by configuring workflow rules.
- **Validating Workflows**
  After creating a new workflow rule, you must validate the workflow. Once validated, you will receive a confirmation email.

Creating New Workflow Rule

Workflow rules give you the ability to enforce key business processes easily without needing to write any code. You can automate your organization's standard processes by configuring workflow rules.

To create new rules, refer to the following standard Salesforce Help:

1. Selecting the Agreement object to which the workflow rule applies
2. Configuring the workflow rule settings and criteria
3. Configuring the workflow actions
4. Activating the workflow rule

Watch a demo: Creating a new workflow rule.

Automating the Process Through Workflow Rules

In this fast-paced world time is money for your organization. You can save time by automating the processes by configuring workflow. Also, you can help make operations more efficient with standardized internal procedures and automated business processes.

To automatically perform the procedures and processes, you must do settings based on your workflow requirements.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Design workflow actions, and then configure workflow rules, and approval processes that determine the conditions under which actions are executed.

Workflow is a series of activities that automates the following types of actions:

Actions	Description
Tasks	A task is a type of workflow action by which you can determine the details of an assignment given to a specified user by a workflow rule or approval process. Create tasks and then associate them with the workflow rules or approval processes that will trigger them. When a workflow rule or approval process meets the business conditions that you set up, any tasks associated with it are assigned to designated users with the Subject, Status, Priority, and Due Date of the workflow task.
Email Alerts	Email alerts are emails generated by a workflow rule or approval process and sent to intended recipients whenever specific business actions trigger the workflow rule or approval process. Email alerts contain the standard text and list of recipients for an email. It is recommended that you specify an email template for email alerts.
Field Updates	Field updates are actions associated with workflow rules or approval processes. With Field updates, you can automatically specify a field value.
Outbound Messages	Outbound messages send a secure configurable API message in XML format to a designated listener. For example, automatically initiate the reimbursement process for an approved expense report by triggering an outbound API message to an external HR system.

To create a workflow task

1. Click **Create > Workflow & Approvals > Tasks**.
2. Click **New Task**.
3. Select a record type and click **Next**.

> **Note**

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

You can associate Task with workflow rules or approval processes for the same object type.

4. Perform the following steps to configure the task:
    a. Select an **Assignee**.
    b. Enter a subject for the task.
    c. Enter a **Unique Name**.
    d. Specify a due date, status, and priority.
    e. Check **Notify Assignee** to send an email notification when the task is assigned.
    f. Check **Protected Component** to mark the task as protected.
    g. Enter any comments to add to the task.
    h. Click **Save**.

To create email alerts

1. Click **CreateWorkflow & ApprovalsEmail Alerts**.
2. Click **New Email Alert**.
3. Perform the following steps to configure the email alert:
    a. Enter a Description.
    b. Enter a Unique Name.
    c. Select the Object for the email alert.

    Note

    This is used when you generate merge field values for email templates with workflow rules and approval processes. Also, you can define the recipients of this email alert using contact and user lookup fields that are relevant to that object.

    d. Choose an email template from the lookup.
    e. If required, select the **Protected Component** check box to mark the alert as protected if it is part of a Managed - Released package.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

f. From the Recipient Type list, select who all (type of users) should get your email alerts.

g. From the Available Recipients list, select the recipients who should receive this email alert in the Available Recipients list and click Add to include in the Selected Recipients list.

h. Enter up to five additional email addresses.

i. Use the From Email Address field to the email address of the default workflow user.

> **Note**
>
> Selecting Make this address the default From email address for this object's email alerts overrides the From Email Address for all email alerts associated with that object.

j. Click **Save**.

To define field updates

1. Click **CreateWorkflow & Approvals Field Updates**.
2. Click **New Field Updates**.
3. Perform the following steps to configure the field update and complete the workflow:
   a. Enter a **Name** and **Unique Name** for this field update.
   b. Type the Description for the filed that you need to update.
   c. Select the object for the associated field to update and click **Next**.
   d. To re-evaluate the workflow rules on the selected object after the field update is done, select the **Re-evaluate Workflow Rules After Field Change** check box.
   e. Under the Specify New Field Value section, select an appropriate options from the list of available options based on the Field to Update selection.
   f. Click **Save**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Validating Workflows

After creating a new workflow rule, you must validate the workflow. Once validated, you will receive a confirmation email.

To validate a workflow

1. Navigate to the **Agreements** tab and click **New**.
2. Select a record type for the new agreement and click **Continue**.
3. Type a mandatory **Agreement Name** and enter a mandatory **Account**.
4. From **Select Category**, select *In Effect*. Based on your selection from the **Select Category**, the **Status** pick list is auto-populated.
5. From **Status**, select *Activated*.
6. Click **Save**.

This saves the edited values and triggers the workflow. If your email is set for the Owner of the agreement type, you will receive an email.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Retention Policies

A retention policy determines the length of time a record must be stored. Generally, organizations will apply retention policies to all records sharing certain characteristics. These characteristics can include, but are not limited to, record type, region and owner.

The following sections describe how to create Retention Policies for your agreement records and how to configure record purges based on your business needs:

- **Retention Policies**

  The Retention Policy object contains the policy details. The policy specifications are contained in an XML format and maintained using a Visualforce page. The policy header information is maintained using a standard Salesforce page. For details on the Retention Policy XML schema, refer Apttus Retention Policy Schema.

- **Retention Date**

  The retention date calculation is done periodically using a batch apex class. The batch apex sequences through all the active retention policies, select applicable business objects using the filters, compute the retention date and update the object.

- **Record Retention Authorized Users**

  You can use the RecordRetentionUsers public group to identify the users who are recipients of the purge notification report and authorized to selectively purge records.

- **Purge Notification**

  You can schedule a report to run periodically to identify records eligible for purging. The retention date field in the agreement provides the selection criteria. A sample report is provided which can use be used as the basis for creating the report.

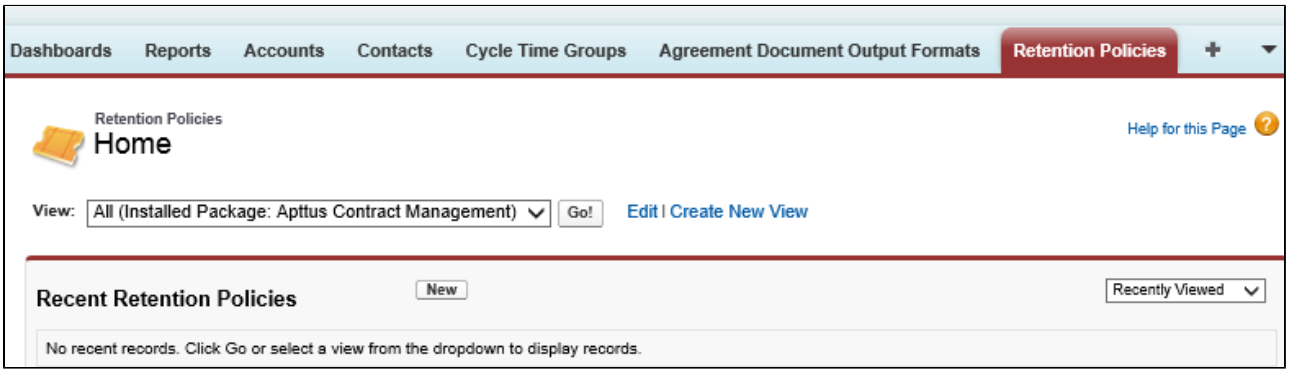
- **Purge Agreements**

  The Purge Agreements Visualforce page allows the authorized user to search records eligible to be purged based on the retention date combined with other filter criteria. It also provides a scrollable record set to view.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Creating Retention Policies

The Retention Policy object contains the policy details. The policy specifications are contained in an XML format and maintained using a Visualforce page. The policy header information is maintained using a standard Salesforce page. For details on the Retention Policy XML schema, refer to Apttus Retention Policy Schema.



A Retention Policy contains several fields (see table), which store information about the policy specifications to support agreements and business objects.

Field Name	Description	Values/Notes
Policy Name	Policy name	Required – user entered
Description	Description of the policy	
Business Object	Indicates the business object governed by the policy	Required – Apttus__APTS_Agreement__c
Policy Spec	The policy specification	Maintained by a VF page
Sequence	The policy sequence	Required
Active	Indicates whether the policy is active	

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

		Inactive policies are ignored. This is selected by default

The policy specification is maintained using a Visualforce page. The policy header fields such as Name, Description, Sequence, Active indicator and so on, can be maintained using a standard Salesforce page.

To create a retention policy

User Permissions Needed	
To create and edit retention policies:	Retention Policy: Create, Edit. Agreement: Edit.

1. Click **Retention Policies > New**.
2. Enter details in one or more required fields and click **Save**. Optionally, you can click **Save & New** to save and create new retention policy.

Name	Policy for NDA, CDA contracts
Sequence	2
Business Object	APTS_Agreement__c

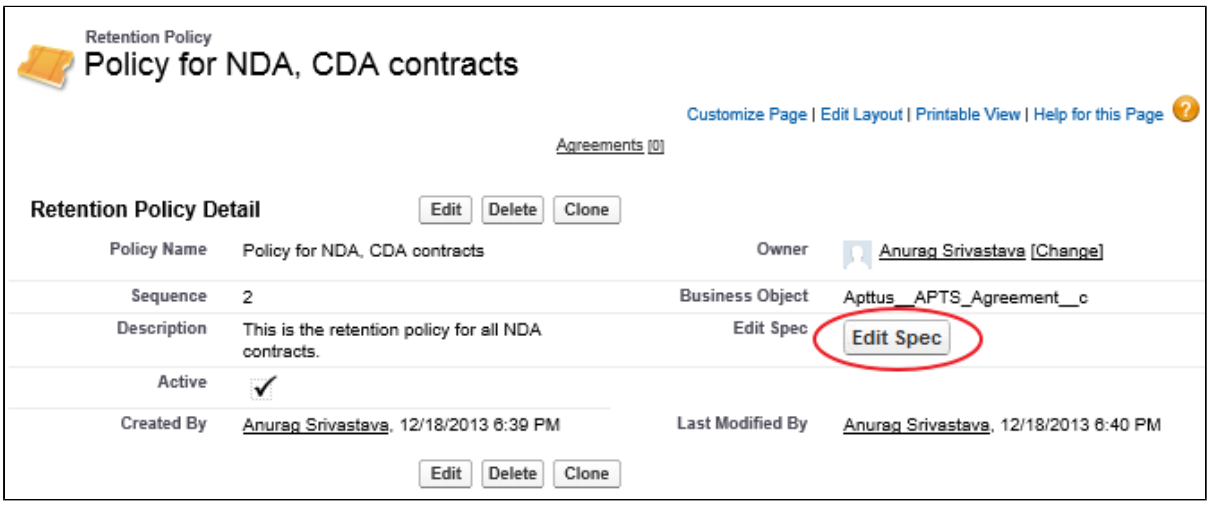
A retention policy is created and added to the Recent Retention Policies list.

To edit a retention policy

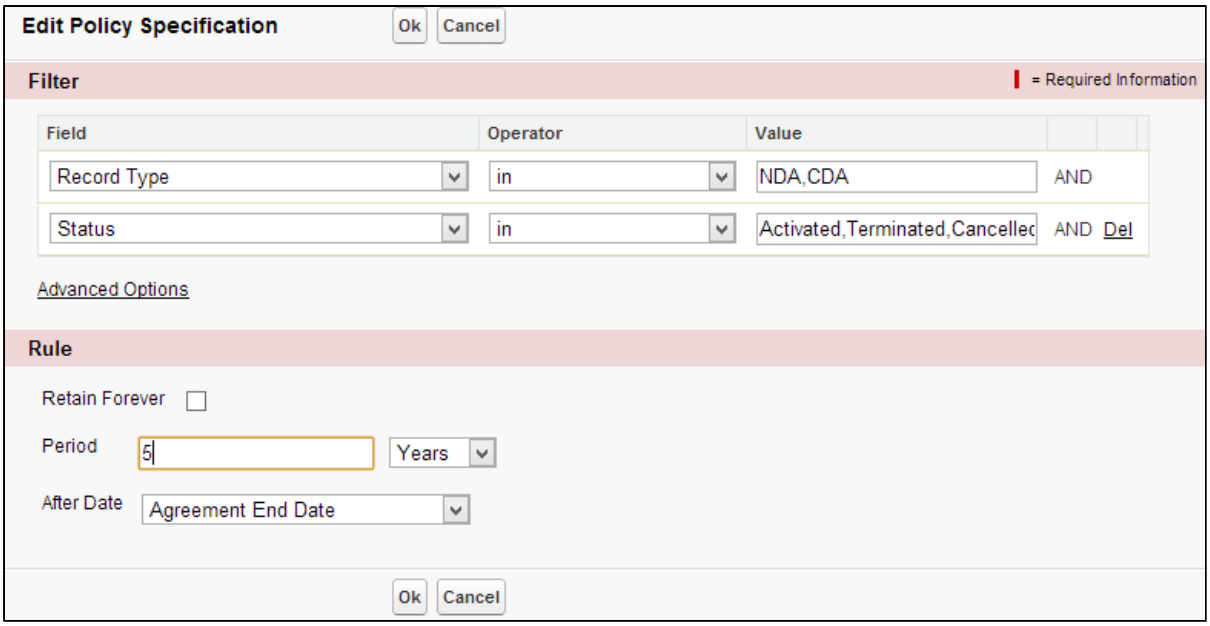
A retention policy must have been already created.

1. Click **Retention Policies** and select the policy which you need to edit by clicking on the policy name link.
2. To edit the retention policy specifications, click **Edit Spec** in the policy detail page.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



3. Set filters and rules and click **Ok**.



The *RetentionPolicyEdit* Visualforce page enables the filter creation and a rule according to the Apttus Retention Policy Schema.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Calculating Retention Date

The retention date calculation is done periodically using a batch apex class. The batch apex sequences through all the active retention policies, select applicable business objects using the filters, compute the retention date and update the object.

An activity history record is written to the agreement with the policy information. The process terminates on two conditions- when either there are no more business objects to process, or all the policies have been applied. The process is scheduled using the RetentionDateCalcJobScheduler Apex scheduler class. Due to governor limits, each policy processes a maximum of 5000 records during each invocation.

To calculate a retention date

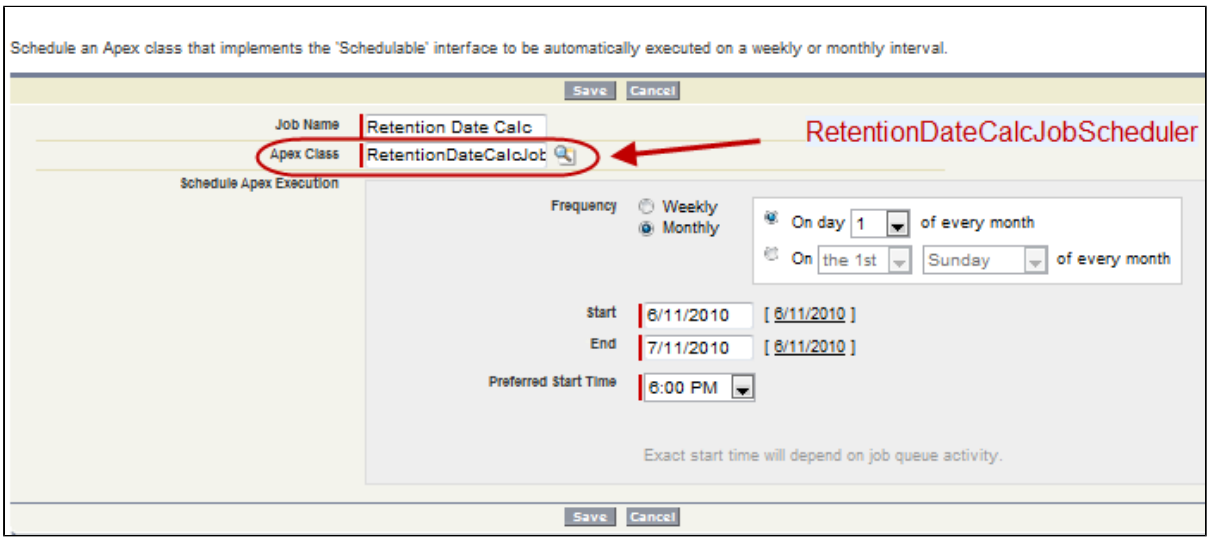
A Retention Policy must have been created.

1. Click **Setup > Develop > Apex Classes > Schedule Apex**.
2. Enter the following information to configure the job parameters.

Job Name	Retention Calc Job
Apex Class	RetentionDateCalcJobScheduler
Frequency	<*as appropriate*>. Specify how often the Apex class is to run: • **For Weekly**—specify one or more days of the week the job is to run (such as Monday and Wednesday). • **For Monthly**—specify either the date the job is to run or the day (such as the second Saturday of every month.)

3. Specify the start and end dates for the Apex scheduled class. If you specify a single day, the job only runs once.
4. Specify a preferred start time. The exact time the job starts depends on service availability.
5. Click **Save**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

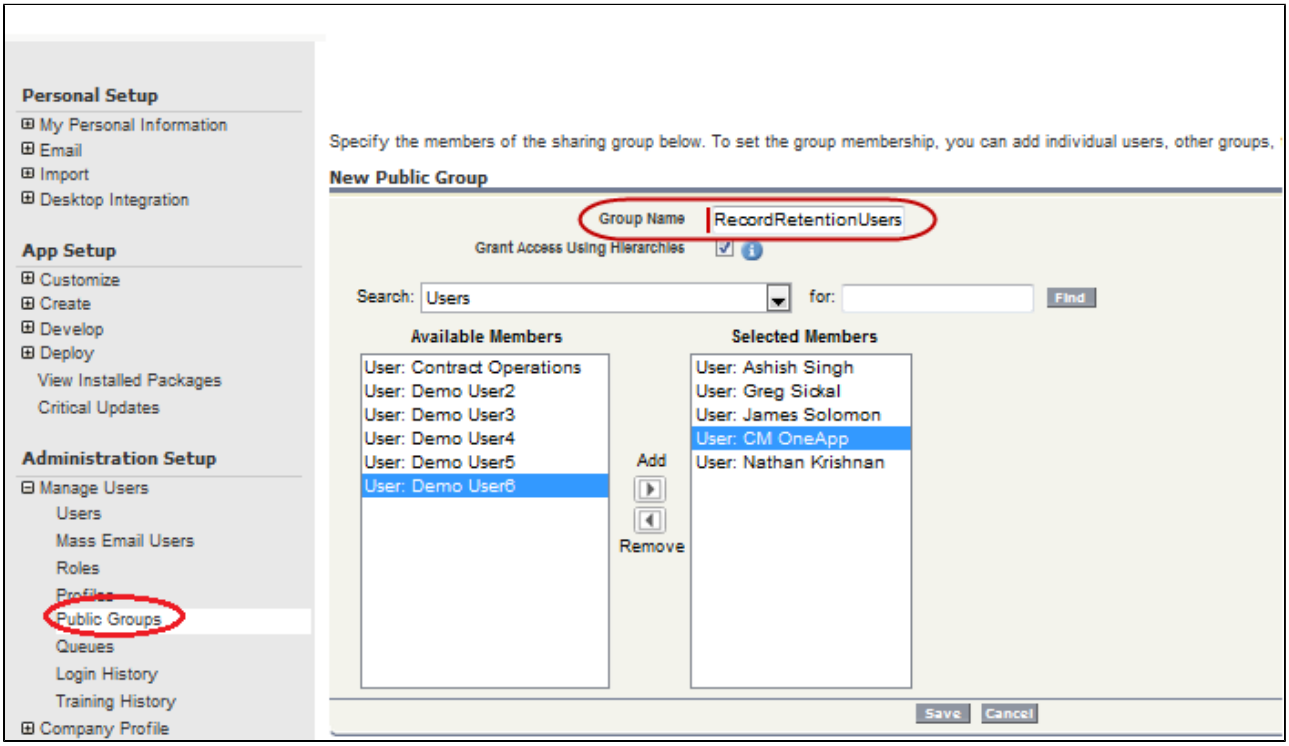


- After you have done the job of calculating a retention date, you can monitor the progress of the job on the All Scheduled Jobs page.
- Once the job has completed, you can see specifics about the job (such as whether it passed or failed, how long it took to process, the number of records process, and so on) on the Apex Jobs page.

Record Retention Authorized Users

You can use the RecordRetentionUsers public group to identify the users who are recipients of the purge notification report and authorized to selectively purge records.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Sending Purge Notification

You can schedule a report to run periodically to identify records eligible for purging. The retention date field in the agreement provides the selection criteria. A sample report is provided which can use be used as the basis for creating the report.

The report can be emailed to Record Retention Authorized Users to allow them to selectively purge records.

User Permissions Needed to Build a Report	
To create, edit, and delete reports	Create and Customize Reports
	AND
	Report Builder

To send purge notification, perform the following:

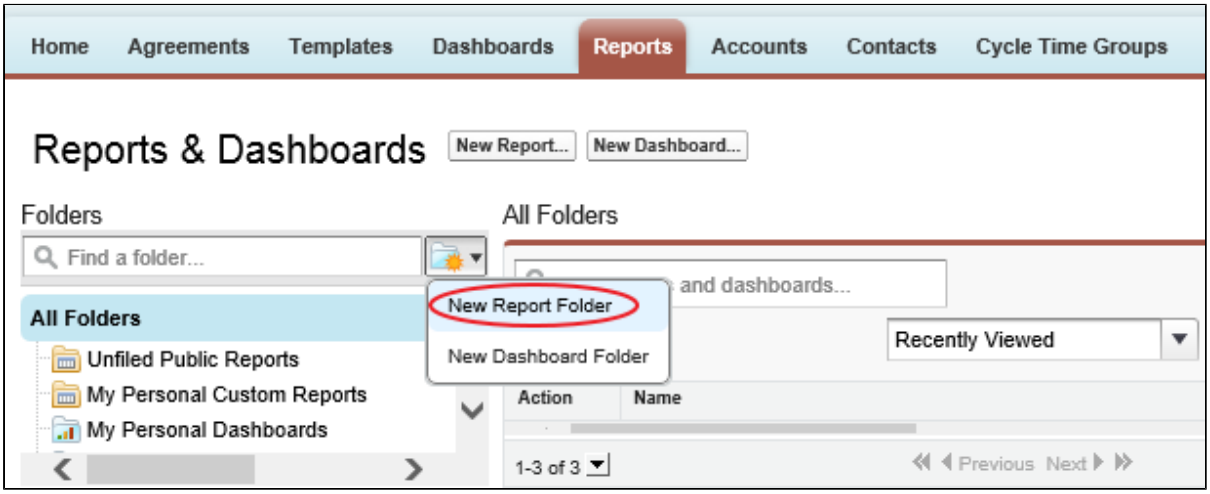
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- Create a public folder to hold the purge notification report
- Create a new report using the report builder
- Edit report properties and save the report
- Schedule the report and send notification

To create a public folder

User Permissions Needed	
To create, edit, or delete public document folders:	“Manage Public Documents”
To create, edit, and delete public email template folders:	“Manage Public Templates”
To create, edit, and delete public report folders:	“Manage Public Reports”
To create, edit, and delete public dashboard folders:	“Manage Dashboards” AND “View All Data”

1. Go to the **Reports** tab.
2. Click **New Report Folder**.



3. Enter a **Report Folder Label**. For example, Record Retention Report.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

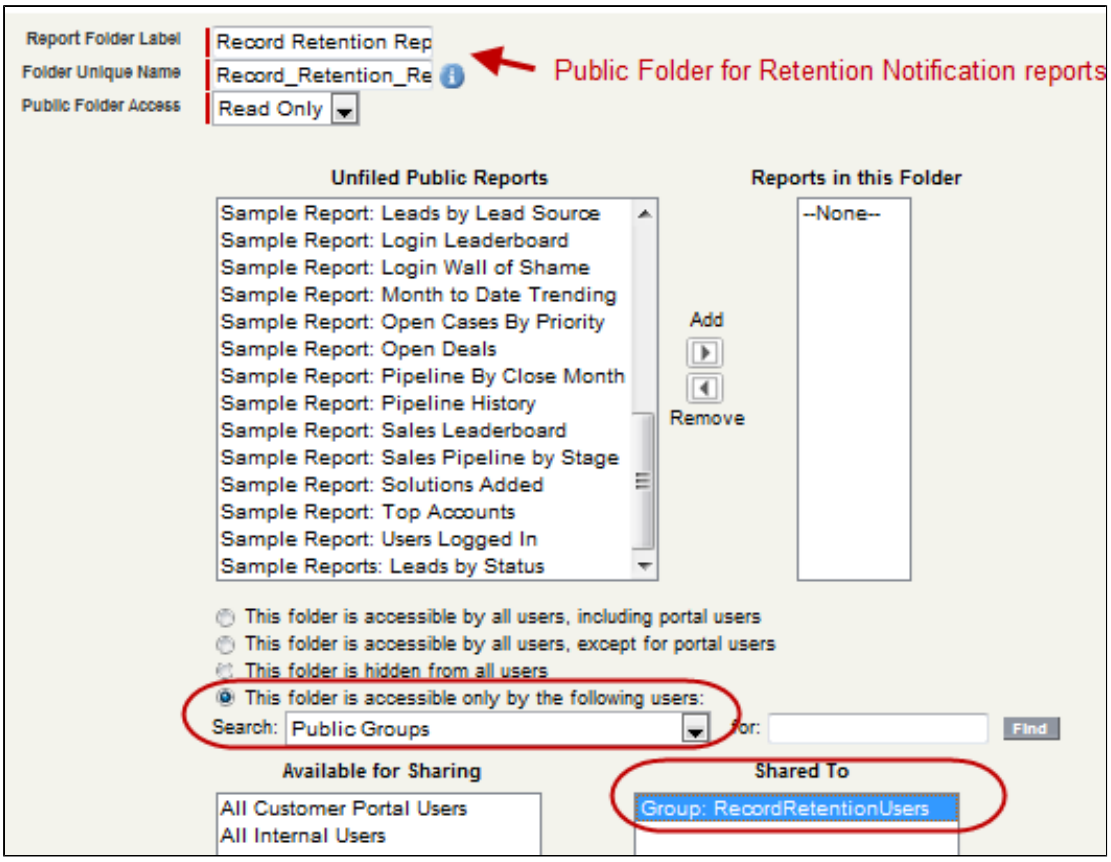
4. The **Folder Unique Name** is entered automatically when you type the folder label. If you have the Customize Application permission, enter a unique name to be used by the API and managed packages.
5. Choose a **Public Folder Access** option. Select read/write if you want users to be able to change the folder contents. A read-only folder can be visible to users but they can't change its contents.
6. Select an unfiled report, dashboard, or template and click **Add** to store it in the new folder. Skip this step for document folders.
7. Choose a folder visibility option.
8. Choose **Public Groups** from the Search drop-down list.

   > **Note**
   >
   > When you share a folder with a group, managers of the group members have no access to the folder unless those managers are also members of the group.

9. If the Available for Sharing list does not immediately display the desired value, enter search criteria and click **Find**.
10. Select the desired value from the Available for Sharing list and click **Add** to move the value to the Shared To list.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

11. Click **Save.**



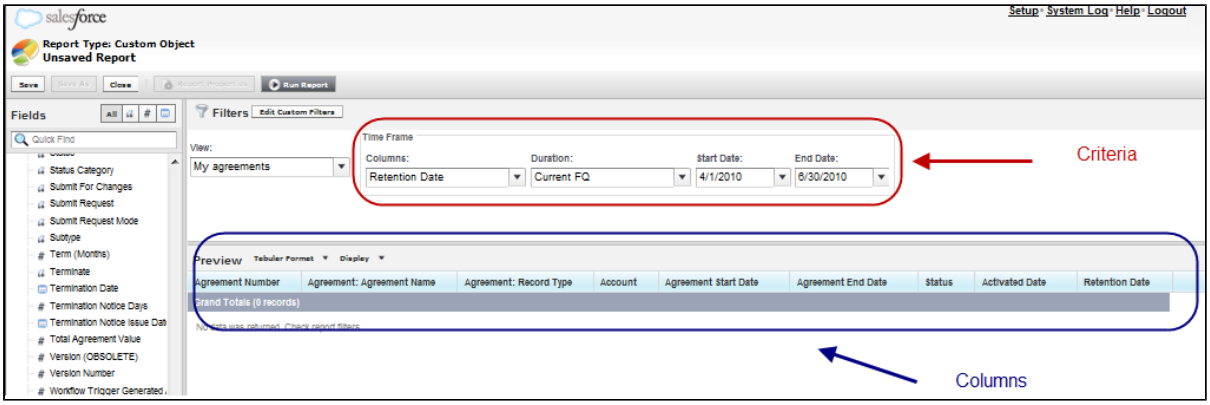
A folder is created. You can create a new report using Report Builder.

To create a new report using the report builder

1. On the Reports tab, select the report type and click **Create**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

2. Enter the Filters and Fields details as:

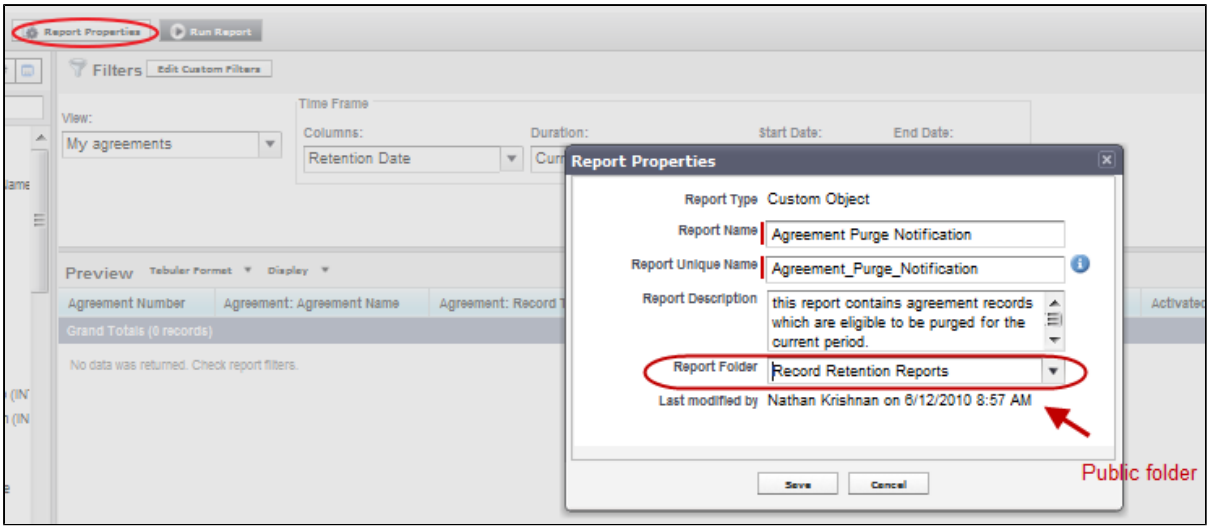


3. Add, reorder, and remove columns, summary fields, formulas, groupings, and blocks to customize and preview your report. Change the report format and display options, or add a chart. The preview shows only a limited number of records. Run the report to see all your results.

You have created report fields and filters, and previewed your report with some of the data. You can edit report properties.

To edit report properties

1. On the Reports tab, select the report and click **Edit**.
2. Click the **Report Properties** tab.
3. Edit the report properties and click **Save**.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

A report is edited and saved. You can also schedule the report.

To schedule a report

You must have the Schedule Reports permission to schedule reports.

1. On the Reports tab, click an existing report name.
2. From the Run Report drop-down, click **Schedule Future Runs**. If you're creating a new report, you are asked to save the report with a name and in a folder before scheduling.

3. On the Schedule Report page, specify a Running User who has access to the folder where the report is stored.

> **Note**
>
> - If the running user becomes inactive, the report is not run. The system administrator receives an email notification to either activate the user, delete the report schedule, or change the running user to an active one in the scheduled report.
> - The access level of the running user determines what other users, including portal users, see when they receive the scheduled report run results. You need the "View All Data" permission to specify a running user other than yourself.

4. Select an email setting:

Select	To
To me	Send the report to your email address specified on your user profile.
To me and/or others	Email the report to additional users.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

You can send reports only to email addresses included on Salesforce user records. When portal users receive emailed reports, they see the same data as the running user set in the report schedule. If you have information you'd rather not share, schedule the report to run with a portal user as the running user.

> **Note**
>
> Portal users receive report and dashboard refresh email notifications when the Allow Reports and Dashboards to Be Sent to Portal Users option is enabled.

5. Set the frequency, duration, and time for running the report.
   - In the Frequency field, select Daily, Weekly, or Monthly and then refine the frequency criteria.
   - Using the Start and End fields, specify the dates during which you want to schedule the report. To enter the current date, click the link showing the date.
   - Next to Preferred Start Time, click **Find available options** to choose a start time.

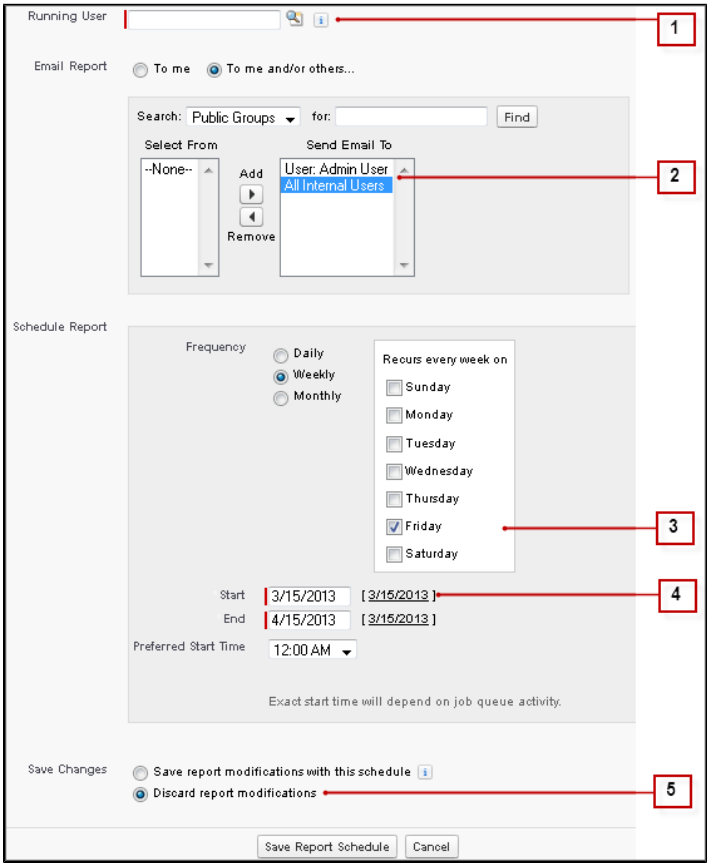
   Your preferred start time might not be available if other users have already selected that time to schedule a report.
6. Click **Save Report Schedule**. You can choose the following:

Choose	To
Save report modifications with this schedule	Save both the report schedule and changes you made to the report.
Discard report modifications	Save the schedule only. Changes you made to the report are discarded.

   Report recipients can click the report name in emailed reports to log in to Salesforce and view the report directly.

A report is scheduled to run every Friday at midnight, and its results are emailed to a selected group and user.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

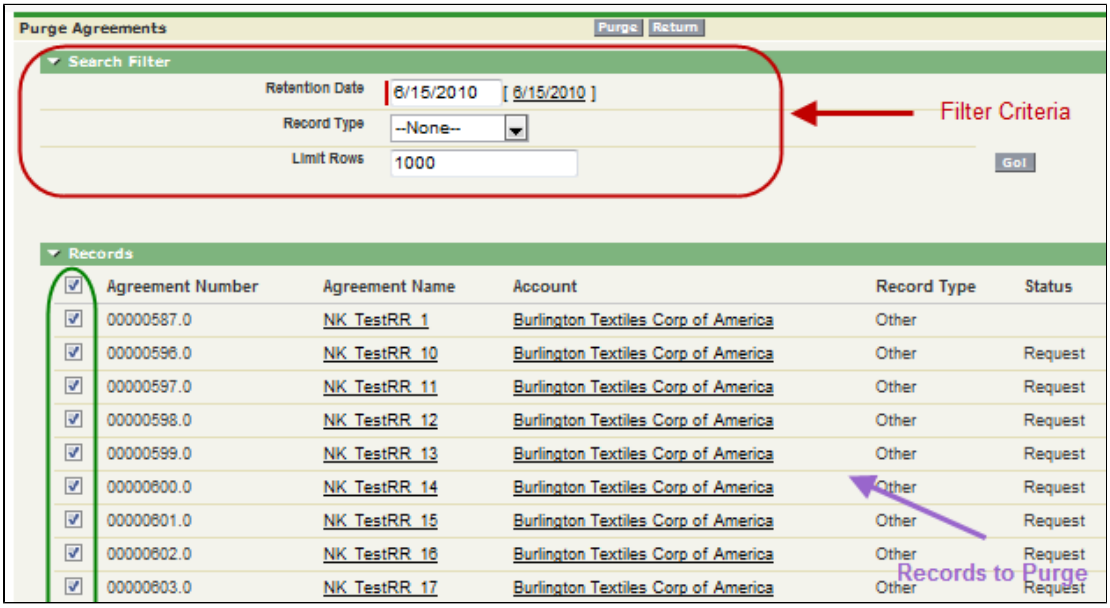


1. All users, including portal users, viewing the scheduled report see the report data that Running User's access level allows.
2. Report run results are set to be emailed to a public user group called All Internal Users and the admin user.
3. The report is scheduled to run every Friday.
4. The report run is scheduled to start on the current date.
5. The schedule is saved without saving prior changes made to the report.

About Purge Agreements

The Purge Agreements Visualforce page allows the authorized user to search records eligible to be purged based on the retention date combined with other filter criteria. It also provides a scrollable record set to view.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



To access the page, click **+** and select Purge Agreements.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Agreement Explorer Reports

Agreement Explorer is a powerful search and reporting feature that allows you to search for records in the Agreement object through the use of configurable and reusable search reports. This feature complements standard reporting views to satisfy the demands of many Apttus customers who require more powerful, specific search results and related exports to Excel to satisfy their business needs. Agreement Explorer expands your access to agreements by providing reusable searches with configurable field sets and filtered lists for multiple contexts associated with agreements. You can use these reports to discover and expose record lists for agreement searches, the hierarchies of agreements and accounts, and a combination of account hierarchies and the individual account's related agreement hierarchies. Users can create published lists of available reports, which can then be complemented by users creating and saving their own public or private ad-hoc reports. The resulting reports can be exported to Excel.

Understanding Agreement Explorer Report Types

The key to understanding how to create and use Agreement Explorer reports effectively is to understand the application types assigned to each report. When you create an Agreement Explorer report as an administrator, you are required to define the context (type). The type determines the list of records and hierarchy displayed in the results available to the user. There are three types available for reports:

Report Type	Report Location	Description
Agreement Search	Agreement Explorer Tab	Returns a filtered list of agreement records. For example, return all the agreements filtered by Status Category and Status. These results do NOT display Agreement Hierarchy.
Agreement	Agreement Record, Agreement Explorer Tab	Returns a filtered, hierarchical list of agreements with the current record highlighted. Records in this list represent a hierarchy of parent and child agreements with the current record as context.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Report Type	Report Location	Description
Agreement Hierarchy by Account (s)	Agreement Record, Account Record, Agreement Explorer tab	Returns a filtered, hierarchical list of agreements associated with one or more chosen account records. Records in this list represent a hierarchy of parent and child agreements for all specified accounts.

For more detailed information on how to run, use and maintain Agreement Explorer reports, please refer to Agreement Explorer section in the *Contract Management User Guide*.

Adding Agreement Explorer Buttons to Page Layouts

To enable default Agreement Explorer reports to be run from Agreement or Account records, an administrator must add custom buttons to the Agreement and Account object page layouts. Users and administrators use these custom buttons to run existing reports or to create "ad hoc" reports as required.

The following custom buttons must be added to their respective layouts:

1. Add two (2) buttons to the Agreements page (Agreement Page Layout):
    a. **View Agreement Hierarchy**
    b. **View Hierarchy for Account**
2. Add one (1) button to the Accounts page (Account Page Layout): **View Hierarchy for Account**

All custom buttons are already provided with installation of the Apttus Contract Management package. For information on how to add Custom Links and/or Buttons to object page layouts, please refer to Salesforce documentation on Customizing Page Layouts and Customizing Search Layouts.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

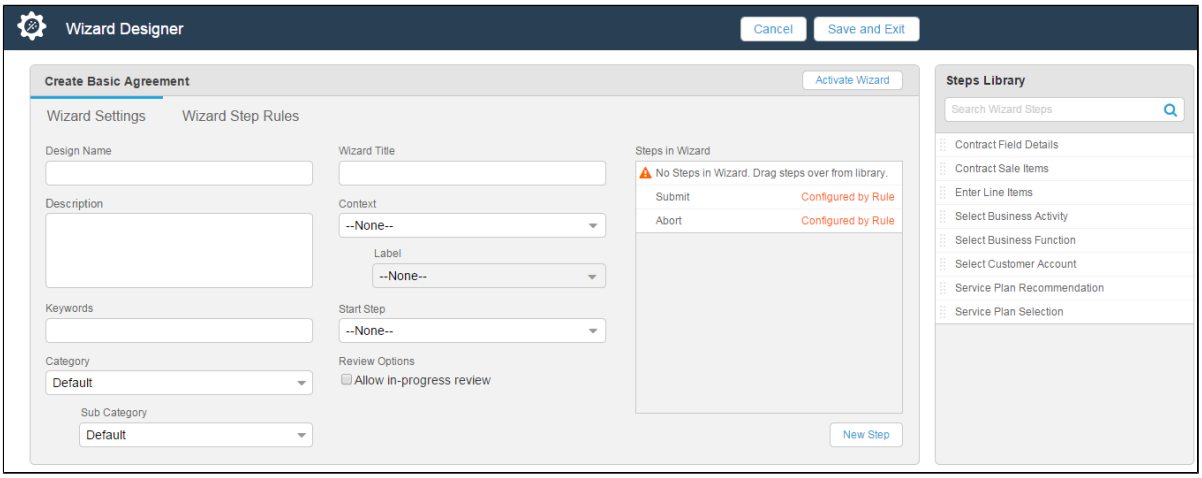
Contract Wizard

Use the Apttus Contract Wizard to design and deploy custom user-friendly Wizards based on **Accounts, Opportunities, Quotes/Proposals, Agreements** and other **custom Salesforce objects**. These Wizards are intended to be used by your sales representatives, purchasing agents, HR managers and other users to quickly create their own records by entering responses to criteria-based inputs that follow a logical series of steps. Wizards can also be used to collect data from customers to be posted to internal systems or for other business use.

As an administrator, the wizards you create are stored as Wizard Designs. Wizard Designs are comprised of a series of Inputs and Steps, governed by rules that determine the flow and resultant values of the Wizard.

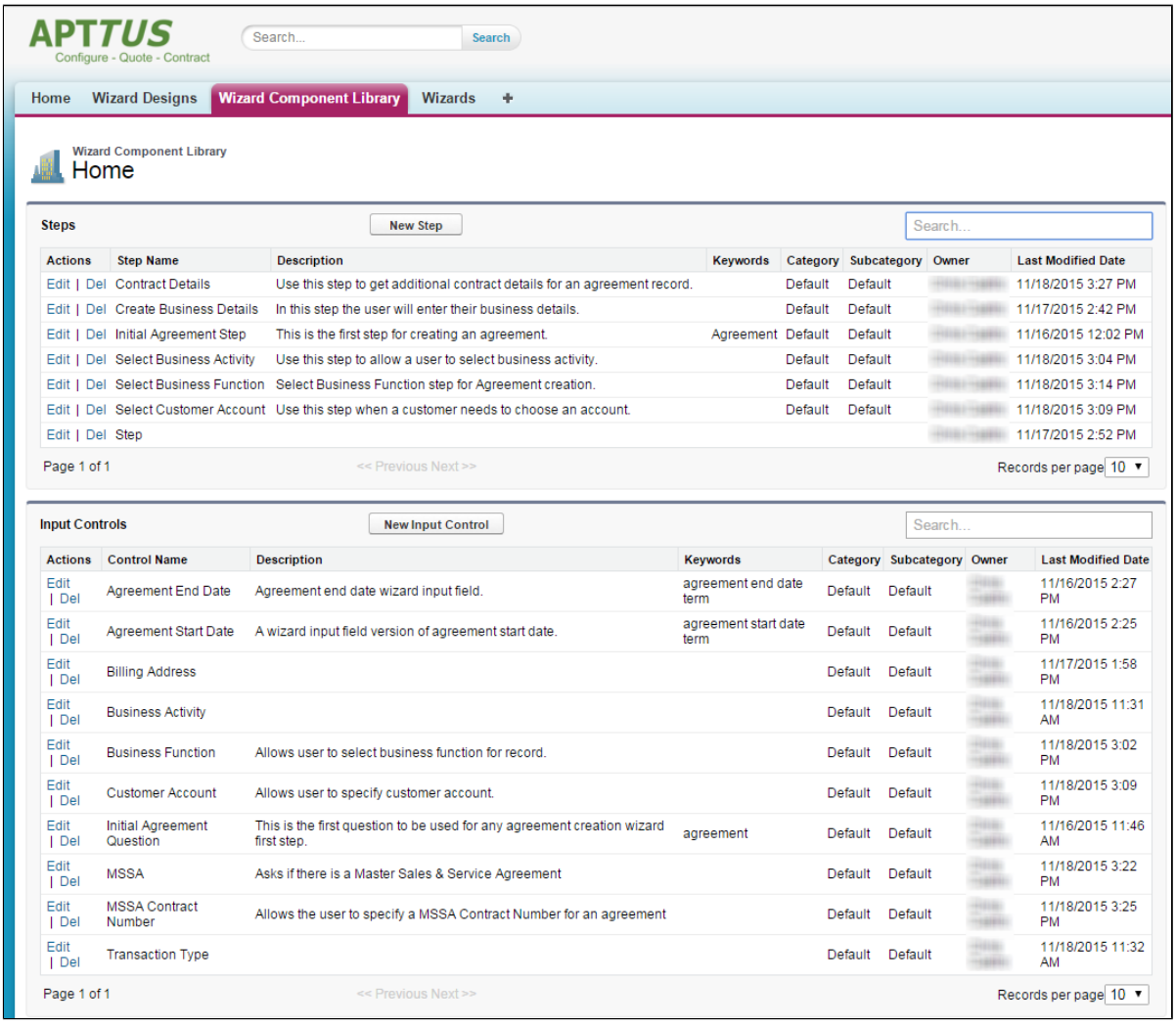
The Contract Wizard is comprised of three tabs:

- **Wizard Designs** – Use this tab to create new Wizard designs or edit existing Wizard designs. You assemble Wizards using the Wizard Designer tool, adding **Inputs** and **Steps** from the Wizard Component Library or creating instances for use with specific designs. You can design rules for your Inputs based on criteria or values from other Inputs, configure the flow for your Steps by creating and organizing Wizard Steps rules, and preview Steps and Inputs as needed while finalizing the Wizard Design. When you are finished with a design, you can activate it for use from the Wizards tab.



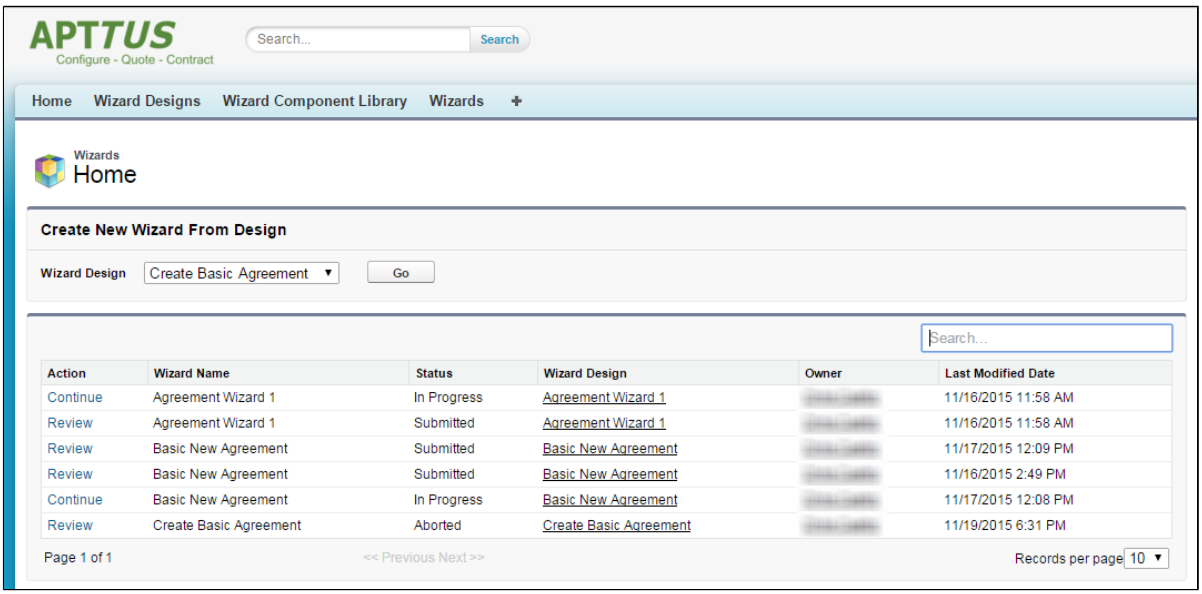
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- **Wizard Component Library** – Use this tab to create reusable **Inputs** and **Steps** for your Wizard Designs. Separate, searchable libraries for both Inputs and Steps can be created and maintained. Metadata on Inputs and Steps in the library allow you to categorize and keep track of when Inputs and Steps are created or modified.



- **Wizards** – Use this tab to run Wizards created from the Wizard Designer. Your end-users will be able to easily search and select from Wizard designs to create well-formed records. Wizards are presented to users in a questionnaire style, allowing them to view and preview their progress with sidebar navigation and a review summary, returning to previous Inputs and Steps to make changes or corrections. Users can also use the tab to resume completion of in-progress Wizards or review completed or aborted Wizards.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Getting Started with the Wizard Designer

A Wizard Design can be as complex or simple as required, allowing your users to create a basic records or populate second and third-level items conditionally based on input or step rules.

A Wizard Design is comprised of the following key components:

- **Inputs** – Input are the primary wizard component of any wizard. They are the questions and instructions that you provide to the end users of the wizard at runtime. The values received from the end user are stored as Inputs. For example, you might create an input that requires users to select options from a picklist, such as a Business Function or Agreement Start and End dates. Inputs are reusable, so you can use them in as many steps as you want to.
- **Steps** – Inputs are placed in Steps in the desired sequence for runtime use. Steps will also contain rules which are used to designate the navigation flow, the object and submission actions, which are determined and executed based on the end user responses at runtime.
- **Step Input Rules** – These rules allow you to configure rules and expressions for your Inputs at Wizard runtime. Input rule types can be configured to enable/disable or show/hide Inputs, or to conditionally determine the focus object of the Wizard (e.g., Agreement) or conditionally determine the record type for the focus object's record to be created (e.g., SOW, NDA, MSA, etc.), or to set the value of one input based on the value of other inputs.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- **Wizard Step Rules** – These rules control the flow of Wizard steps at runtime. You can create "GoTo" rules for your steps which determine step order in the Wizard based on runtime user responses. The rules you create can be assigned as default for individual steps and can be made conditional based on expressions you create for each rule, using values from Inputs to determine whether or not rules are fired for any given step.

The following sections describe the Wizard design process, from initial settings to input and steps, including guidance on how to create your own Inputs and Steps during design and how to use and maintain the Wizard Component Library. The Agreement object is used as the focus object in most Wizard examples, but the same instructions can be used to create a Wizard based on **Account, Opportunity** or any **custom Salesforce object**.

Creating a New Wizard Design

The following sections describe the Wizard Design process. The process is comprised of several steps:

- Configure Wizard Settings and Add Steps
- Create Steps for the Wizard (optional)
- Configure Step Input Rules
- Configure Wizard Design Step Rules
- Activate the Wizard

Configuring Wizard Settings

The first step in designing a Wizard is to define the basic settings for your Wizard, including the name, description and other search properties, as well as the **Context** (for one Object or All Objects) and the **Start Step**.

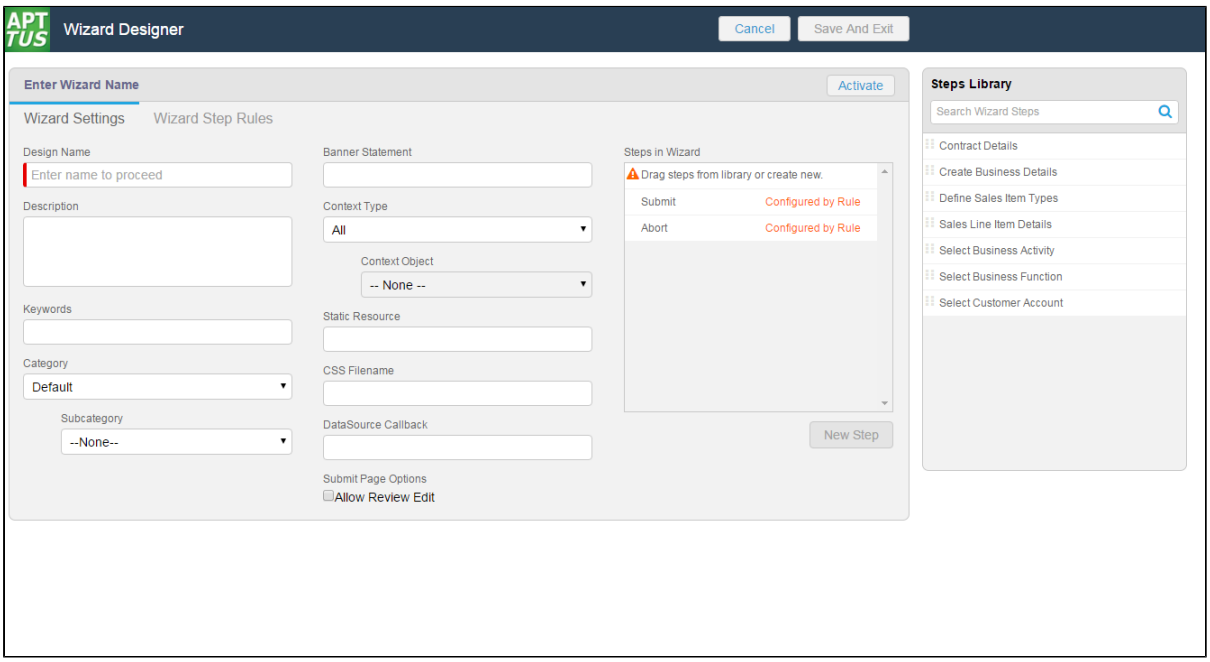
In this step you also define the Static Resource location and CSS file for any branding and/or banner logo you want to add to your Wizard (see the table below). For information on how to add static resources to your Salesforce org, refer to Salesforce documentation on Using Static Resources. Any Static Resource used with the Contract Wizard must contain all files in an **application/zip** format.

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To configure Wizard Settings

1. From the Salesforce application menu, choose **Apttus Contract Wizard**. The application displays the Home tab and three tabs unique to the Contract Wizard: Wizards, Wizard Designs and Wizard Component Library.
2. Navigate to the **Wizard Designs** tab (click **+** and add the tab if it does not already exist).
3. Click **New Wizard Design** to open a new Wizard Design form displaying fields for Wizard Settings.



4. Enter the following search properties into the form:

Setting	Description
Design Name	Enter a name for your Wizard Design. This name can be internal but is used in the runtime banner for the Wizard steps when the user is interacting with the Wizard if **Banner Statement** (below) is not defined. Note: You cannot add any steps to your Wizard Design until you choose a Design Name.
Banner Statement	Enter a Banner Statement to display at Wizard runtime when the user is interacting with the Wizard. If left blank, the **Wizard Design Name** will be used instead.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Setting	Description
Description	Enter a description for your Wizard Design which describes its intended use (for example, "Use this Wizard to create MSA Agreements for Acme.")
Keywords	Enter a list of keywords which can be used to search for this Wizard Design.
Category	Choose an option from a drop-down list of pre-defined Wizard Categories (define picklist values on the Wizard Design object).
Sub Category	Choose an option from a drop-down list of pre-defined Wizard Sub Categories (define picklist values on the Wizard Design object).
Context Type	Define whether your Wizard Design context will apply to **All** objects or a specific **Object**.
Context Object	Choose the specific context Object for your Wizard. This option is only available if you specified "Object" for Context Type. (e.g., "Agreement")
Static Resource Name	Enter the static resource name where your banner logo (must be named "**logo.png**"), foreground images (for branding of any steps) and your CSS file reside. Banner height is 50 pixels. The CSS file you provide can override any style present in the runtime wizard–the margin-left of the Title /Breadcrumbs in the banner can be modified to allow for more breathing room from where the logo is placed. How to create your static resource: 1) Place all images and .css files inside a single folder and compress them into a ZIP. 2) Go to Salesforce **Setup** and enter "Static Resources" into the **Quick Search** box. 3) Create a new *Public* Static Resource and upload the ZIP file.
CSS File Name	The name of the CSS file located in the static resource (e.g., "style.css").

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Setting	Description
DataSource Callback	Enter the name of the Callback Resource that will store values to pre-populate runtime input responses when this design is used to create a new Wizard. This resource holds the implementation class name for the callback interface. The interface contains a getData() method and returns a JSON string to pre-populate fields in the Wizard.
Allow Review Edit	Select this checkbox to enable the Wizard runtime user to edit steps during the Wizard review prior to submission.

When you determine a specific **Context Object** for a Wizard Design, the available steps listed in the **Steps Library** to the right of the form will be refreshed. Only Steps which match the Object type you selected will be displayed for use.

5. Drag-and-drop a step from the Steps Library to the **Steps in Wizard** pane. If you do not see your Step listed, use the type-ahead feature in the Search box to locate the step you want to use.

   You cannot add steps to a Wizard unless the Design Name has been entered.

6. You can take the following actions on steps you have added:
   - Hover over a step in the list and click **Edit** to edit the step settings and inputs for *this wizard design only*.
   - Hover over a step in the list and click **Delete** to remove a step from the Wizard.
   - Click and drag steps in the Steps in Wizard pane to reorder them. If you have a more complex flow to your wizard, click on **Wizard Step Rules** to configure condition-based rules for your steps (see Configuring Wizard Step Rules).

     The **Submit** and **Abort** steps system-provided and are always included in every Wizard design and cannot be modified, removed or reordered. Condition expressions can be defined to go to either step as part of a rule.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

7. Add more steps from the Step Library as described in the general sequence you want them to appear in the Wizard.
8. If you do not find the correct step in the library and need to create a new one for your wizard, see Creating Steps from the Wizard Designer.
9. Click **Save And Exit** to save your changes or click **Cancel** to discard the Wizard and return to the Wizard Designs tab.

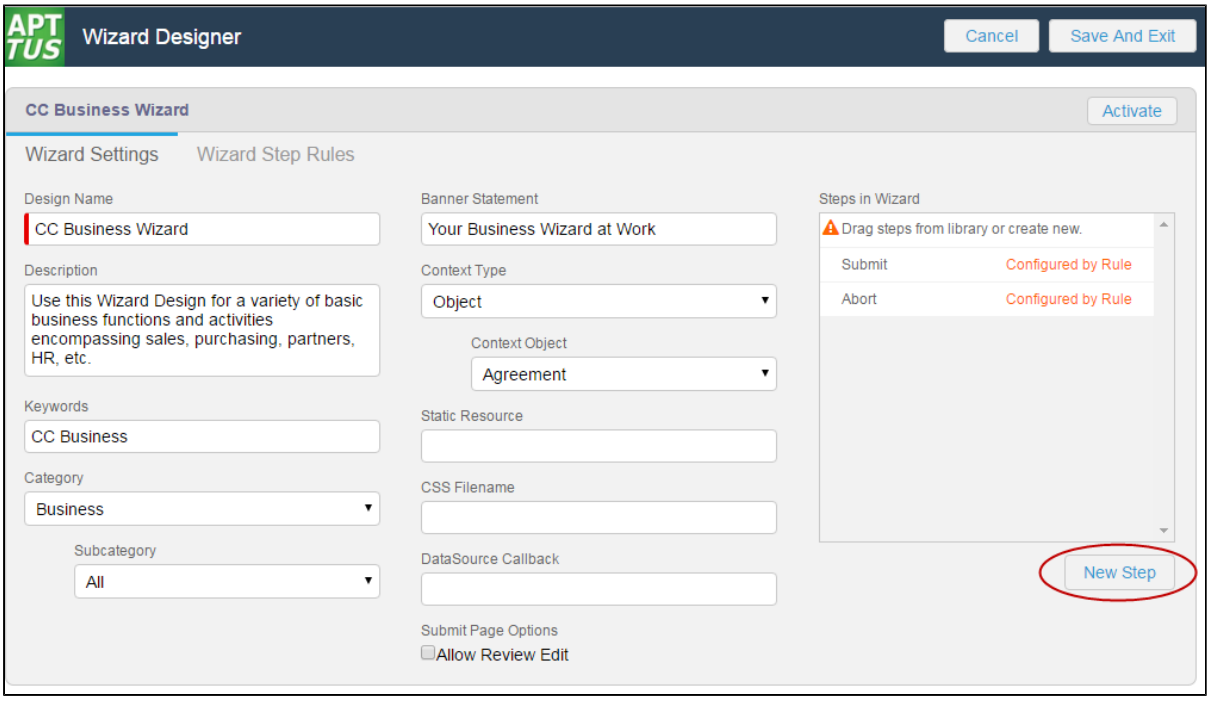
Creating Steps from the Wizard Designer

Steps are used to designate the actions that occur when end-users use the Wizard. Steps use common elements, like actions and rules, to define the flow of your Wizard. Each step represents a screen in the wizard runtime.

If the step you want to use in a Wizard design does not exist in the Steps Library, you can create one and use it with your Wizard from the Wizard Designer. Steps created in this way can be saved for use in the current Wizard design only.

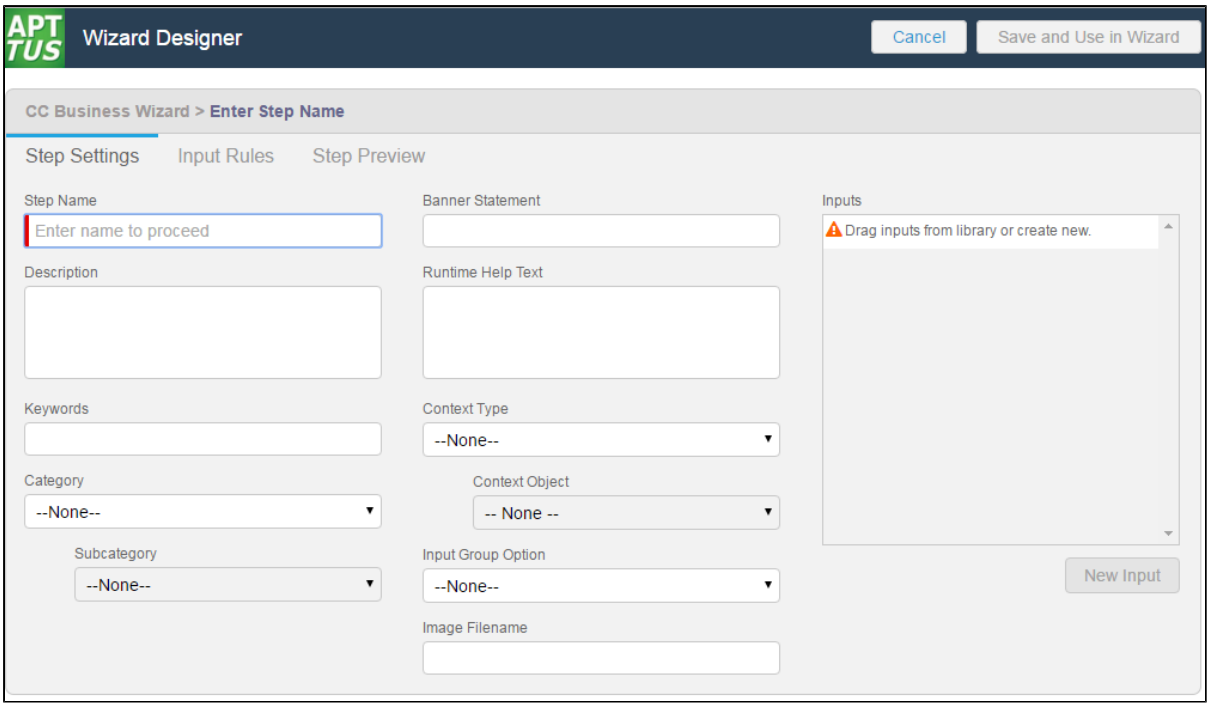
To create a new Step from a Wizard design

1. From the Wizard Designer, click on **New Step**. (Note: Your Wizard design must have a Design name before you can create a new step.)



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

The Step Settings form is displayed.



2. Enter the following properties into the form:

Step Setting	Description
Step Name	Enter a name for your Step. This name can be internal but is used in the runtime banner when the user is interacting with the Wizard if **Banner Statement** (below) is not defined. Note: You cannot add any inputs to your step until you choose a Step Name
Banner Statement	Enter a Banner Statement to display at Wizard runtime when the user is interacting with the Wizard. If left blank, the **Step Name** will be used instead.
Description	Enter a description for your step which describes its intended use (for example, "Define business details in this step.")
Keywords	Enter a list of keywords which can be used to search for this step.
Category	

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Step Setting	Description
	Choose an option from a drop-down list of pre-defined Step Categories (define picklist values on the Wizard Step object).
Sub Category	Choose an option from a drop-down list of pre-defined Step Sub Categories (define picklist values on the Wizard Step object).
Runtime Help Text	Enter text to display when the user clicks the help icon at the top of the Step page.
Context Type	Define whether your Step will apply to **All** objects or a specific **Object** .
Context Object	Choose the specific context Object for your Step. This option is only available if you specified "Object" for Context Type. (e.g., "Agreement")
Input Group Option	Select an option from the drop-down list to choose how Inputs will be displayed in the Step (as groups): **None** – Select this option to display all Inputs for the step in the sequence listed in the Inputs pane. **Repeatable** – Select this option to allow the end user to add multiple records for selected Inputs in list format. User can click the **Add Item** button to add additional values for the same group of Inputs (e.g., multiple Addresses). **Table Layout** – Select this option to allow the end user to add multiple records for selected inputs in tabular format. User can click the **Add Item** button to add additional values for the same group of Inputs (e.g. Agreement Line Item Products, Quantity, List Price, etc.)
Image Filename	Filename of the image located in the Static Resource (defined in Wizard Settings) to display in this step to the right of the input controls. For information on setting up the Static Resource, refer to Configuring Wizard Settings.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Step Setting	Description
	Note: You can only add images to steps created within a specific Wizard design. You cannot add images to steps created from the Component Library .

3. Drag-and-drop an Input from the Inputs Library to the **Inputs** pane. If you do not see your Input listed, use the type-ahead feature in the Search box to locate the Input you want to use.

   > ⓘ You cannot add inputs to a step unless the Step Name has been entered.

4. You can take the following actions on Inputs you have added: Add more inputs from the Inputs Library in the sequence you want them to appear in the step.
   - Hover over an Input in the list and click **Edit** to edit the input settings for this step only.
   - Hover over an Input in the list and click **Delete** to remove an Input from the step.
   - Click and drag Inputs in the Inputs pane to reorder them.
5. If you do not find the correct input in the library and need to create a new one to use in your step, see Creating Inputs from the Wizard Designer.
6. To create rules which govern inputs for the current step, click on **Input Rules** (see Configuring Step Input Rules from the Wizard Designer).
7. Click **Save And Use in Wizard** to save your changes or click **Cancel** to discard changes and return to the Wizard Design form.

Creating Inputs from the Wizard Designer

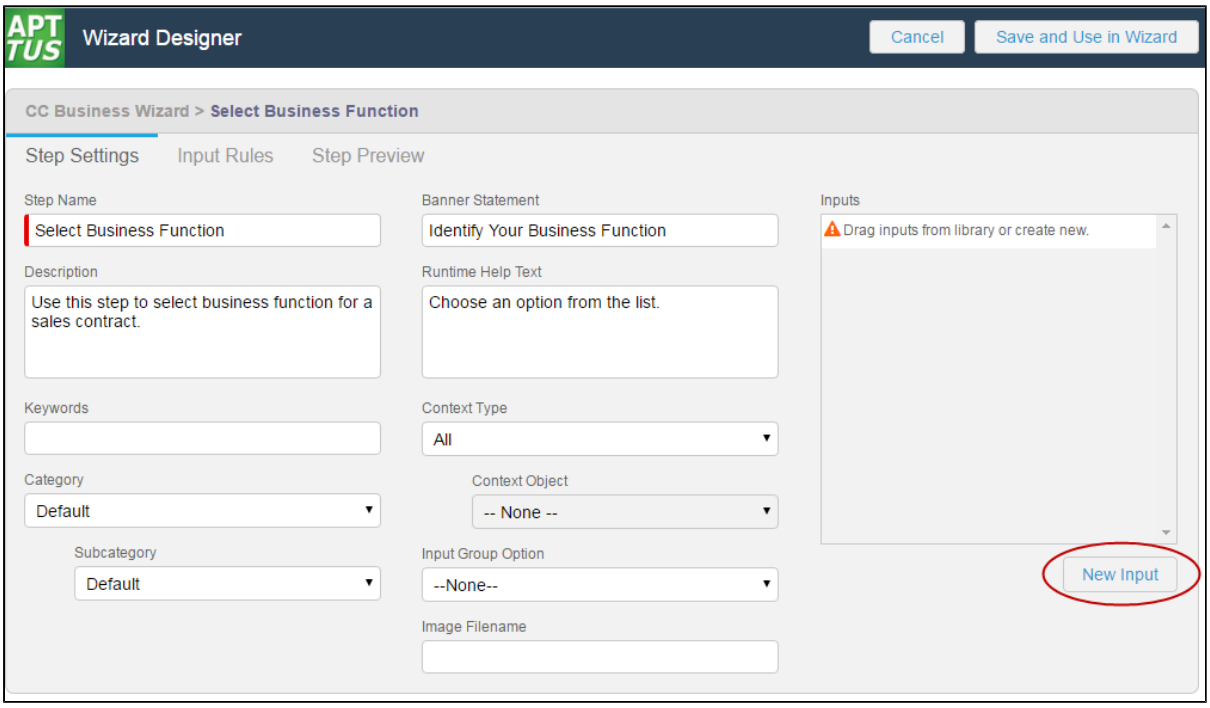
Input controls are the primary components of any wizard. They are the questions and instructions that you provide to the end users of your wizard. For example, you might create an input control that requires users to select picklist options, such as Business Function or Agreement Start and End dates. Input controls are reusable, so you can use them in as many steps as you want to.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

If an Input you want to use in a step does not exist in the Inputs Library, you can create one and use it with your step. Inputs created in this way can be saved for use in the current Wizard design only.

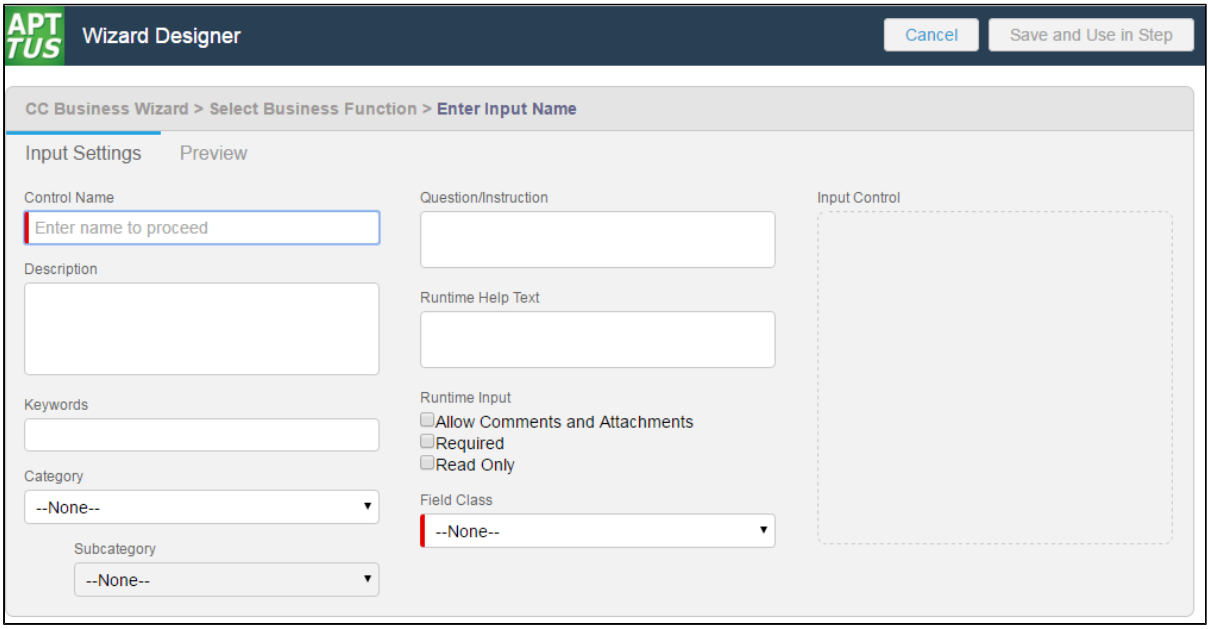
To create a new Input from a Step

1. From the Step Settings form, click **New Input**.



The Input Settings page is displayed.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



2. Enter the following properties into the form:

Input Setting	Description
Control Name	Enter a name for your Input.
Question /Instruction	Enter a question or instruction which the end user will see in the runtime wizard.
Description	Enter a description for the input which describes its intended use (for example, "Use this Wizard to create MSA Agreements for Acme."
Keywords	Enter a list of keywords which can be used to search for this Input.
Category	Choose an option from a drop-down list of pre-defined Input Categories (define picklist values on the Wizard Input Control object).
Sub Category	Choose an option from a drop-down list of pre-defined Input Sub Categories (define picklist values on the Wizard Input Control object) .

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Input Setting	Description
Runtime Help Text	Enter text to display when the user hovers over the help icon next to the question/instruction.
Runtime Input	Determine how the end user can interact with this Input at wizard runtime:
	Allow Comments and Attachments – Select this check box to enable the end user to add comments and/or attachments in addition to the input control value. Comments are entered into a text area field and are limited to 500 characters. There is no limit to the number of files a user can attach. For an example of how this looks in the Wizard, see Running Wizards . **How Comments and Attachments are used in the Wizard** For any type of Wizard, all runtime comments and attachments are saved in the Wizard Runtime Input instance record under Notes & Attachments. You can make use of these comments and attachments through your own implementations. If you design a Wizard to create a record, comments and attachments are copied to the Notes & Attachments list only if the corresponding input uses an Object for the same object created by the record (e.g., Input defined as 'Field Class = Object Field,' 'Object = Agreement' when the Wizard creates as Agreement record). Notes containing comments are named after the Object Field for which they were entered (e.g., "Account Notes," or "Agreement Risk Rating Notes"). **Required** – Select this check box if a value is required for the input. An end user will not be able to complete the current step without entering a value for this input.

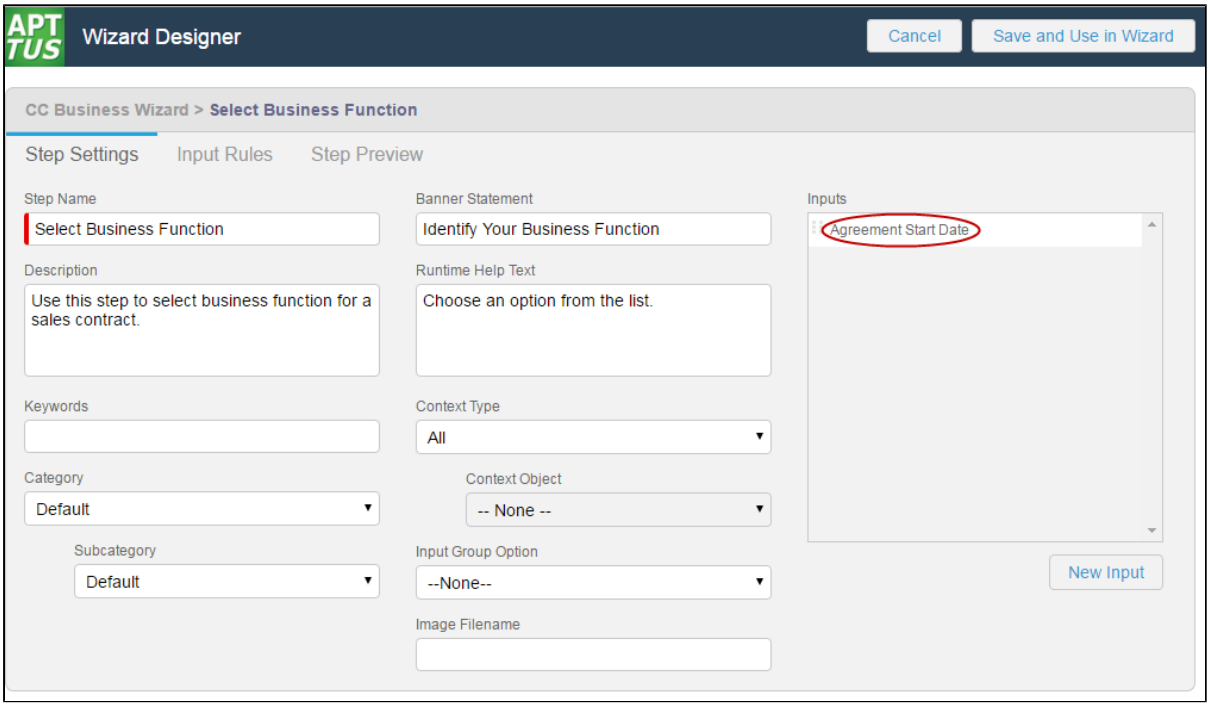
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Input Setting	Description
	Read Only – Select this check box if you plan to have the input value set by Step Input rules *in all cases* . The end user will not be able to change the value of this input.
Field Class	The Field Class defines the type of response you expect for the input. • **Wizard Input Field** – Use this field class when you want the response to indirectly set other Wizard values. Wizard input fields values are only used to affect the value or state of other input controls using Step Input Rules. When you choose this field class, you must specify one of the following data types: • • Checkbox • Date • Number • Picklist • Picklist Radio Button • Multi Picklist • Text • Text Area If you choose to make the Wizard Input field a Picklist type, you must also enter valid values to be used as input responses. • **Object Field** – Use this field class when you want the response to directly set a field value on the Salesforce object which is created from the Wizard (e.g., the "Agreement Start Date" field on the Agreement object). Use the drop-down list under Input Control to choose the Object Name, then choose the Field Name based on the object chosen.

3. When you are finished creating your Input, click on the **Preview** tab to show how the input will appear at Wizard runtime.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

4. Click **Input Settings** to return to the Input form.
5. Click **Save and Use in Step** to save your new Input or **Cancel** to discard changes and return to the Step Settings form. The new Input is added to the list displayed in the Inputs pane for your step.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Configuring Step Input Rules from the Wizard Designer

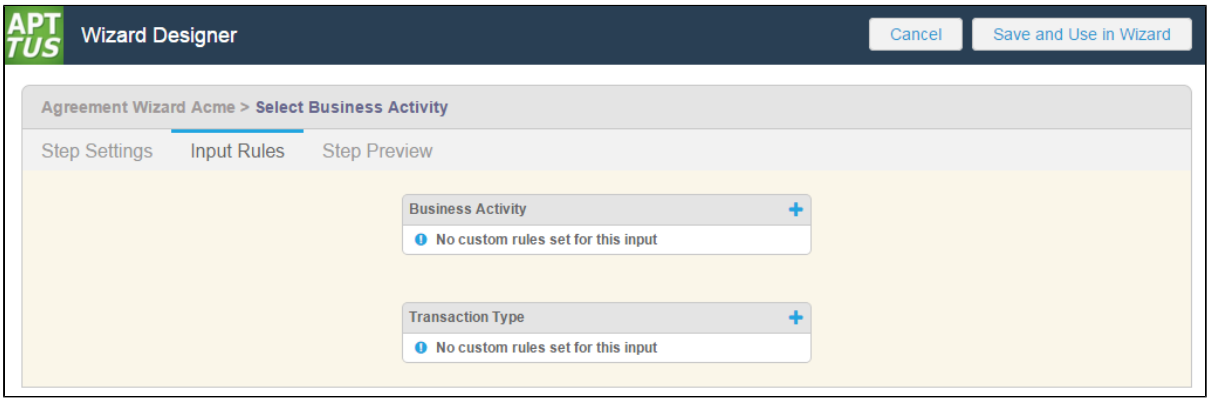
Step Input Rules allow you to configure rules and expressions for your Inputs at Wizard runtime. These rules apply to Inputs which are part of the same step, and generally trigger based on user interaction with the Wizard. Input rule types can be configured to:

- *Enable* or *Disable* Inputs
- *Show* or *Hide* Inputs
- Determine the Focus Object of the Wizard (e.g., Agreement)
- Determine the Record type for the focus object's record to be created (e.g., SOW, NDA, MSA, etc.)
- Set the value of one input based on the value(s) of other inputs.
- Set the value of a custom field based on the value(s) of inputs in the same step.

> If you are creating a Wizard Design which will create an object record you must include at least one Determine Focus Object and one Determine Record Type rule for each object to be determined.

To configure Input Rules for a Step

1. From the Step Settings form, click on the **Input Rules** tab. A graphic representation of the list of inputs for the step is displayed.

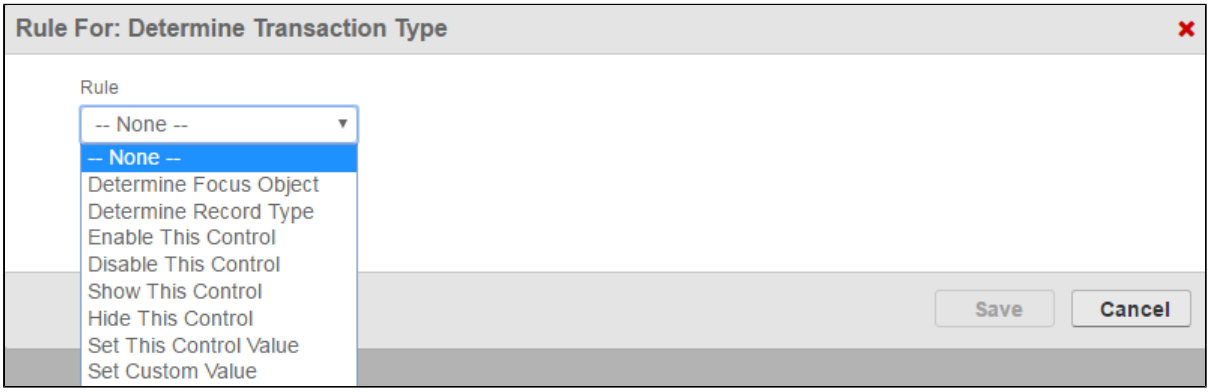


   Inputs are displayed in the sequence you defined in Step Settings. Each input is displayed on the page with each input rule listed below the name of the input.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

2. To create a new rule for an input, click on the + icon next to an input name or hover over the list of rules and click **New**. A dialog is displayed for defining the input rule.

3. Choose a rule type to use from the **Rule** drop-down list.



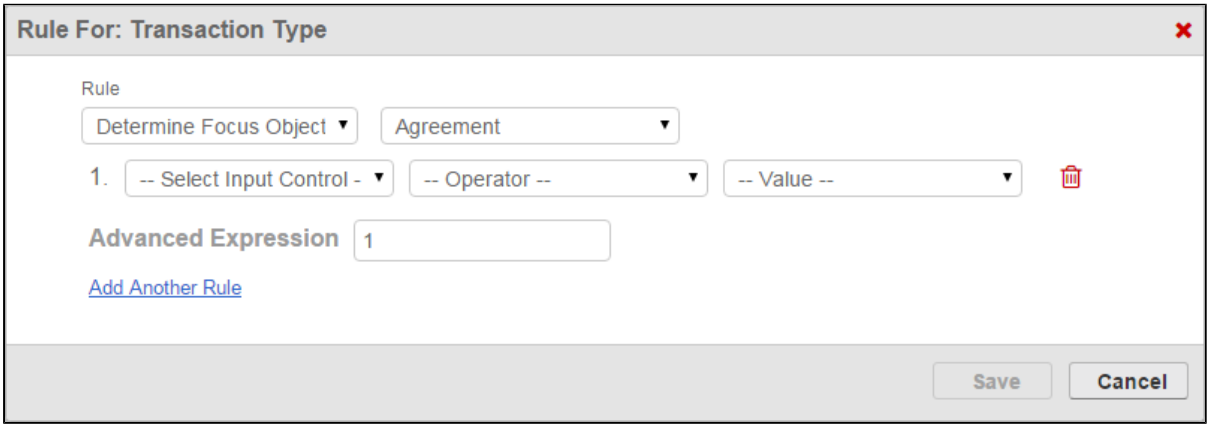
Rule Type	Description
Determine Focus Object	Use this rule to allow the user to determine the focus object for the runtime record to be created (e.g., Agreement object). Note: If this rule is used, there must also be a Determine Record Type rule used to create a record from the Wizard *if record types have been defined for the object*. **Important:** When using this rule, make sure to select the Rule Type before the Object to avoid configuration errors.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Rule Type	Description
Determine Record Type	Use this rule to allow the user to determine the record type for the focus object's record to be created (e.g., SOW, MSA, NDA for Agreement). Note: If this rule is used, there must also be a Determine Focus Object rule used to create a record from the Wizard.
Enable This Control	Use this rule to allow the user to edit the field value for this input. This is the default setting for an input in a step. You can use this as a rule to conditionally enable the input if a previous input rule caused it to be disabled.
Disable This Control	Use this rule if you want to prevent the user from editing this input's value. You can use this rule to conditionally make an input read-only.
Show This Control	Use this rule to show the field value for this input at runtime. This is the default setting for an input in a step. You can use this rule to conditionally show the input if a previous input rule caused it to be hidden.
Hide This Control	Use this rule to hide the field value for this input at runtime. You can use this rule conditionally to allow different inputs to be exposed within a step based on previous responses in the step.
Set This Control Value	Use this rule to set the field value for this input based on the response values of one or more other inputs in the same step.

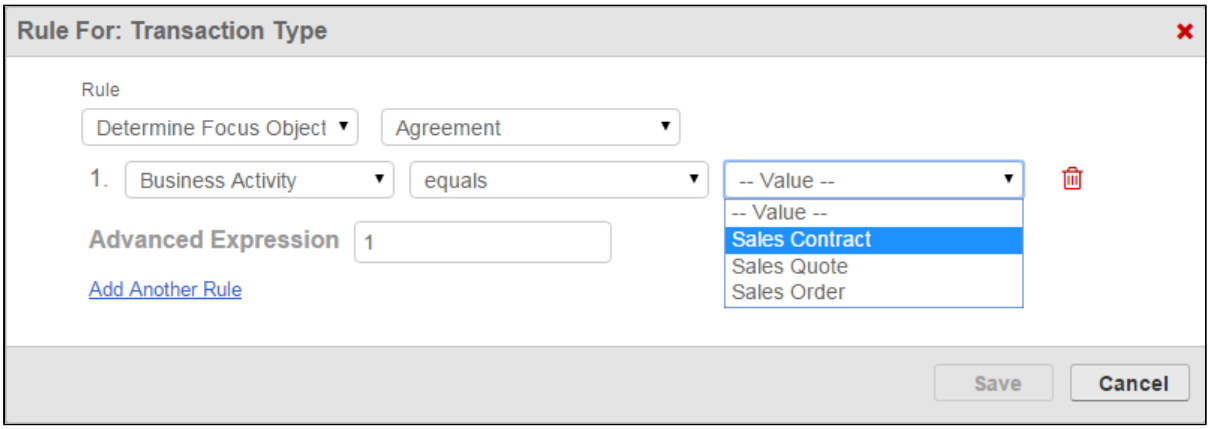
4. To make your rule conditional, click **Add Another Rule** to add a condition to your rule type.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



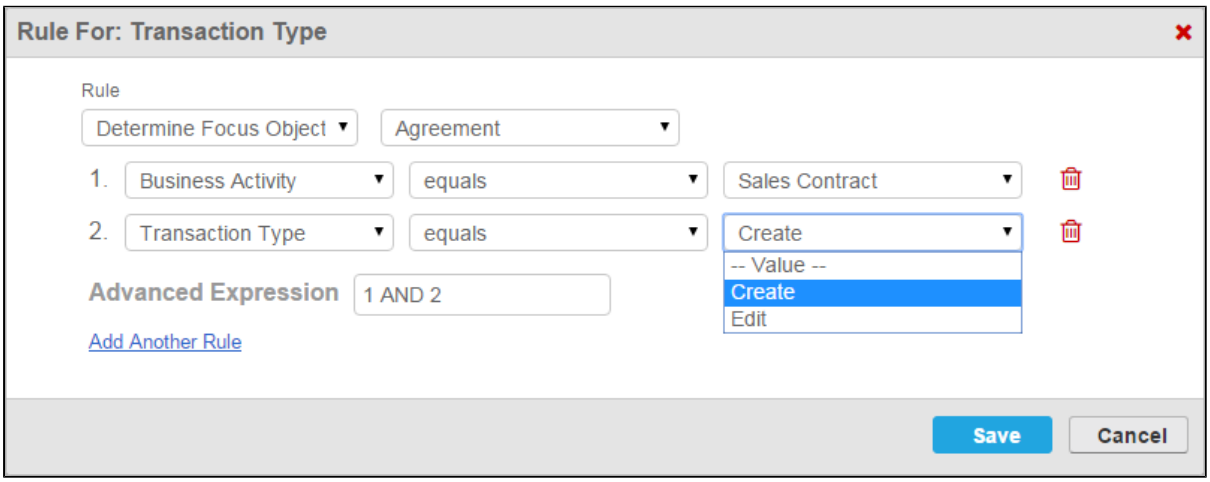
Note: If you choose not to add conditions to your rule type, the Input rule you create will always trigger regardless of other rules in the step.

5. Use the drop-down menus to build a condition expression:
   - Choose an input from the list of inputs in the current step
   - Choose an operator for the expression which is specific to the chosen input's data type
   - Choose a value for the expression which defines the condition



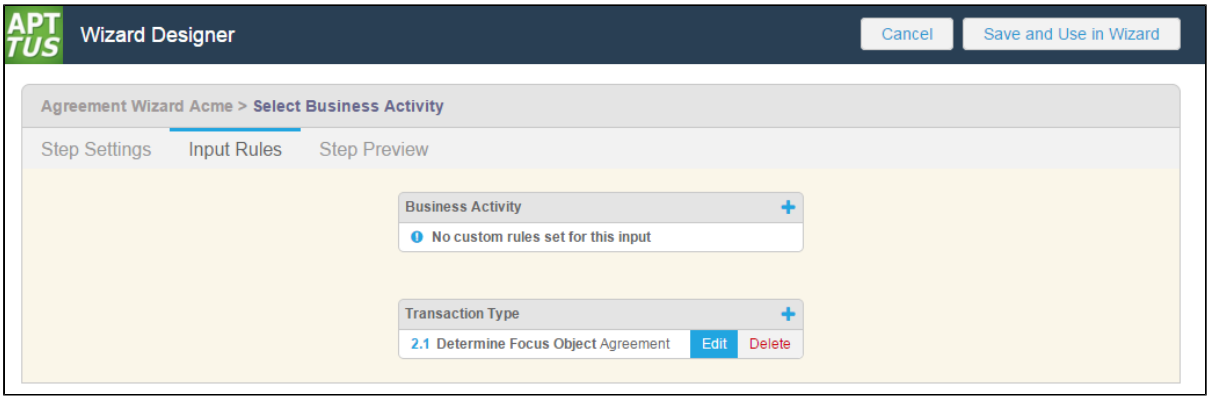
6. Add more conditions as necessary to complete the rule. By default, all expressions use **AND** logic, meaning all conditions are required for the rule to execute. You can use the Advanced Expression field to change condition logic to **OR,** or create your own custom condition (for example, (1 OR 2) AND 3 if you want to make only 1 of the first 2 conditions required).

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



> There is no limit to the number of conditions you can create for a single input rule.

7. Click **Save** to save your new input rule or **Cancel** to discard rule changes. The step inputs graphic changes to reflect the newly-created rule.

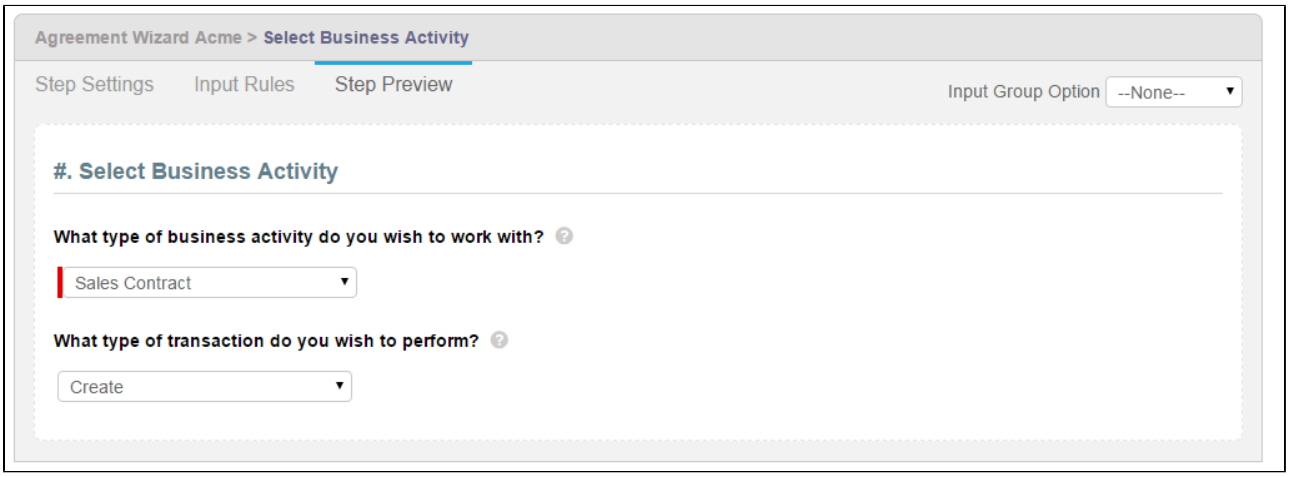


8. From the Input Rules tab you can:
   - Click the + icon to create another rule for an input.
   - Click **Edit** next to an existing input rule to make changes.
   - Click **Delete** next to an existing input rule to delete the rule.
   - Click **Step Settings** to return to the step and create or add more inputs or save the step.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Previewing Wizard Steps from the Wizard Designer

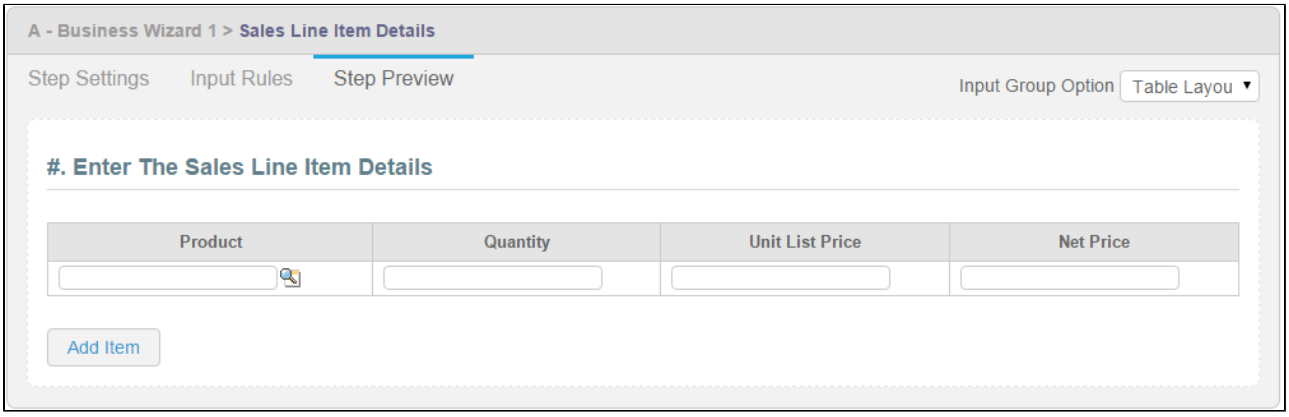
You can preview what a step will look like at runtime from Step Settings. To preview the step, click on the **Step Preview** tab. The page displays a preview of the step you are building:



The Step Preview renders a representation of the step in the Wizard at runtime. You can interact with the preview to an extent–it does not show or demonstrate any conditional input rules you have defined. For example, if you disable a control based on another input's value and choose that value, the input in question will not be disabled within the preview.

> The Step Name will always be proceeded by a # symbol, which is a placeholder for the assigned step number at runtime (dependent on the sequence of steps in the Wizard).

You can also preview how the step will look when you choose an Input Group Option. Use the drop-down menu in the upper-right-hand corner of the preview page to switch between Input Group views. For example, the above preview rendered in a table layout would look as follows.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Note that if you change the Input Group Option in the Step Preview, the option gets changed on the Step Settings form as well. Save the step again after making more changes.

Configuring Wizard Step Rules

Wizard Step Rules control the flow of Wizard steps at runtime. You can create "Go to" rules for your steps which determine step order in the Wizard based on runtime user responses. The rules you create can be assigned as default for individual steps and can be made conditional based on expressions you create for each rule, using values from Inputs to determine whether or not rules are fired for any given step.

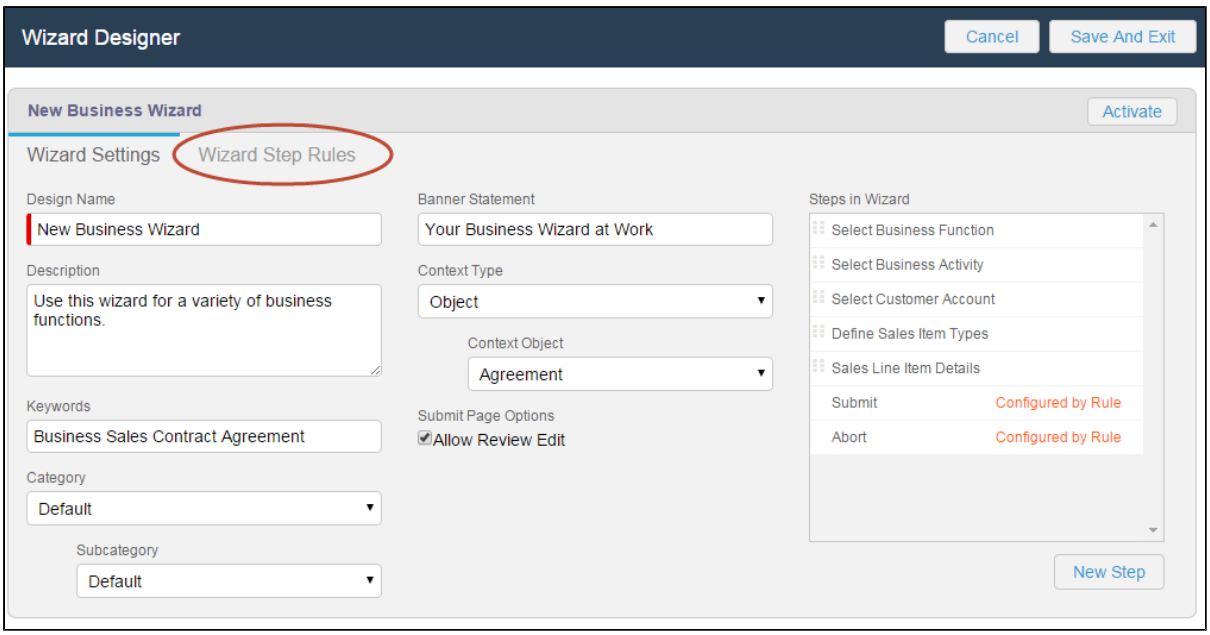
Much like Step Input Rules, Wizard Step Rules for any given Wizard are displayed as a graphical representation of the Wizard flow. As you add steps to your Wizard and configure **Go to** rules, the flow of the Wizard changes and is visually represented to give you an accurate snapshot of Wizard flow.

To configure Wizard Step Rules, you must have already added steps to the Wizard Design.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

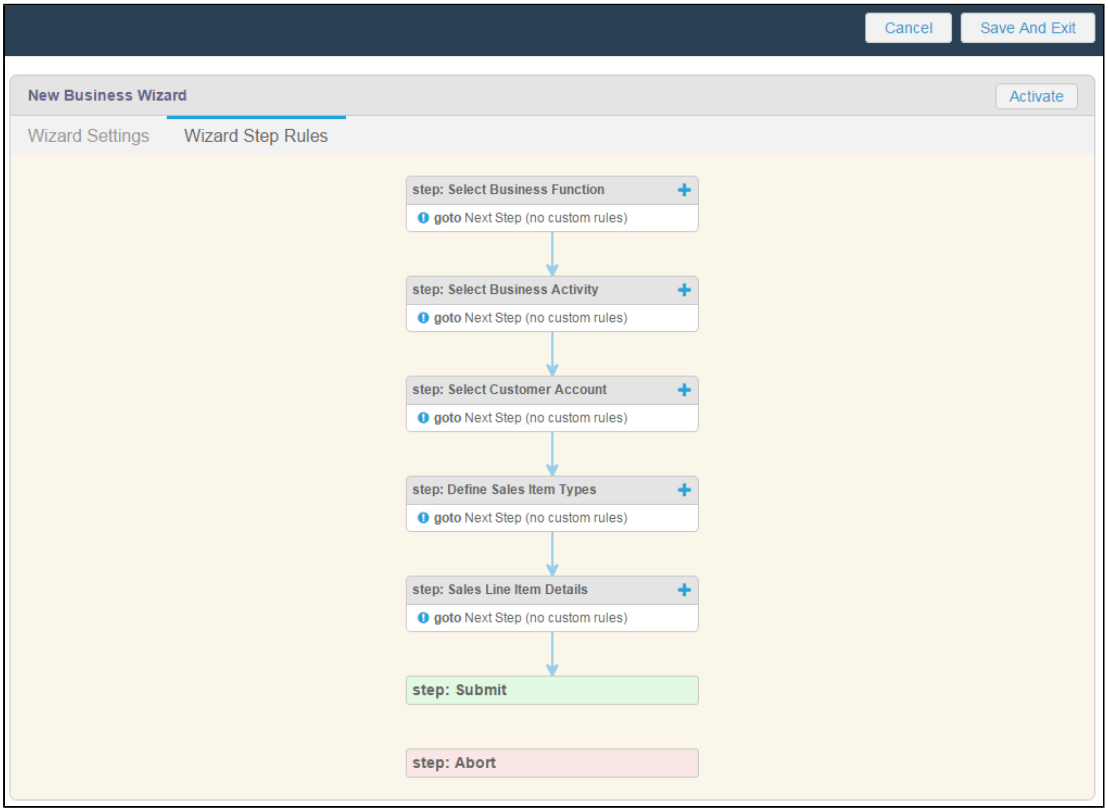
To configure Wizard Step Rules

1. From the Wizard Designer Settings page, click on the **Wizard Step Rules** tab.



The Wizard Step Rules tab displays a graphical representation of your current Wizard, with all steps and any current rules shown as a flow from the first step to the Submit step.

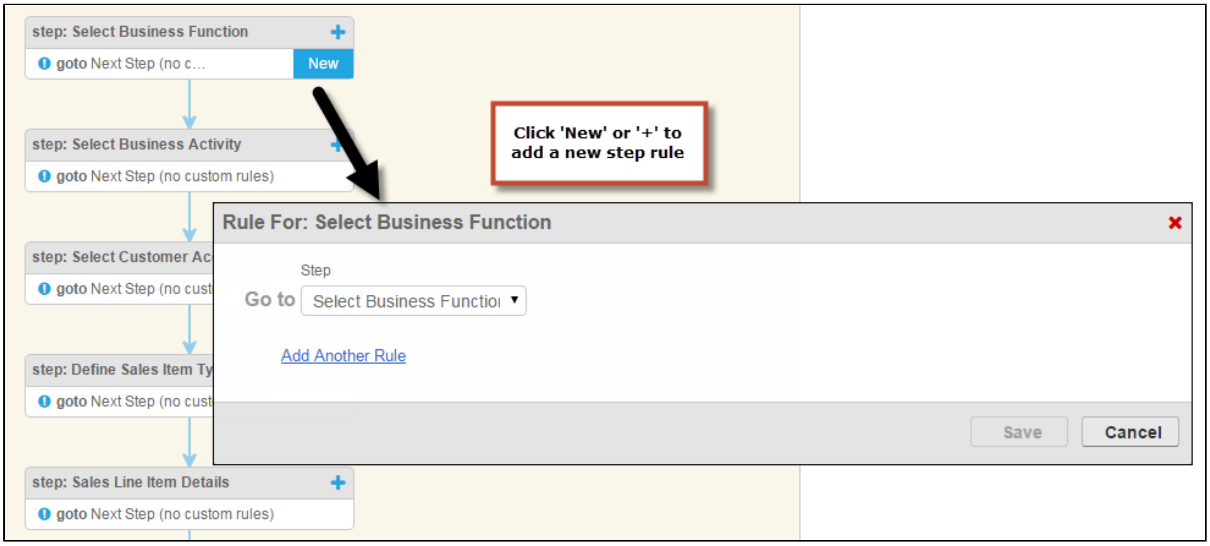
Copyright ©2011-2017 Apttus Corporation. All rights reserved.



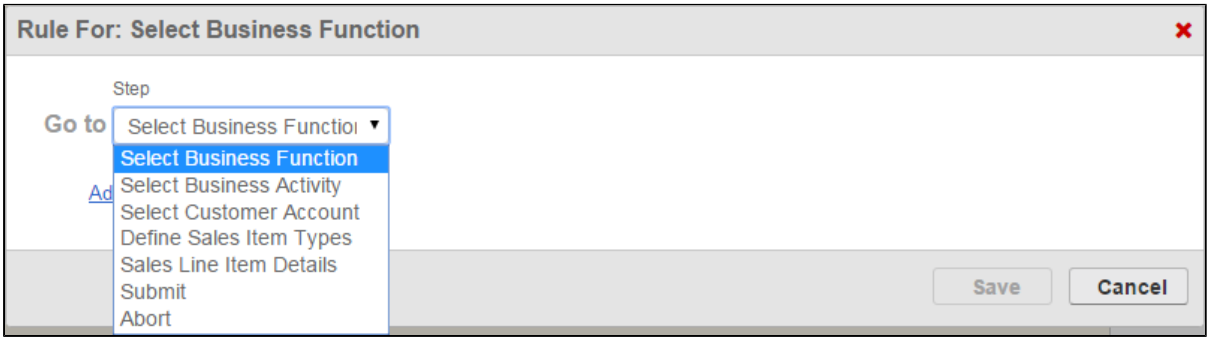
By default, steps flow in the Wizard based on their listed sequence in Wizard Settings, with the Go to rule defined as "Next Step (no custom rules)."

2. Click on the ✚ icon next to the step name or hover over the list of rules and click **New**. A dialog is displayed for defining the step rule.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



3. Choose a Go to Step rule from **Step** drop-down list.



Go to Step Rule	Description
Go to *Step Name*	Use this rule to define a specific step as the next step in the Wizard flow. For example, for the Select Business Function step rule, you could choose "Select Business Activity."
Go to Submit	

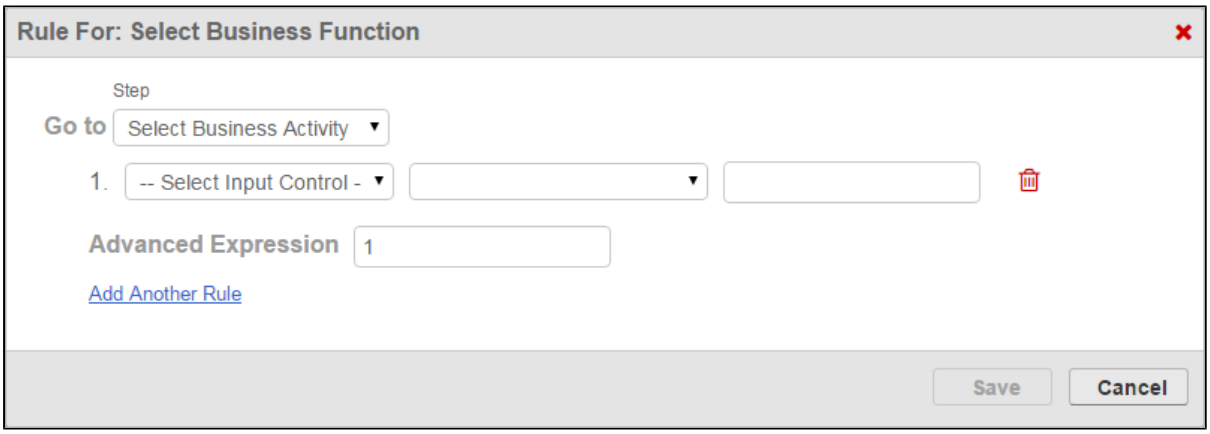
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Go to Step Rule	Description
	Use this rule to make this step the last step in the Wizard. The **Next** button in Wizard runtime will be replaced with the **Submit** button. When Submit is clicked, the user is taken to the Wizard acknowledgement screen (or review page) and the Wizard is marked submitted (see Running Wizards for more information). Optionally, you can **configure a URL** to take an action upon **Submit**. Form your URL in one of two ways: • If your Wizard creates a record as a result of submission (i.e. one of your inputs determines the focus Object AND Record Type), you can configure the URL to: • • take the user to the default Salesforce record page for the record created (e.g., "%Agreement%"). • take the user to a page name with parameters (e.g., Submit Request Mode for an Agreement "Apttus__AgreementSubmitRequest?id=%Agreement%" • If your Wizard does not create a record but is simply posting information collected as the user interacts with the Wizard (for example, as a survey), use a REST URL for POST. The user is taken to the Wizard acknowledgement screen. Note: Any URL entered for a Go to Submit rule must be relative, starting with the page name. For example, if you want to redirect the user to the agreement, use "%Agreement%" as the URL. The Object name between the % symbols represents the *Label*, not the API name. If there is NO URL specified for Go to Submit and the Wizard creates a record, by default the user will be taken to the Salesforce page for the newly-created record.
Go to Abort	

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

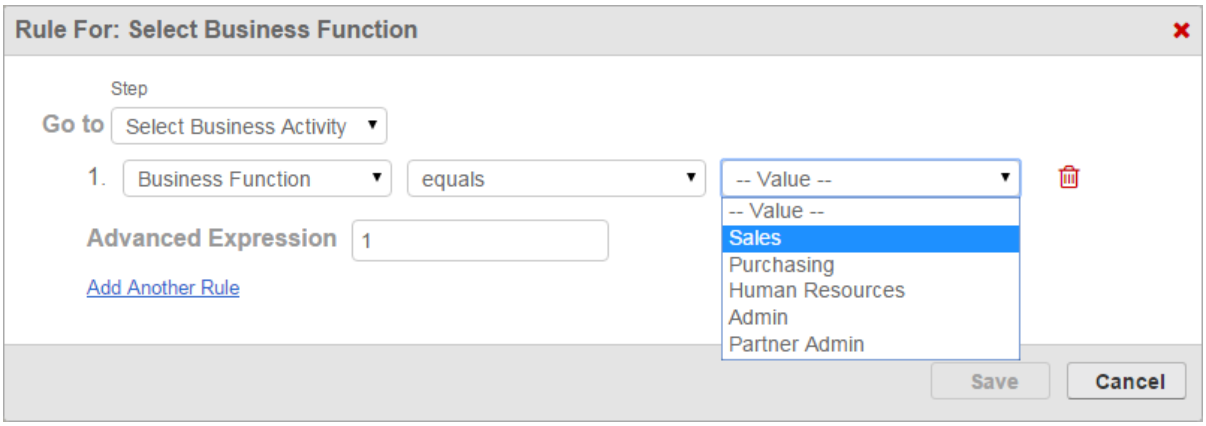
Go to Step Rule	Description
	Use this rule to Abort the runtime Wizard from this step. In most cases, a rule will conditionally trigger this Go to Step as it will not make sense to always have a step lead to Abort. As with the Go to Submit rule, you can optionally add a URL to another Salesforce page to Go to Abort, which will redirect the user to that page after they abort the Wizard. The URL enter for a Go to Abort rule must be relative, starting with page name.

4. To make your Go to rule conditional, click **Add Another Rule** to add a condition to your rule type.

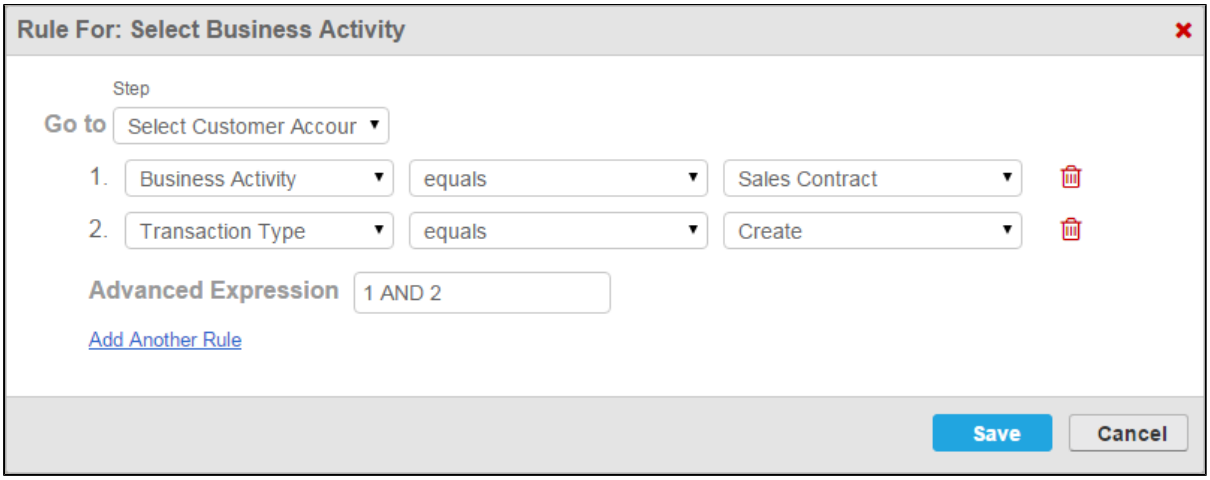


5. Use the drop-down menus to build a condition expression:
   - Choose an input from the list of inputs which are a part of the current step.
   - Choose an operator for the expression which is specific to the chosen input's data type.
   - Choose a value for the expression which defines the condition.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



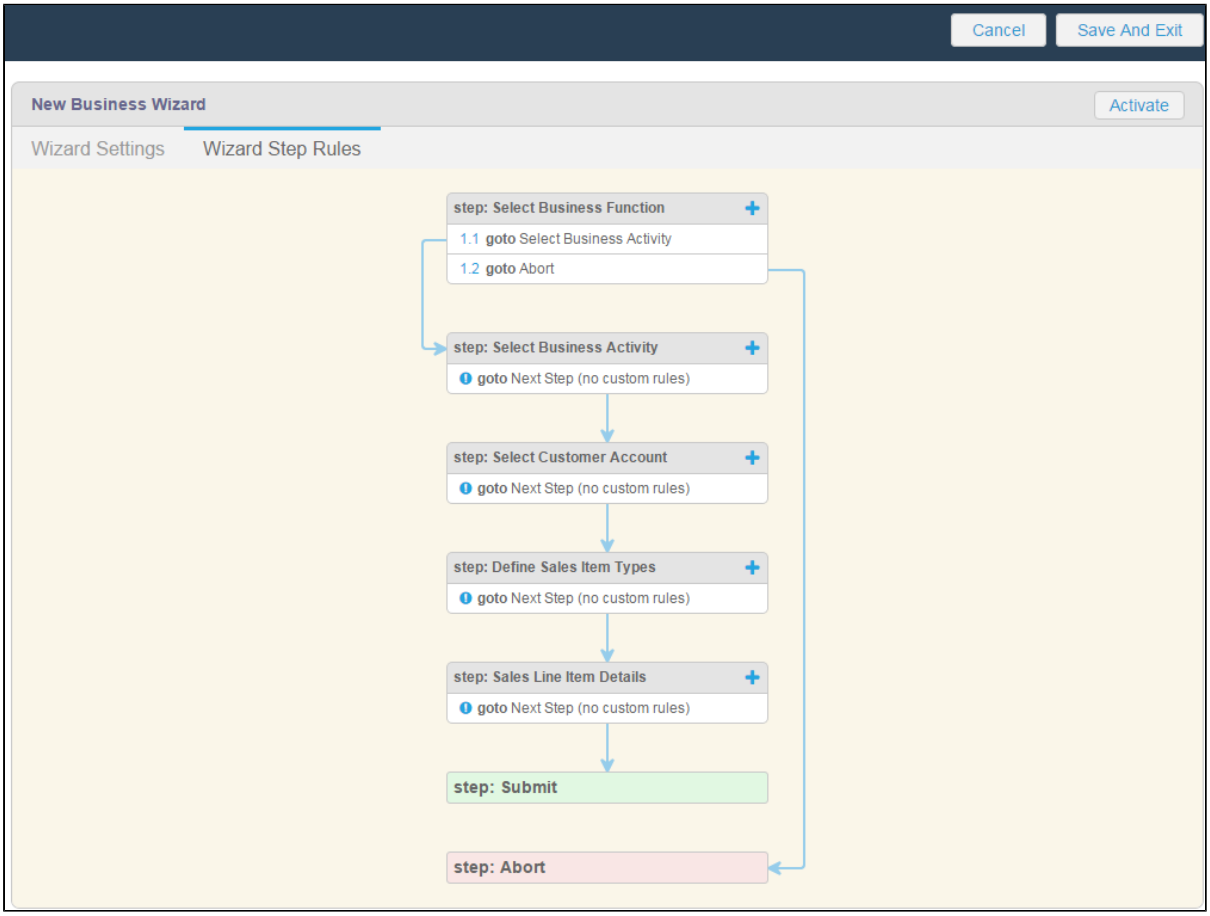
6. Add more conditions as necessary to complete the rule. By default, all expressions use AND logic, meaning all conditions are required for the rule to execute. You can use the Advanced Expression field to change condition logic to OR, or create your own custom condition (for example, (1 OR 2) AND 3 if you want to make only 1 of the first 2 conditions required).



> There is no limit to the number of conditions you can create for a single step rule.

7. Click Save to save your new step rule. The graphic changes to reflect the new flow based on the rule you have created. In the below example, a rule was configured to conditionally go to step 2 and a second rule was configured to conditionally abort the wizard.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



8. From the Wizard Step Rules tab you can:
    - Click the ✚ icon to create another step rule.
    - Click **Edit** next to an existing step rule to make changes.
    - Click **Delete** next to an existing step rule to delete the rule.
    - Click **Wizard Settings** to return to the Wizard.

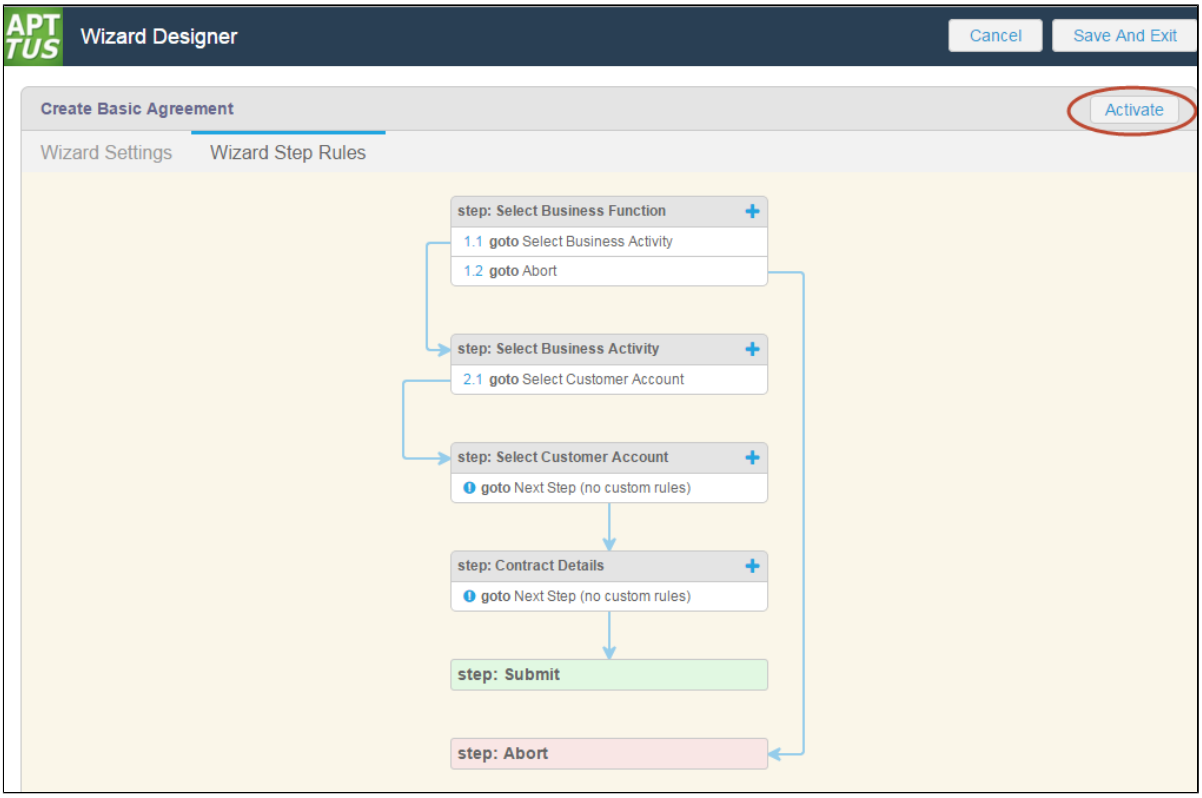
Activating a Wizard Design

When you are finished adding Steps, Inputs and creating Step and Input rules for your Wizard (along with any other settings), you can **activate** your Wizard design to make it available to users from the Wizards tab. You can also activate a Wizard design which has been previously deactivated.

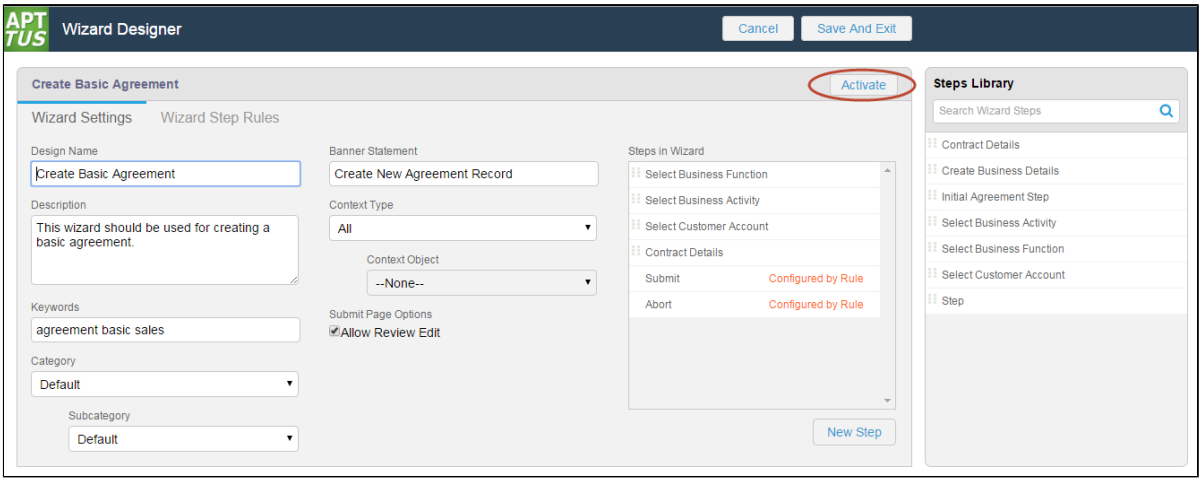
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

You can activate your Wizard Design from two locations within the Configurable Wizard:

- from the **Wizard Step Rules** tab.



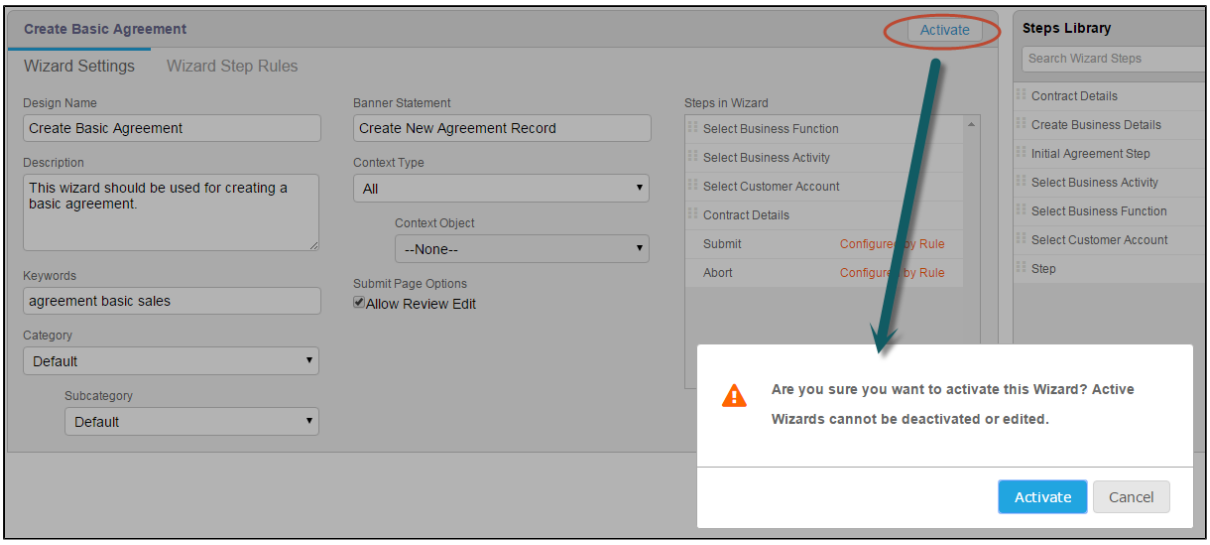
- from the **Wizard Settings** page.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

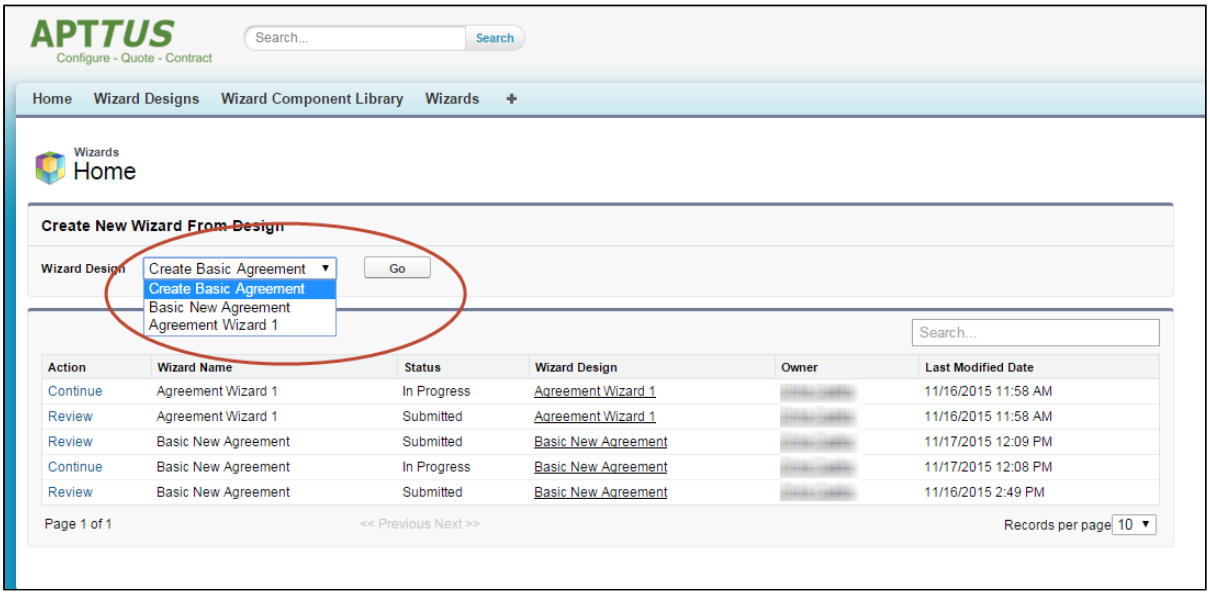
To activate a Wizard Design

1. Navigate to the Wizard Designer **Wizard Settings** page or **Wizard Step Rules** tab.
2. Click **Activate**. A pop-up dialog is displayed to confirm activation.



3. Click **Activate** to activate your Wizard or click **Cancel** to return to the Wizard to make more edits.

   The new Wizard is now available to be run from the Wizards tab.

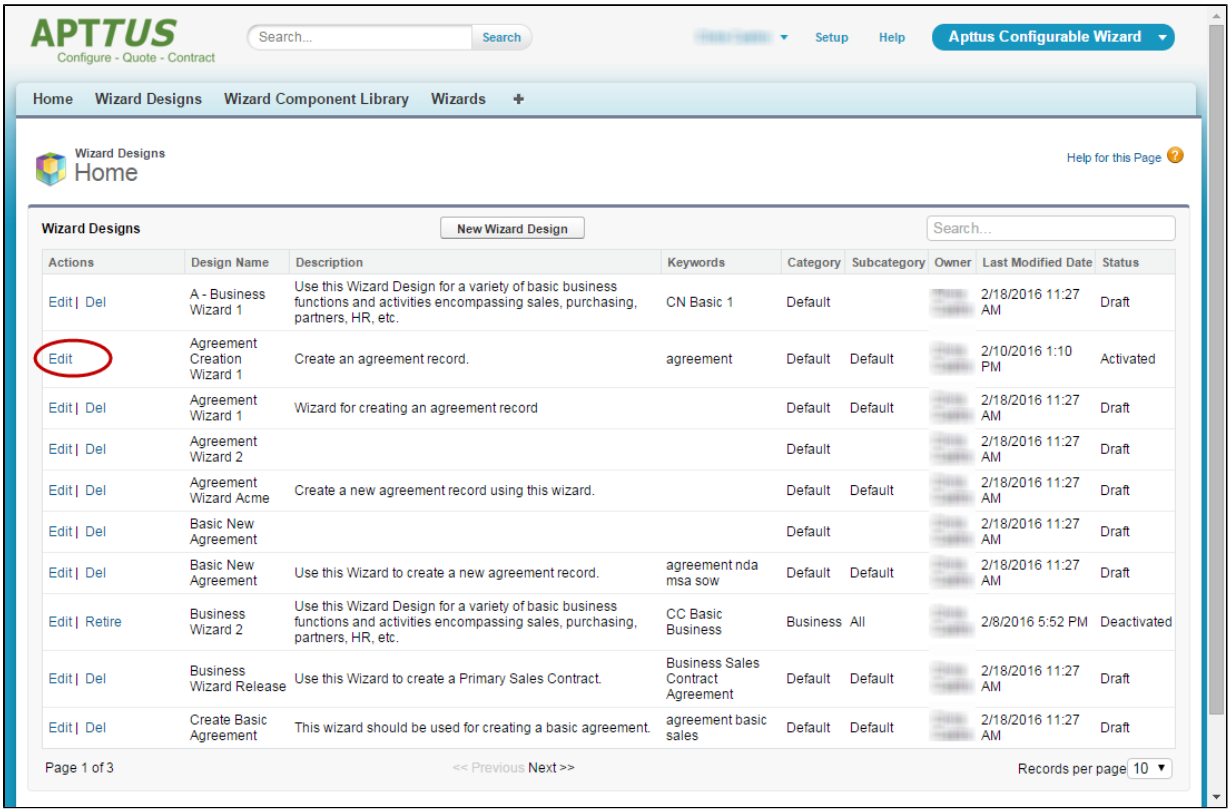


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Reviewing a Wizard Design following Activation

After the Wizard is activated, the Activate button changes to **Activated**.

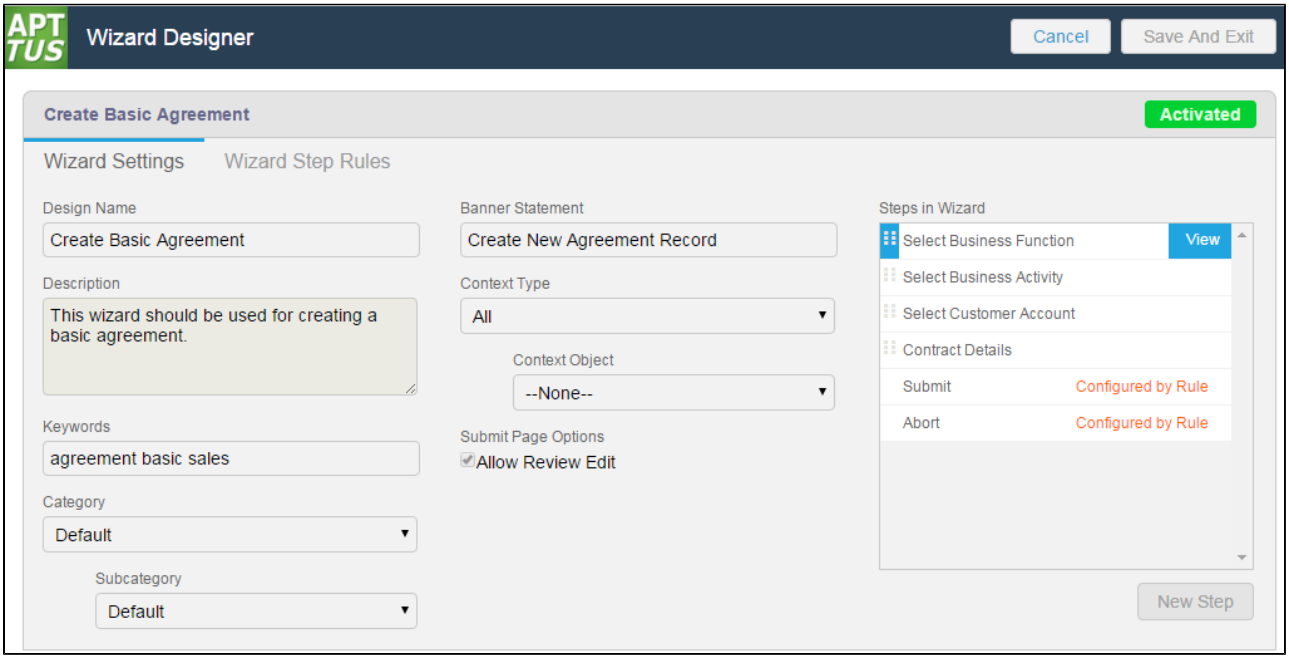
To review the Wizard design, go to the **Wizard Designs** tab and click **Edit** next to the Wizard design.



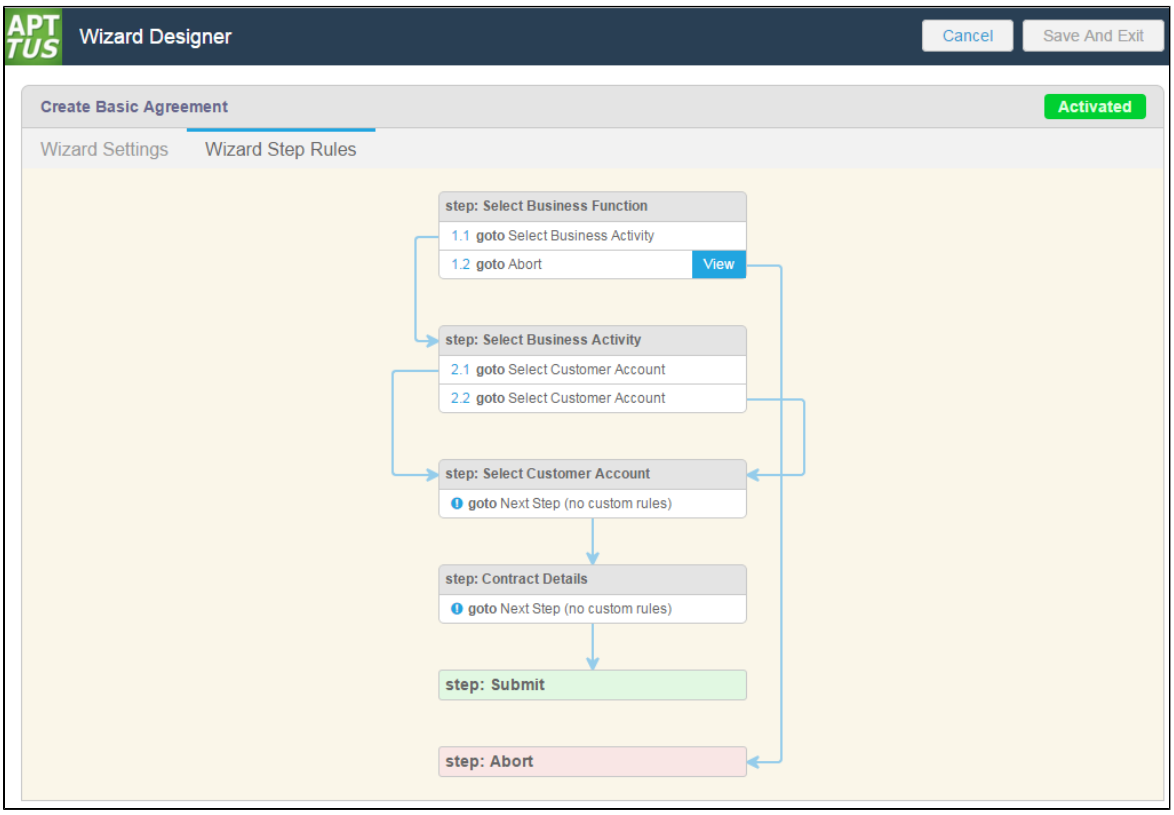
You can explore the Wizard, but you cannot make any further edits once it has been activated. You can take the following actions to review the design:

- From the Wizard Design or Step Settings you can hover over a step or input and click **View** to view the Step or Input Settings.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

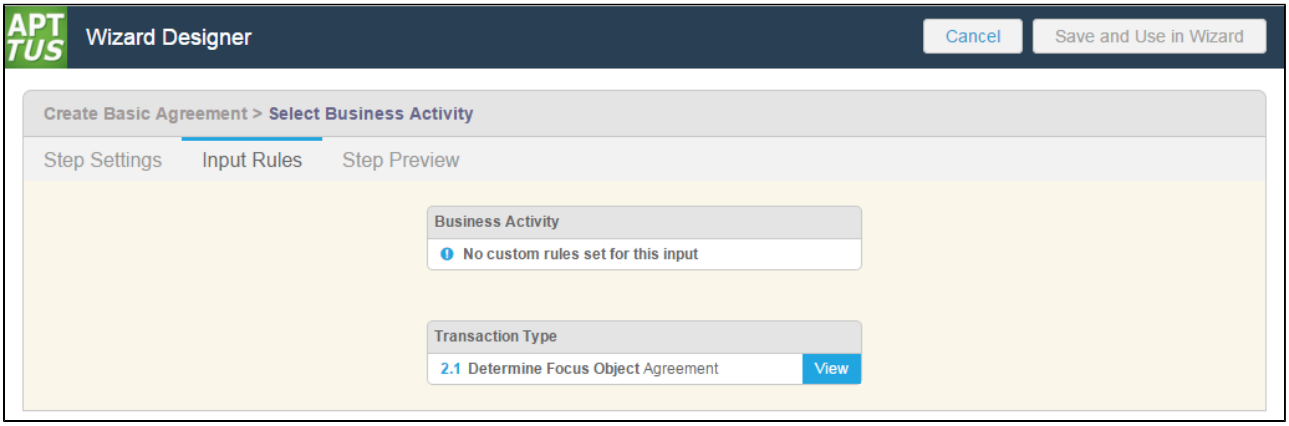


- From Wizard Step Rules you can hover over a rule to view rule details.



- Similarly, from Step Input rules you can hover over an input rule to view rule details.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



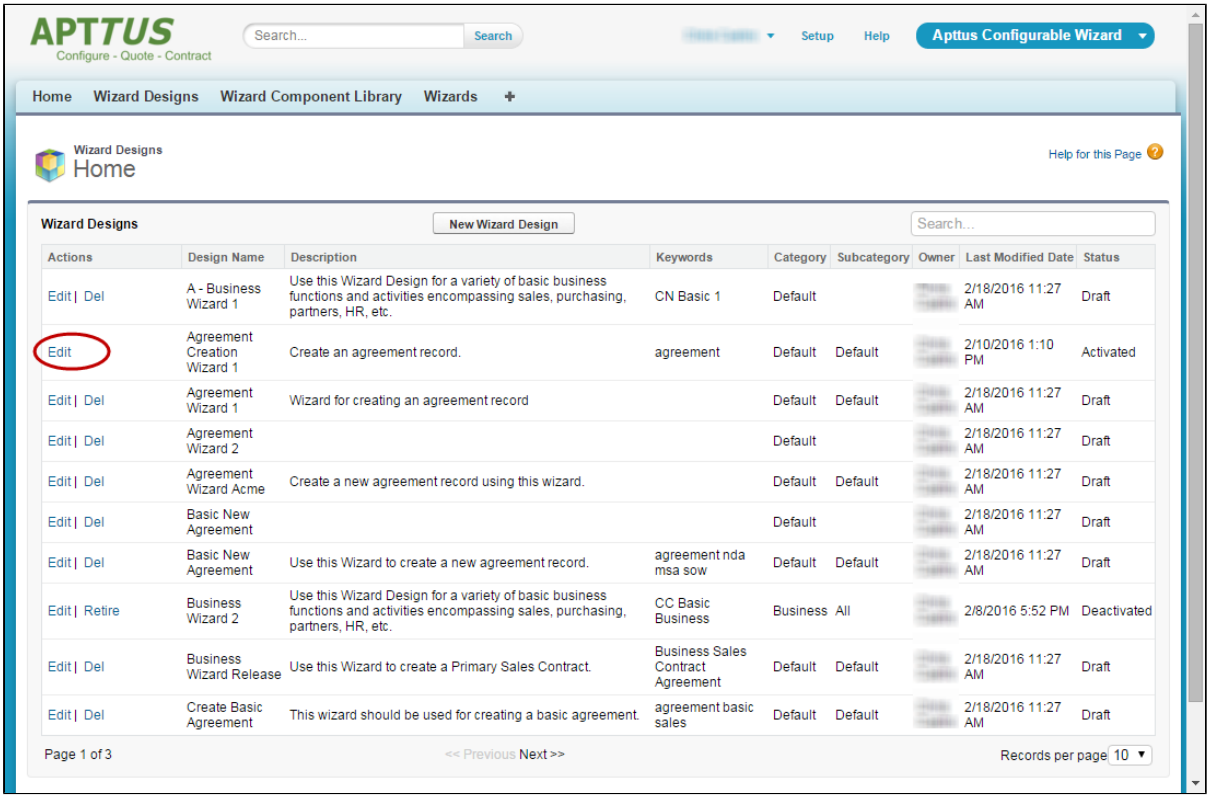
Deactivating a Wizard Design

You can **Deactivate** an active Wizard design when you do not want any new runtime Wizards to be initiated by users for that particular design. Deactivating a Wizard changes its state to "Deactivated," from which state the Wizard can either be re-activated or retired.

To deactivate a Wizard Design

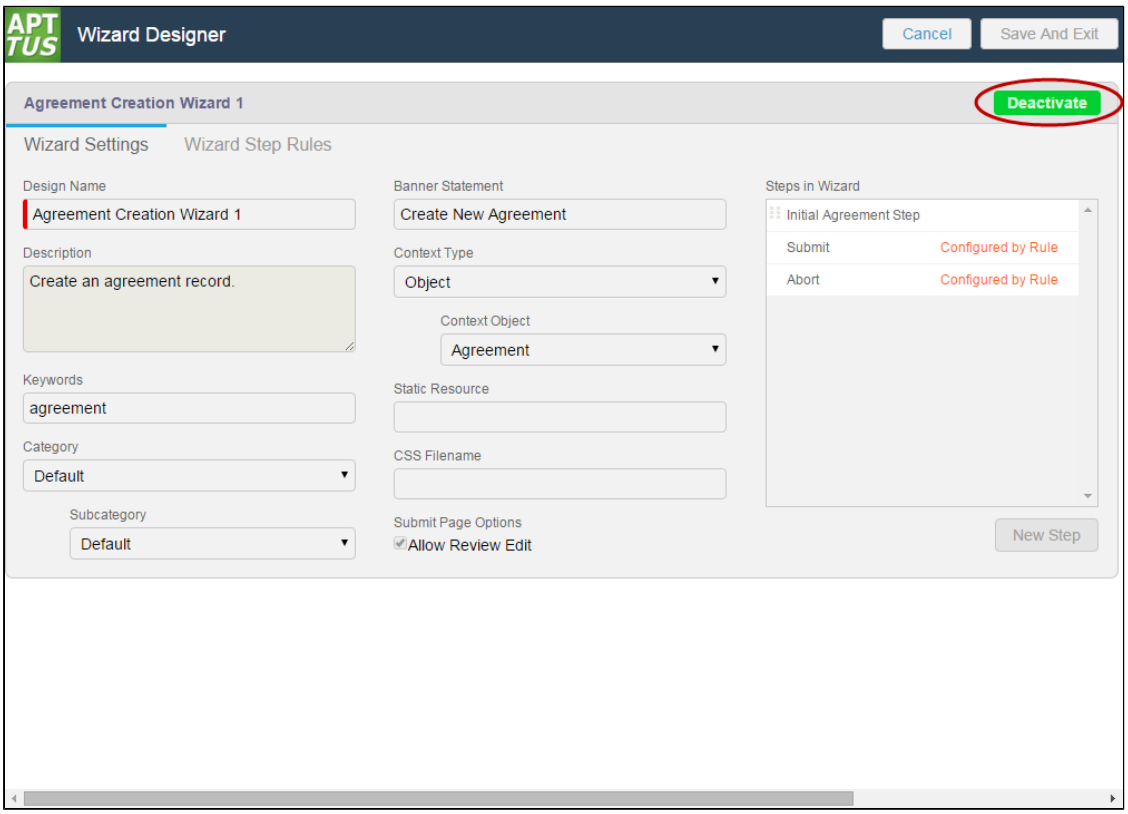
1. Go to the **Wizard Designs** tab.
2. Click **Edit** next to the active Wizard design you want to deactivate.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



3. Click **Deactivate Wizard** on the Wizard Properties screen.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



4. Click **OK** to confirm deactivation of the Wizard design. The Wizard design changes from Activated to Deactivated state.

> If you deactivate a Wizard design, any in-progress Wizards which have already been initiated by users will remain in-progress. These wizards can be completed as normal but no new wizards using the deactivated design can be initiated.

After a Wizard design has been deactivated, you can take the following actions from the Wizard Designs tab:

- click **Edit** to review or reactivate the Wizard design.
- click **Retire** to retire the Wizard design.

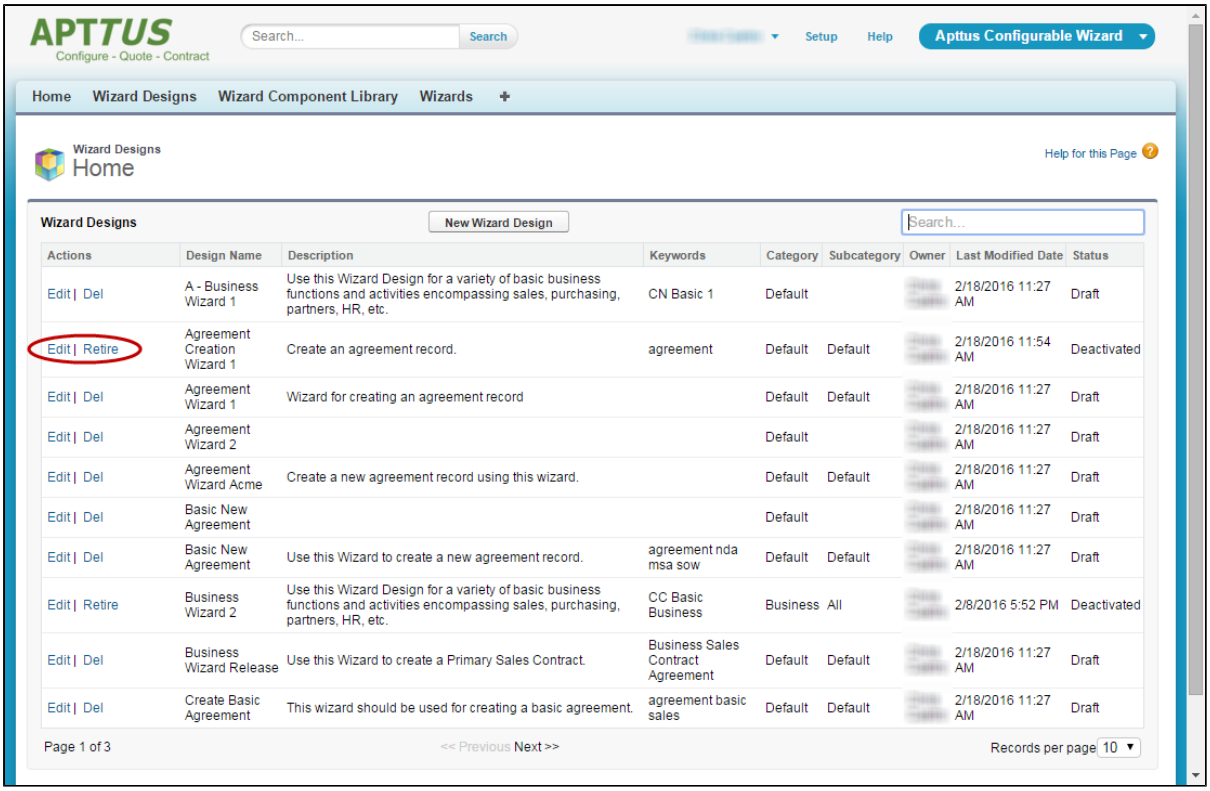
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Retiring a Wizard Design

You can **Retire** a Wizard design which has been deactivated when you no longer want any Wizards initiated from that design to be run by a user. When a Wizard design is retired, users can no longer initiate the Wizard or continue in-progress Wizards associated with that design from the Wizards tab.

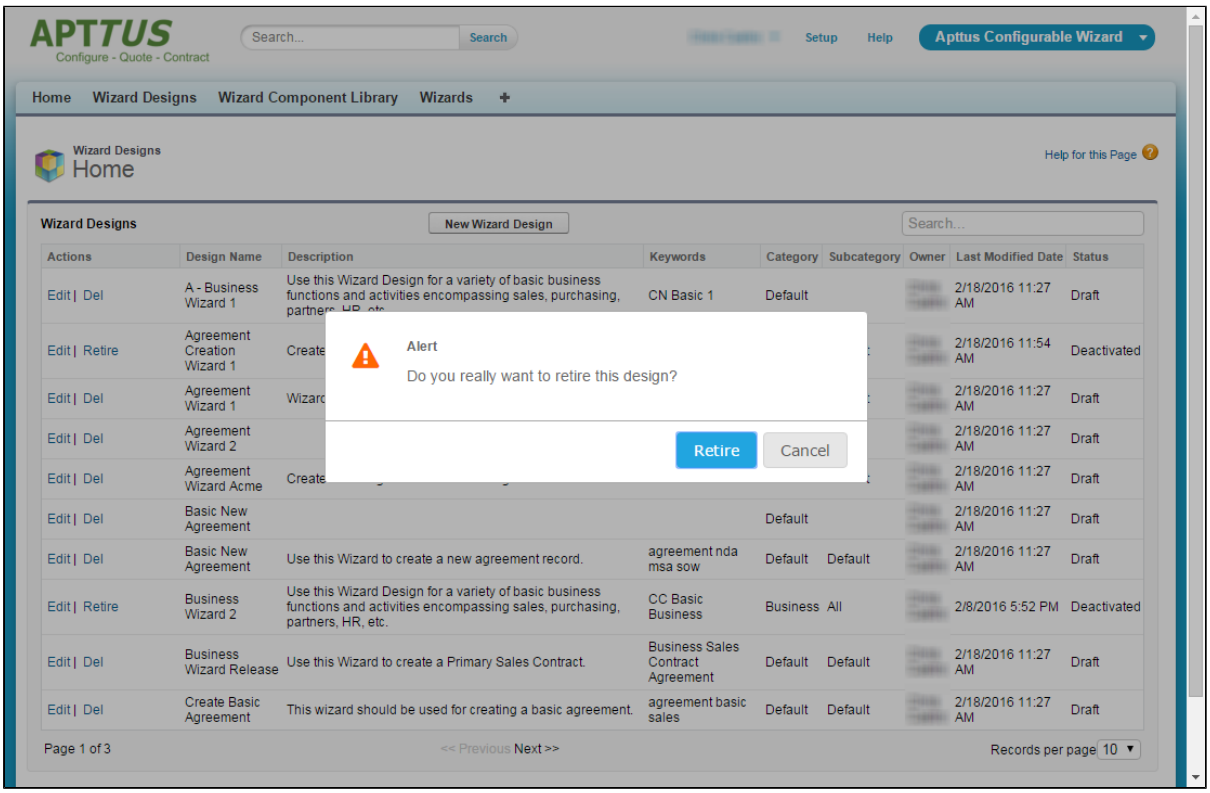
To retire a Wizard Design

1. Go to the **Wizard Designs** tab.
2. Click **Retire** next to the Wizard design you want to retire.



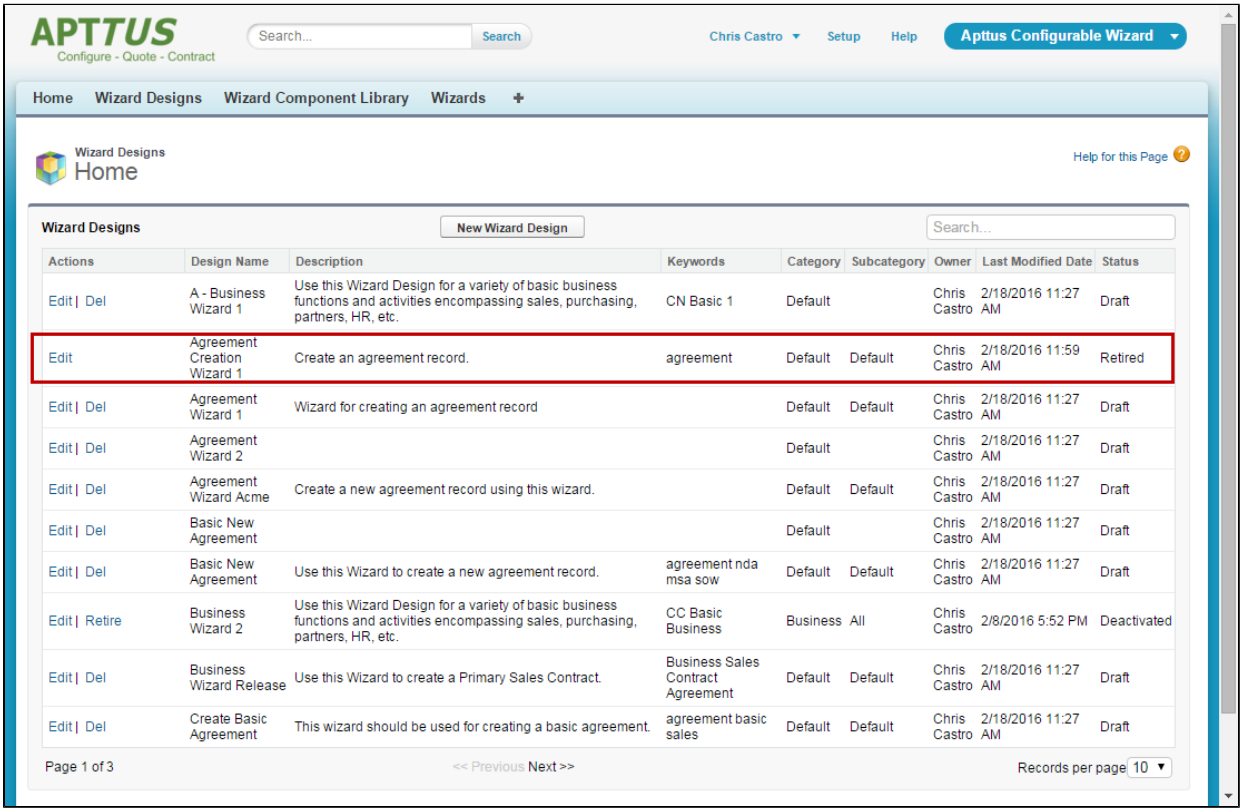
3. Click **Retire** to confirm retirement of the Wizard design.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



After a Wizard design has been retired, its State is displayed on the Wizard Design tab as "Retired." Click **Edit** next to the Wizard design to open the Wizard designer. You can review the retired Wizard design but cannot make any edits.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



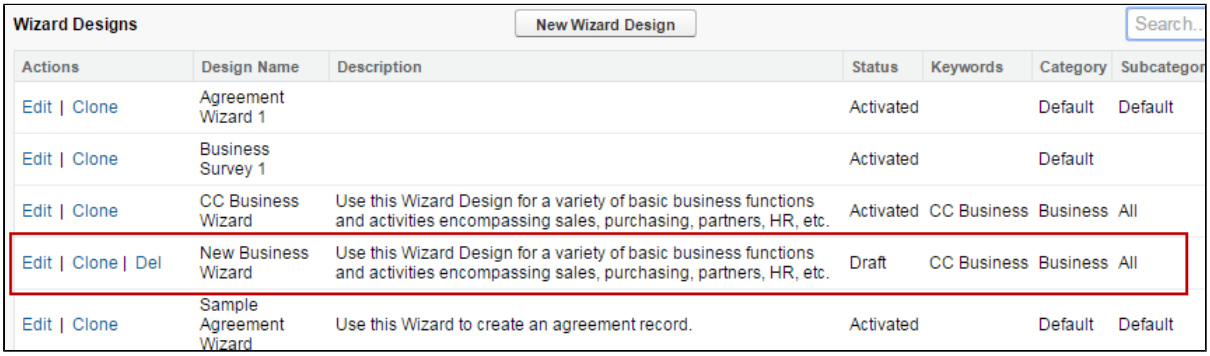
Cloning a Wizard Design

For auditing purposes and to prevent errors with any in-progress Wizards, you can only deactivate or retire an active Wizard design. To edit and repurpose a Wizard design, clone the Wizard design and edit the copy. You can also clone a draft Wizard design if you choose.

To clone a Wizard Design

1. Go to the **Wizard Design** tab.
2. Under the Actions column, click the **Clone** link next to the design you want to clone.
3. In the Clone Wizard Design form, enter a unique design name for the new wizard in the **Wizard Design Name** field.
4. Click outside the field then click **Clone**. The new Wizard design is created and displayed in the Wizard Design list on a new line with Status = Draft. All information is copied from the cloned Wizard.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Wizard Designs | New Wizard Design | Search...

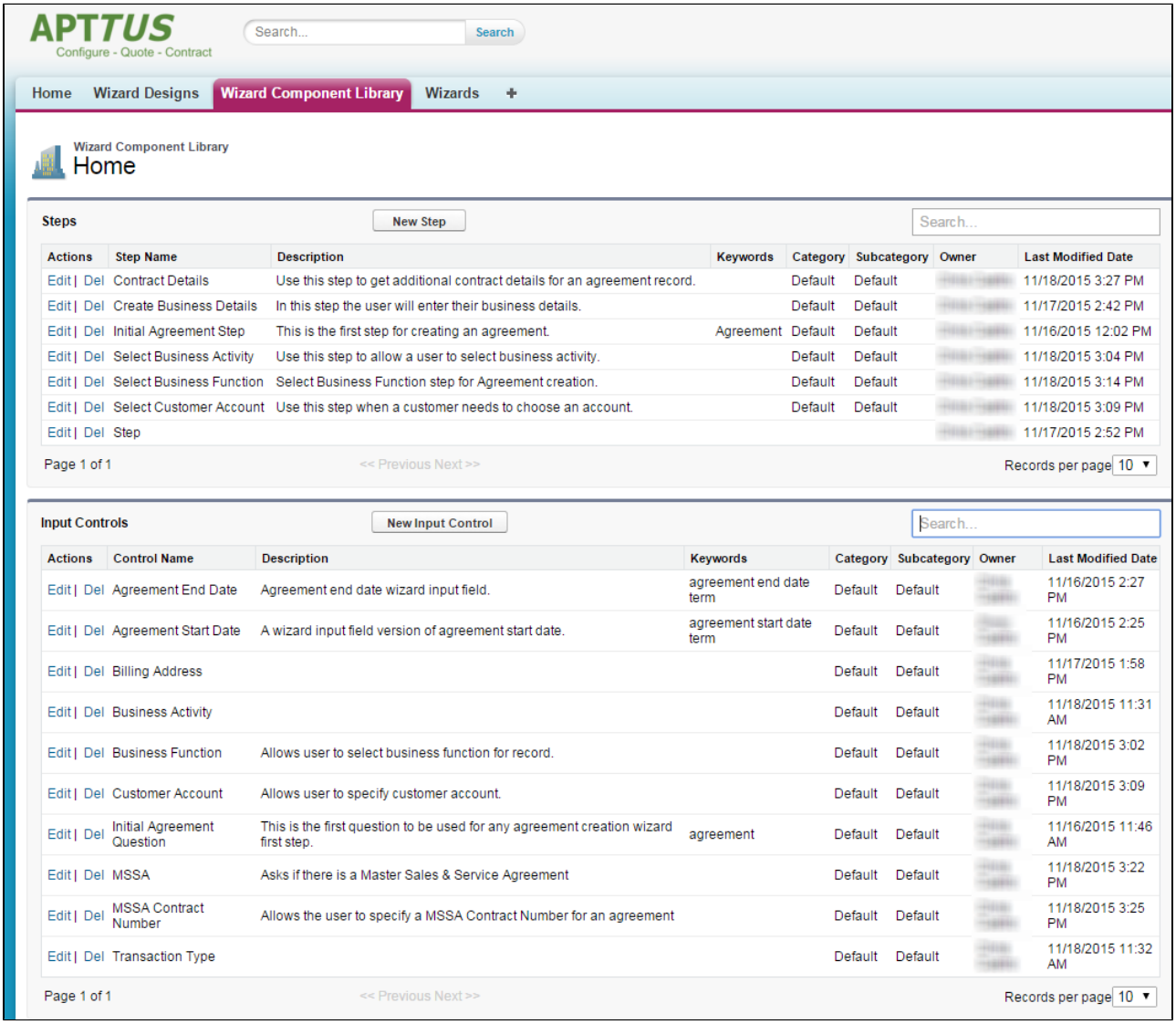
Actions	Design Name	Description	Status	Keywords	Category	Subcategor
Edit | Clone	Agreement Wizard 1		Activated		Default	Default
Edit | Clone	Business Survey 1		Activated		Default	
Edit | Clone	CC Business Wizard	Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.	Activated	CC Business	Business	All
Edit | Clone | Del	New Business Wizard	Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.	Draft	CC Business	Business	All
Edit | Clone	Sample Agreement Wizard	Use this Wizard to create an agreement record.	Activated		Default	Default

Using the Wizard Component Library

The Configurable Wizard offers a tab from which you can manage libraries of both Steps and Inputs. When you create a step or input from a Wizard Design, that step or input is available to that *specific wizard design only*. In many cases, you will want to create steps or inputs which can be used by more than one Wizard. Use the **Wizard Component Library** to create reusable steps and inputs.

The Wizard Component Library is comprised of two tables: **Steps** and **Input Controls**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Information displayed in table columns comes directly from Input or Step Setting details.

You can take the following actions on tables in the Wizard Component Library:

Action	Description
New Step	Click **New Step** to create a new step in the Steps Library. See Creating Steps for more information.
New Input Control	Click **New Input Control** to create a new input in the Inputs Library. See Creating Inputs for more information.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Edit	Edit an existing step or input. Edited steps and inputs will only apply to newly-created Wizard Designs and do not affect steps or inputs for existing Wizard Designs.
Delete	Delete an existing step or input. Deleted steps and inputs will only apply to newly-created Wizard Designs and do not affect steps or inputs for existing Wizard Designs.
Search	Use the type-ahead feature to narrow the list of displayed inputs or steps you want to edit, delete or view.

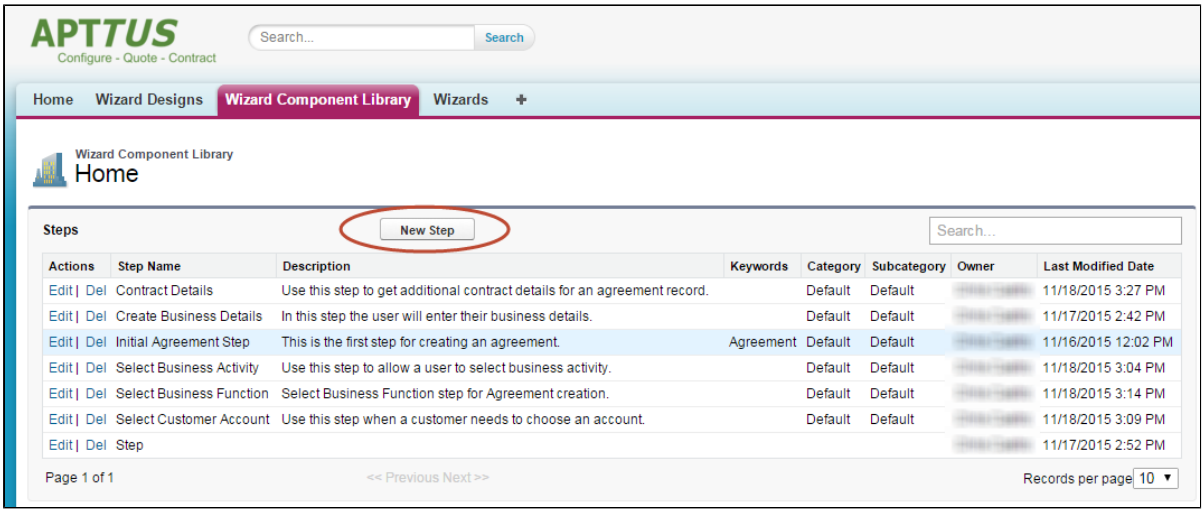
Creating Steps

Steps are used to designate the actions that occur when end-users use the Wizard. Steps use common elements, like actions and rules, to define the flow of your Wizard. Each step represents a screen in the wizard runtime.

When you create a new step in the Wizard Component Library and save it, it becomes available for use in Wizard Designs which match the Context Type and Object specified when you define it (if any). Please note that any modifications to the step from within a Wizard Design will not affect the properties of a step saved in the library.

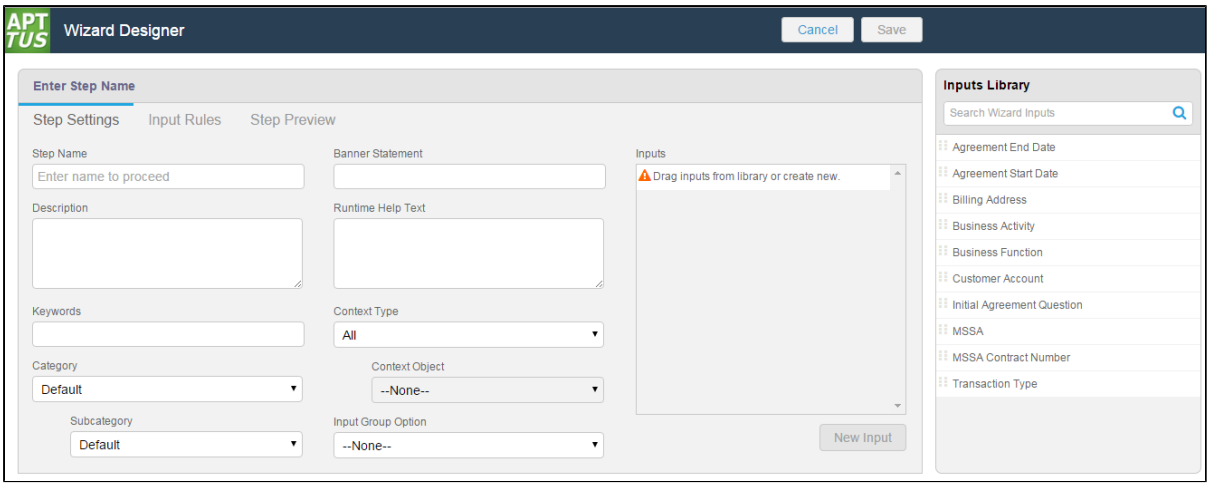
To create a new Step from the Wizard Component Library

1. From the Wizard Component Library, click on **New Step**.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

The Step Settings form is displayed.



2. Enter the following properties into the form:

Step Setting	Description
Step Name	Enter a name for your Step. This name can be internal but is used in the runtime banner when the user is interacting with the Wizard if **Banner Statement** (below) is not defined. Note: You cannot add any inputs to your step until you choose a Step Name.
Banner Statement	Enter a Banner Statement to display at Wizard runtime when the user is interacting with the Wizard. If left blank, the **Step Name** will be used instead.
Description	Enter a description for your step which describes its intended use (for example, "Define business details in this step.")
Keywords	Enter a list of keywords which can be used to search for this step.
Category	Choose an option from a drop-down list of pre-defined Step Categories (define picklist values on the Wizard Step object) .
Sub Category	Choose an option from a drop-down list of pre-defined Step Sub Categories (define picklist values on the Wizard Step object).

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Step Setting	Description
Runtime Help Text	Enter text to display when the user clicks the help icon at the top of the Step page.
Context Type	Define whether your Step will apply to **All** objects or a specific **Object** .
Context Object	Choose the specific context Object for your Step. This option is only available if you specified "Object" for Context Type. (e.g., "Agreement")
Input Group Option	Select an option from the drop-down list to choose how Inputs will be displayed in the Step (as groups): • **None** – Select this option to display all Inputs for the step in the sequence listed in the Inputs pane. • **Repeatable** – Select this option to allow the end user to add multiple records for selected Inputs in list format. User can click the **Add Item** button to add additional values for the same group of Inputs (e.g., multiple Addresses). • **Table Layout** – Select this option to allow the end user to add multiple records for selected inputs in tabular format. User can click the **Add Item** button to add additional values for the same group of Inputs (e.g. Agreement Line Item Products, Quantity, List Price, etc.)

3. Drag-and-drop an Input from the Inputs Library to the **Inputs** pane. If you do not see your Input listed, use the type-ahead feature in the Search box to locate the Input you want to use.

> You cannot add inputs to a step unless the Step Name has been entered.

4. You can take the following actions on Inputs you have added: Add more inputs from the Inputs Library in the sequence you want them to appear in the step.
    - Hover over an Input in the list and click **Edit** to edit the input settings for this step only.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- Hover over an Input in the list and click **Delete** to remove an Input from the step.
- Click and drag Inputs in the Inputs pane to reorder them.

5. If you do not find the correct input in the library and need to create a new one to use in your step, see Creating Inputs from the Wizard Designer.
6. To create rules which govern inputs for the current step, click on **Input Rules** (see Configuring Step Input Rules from the Wizard Designer).
7. Click **Save** to save your changes or click **Cancel** to discard changes and return to the Wizard Design form. The new step is now available from the Wizard Component Library.

Creating Inputs

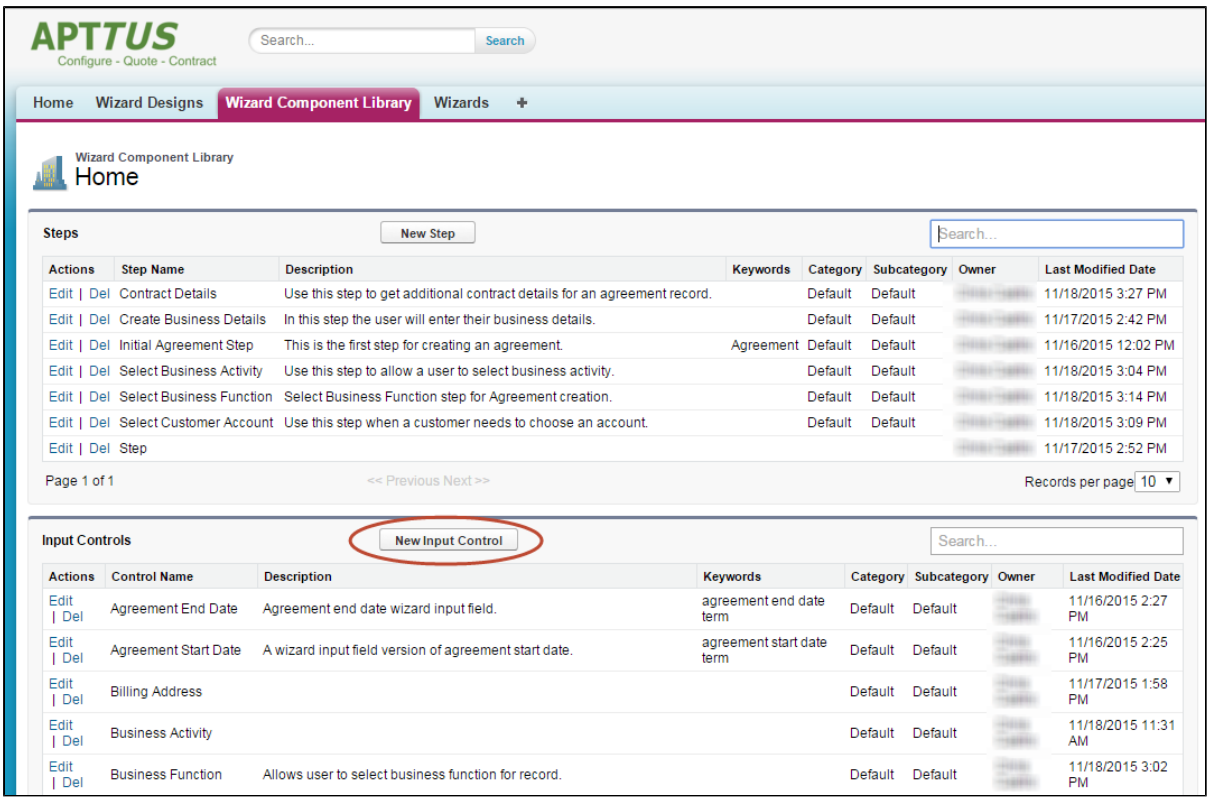
Input controls are the primary components of any wizard. They are the questions and instructions that you provide to the end users of your wizard. For example, you might create an input control that requires users to select picklist options, such as Business Function or Agreement Start and End dates. Input controls are reusable, so you can use them in as many steps as you want to.

Please note that any modifications to the input from within a Wizard Design will not affect the properties of an input saved in the library.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

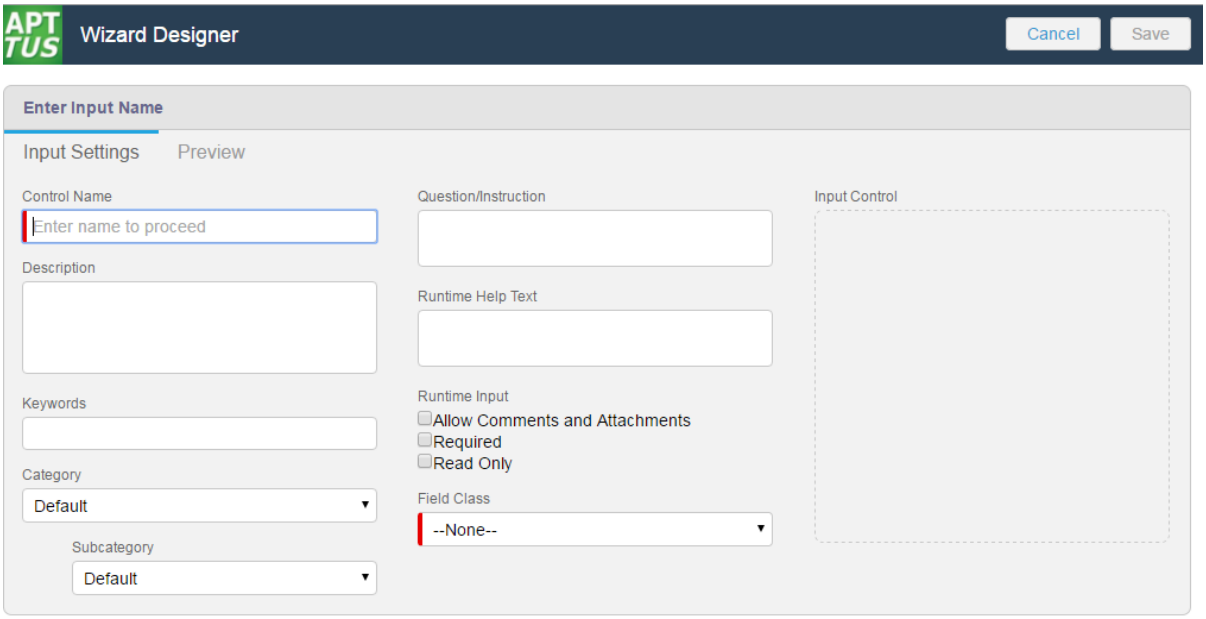
To create a new Input from the Wizard Component Library

1. From the Wizard Component Library, click **New Input Control**.



The Input Settings page is displayed.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



2. Enter the following properties into the form:

Input Setting	Description
Control Name	Enter a name for your Input.
Question /Instruction	Enter a question or instruction which the end user will see in the runtime wizard.
Description	Enter a description for the input which describes its intended use (for example, "Use this Wizard to create MSA Agreements for Acme."
Keywords	Enter a list of keywords which can be used to search for this Input.
Category	Choose an option from a drop-down list of pre-defined Input Categories (define picklist values on the Wizard Input Control object).
Sub Category	Choose an option from a drop-down list of pre-defined Input Sub Categories (define picklist values on the Wizard Input Control object).

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Input Setting	Description
Runtime Help Text	Enter text to display when the user hovers over the help icon next to the question/instruction.
Runtime Input	Determine how the end user can interact with this Input at wizard runtime: **Allow Comments and Attachments –** Select this check box to enable the end user to add comments and/or attachments in addition to the input control value. Comments are entered into a text area field and are limited to 500 characters. There is no limit to the number of files a user can attach. **Required –** Select this check box if a value is required for the input. An end user will not be able to complete the current step without entering a value for this input. **Read Only –** Select this check box if you plan to have the input value set by Step Input rules in all cases. The end user will not be able to change the value of this input.
Field Class	The Field Class defines the type of response you expect for the input. • • **Wizard Input Field** – Use this field class when you want the response to indirectly set other Wizard values. Wizard input fields values are only used to affect the value or state of other input controls using Step Input Rules. When you choose this field class, you must specify one of the following data types: • • Checkbox • Date • Number • Picklist • Picklist Radio Button • Multi Picklist • Text • Text Area

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Input Setting	Description
	If you choose to make the Wizard Input field a Picklist type, you must also enter valid values to be used as input responses. • **Object Field** – Use this field class when you want the response to directly set a field value on the Salesforce object which is created from the Wizard (e.g., the "Agreement Start Date" field on the Agreement object). Use the drop-down list under Input Control to choose the Object Name, then choose the Field Name based on the object chosen.

3. When you are finished creating your Input, click on the **Preview** tab to show how the input will appear at Wizard runtime.

4. Click **Input Settings** to return to the Input form.
5. Click **Save** to save your new Input or **Cancel** to discard changes and return to the Wizard Component Library.

Running Wizards

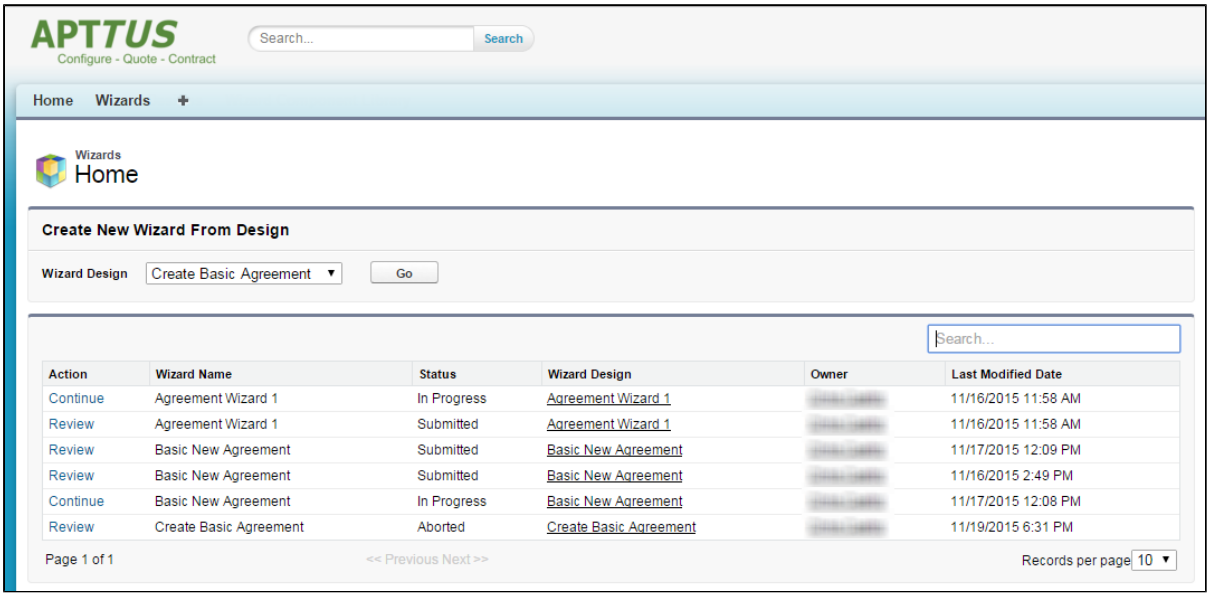
Hint: click on an image on this page to enlarge the view.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

The **Contract Wizard** application allows you to run Wizards created by administrators. Wizards are custom, user-friendly step-by-step questionnaires that allow you to create records based on any standard or custom Salesforce object (Agreements, Accounts, Proposals, Leads, etc.). Using a Wizard, you can quickly create your own records by entering responses to criteria-based inputs that follow a logical series of steps.You can easily search and select from Wizard designs to create well-formed records, and if enabled, you can preview your responses prior to submission, returning to previous Inputs and Steps to make changes or corrections.

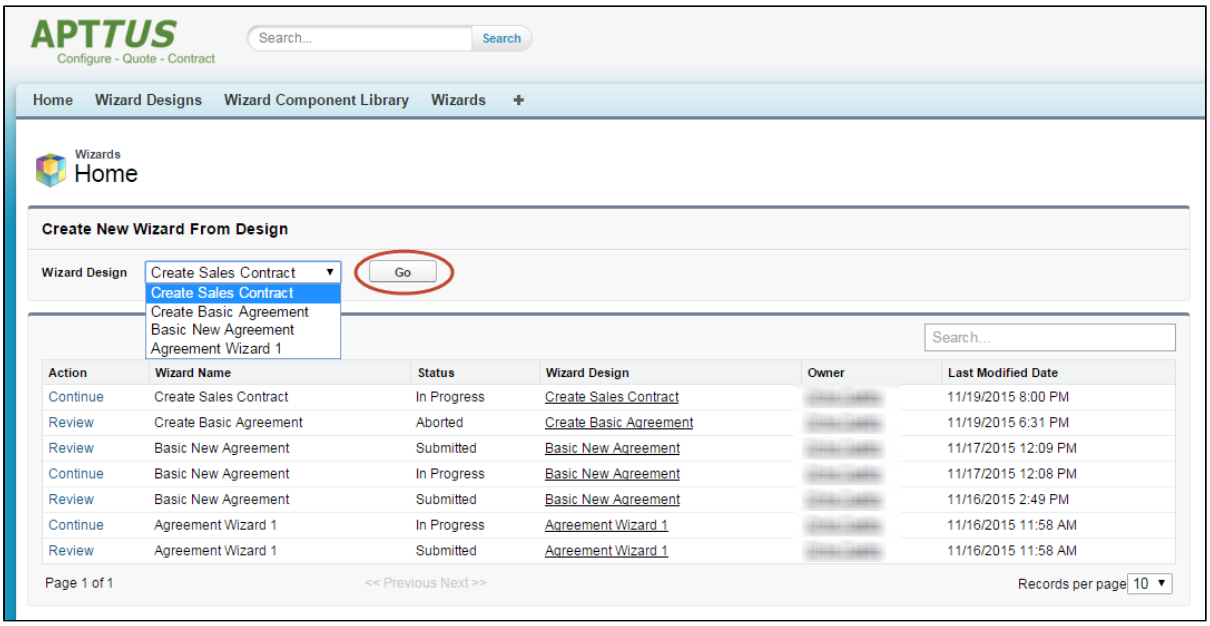
To run a Wizard

1. From the Salesforce application menu, choose **Apttus Contract Wizard**. The application displays the Home tab and the **Wizards** tab (you will see additional tabs if you have permissions to create Wizards).



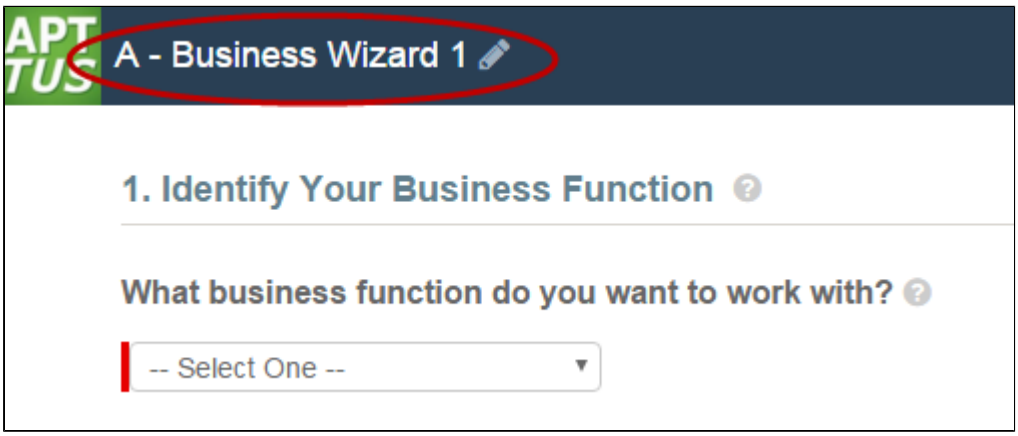
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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.

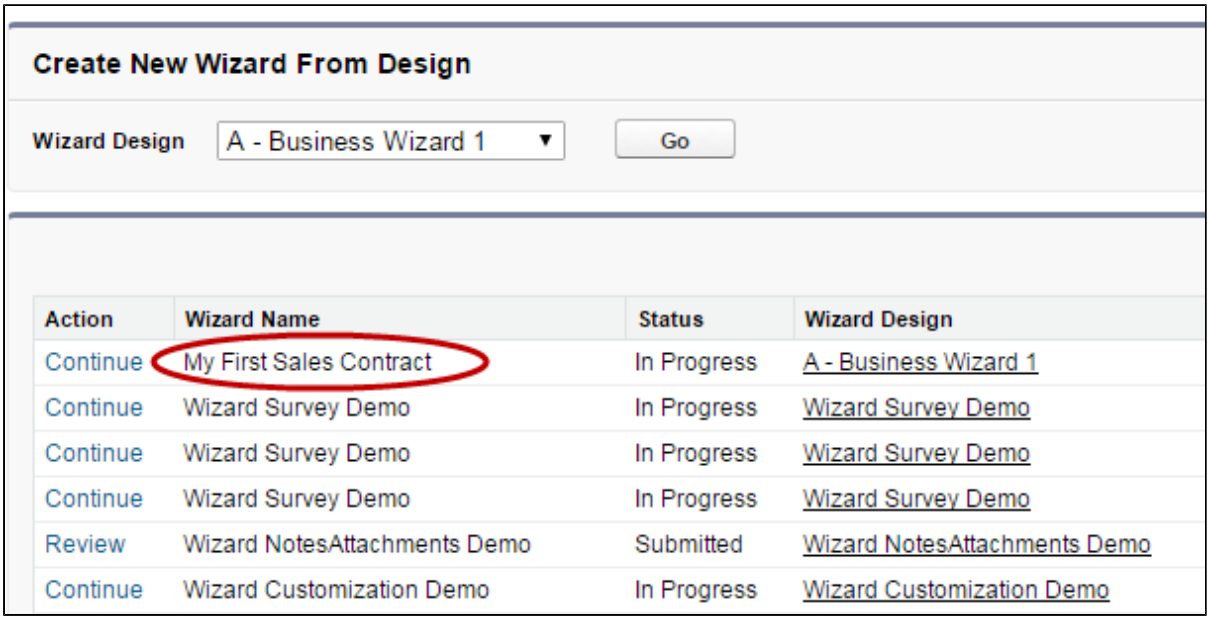
3. **(Optional)** Click the pencil icon in the banner to give your Wizard a unique name, so you can differentiate it from other Wizards you run using the same Wizard design.



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

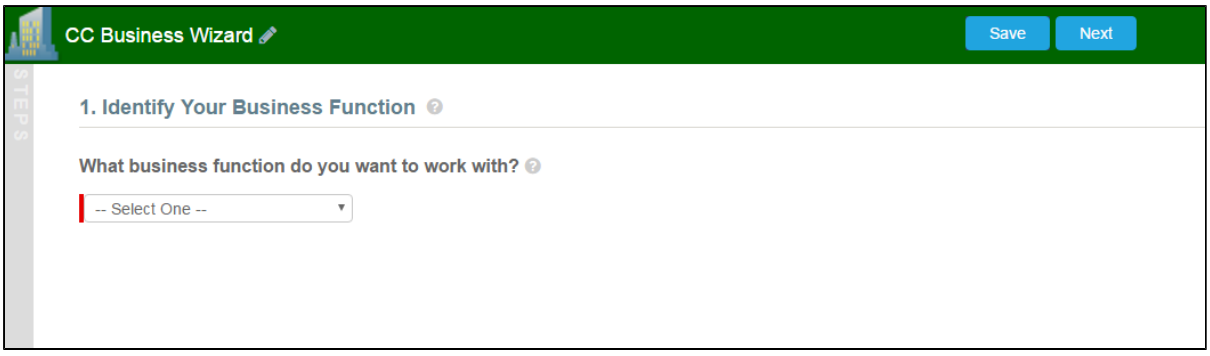
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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.

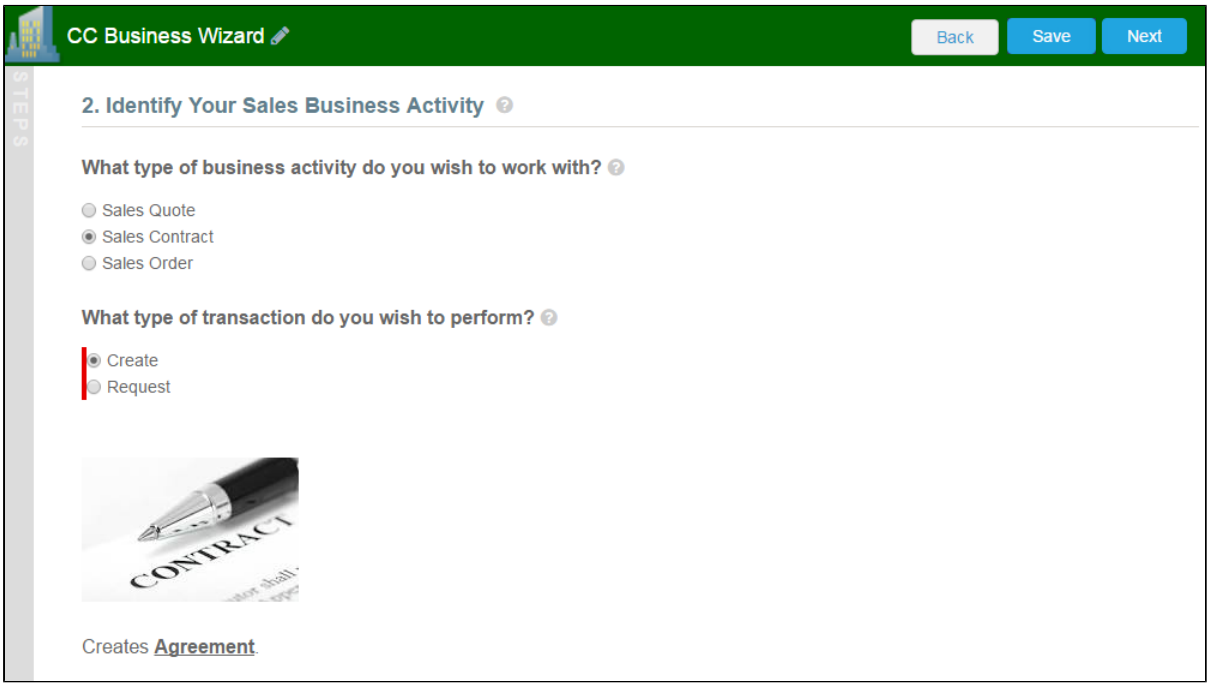
> ⚠ You must fill in all the required fields on the current wizard page before clicking Save; otherwise, the Wizard will throw validation error message.



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(s). For example, in the following step, when you choose "Sales Contract" as the

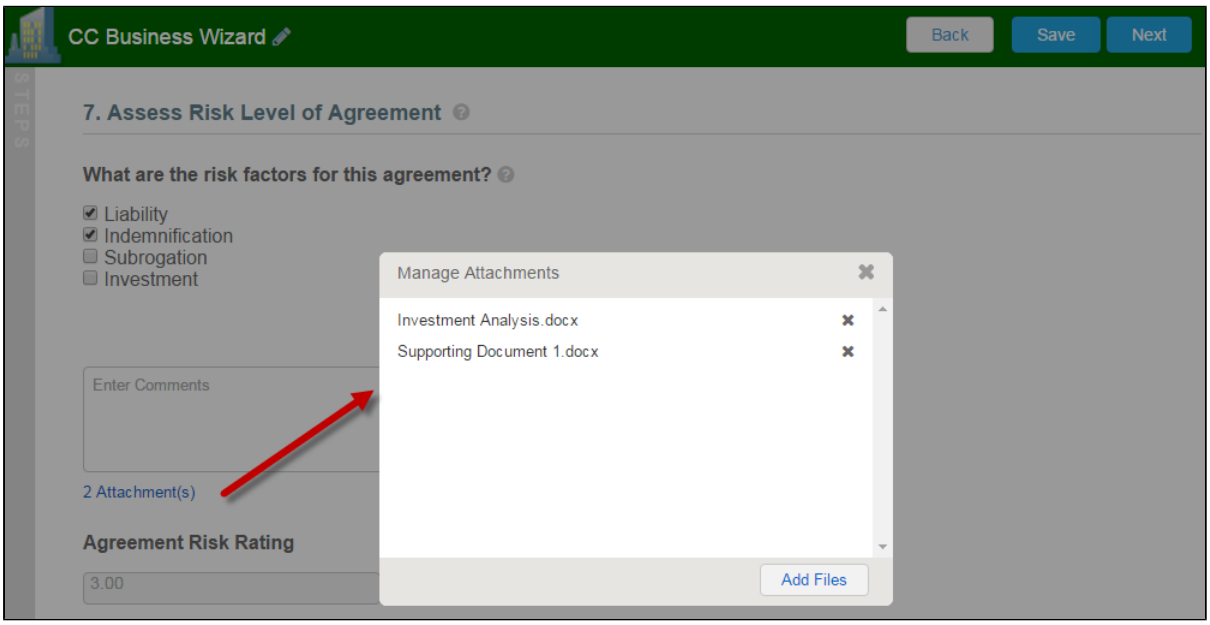
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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.

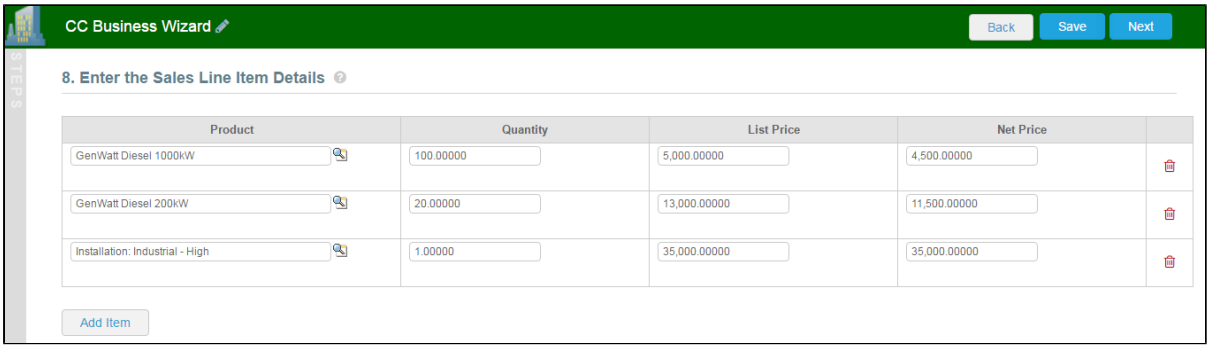


5. Some Wizard steps may include the option to add comments and/or attachments in addition to providing traditional responses. You can add comments in the text area provided (500 character limit), and/or click **Attach Files** to attach files to the Wizard step. When you use the Wizard to create a record, 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.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

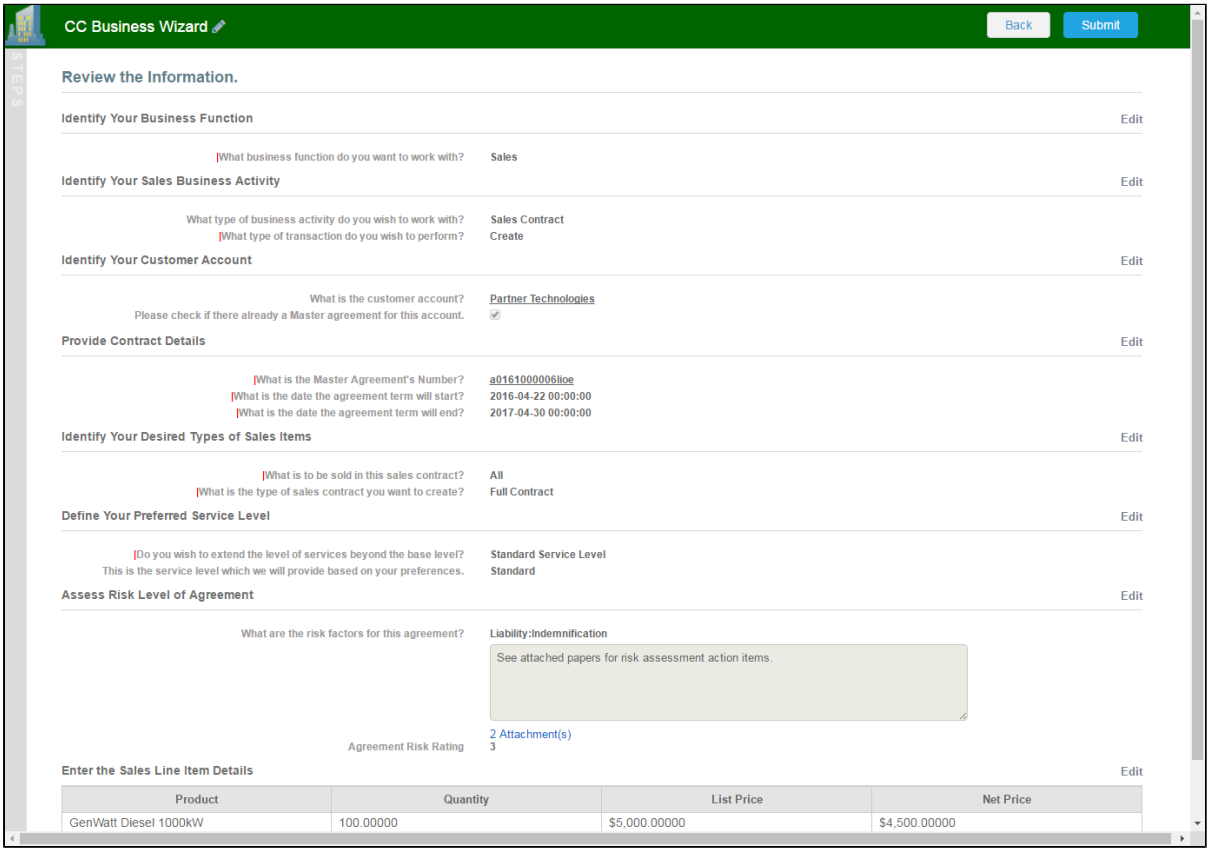


6. Click **Add Item** when there is a repeatable field in the Wizard. These fields are used when you need to enter multiple values as certain responses, for example when you are adding multiple business addresses, or product line items and prices to a Sales Contract, as shown in the example below.

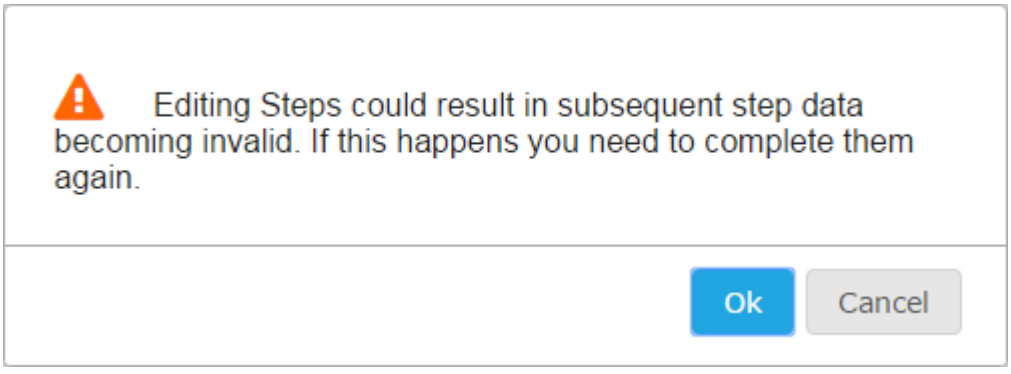


7. Closing the Wizard automatically saves your progress in the Wizard up to the current step. You can continue where you left off from the **Wizards** tab (see Working with the Wizards Tab).
8. When you have answered the final question in the Wizard and clicked **Next**, the page will display a Review of all steps you have completed.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



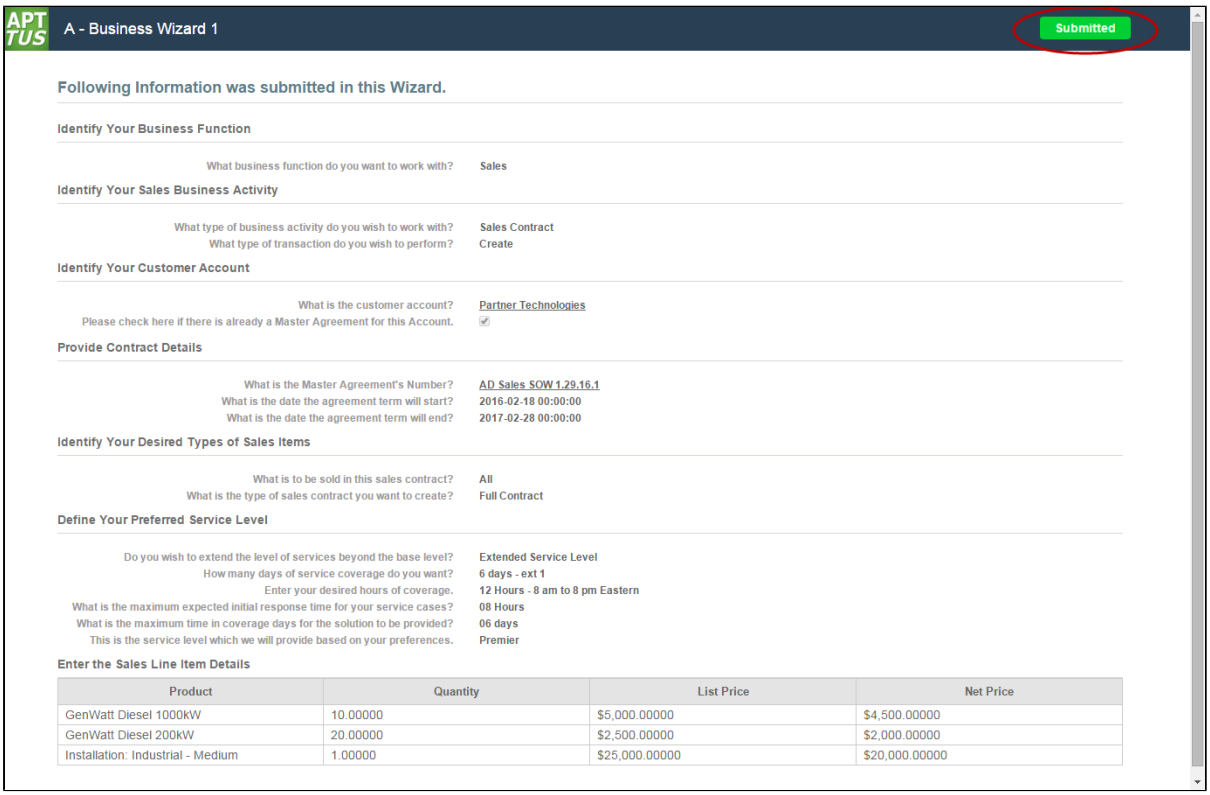
9. Click **Edit** to change your answers for any steps in the Wizard. A dialog is displayed warning that you may have to repeat steps of the Wizard that you previously completed depending on edits you make.



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

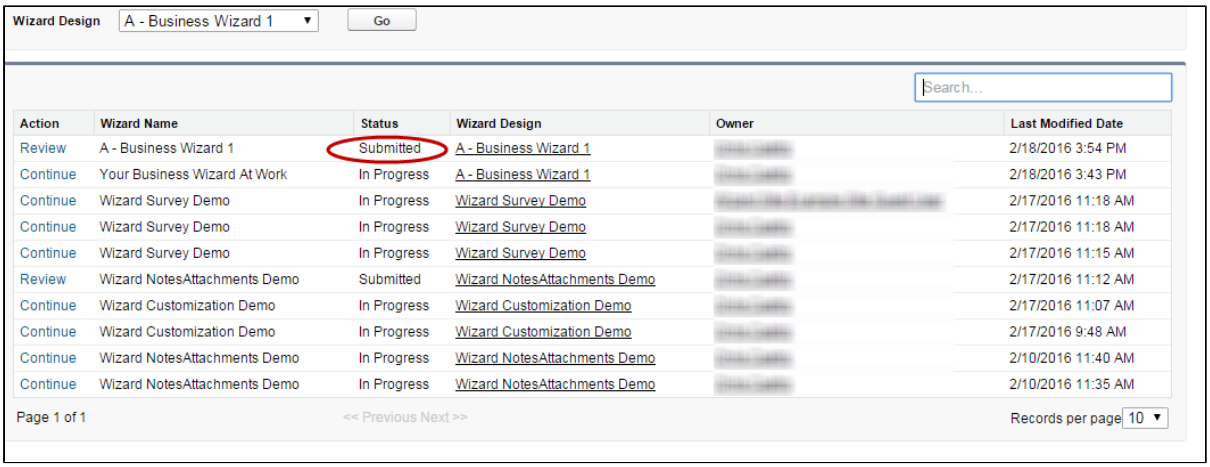
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

11. When you are satisfied with your responses, click **Submit.**
    Depending on the design of the Wizard, one or more of the following will occur:
    - A record of the type determined by your inputs within the Wizard will be created (e.g., a Sales Agreement record).
    - You will be redirected to the record details page of the record just created by the Wizard.
    - You will be redirected to another page in Salesforce.
    - You will remain on the Review page and the Wizard will be shown as **Submitted** (in this case data from the Wizard has usually been submitted for purposes other than creating a record).



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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



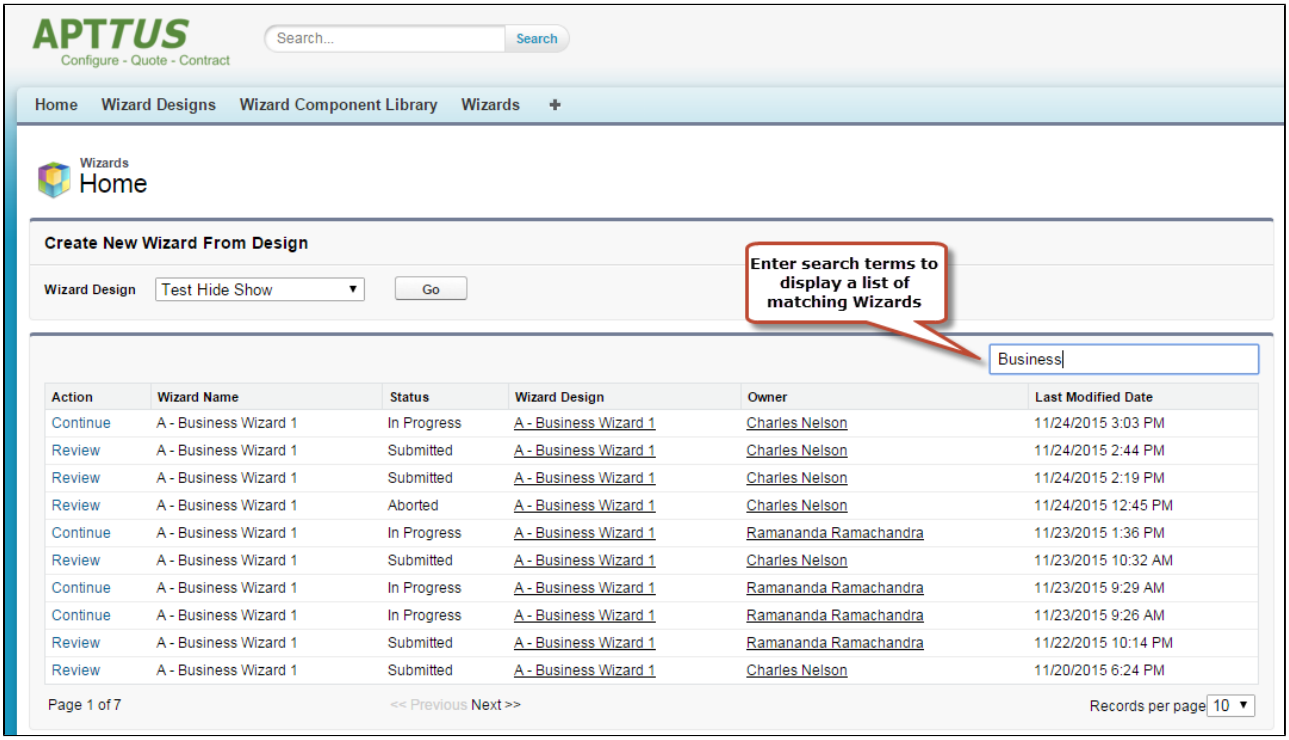
Working with the Wizards Tab

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.

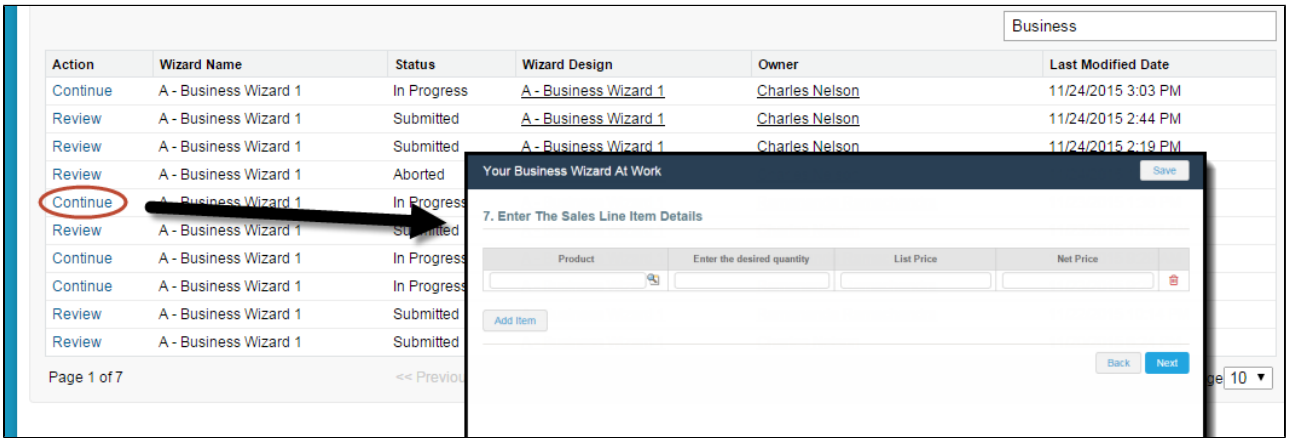
Copyright ©2011-2017 Apttus Corporation. All rights reserved.



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.



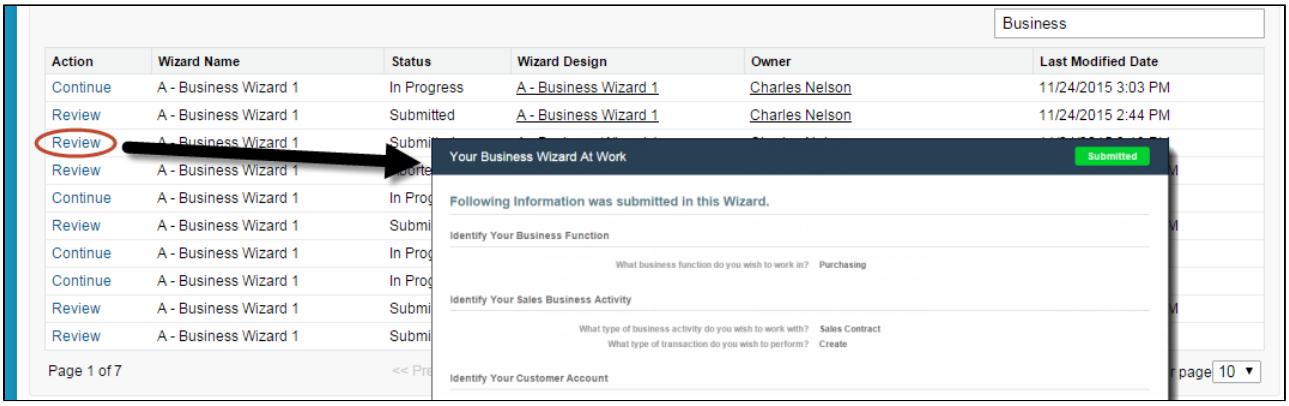
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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

To review a completed Wizard

You can revisit the Review page for a Submitted or Aborted Wizard once it is complete.

1. Navigate to the Wizard using the type-ahead feature or page navigation
2. Click **Review** under the Action column. The Wizard opens in a new tab and displays the Review page (you can no longer edit any steps).

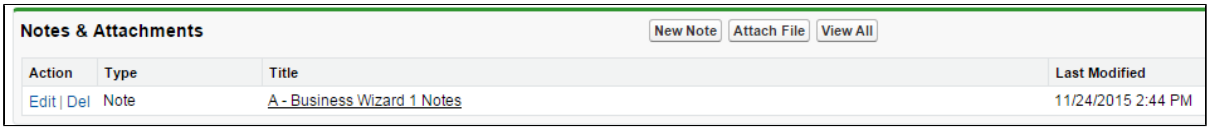


Tracking Wizard Activity from a Record

When a Wizard results in the creation of an Object record (such as an Agreement), a note is automatically added to the **Notes & Attachments** Related List of the created record identifying which Wizard originated the record.

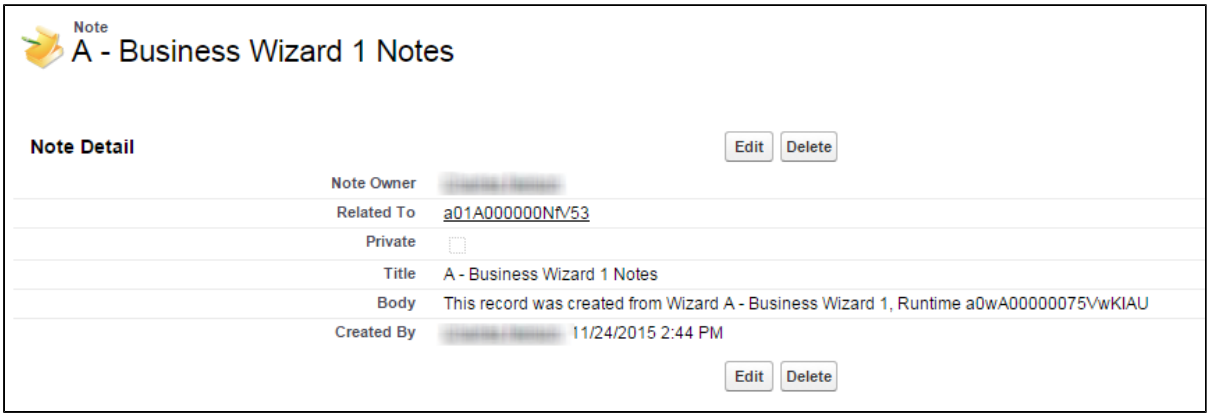
For example, an Agreement record has been created from a Wizard.

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



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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



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

The Notes & Attachments Related List must be added to the record layout to view the Wizard notes.

Using the Preview Sidebar

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

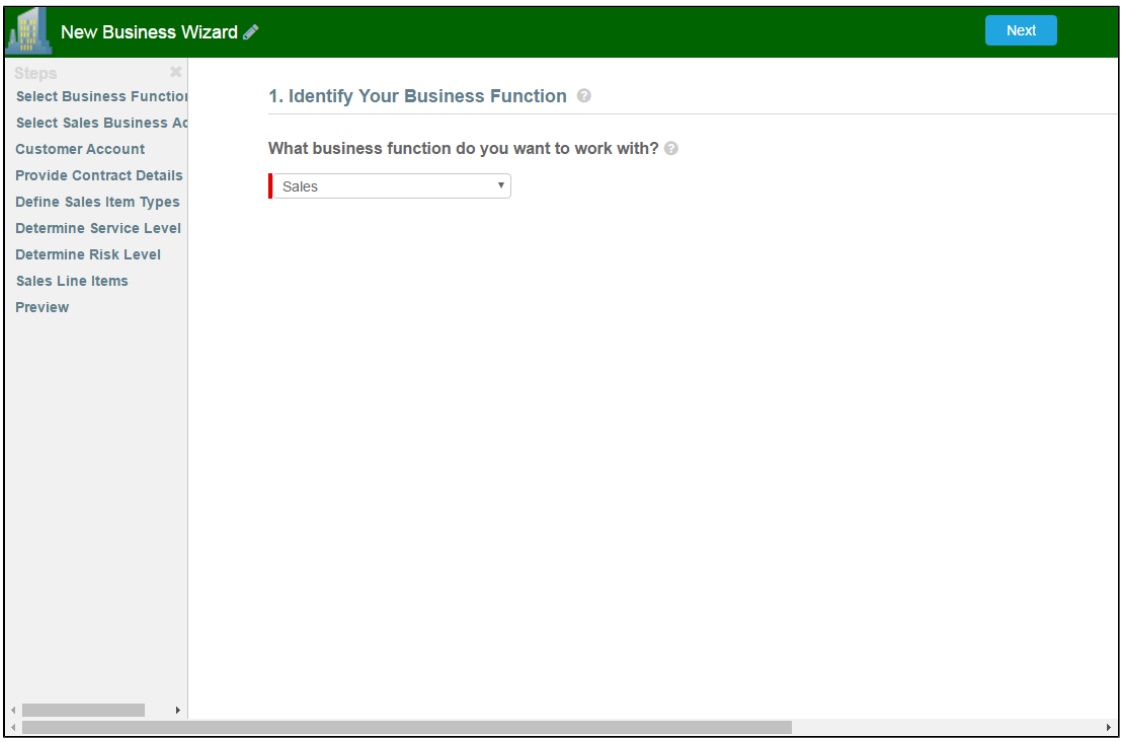
- Preview a future step in the Wizard.
- Track overall completion progress.
- Return to a previous step in the Wizard to complete responses or correct a mistake.
- View a full preview of all completed responses.

To use the Preview Sidebar

1. Launch a new Wizard from the **Wizards** tab. The runtime Wizard is displayed with the Preview Sidebar in collapsed view.
2. Click on the sidebar to expand it. You will see one of two possible views:

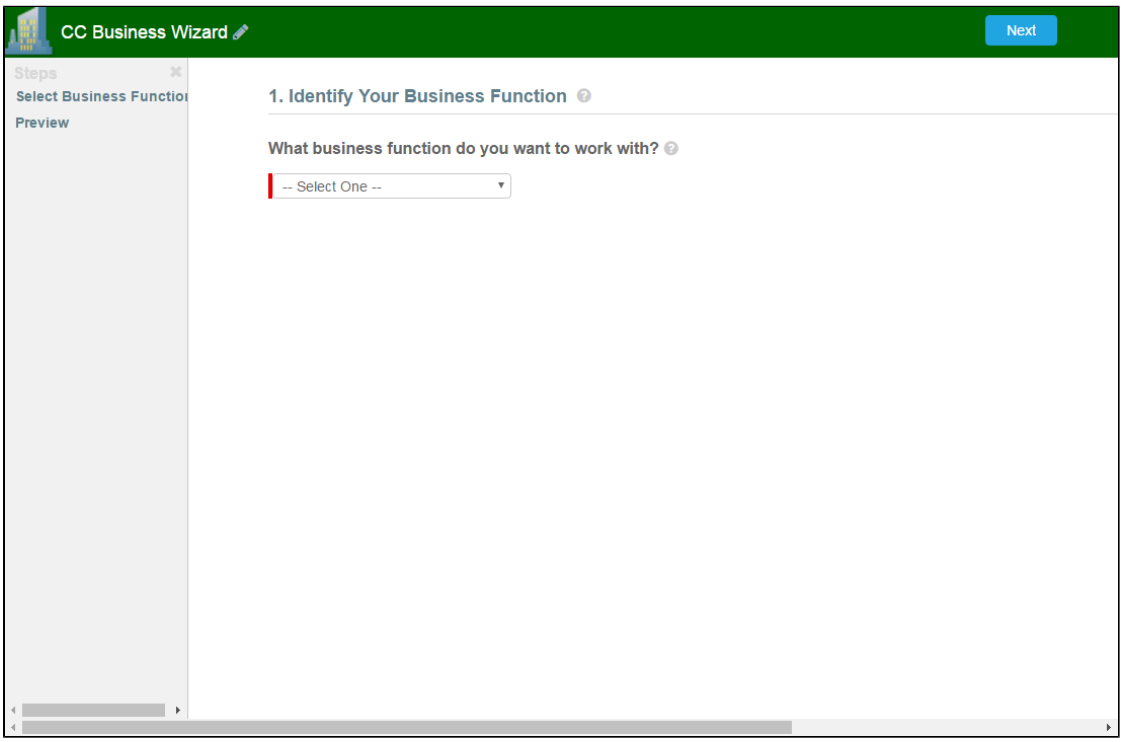
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- 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.

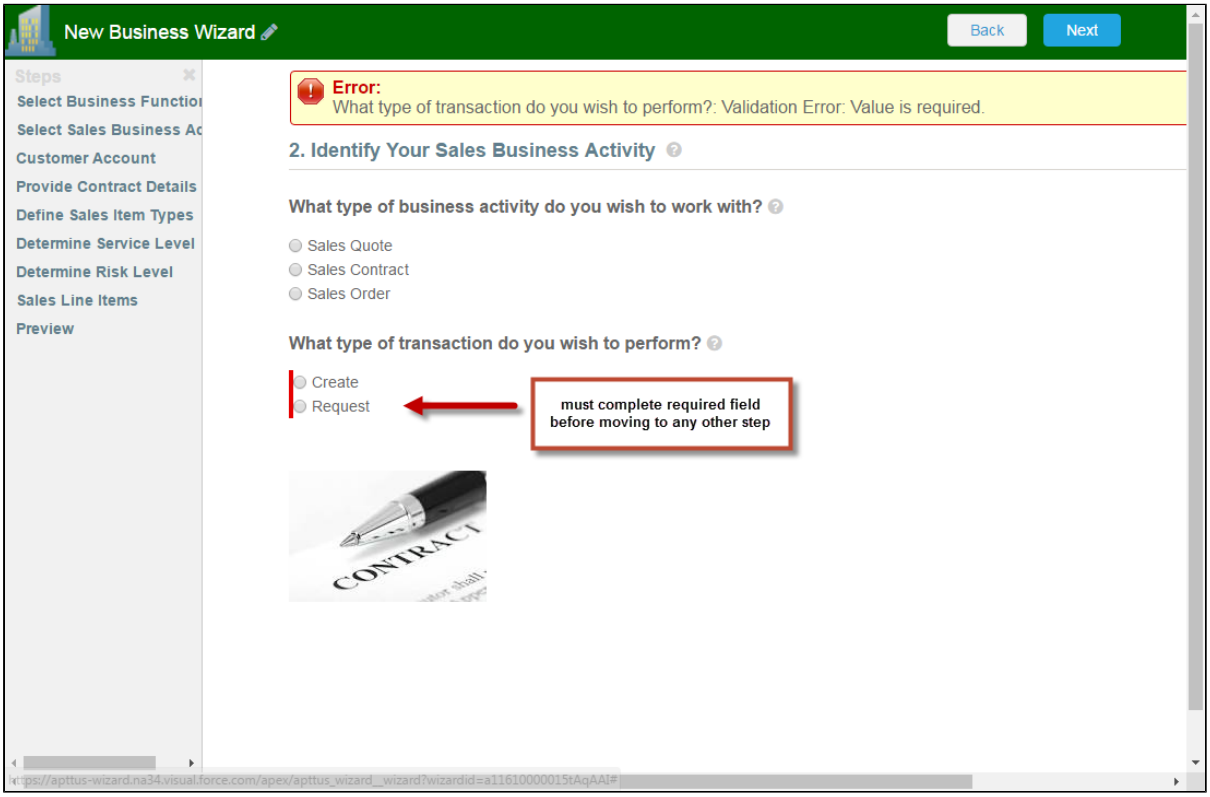
Copyright ©2011-2017 Apttus Corporation. All rights reserved.



> You can click on the X in the upper-right-hand corner of the sidebar at any time to collapse it.

3. Click on any step in the preview sidebar to preview it. **Important Note:** if you attempt to view a future step but the current step contains any required fields, you cannot preview that step until you have completed the required fields in the current step.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



4. Click on **Preview** at any time to go to the Review screen where you can review all visible steps in the Wizard, including any completed responses. The Preview screen only reflects steps that are present in the sidebar. No conditional steps will be shown unless the conditions that trigger them are satisfied.
5. Click **Back** to return to the last step you worked with.

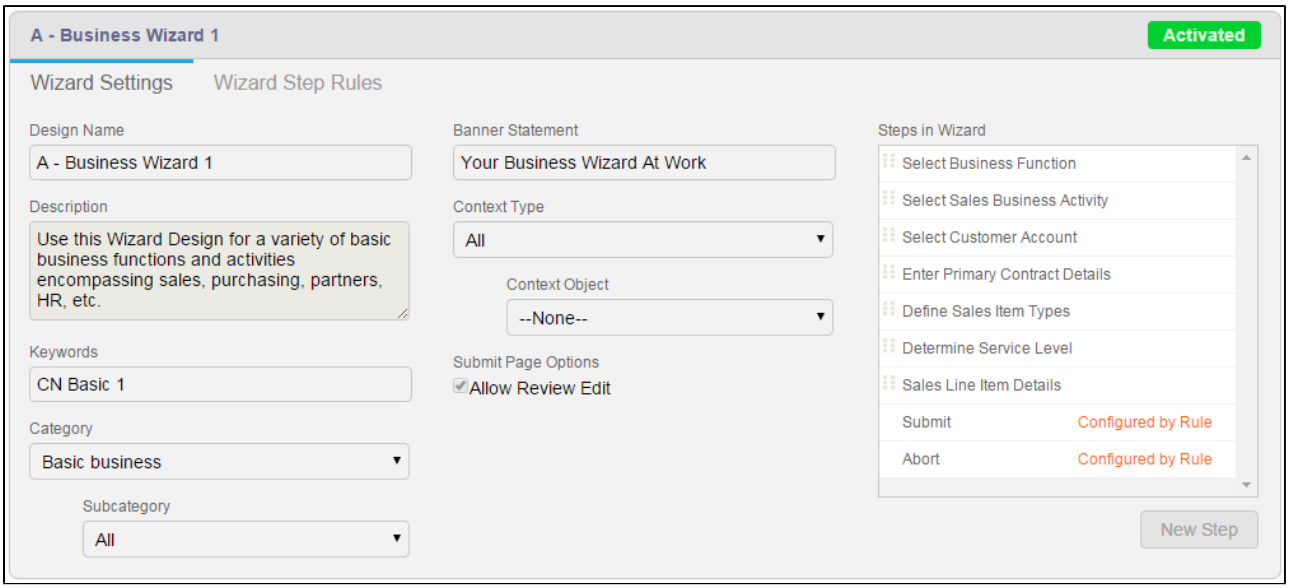
Example Wizard Design: Sales Contract

The following section describes an example process for an Agreement record-creation Wizard. This Wizard will the step the user through the process of creating an Agreement record with a Sales Contract record type. This example demonstrates the use of Wizard Step rules and Step Input rules to **Determine Focus Object** and **Determine Record Type** for the record, in addition to showing how to conditionally **Hide**, **Disable** and **Set** input controls based on values entered by the user. Understanding these processes will improve your ability to create your own unique Wizard designs.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

> Note: The example provided here does assumes the some steps and inputs have already been created and are part of the Wizard Component Library. Similarly, all details of the example Wizard design are not included–only specific portions of the design process are called out to demonstrate how features function within the Wizard.

The objective of the Wizard design used as an example on this page is to easily aid users in performing a variety of basic business functions, one of which happens to be creating an Agreement of record type Sales Contract. Additional logic could be built into both the Steps and Inputs to create other outcomes, including posting information to a URL or creating different types of records. Here is an example of the completed Wizard Design (hint: click the image to enlarge the view):

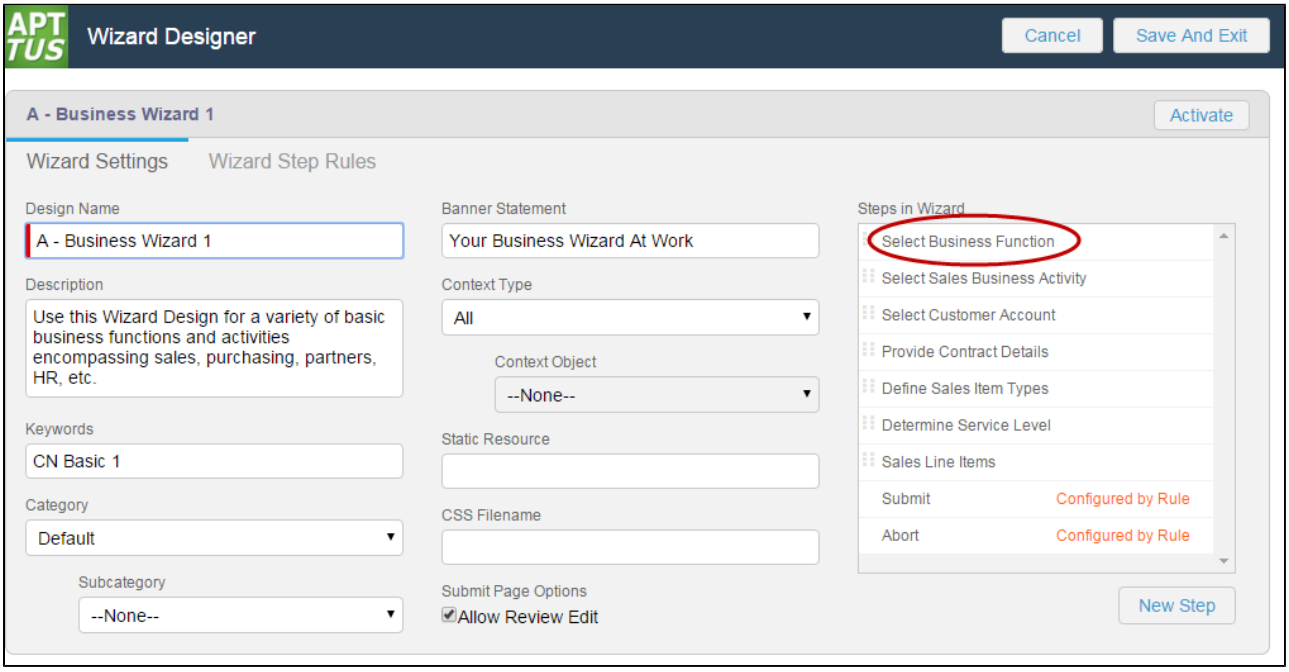


Example: Wizard Step Rule #1

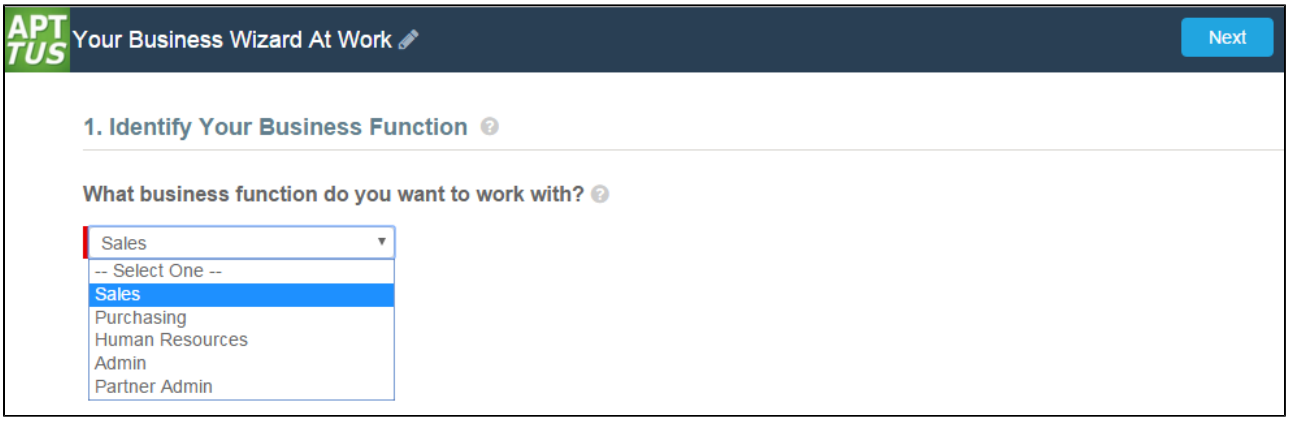
This first example demonstrates how you can create more than one rule for a single step which determines how the Wizard will flow based on conditions.

In our example design, the first step in the Wizard is **Select Business Function**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



The Select Business Function step was created directly from the Wizard design form and contains one Input Control which prompts the user during Wizard runtime to choose a business function for their task.



The Step Rule for this example will determine whether or not the user can continue with the Wizard. If the user chooses "Sales" and clicks **Next** the Wizard should continue to the next step. However, if the user chooses any other option, the Wizard prompts the user to **Abort**.

Create Step Rules

Because of this, two **Go to Step** rules must be created:

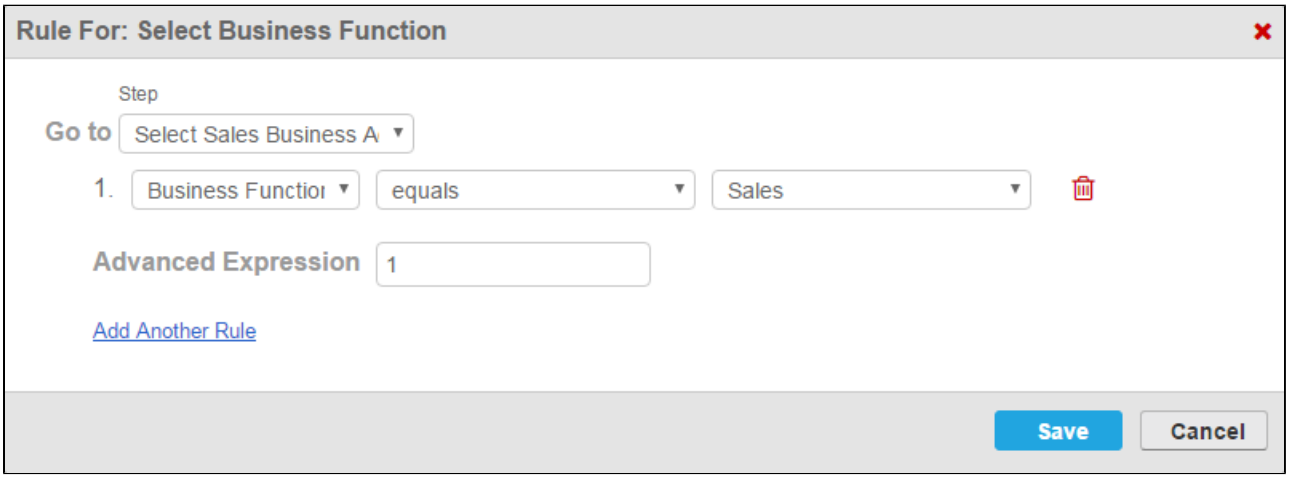
- **Go to Select Business Activity** if the Input value *is equal* to "Sales."

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- **Go to Abort** if the Input value *does not equal* "Sales."

From the **Wizard Step Rules** tab, two rules are created under the **Select Business Function** step.

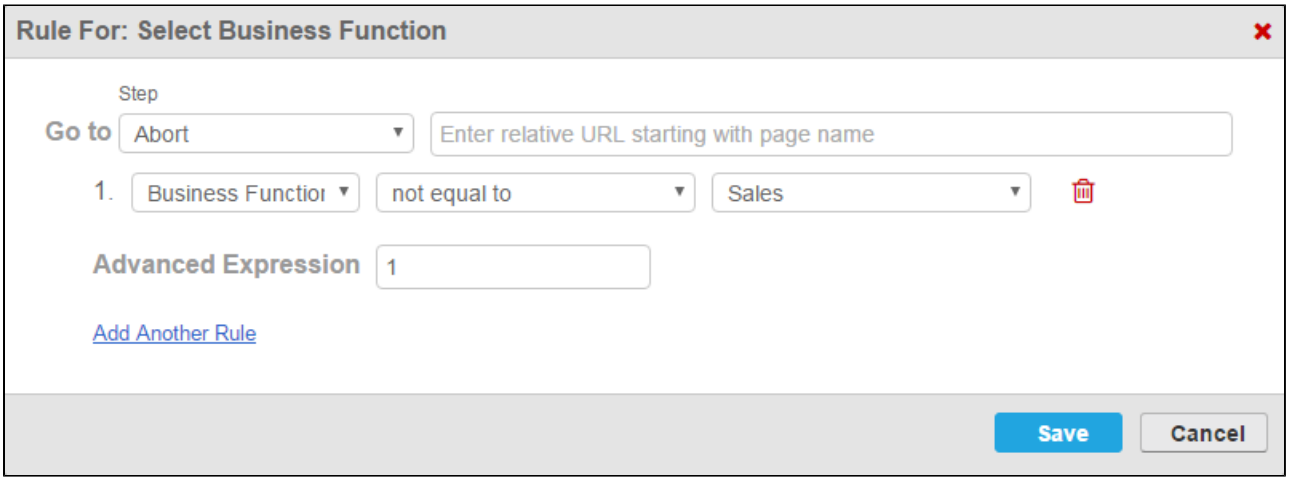
Rule #1: Go to Next Step



A Go to Step rule is defined to **Go to Select Business Activity** when a user chooses **Sales** from the **Business Function** input (see above).

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

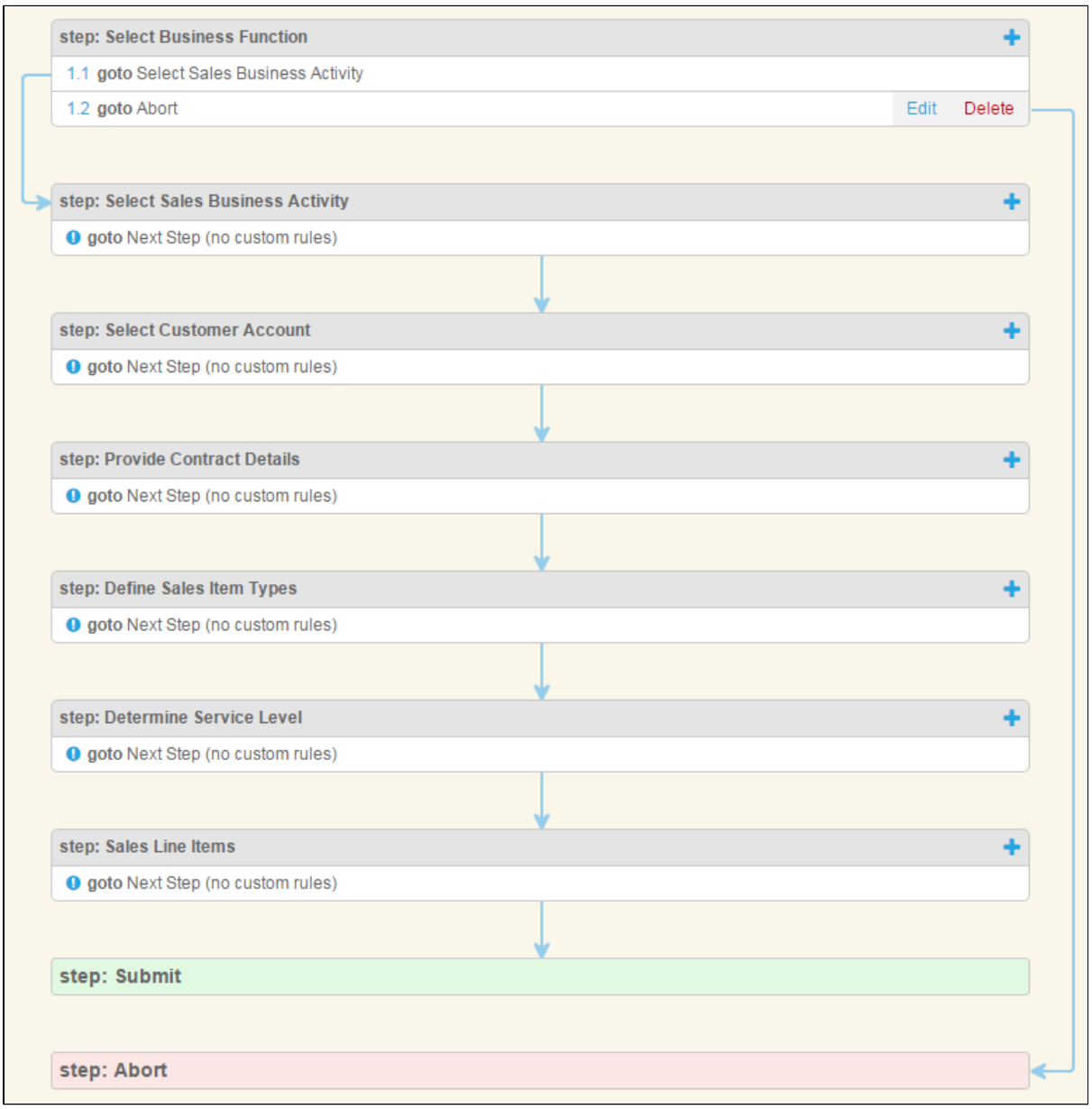
Rule #2: Go to Abort



Another Go to Step rules is defined to **Go to Abort** when a user chooses any other option than **Sales** from the **Business Function** input.

After both rules have been created, they are graphically represented on the Wizard Step Rules tab. Arrows indicate to which step the user is directed when the rule resolves to true. Rule #1 takes the user to the next step, whereas Rule #2 takes the user to Abort.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

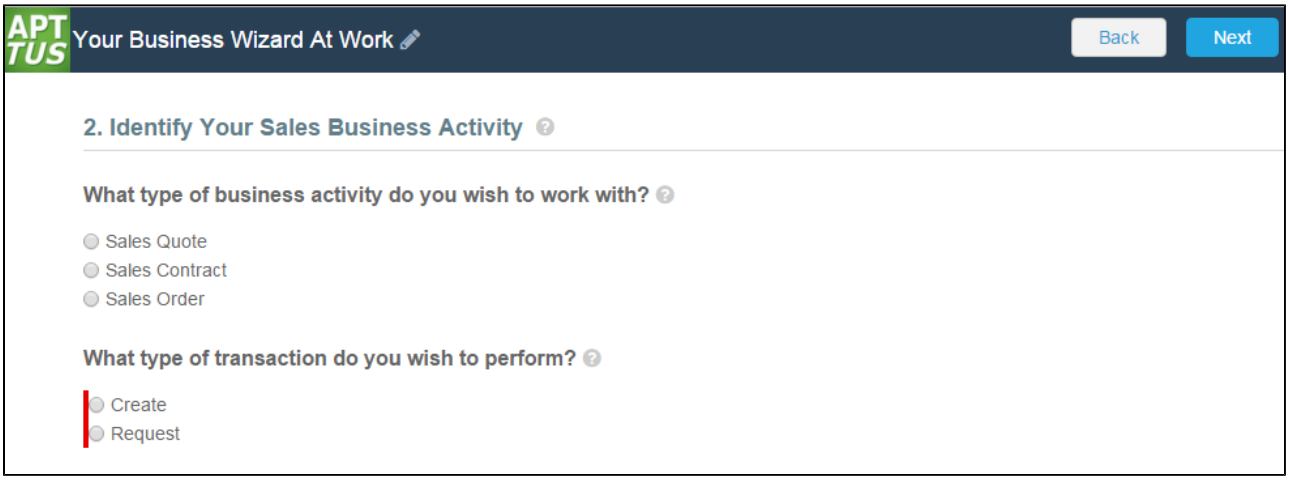


How it looks in the Wizard

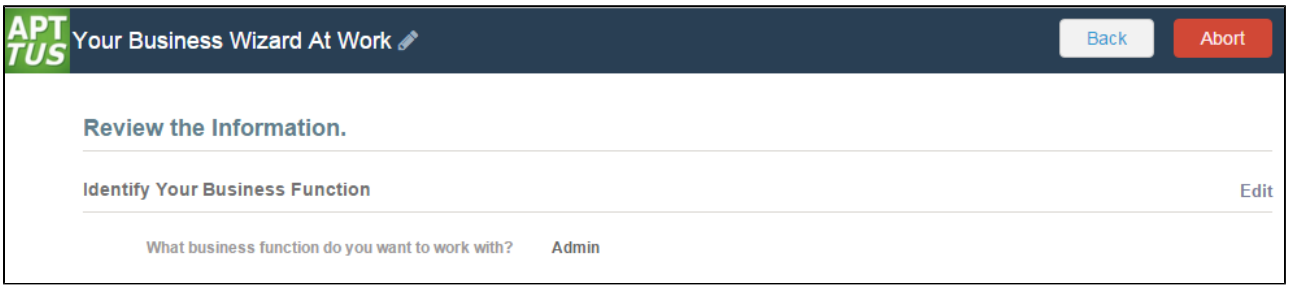
When a user runs the Wizard, the step prompts the user to choose which business function they want to work in.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

If the user chooses **Sales** and clicks **Next**, the step from Rule #1 is displayed next.



If the user makes a different choice and clicks **Next**, the Wizard displays an acknowledgement page, displaying all completed steps and their inputs. The user clicks **Abort** to abort the Wizard or **Back** to return to the previous step or **Edit** to return to a specific step and choose a different option.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

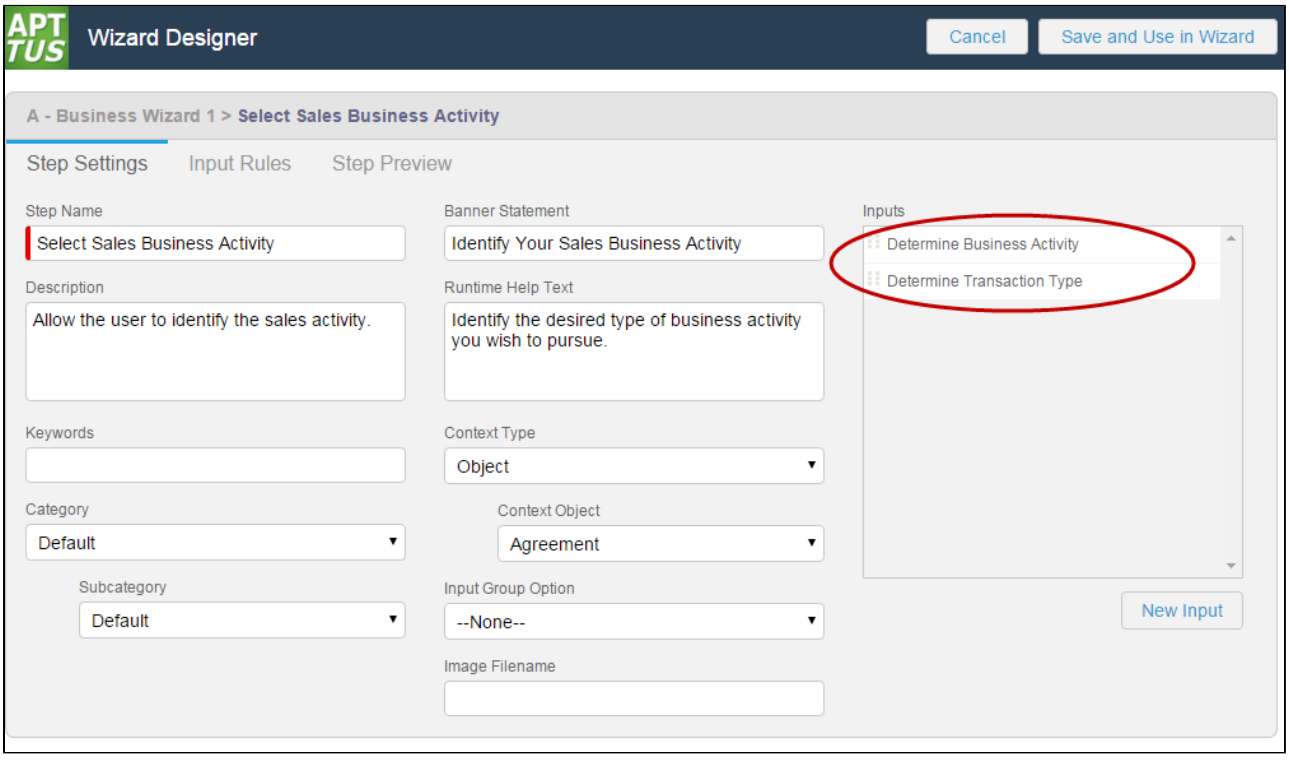
Example: Step Input Rule #1 (Determine Focus Object)

The following example demonstrates an Input Rule for determining the focus object for your runtime Wizard. In this example, inputs entered by the user will determine the focus object of the record to be created (Agreement).

To determine a focus object for the Wizard requires an input rule be created for a specific step in the Wizard. In this example, this rule is created for the second step, **Select Sales Business Activity**.

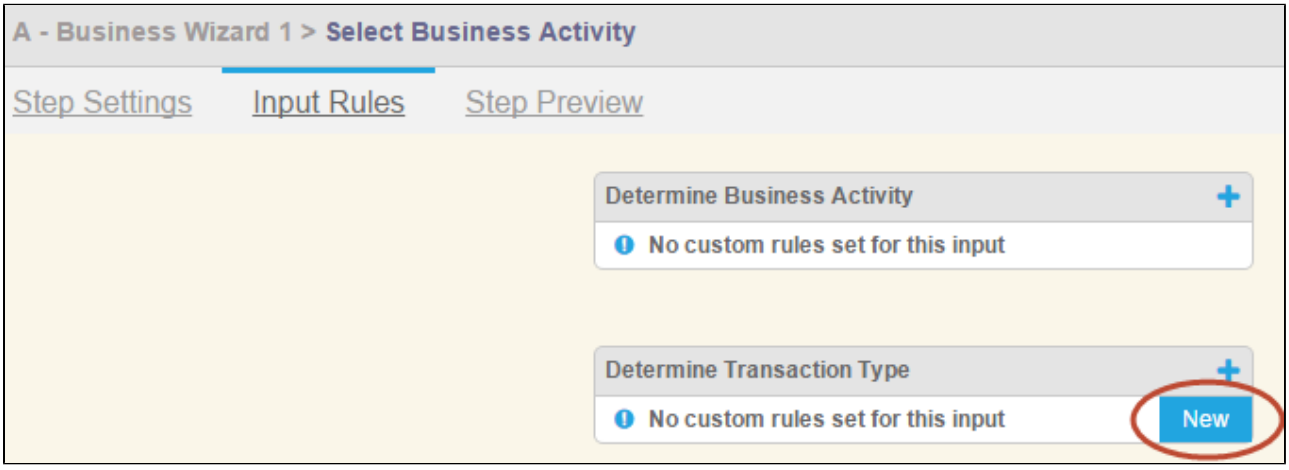
Create Input Rule

The **Select Sales Business Activity** step is used to determine if the Wizard will be used to create an Agreement record. The responses to two Inputs, **Determine Business Activity** and **Determine Transaction Type** serve as criteria to determine if the focus object of the record to be created will be Agreement.

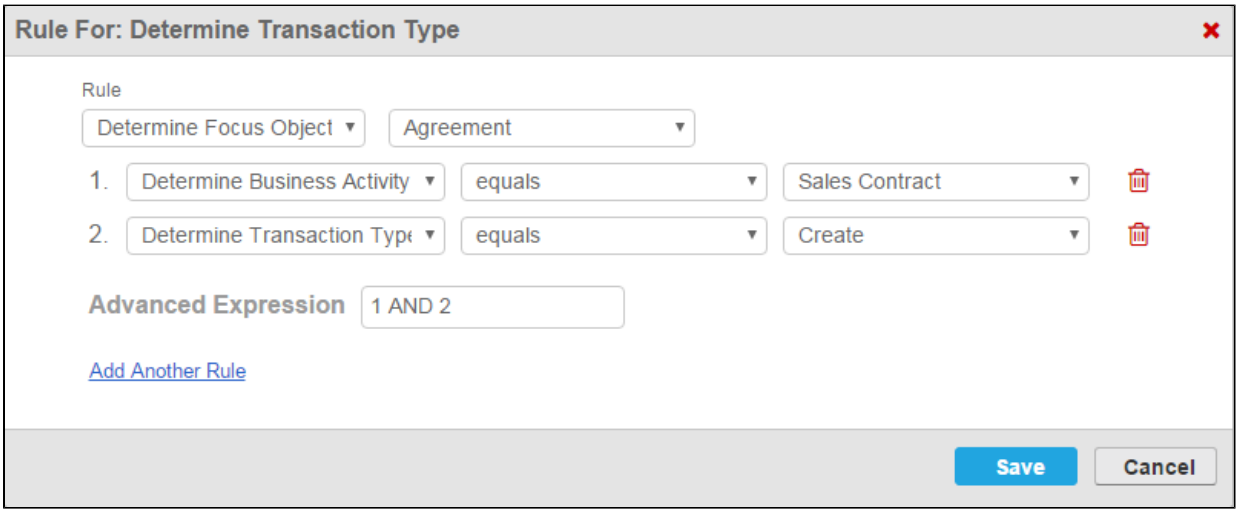


Because responses to both inputs will determine the focus object, an Input rule must be created for the second input control, **Determine Transaction Type**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Rule: Determine Focus Object



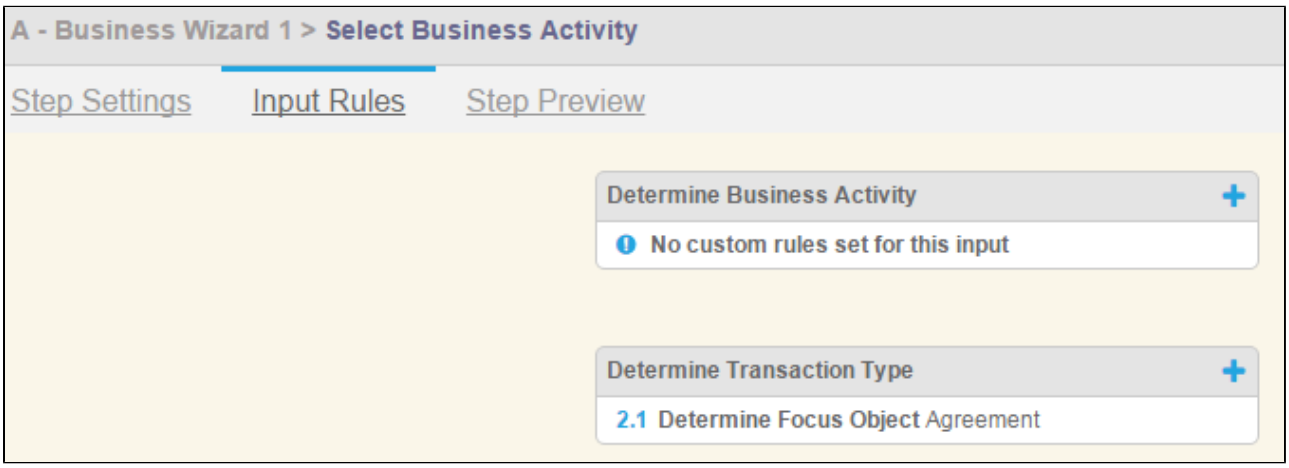
The **Determine Focus Object** rule is defined using two separate expressions. The focus object will resolve to Agreement if:

- **Determine Business Activity** equals "Sales Contract" AND;
- **Determine Transaction Type** equals "Create"

An Advanced Expression is used which specifies both expressions must resolve to true for the rule to be satisfied. Any other combination of responses to the inputs in this step will not result in Agreement being determined as the focus object.

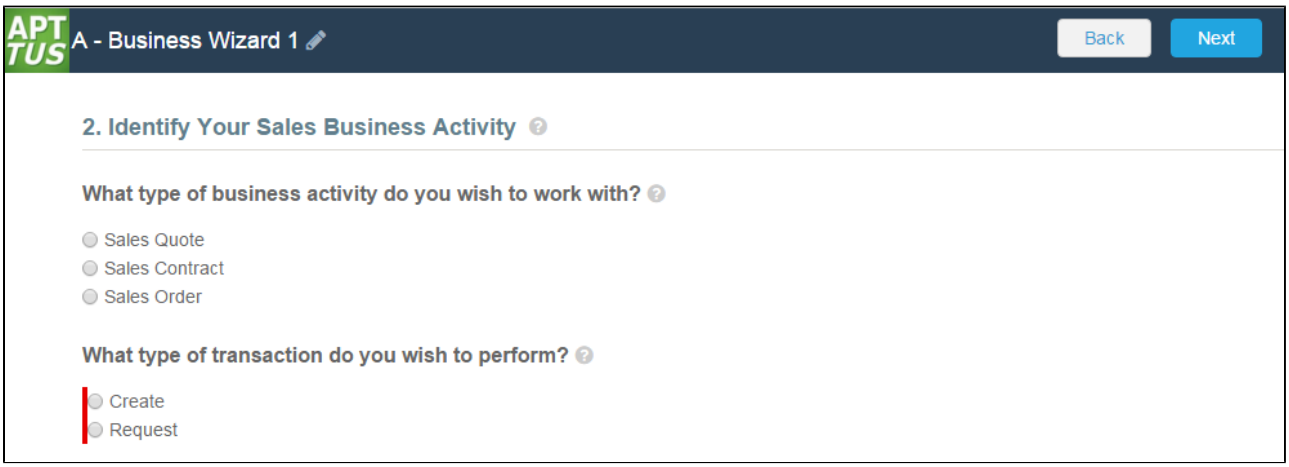
After the rule is defined, the rule type and focus object are displayed on the Input Rules page for easy reference.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



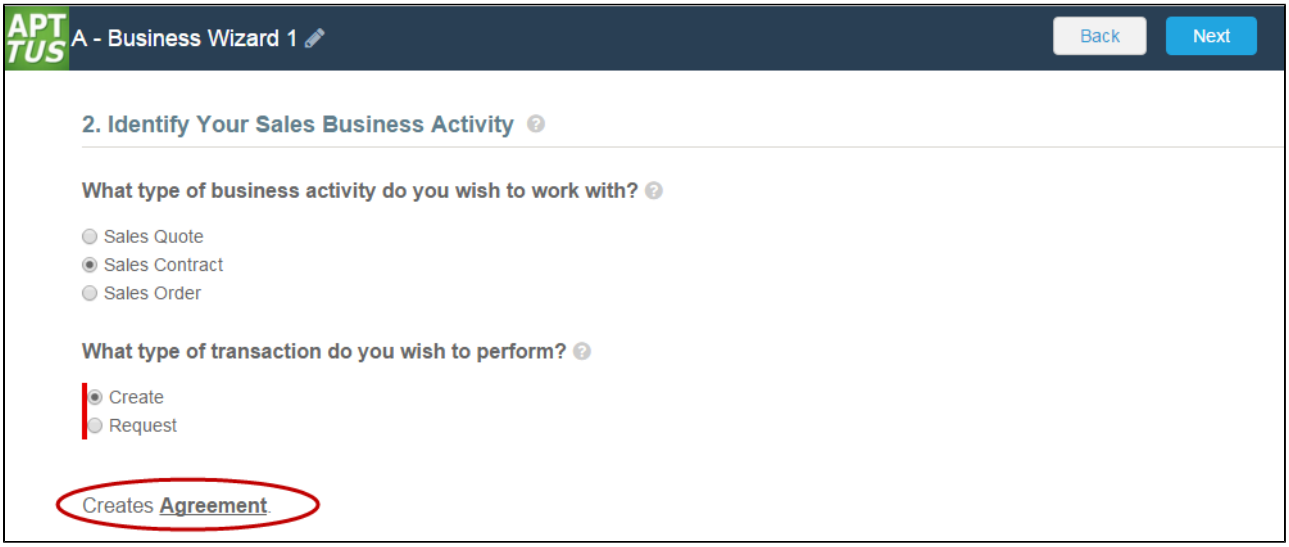
How it looks in the Wizard

When a user reaches this step in the Wizard, they are prompted to enter a response to both questions.



When the user chooses the proper responses to satisfy the input rule, the object being created by the Wizard is displayed at the bottom of the page.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Because a focus object has been determined, the Wizard will now create an Agreement record when the final step of the Wizard is submitted. However, in the case of this example, record type have been determined for the Agreement object, so a **Determine Record Type** rule must also be created. This will be covered in the next example.

Example: Step Input Rule #2 (Determine Record Type)

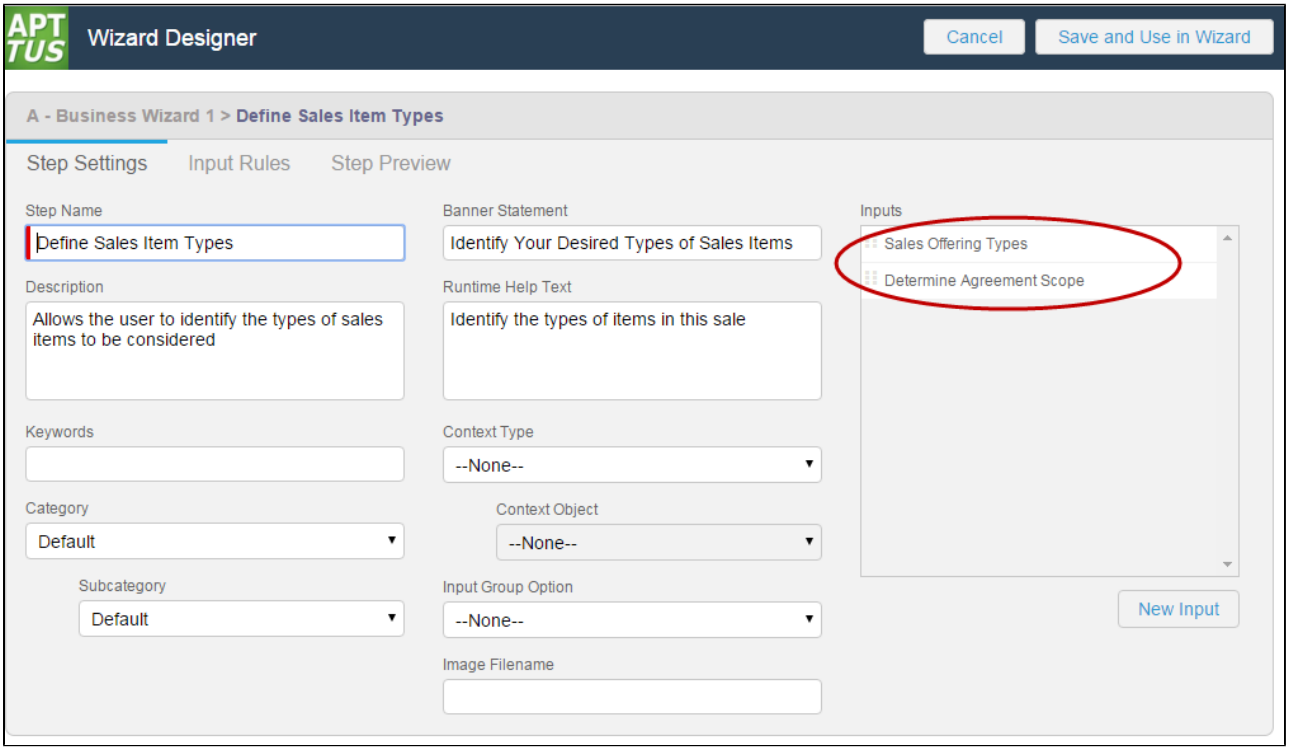
The following example demonstrates an Input rule for determining the record type of the already determine focus object for your runtime Wizard. In this example, inputs entered by the user will determine the record type to be used for the record to be created (Primary Sales Contract).

To determine a record type for the Wizard requires an input rule be created for a specific step in the Wizard. In this example, this rule is created for the fifth step, **Define Sales Item Types**.

Create Input Rule

The **Define Sales Item Types** step is used to determine the Record Type for the Agreement record to be created. The responses to two Inputs, **Sales Offering Types** and **Determine Agreement Scope** serve as criteria to determine if the record type of the record to be created will be **Primary Sales Contract**.

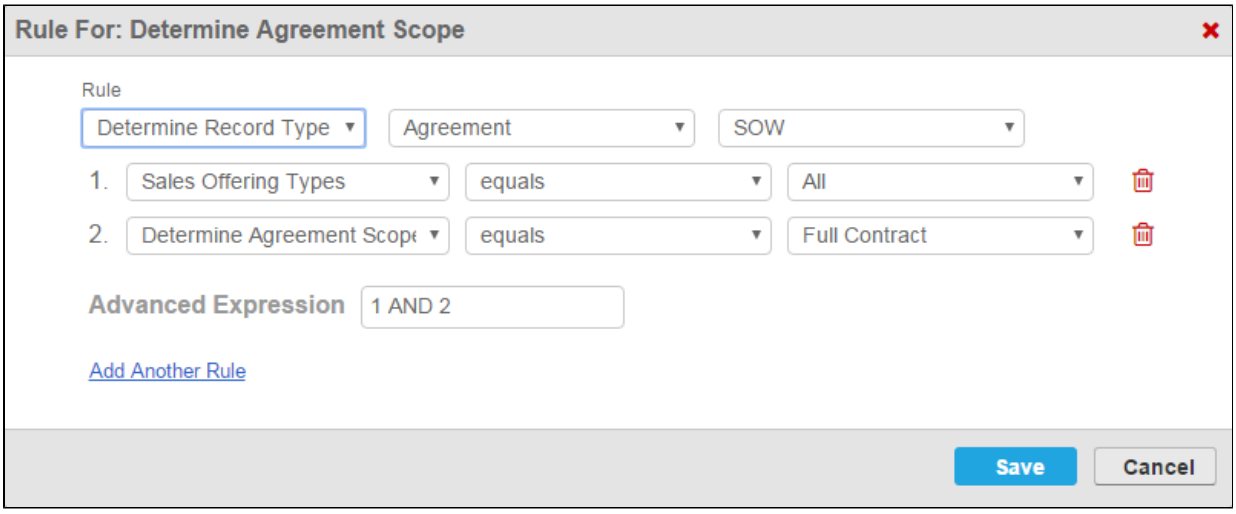
Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Because responses to both inputs will determine the record type, an input rule must be created for the last input in the step, in this case **Determine Agreement Scope**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Rule: Determine Record Type

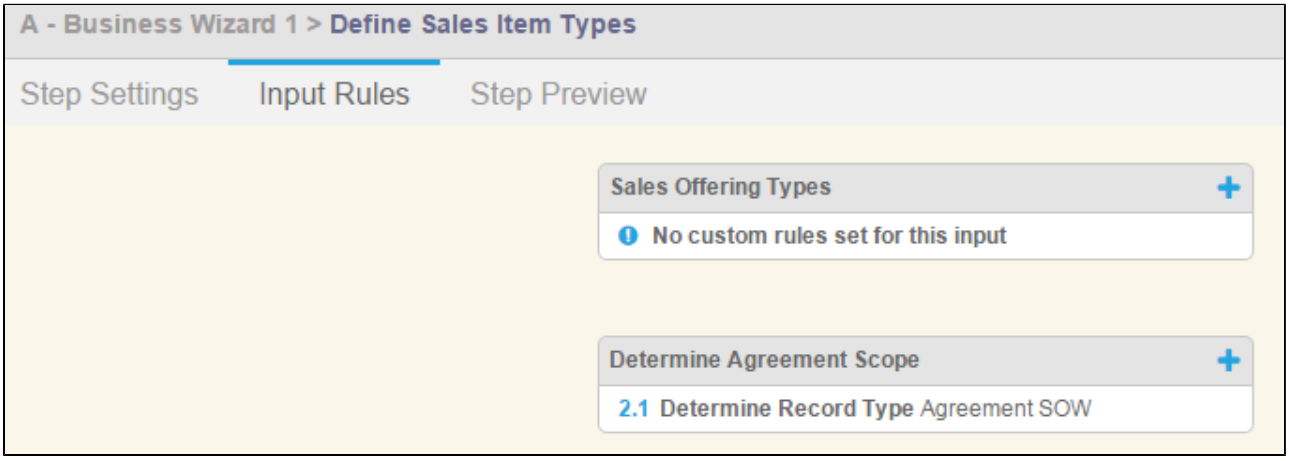


The **Determine Record Type** rule is defined using two separate expressions. The record will resolve to Agreement if:

- **Sales Offering Types** equals "All" AND;
- **Determine Agreement Scope** equals "Full Contract"

An Advanced Expression is used which specifies both expressions must resolve to true for the rule to be satisfied. Any other combination of responses to the inputs in this step will not result in "SOW" being determined as the record type.

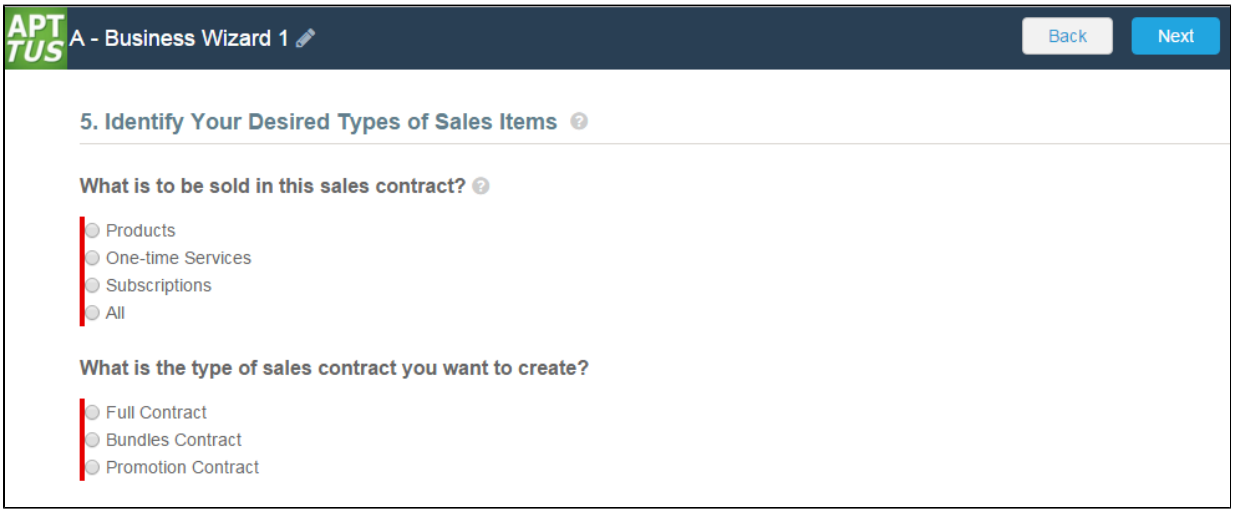
After the rule is defined, the rule type and record type are displayed on the Input Rules page for easy reference.



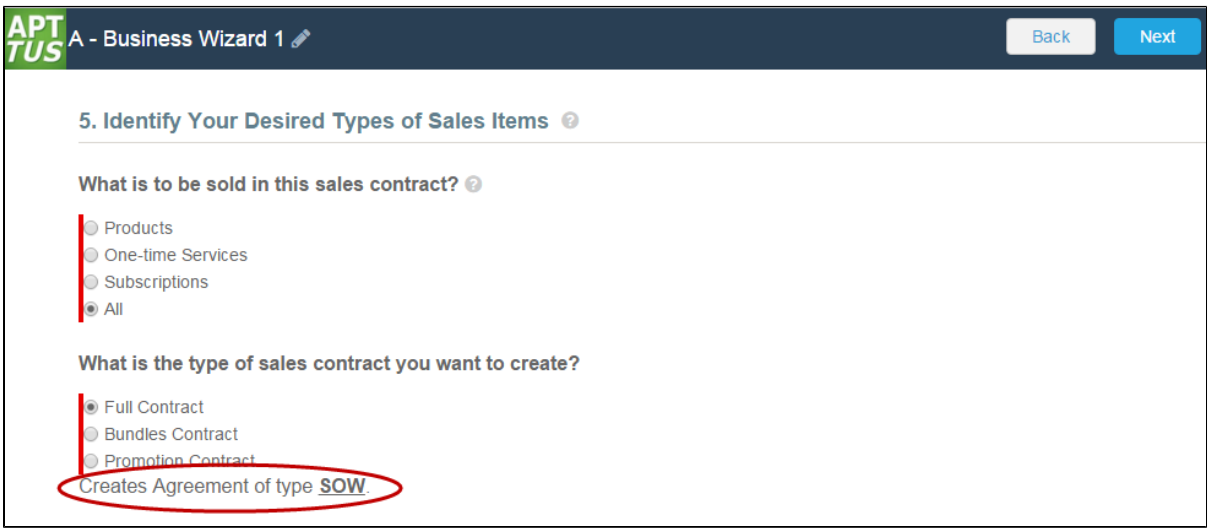
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

How it looks in the Wizard

When a user reaches this step in the Wizard, they are prompted to enter a response to each question.



When the user chooses the proper responses to satisfy the input rule, the record type being specified by the Wizard is displayed at the bottom of the page.



Now that a Record Type has been determined by the Wizard, when the Wizard is submitted, an Agreement record of the type Primary Sales Contract will be created.

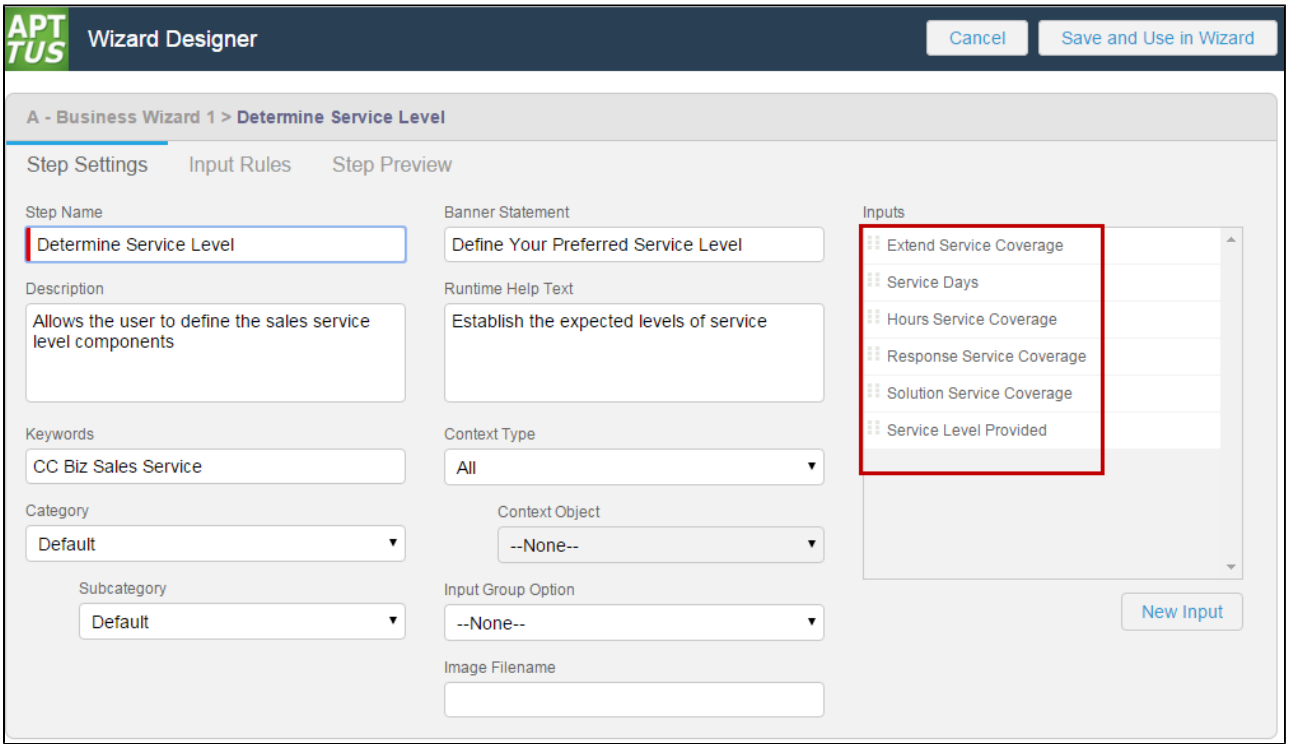
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Example: Step Input Rule #3 (Modify Controls)

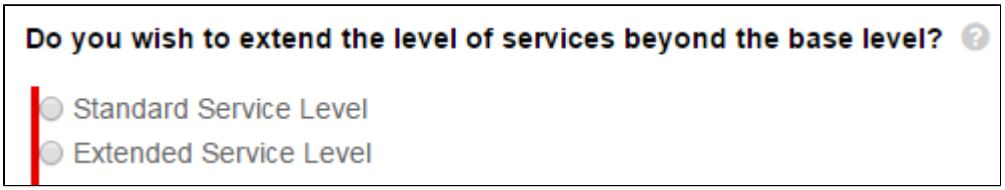
The following example demonstrates how you can modify the behavior and value of input controls for a step using the input rules **Hide This Control** and **Set This Control Value**. In this example, the user is defining the service level to be used in the contract. If the user chooses one option of a certain input, several inputs in the step will be hidden (Hide This Control). Similarly, depending on the combination of responses entered by the user for multiple inputs, the final value of one input will change (Set This Control Value).

Create Input Rules: Hide This Control

In this example, several input rules are defined for the **Determine Service Level** step.



The **Extend Service Coverage** input will be used as the criteria in expressions for rules defined on other inputs to determine whether or not those input controls are hidden.

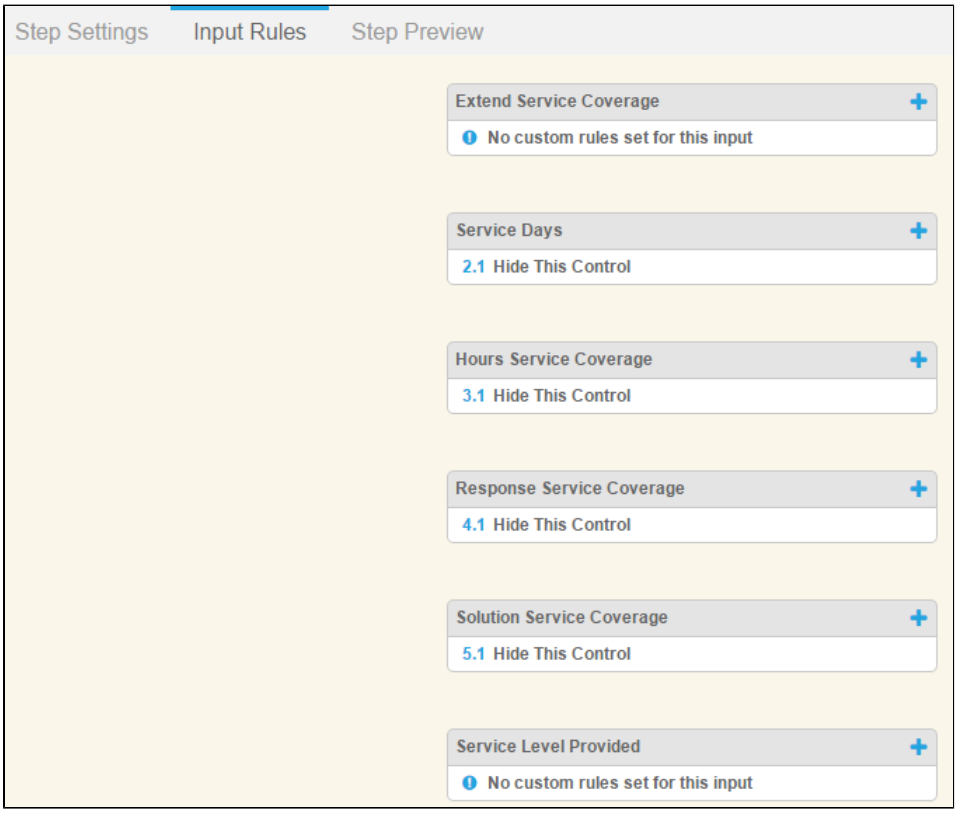


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

If **Standard Service Level** is chosen, the only input shown will be **Service Level Provided** (the value of this input will also be determined by this choice using a Set This Control value, which is described later on this page).

If **Extended Service Level** is chosen, all inputs will be shown.

Because all input controls for a step are shown by default, an input rule must be created for each input which could be hidden.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Rule: Hide This Control

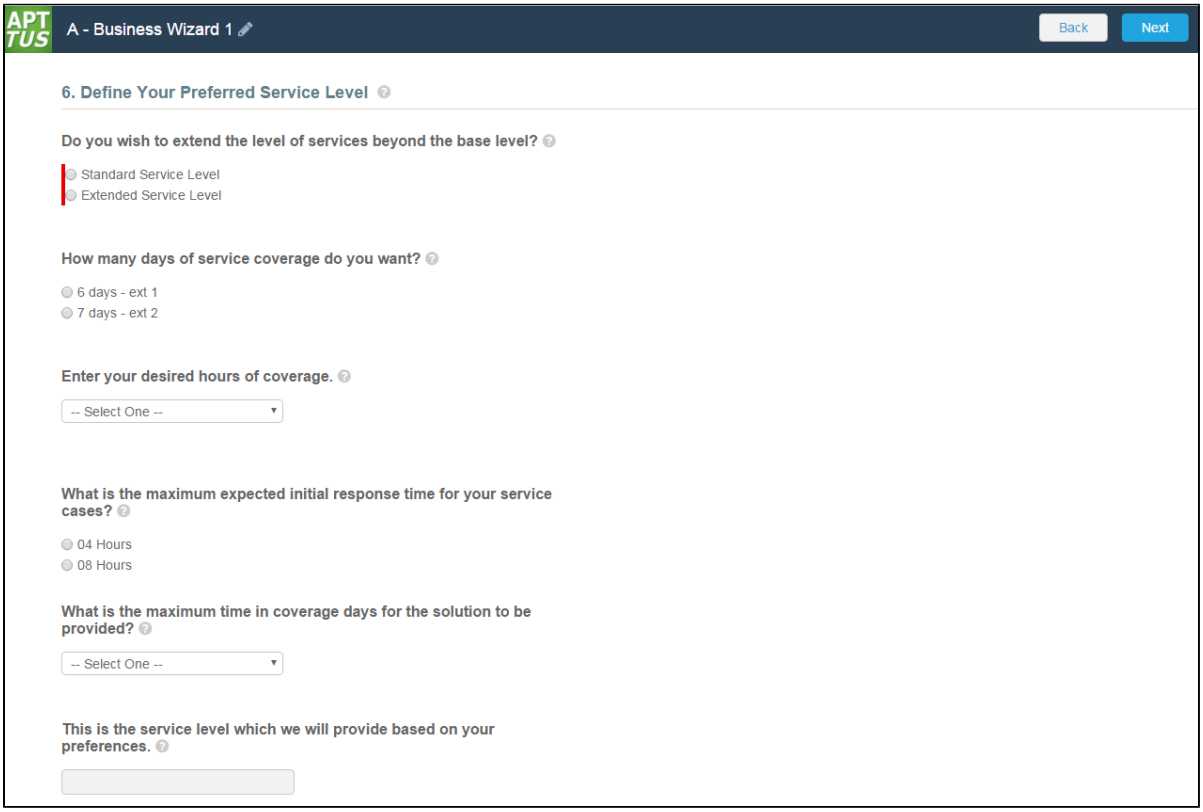
The **Hide This Control** rule is defined using a single expression. If **Extend Service Coverage** is not equal to **Extended Service Level**, then the **Service Days** input control will be hidden. Another way to define this rule could be if Extend Service Coverage equals Standard Service Level.

This rule is repeated for the inputs **Hours Service Coverage**, **Response Service Coverage** and **Solution Service Coverage**.

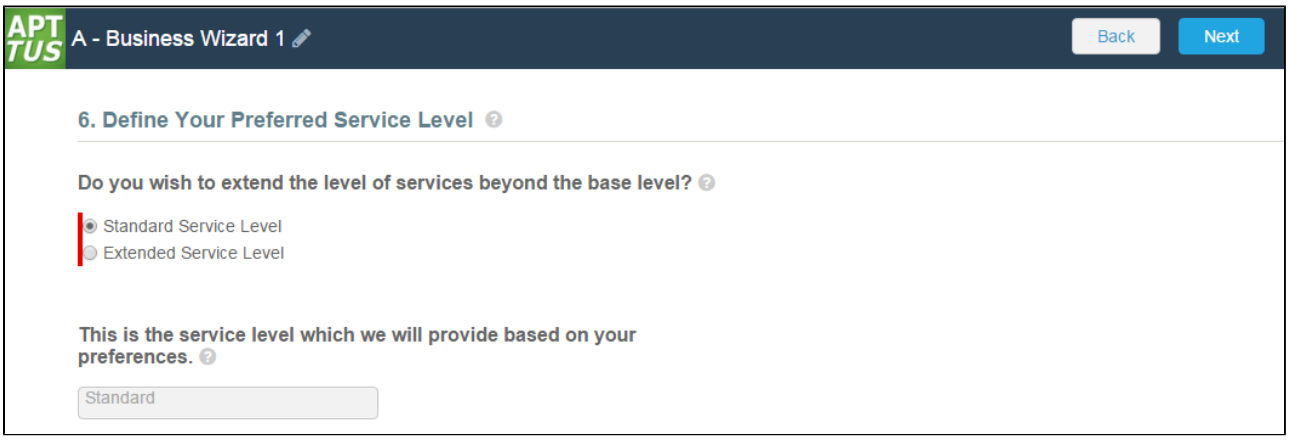
How it looks in the Wizard

When a user reaches this step in the Wizard, the first input prompts them to choose either **Standard Service Level** or **Extended Service Level**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



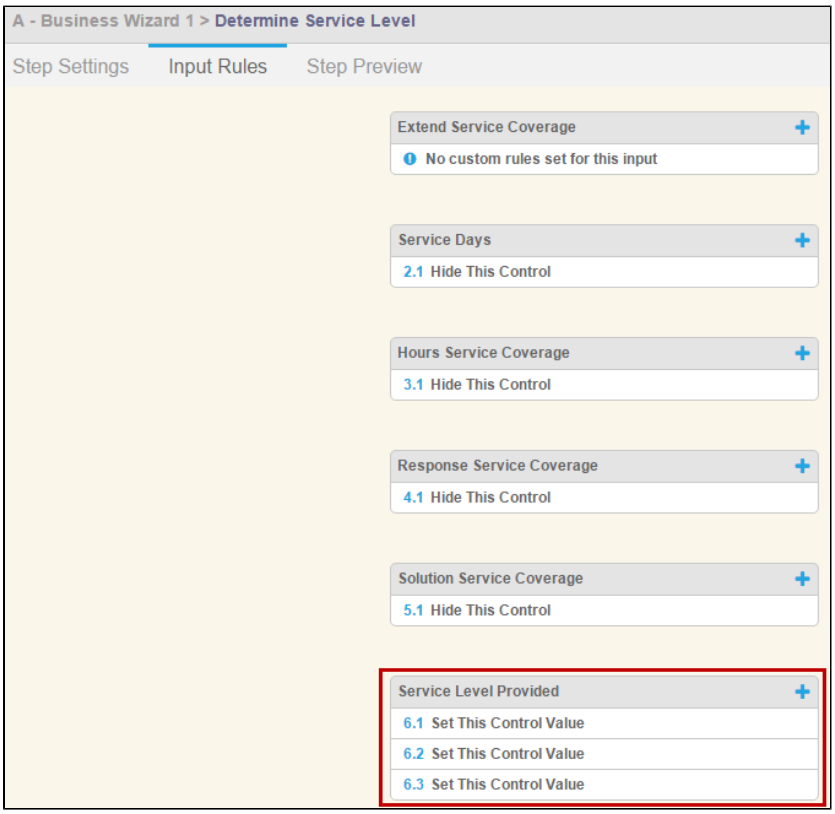
When the user chooses **Extended Service Level**, all remaining inputs remain on the page. When the user chooses **Standard Service Level**, all inputs but the final input are hidden because of the **Hide This Control** rules which were defined.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Create Input Rules: Set This Control Value

In this example, multiple input rules are created for a single input control. The combination of user-selected responses to several inputs in the step will set the value of the **Service Level Provided** input.



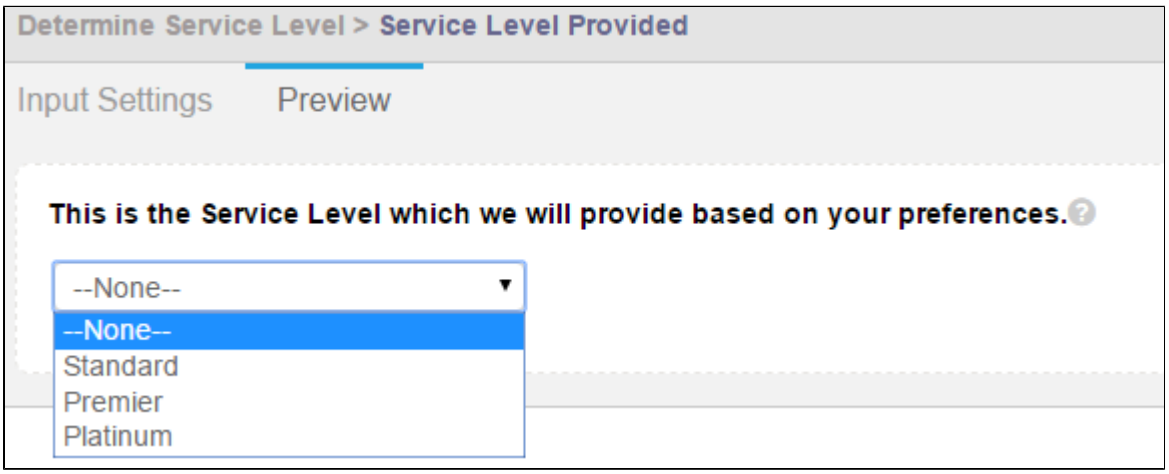
It is recommended that when you create a rule which will set the value of an input in a step, the input being set should be set to Read Only (when it is originally defined). Alternatively, you can create a **Disable This Control** rule and set criteria which will change the input to read only during Wizard runtime.

Rule: Set This Control

Service Level Provided is an input control defined using an object field. This field is a picklist on the Agreement record with three possible values:

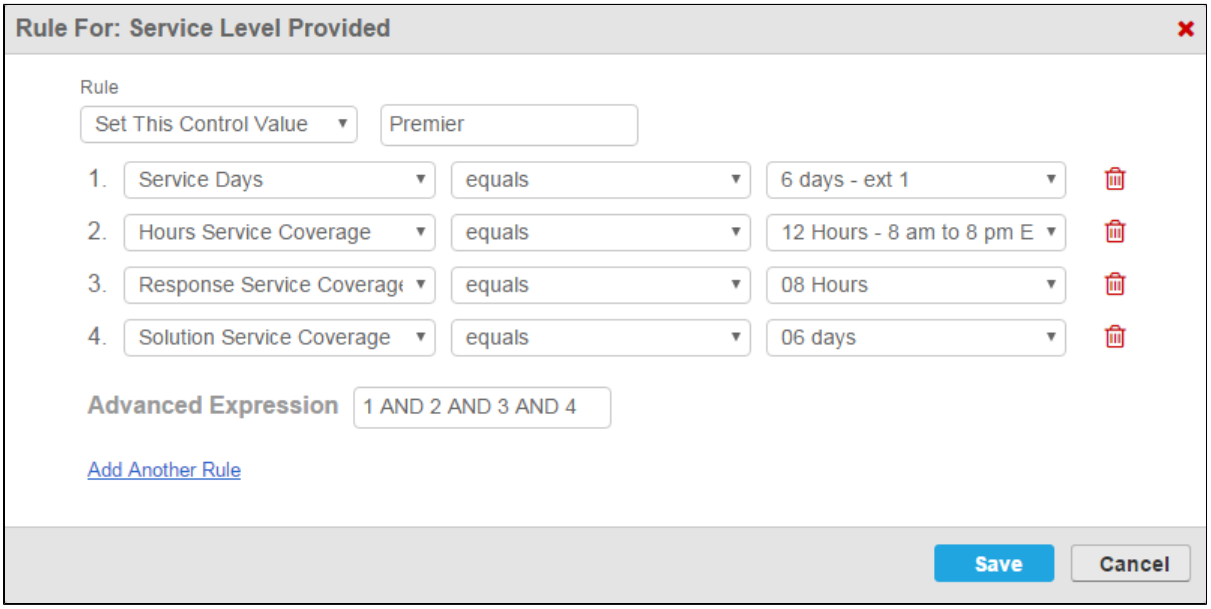
- Standard
- Premier
- Platinum

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



The objective in this example is to create a rule which will resolve to each of the three possible values based on the responses given by the user during this step. So three rules must be created.

The first rule for **Service Level Provided** defines the criteria for setting the Service Level Provided to "Premier." To accomplish this, a **Set This Control Value** rule is created.



In the above example, each input listed in the rule must satisfy the exact criteria specified for the value of Service Level Provided to be set to "Premier" (note the Advanced Expression "1 AND 2 AND 3 AND 4").

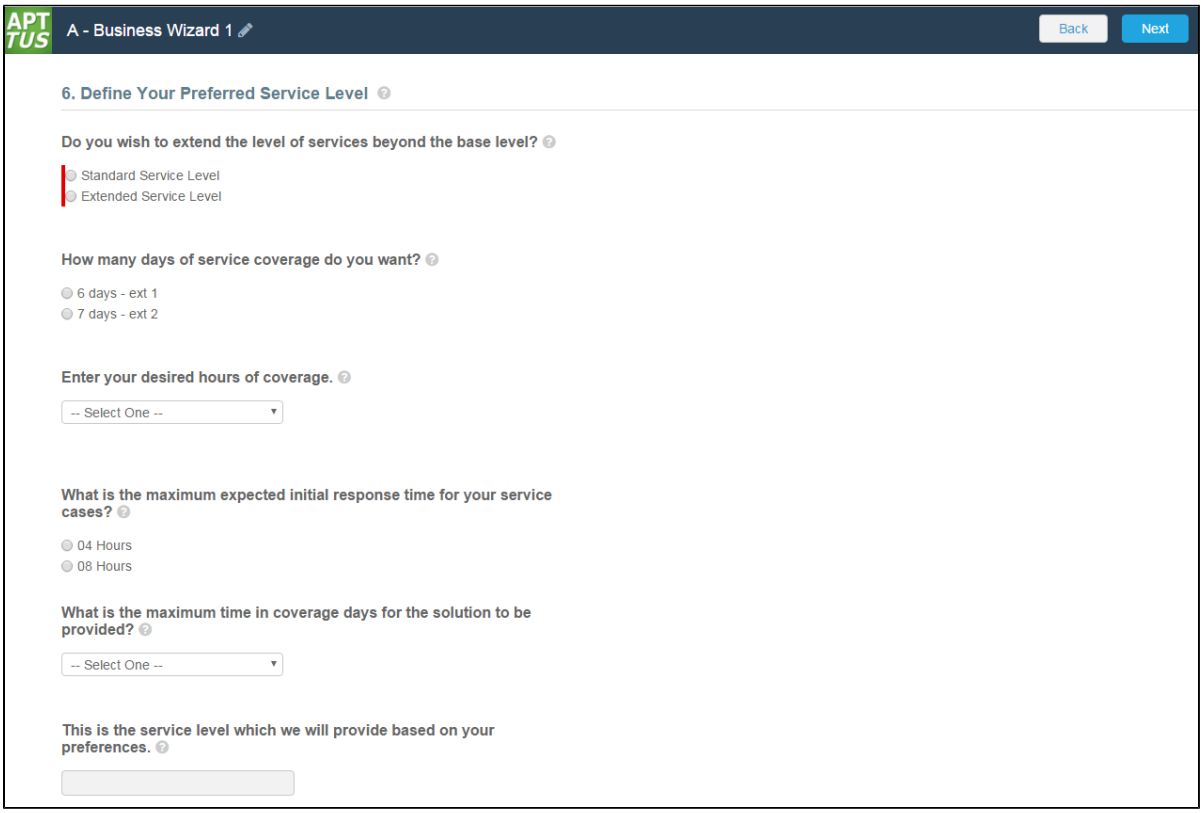
Note that the value of "Premier" is entered manually when the rule is configured but must match one of the options in the Object Field defined when the input was created.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Two more rules are created in turn to set the control value to Standard or Platinum.

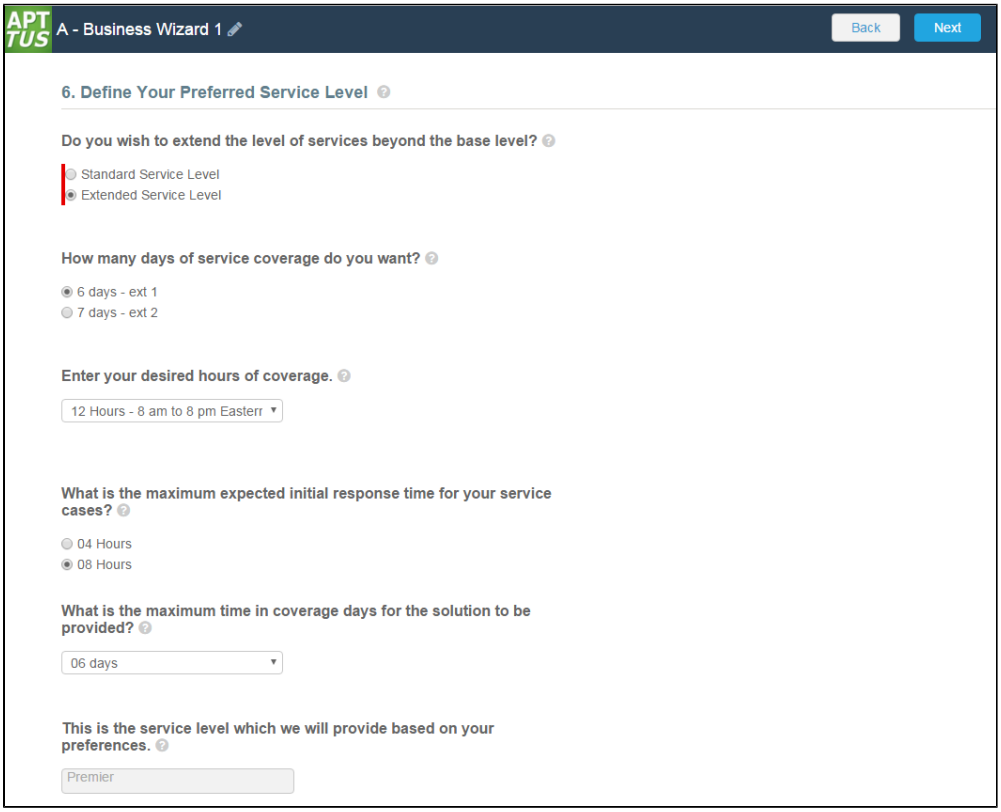
How it looks in the Wizard

When a user reaches this step in the Wizard, they are prompted to provide responses to all questions. Note that the last input, which corresponds to the **Service Level Provided** input, is blank and read only.

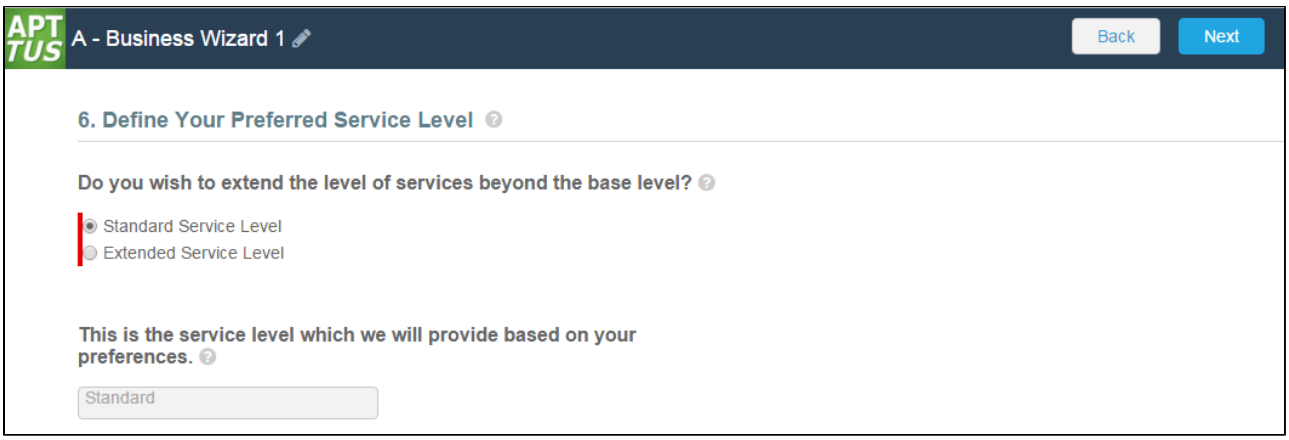


The user responds to questions in the step, matching those of the expression described above. The Service Level is defined and displayed in the field below the last input.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



You can see all the **Hide This Control** and **Set This Control Value** rules for this step resolve to true when the user chooses "Standard Service Level" as the first response.



Example: Wizard Step Rule #2

The final example for this wizard demonstrates one of the options for creating a step rule which determines the action(s) taken when a user clicks **Submit** following the last step of a Wizard.

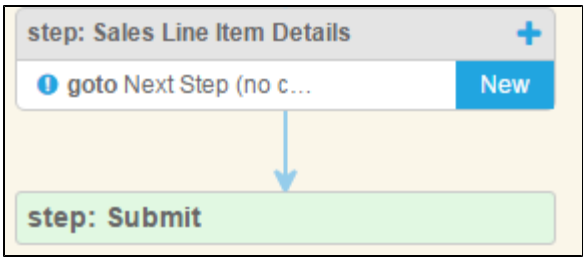
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

In this example, the Wizard designer not only wants an Agreement record of type Primary Sales Contract created, but also wants the record to be created using **Submit Request** Agreement rules defined for this Agreement type.

Create Step Rule

To accomplish this, a **Go to Submit** rule must be specified for the last step in the Wizard.

From the **Wizard Step Rules** tab, a new rule is created under the **Sales Line Item Details** step.



Rule: Go to Submit

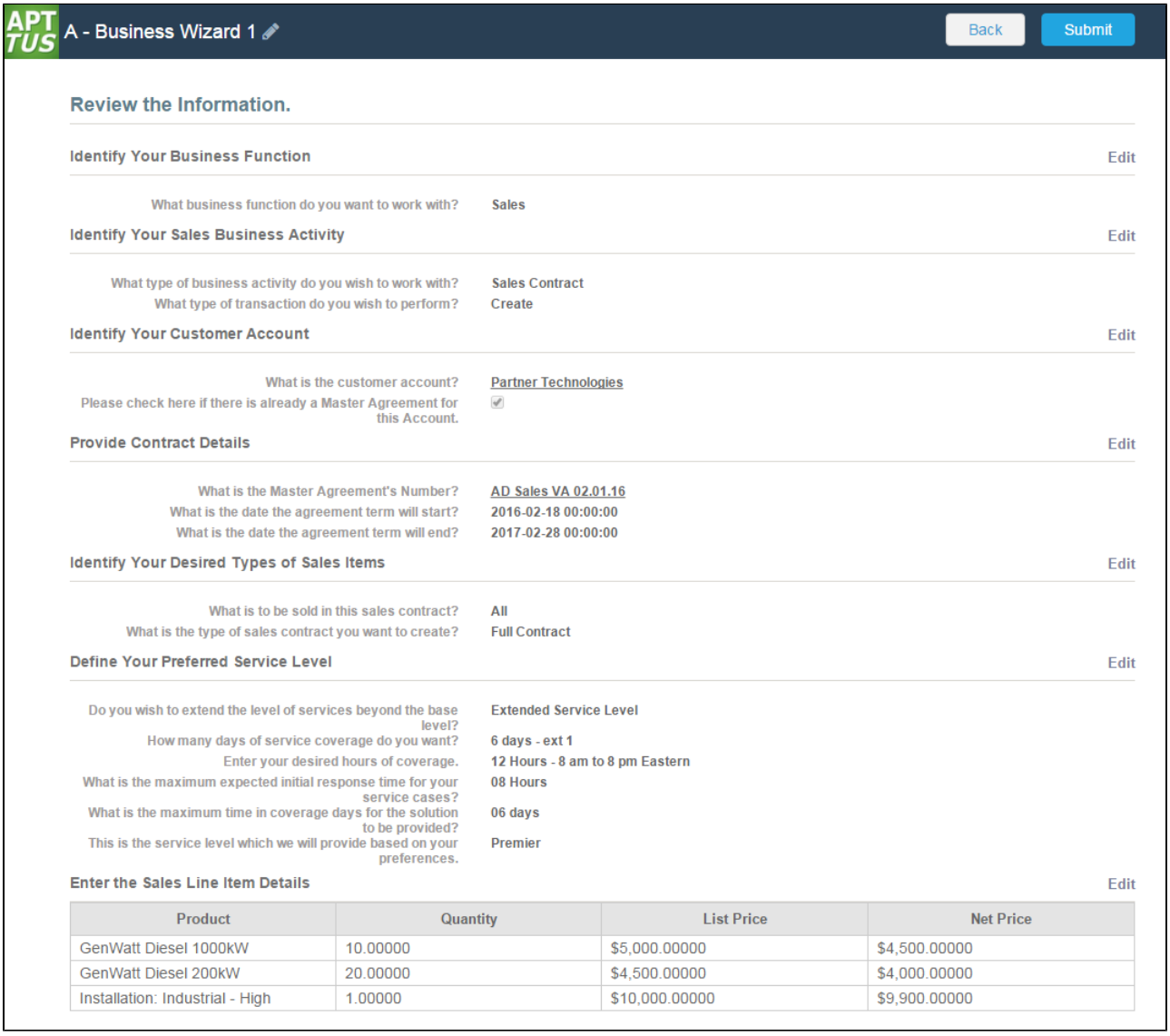
The **Go to Submit rule** is defined with a specific *relative* URL: "AgreementSubmitRequest?id=%Agreement%"

When the user clicks **Submit** from the review page of the Wizard, the Agreement Primary Sales Contract will be created in Submit Request Mode. The %Agreement% is entered here so that the user is redirected to the newly-created record as the request is submitted.

How it looks in the Wizard

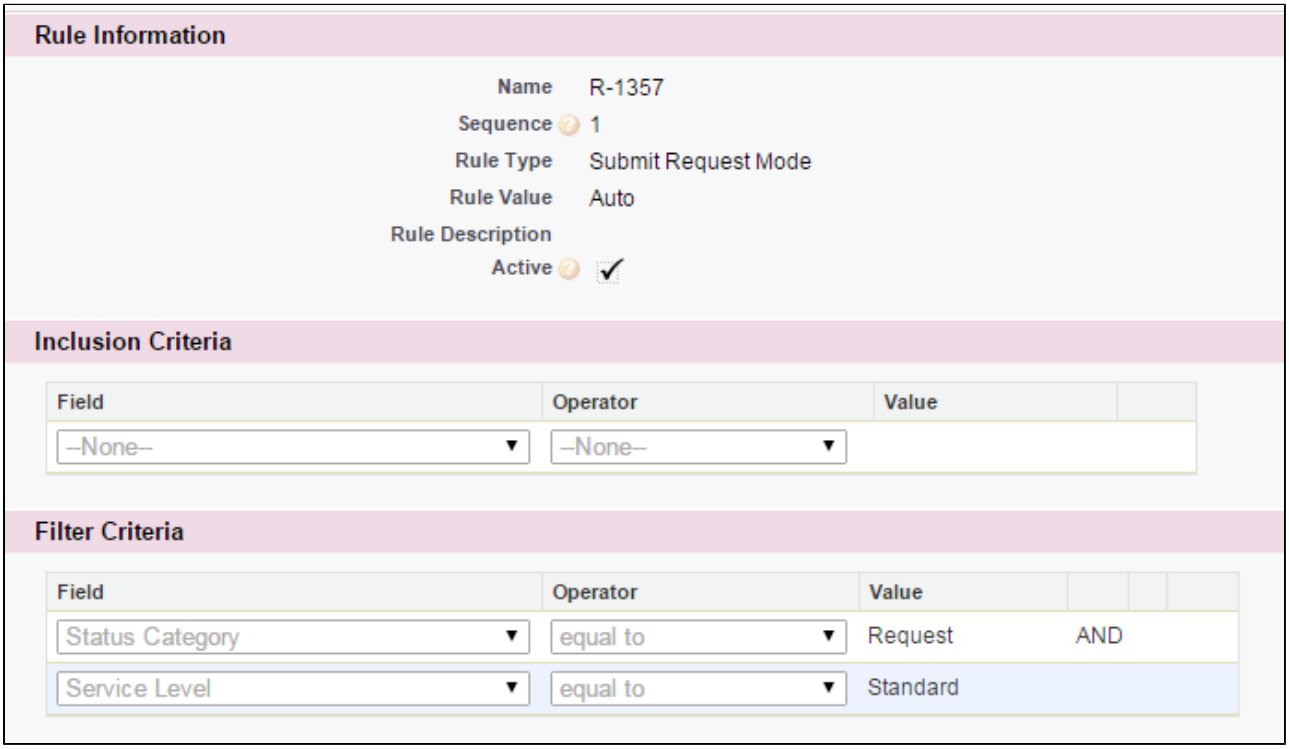
When a user has finished the last step of the Wizard, clicking **Next** takes the user to the Wizard Review page.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

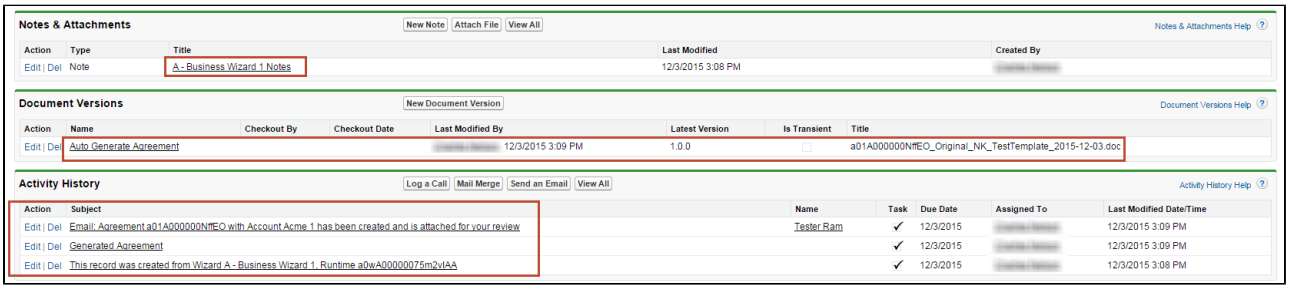


When the user clicks **Submit**, the request to create an Agreement is processed, following the properly defined Agreement Rule for Submit Request Mode. In this example, because the **Service Level** specified in the Wizard by the user was "Standard," the auto Submit Request Mode Agreement rule is executed.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



The Agreement record of type Primary Sales Contract is created and the user is redirected to the newly-created record details page.



A number of actions take place as a result of Wizard submission and the Submit Request rule:

- A note is added to **Notes & Attachments** related list with details about the Wizard which created the record.
- The document is automatically generated from the Submit Request and is attached to the **Document Versions** related list (the document is here because Contract Document Versioning has been enabled for this org. If it is not enabled, the document would be attached to Notes & Attachments instead).

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- Activity History shows which Wizard created the record (this is the same information as the note attached to N&A), the "Generated Agreement" activity, and an Email Template Agreement Rule creates and attaches an automatic email to specified recipients.

The Wizard is now complete and submitted. This example shows one of many outcomes which can occur when the user clicks **Submit**. Refer to Configuring Wizard Step Rules for more information on creating well-formed rules for your Wizards!

Configuring Wizards as Self-Service with Salesforce Sites and Communities

When you want to provide the ability for partners or other parties to run existing wizard designs created in your organization (or to create Wizards of their own), you must configure a method to make your runtime wizards externally facing. The Wizard Designer and Wizard Runtime pages are normally only available to users within your organization and for those who have proper permission extended to Wizard objects. Thankfully, Salesforce has easily configurable methods for exposing content through the use of Salesforce Sites and Community portals. Depending on the requirements of your partners and other customers and their current configurations, you have two options for exposing Wizards externally:

- unauthenticated access to guests using Salesforce (Force.com) Sites.
- authenticated access to licensed and unlicensed users using Salesforce Communities.

The choice between Salesforce Sites and Communities is mainly a question of how you want users to access Wizard functionality. Salesforce sites allows some flexibility, as you can provide guest users with a URL and allow them to run specific Wizards directly without the need for licenses (beyond a single guest user license). Alternatively, you may want to create and design a Salesforce community and give specific users access to design and run Wizards while interacting with partners and other users. In either case, both options provide authentication solutions and permission sets which identify user access to Contract Wizard features.

As a pre-requisite to either option, you must first install the **Apttus Contract Management** package in the org where you intend to provide self-service wizards. Refer to Installing Apttus Contract Management for instructions.

We will explore self-service options in the following sections. Click **Next** to learn how to set up a Salesforce Site to work with Wizards.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

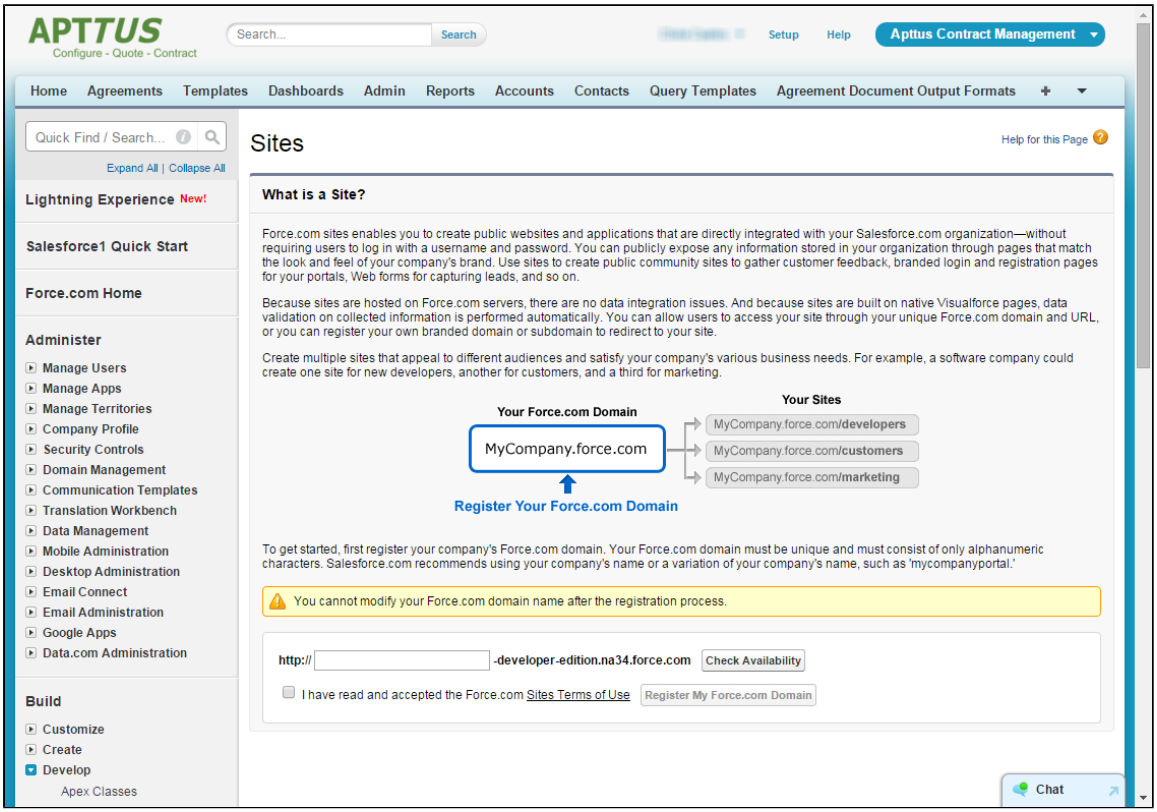
Configuring Salesforce Sites for Self-Service Wizards

You can provide unauthenticated access to the Contract Wizard for guest users without licenses. Using Sites allows your customers to access Wizards from an external location.

Create a Salesforce Site

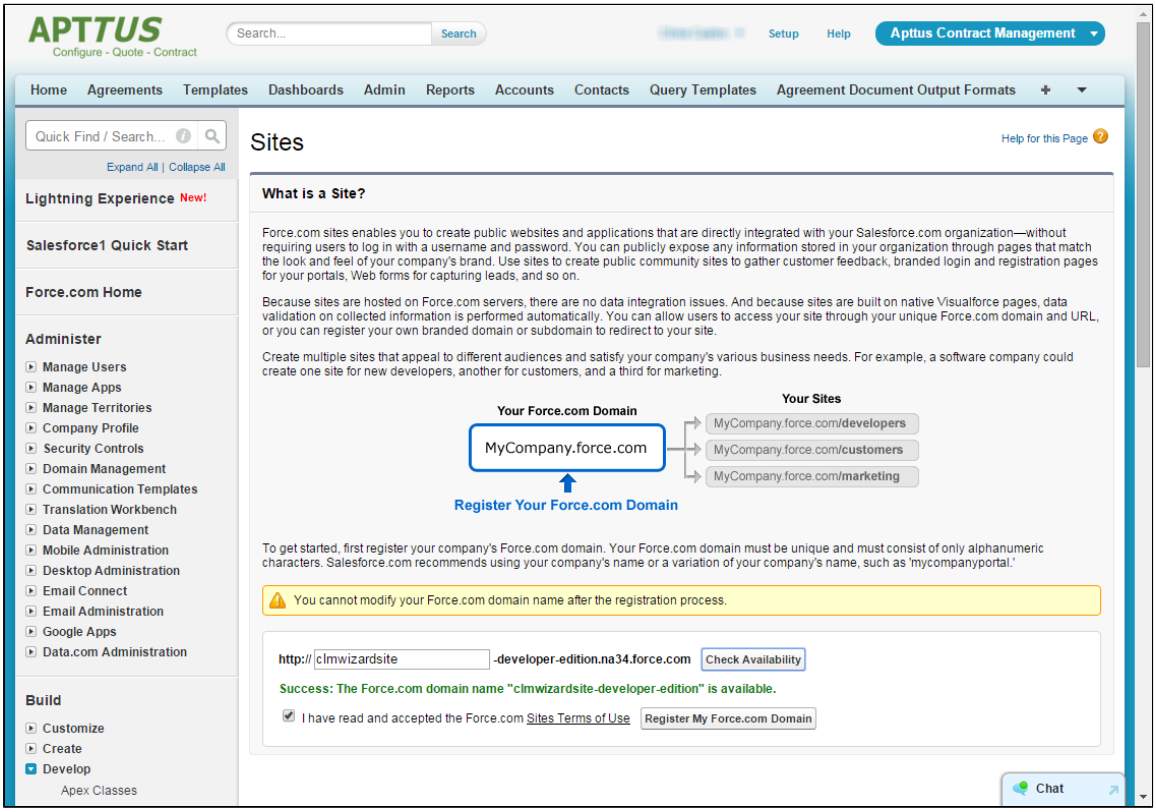
You will make the Contract Wizard available to external users by creating a Force.com site. To create your Salesforce site:

1. Log in to your org as administrator and go to **Setup > Develop > Sites.**



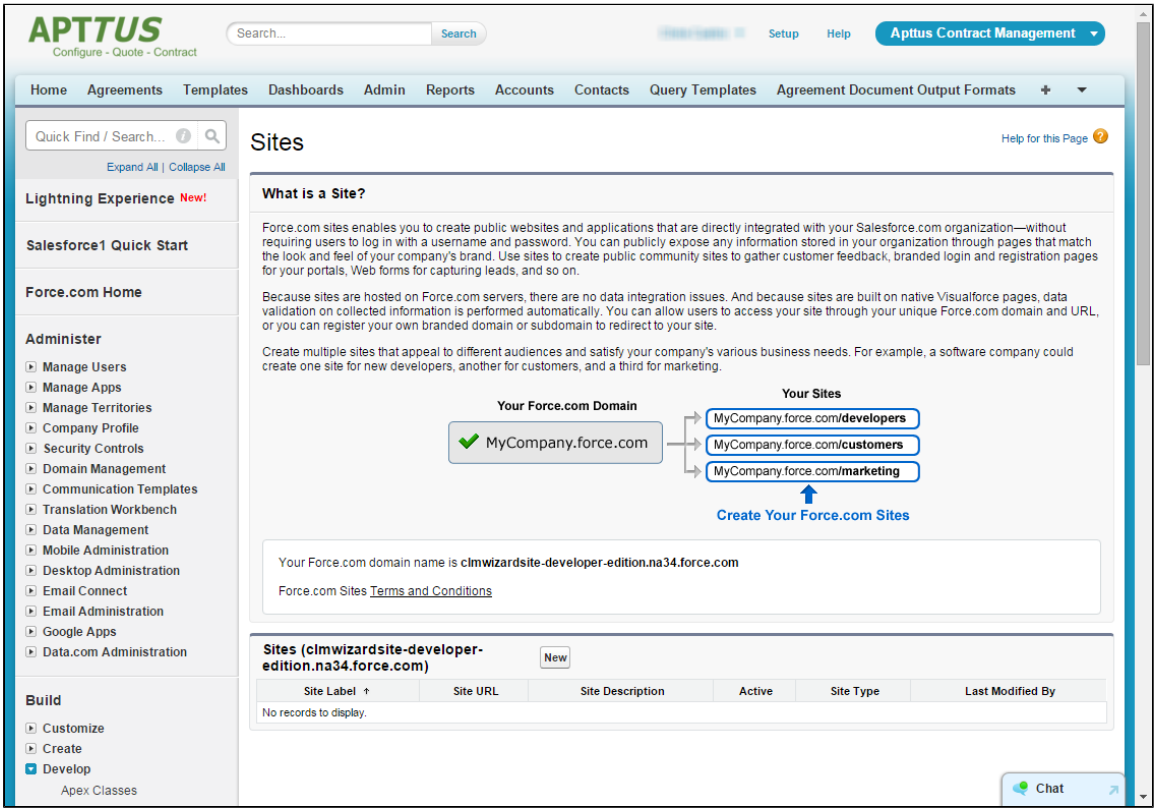
2. Enter a unique domain name in the dialog box provided and click **Check Availability**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



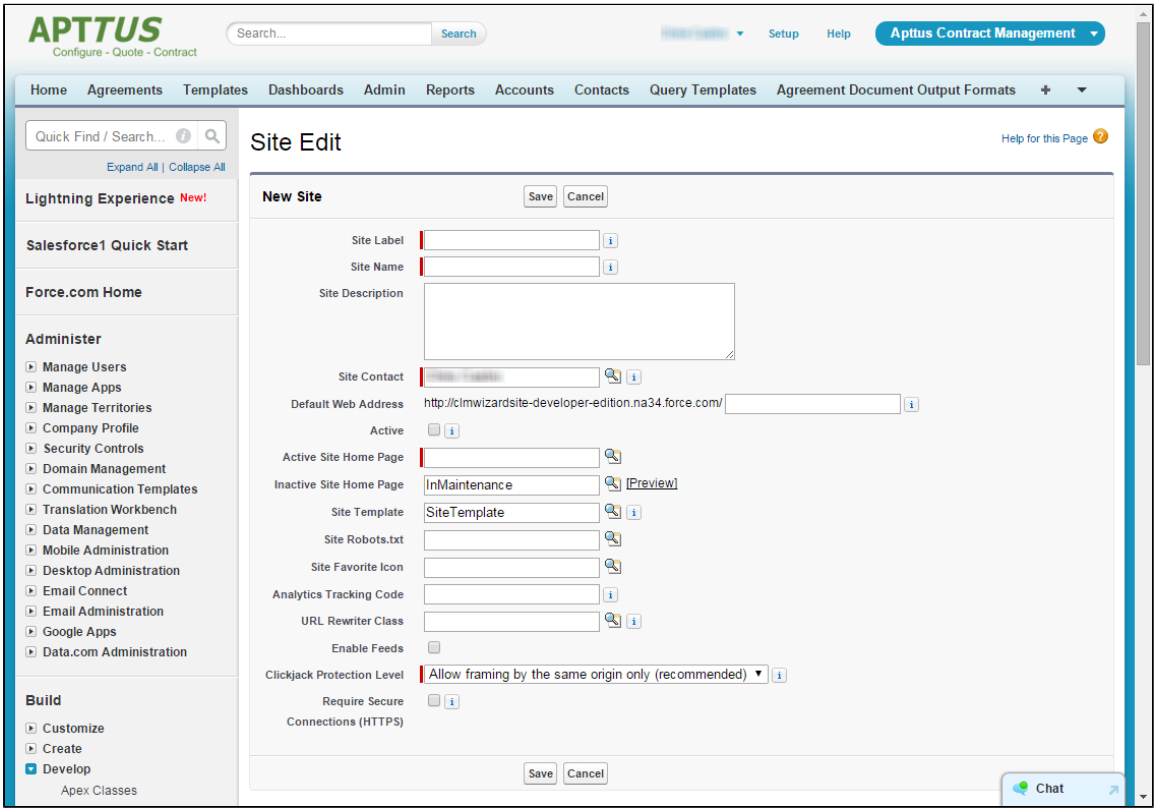
3. Acknowledge the Sites Terms of Use and click **Register My** Force.com **Domain**. Please note that you cannot modify the domain name after you have registered.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



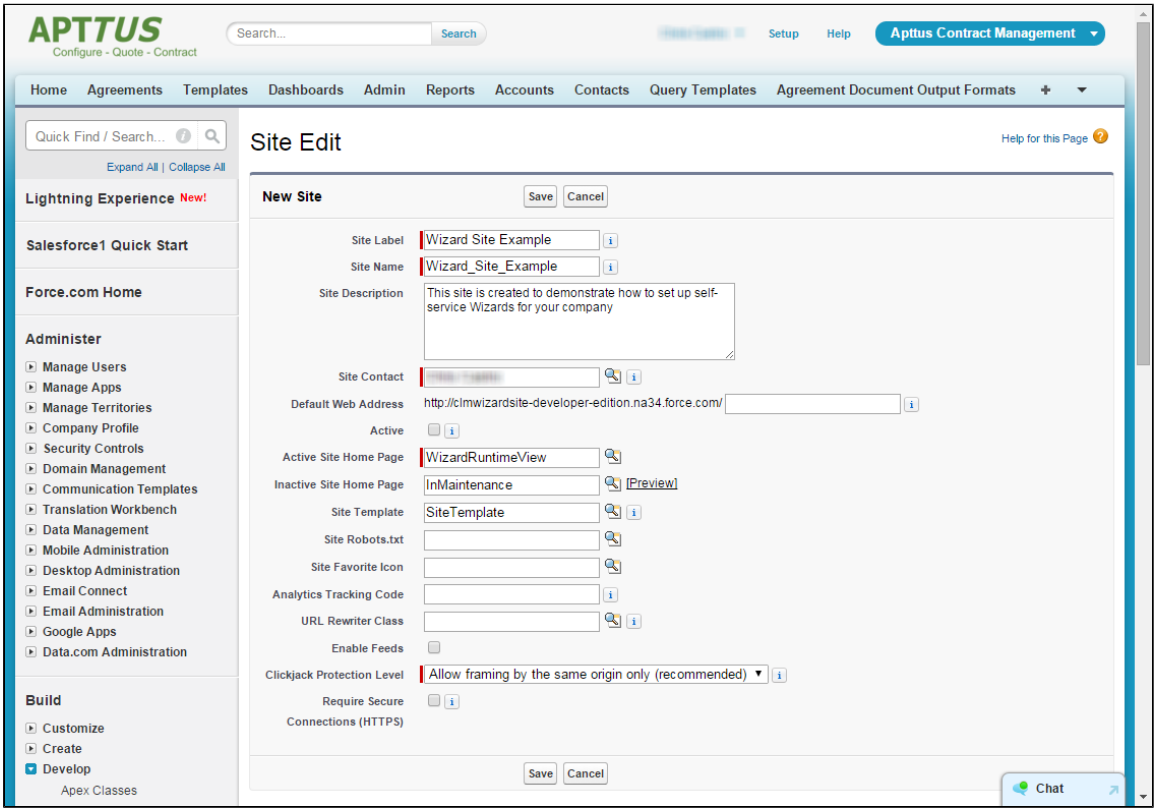
4. Click **New** to create a new site. The Site Edit form is displayed.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



5. Enter details for your site. Click the lookup icon next to **Active Site Home Page** to choose a Visualforce page which displays as the default home page for your site. If you are not sure what to configure, pick the "Under Construction" page.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



6. Click **Save** to save your site details.

Creating Multiple Sites for your Organization

Each additional site you create can provide guest access to a different set of pages, but each site requires a separate guest license. Enterprise and Ultimate editions of Salesforce come with 25 sites/guest user licenses. For more information on Force.com site, refer to the Salesforce help An Introduction to Force.com Sites.

You can create multiple sites in your org, each with a different Active Site Home page. For example, if you want to create a site that gives guests access to the Wizards tab from which they can search for, choose and run specific Wizard design, make the Active home page "WizardRuntimeView" and consider appending "wizards" to your default web address. If you instead want the site to be used for creating Wizard Designs, specify "WizardDesignView" as the Active home page and consider adding "designers" to your default web address.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

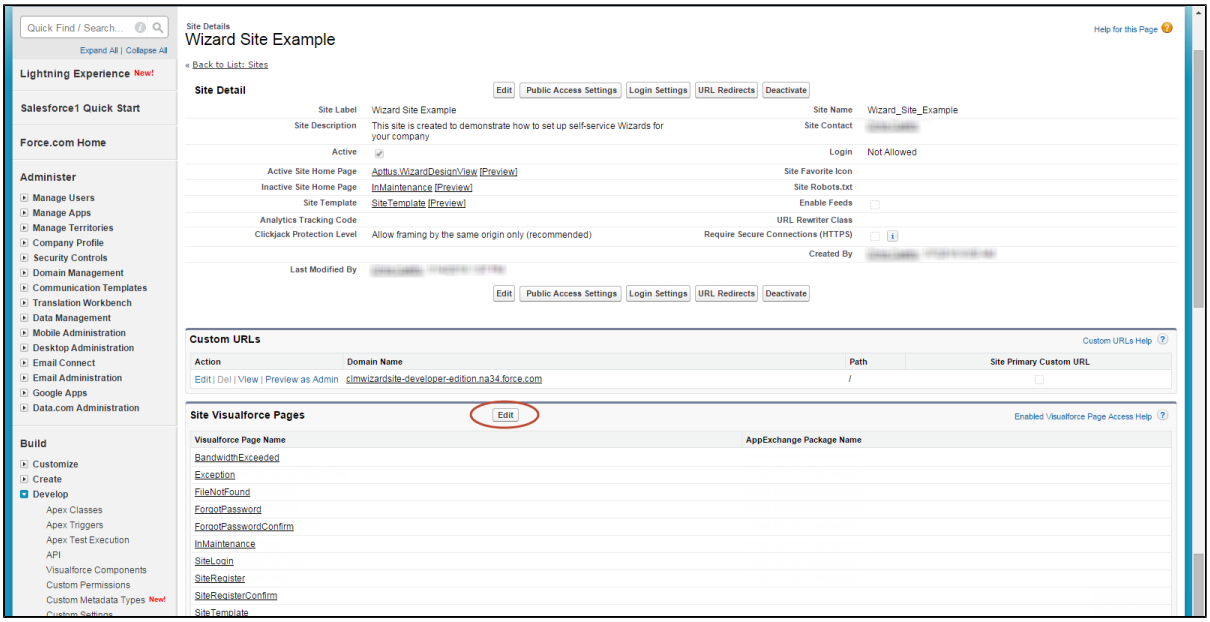
Guest Access to Sites

Follow the steps in this section to allow for public (guest) access to your sites. Using this method gives access to your sites to a public (guest) user and *does not require* authentication. If you require authentication for your Sites (individual users logging in through a portal), follow the instructions for configuring self-service Wizards through Communities.

Assign Visualforce pages to a Site

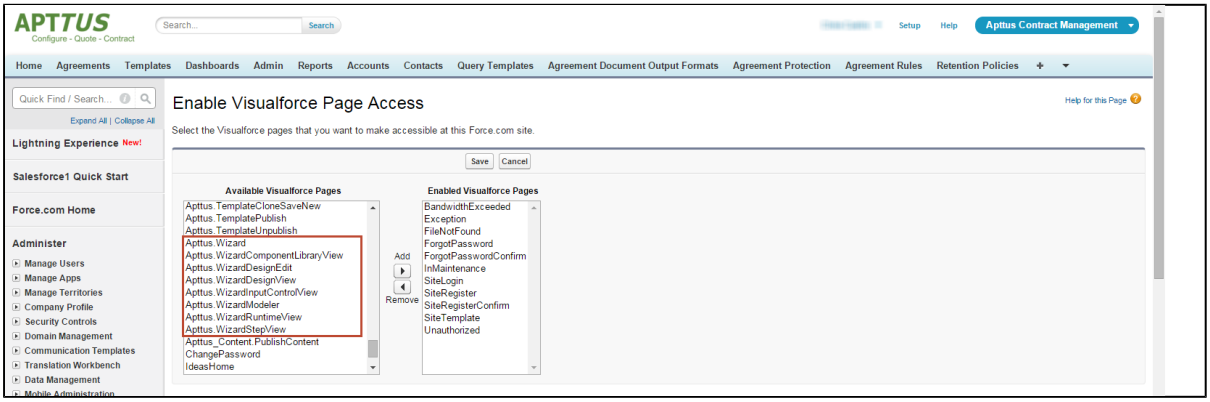
For each Site you create you need to assign Visualforce pages to the Site to make Wizard functionality available to the guest user. Choose pages to assign based on what functionality and permissions you want to grant publicly.

1. From the Site Details page, go to "Site Visualforce Pages" and click Edit,



2. Add pages from the left pane of Available Visualforce pages to the right pane of Enabled Visualforce pages.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



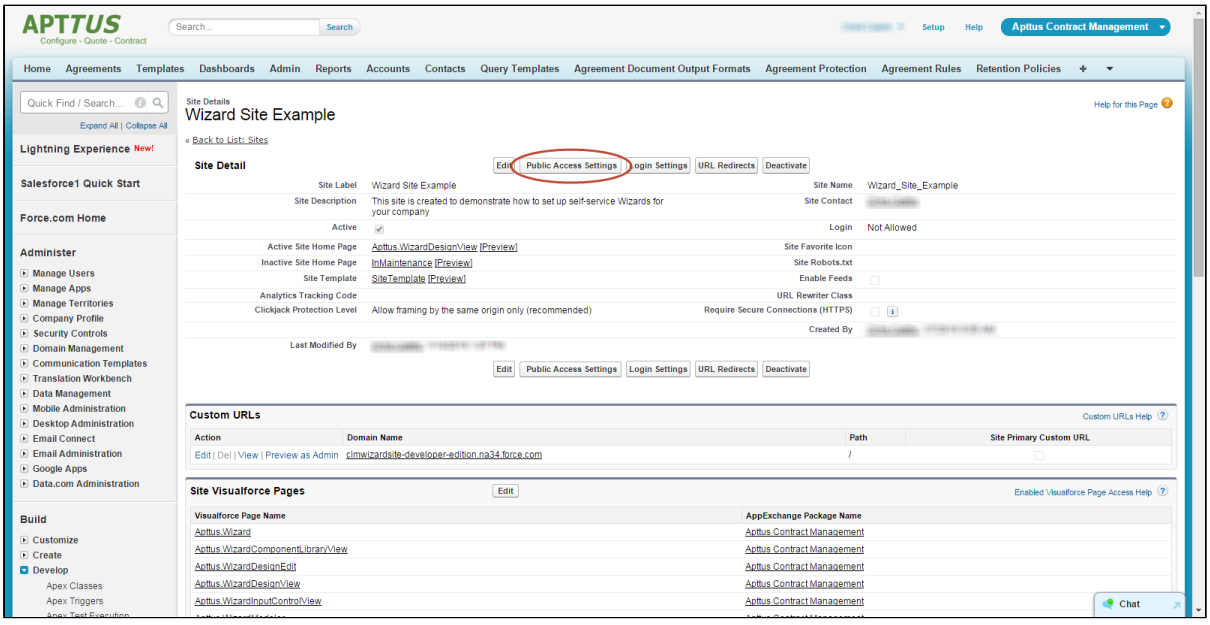
To give access to runtime Wizards, enable pages: *Apttus.Wizard, Apttus.WizardRuntimeView*.

3. Click **Save**.

Configure Public Access Settings

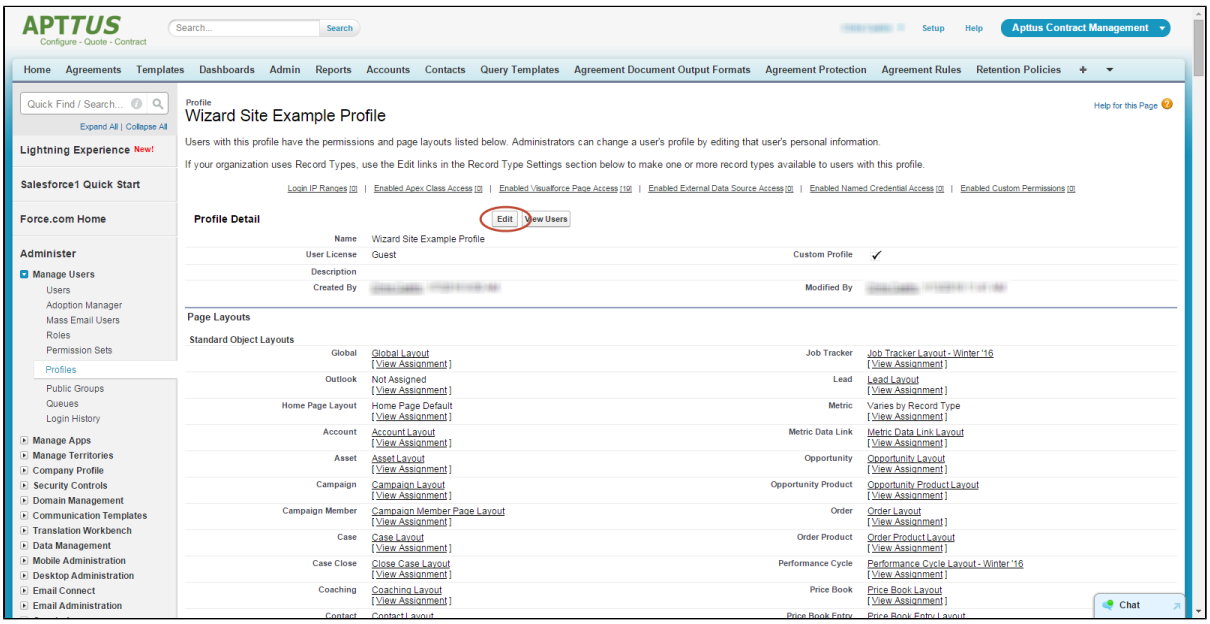
In order for your guest user to interact with the Contract Wizard pages you've just assigned, the user must be granted object permissions and field-level security privileges.

1. From the Site Details page, click on **Public Access Settings** to navigate to the custom profile page for

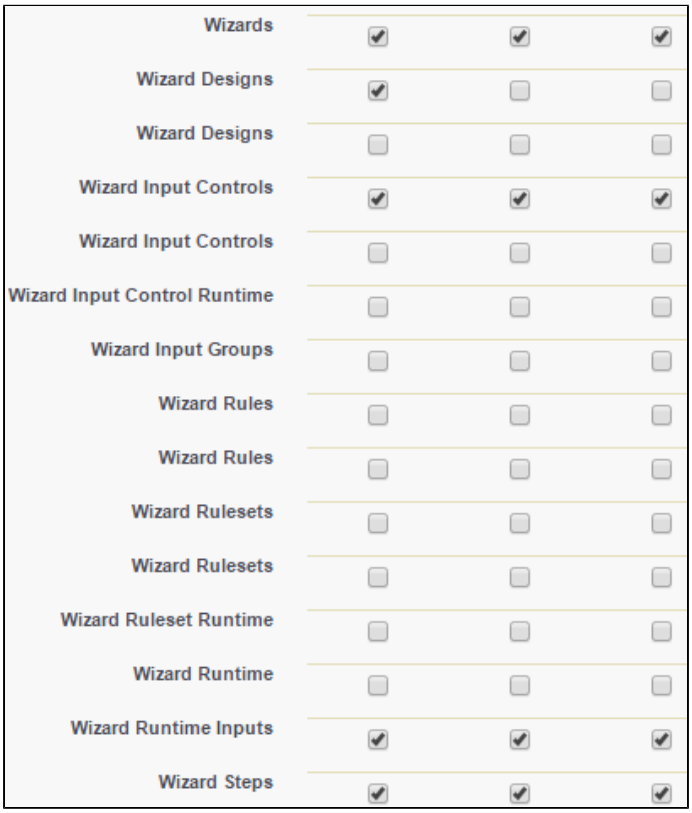


2. From the Site Profile page, click **Edit**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



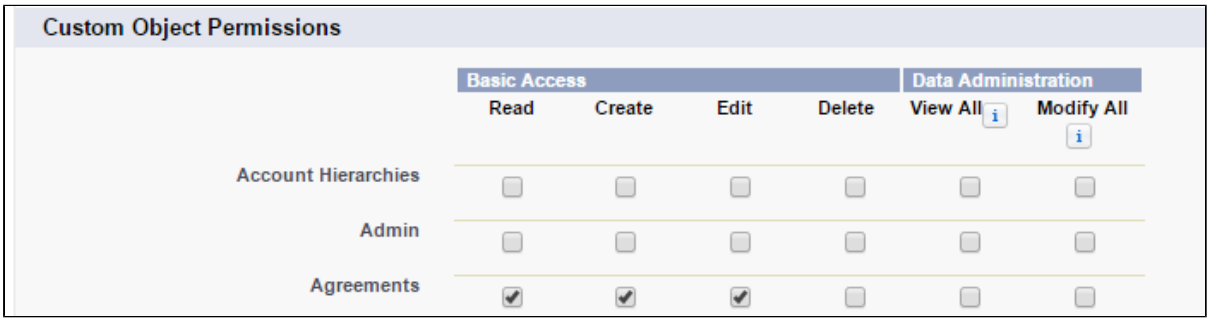
3. Scroll to Custom Object Permissions. Enable **Read, Create** and **Edit** permissions under Basic Access for all Wizard-related custom objects for which you want to grant access to the guest user and **View All** under Data Administration for the same objects.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- minimum object permissions for running Wizards requires Read, Create, Edit access to: *Wizard, Wizard Input Controls, Wizard Runtime Inputs, Wizard Steps.* Read Access must also be granted for *Wizard Designs*.

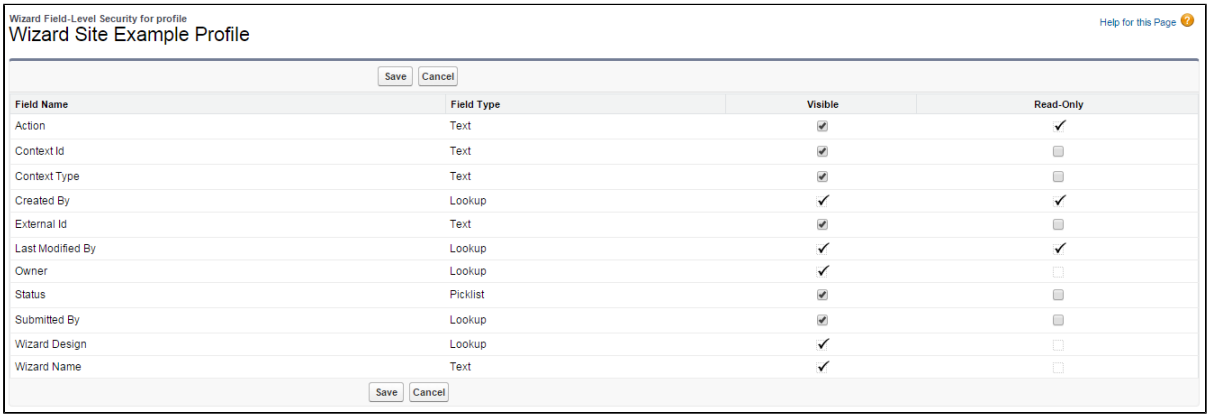
4. If you want guest users to be able to create agreement or other records as a result of executing runtime wizards, you must also assign **Read, Create, Edit** permissions for the Agreement (or object being created) to the guest user.



> If any Wizard you are exposing to the guest user is designed to create an object (Focus Object) you must ensure the Wizard design includes a custom URL to which the user will be redirected once the Wizard is submitted. Since default behavior of agreement and other object-creation Wizards redirects the user to the Object detail page in Salesforce, guest users will not have proper access. Refer to Configuring Wizard Step Rules for information on how to customize Go to Submit URLs.

5. Click **Save**.
6. Scroll to Custom Field-Level security. For each object you gave access to in Step 3, you must make all fields Visible (in addition to any read-only settings). This is especially important when your site is being used by guests to design Wizards as it will enable various fields in the designer. Click View next to a custom object name to view its field-level security.
7. Click **Edit** on the next page to edit field security settings.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

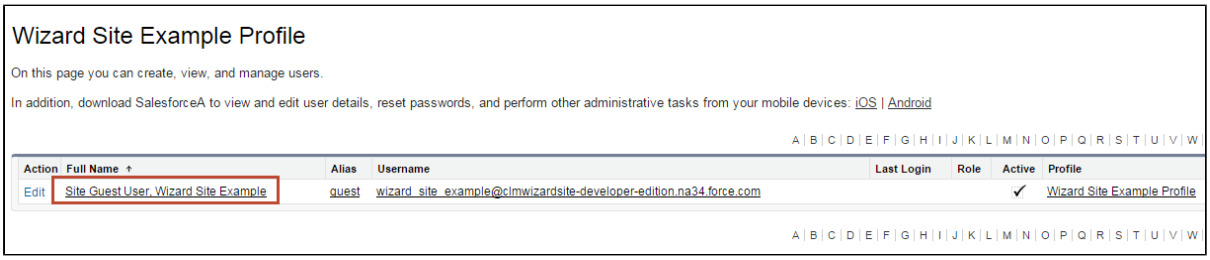


8. Enable each disabled check box under the Visible column.
9. Click **Save.** Repeat Steps 6 – 9 for each object which requires field-level access.

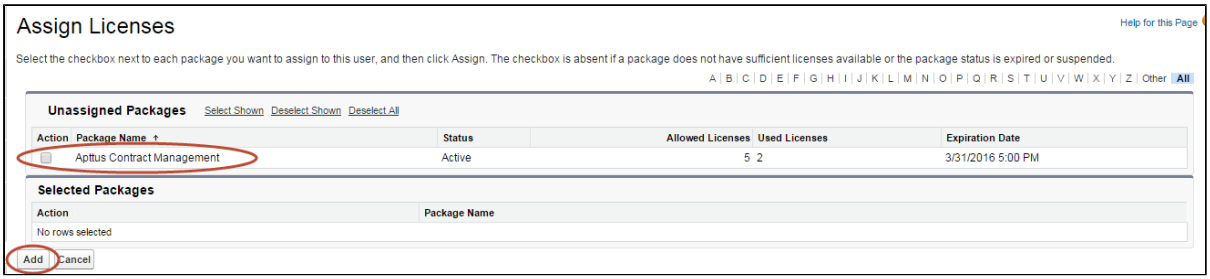
Assign CLM Package to Guest User

Once you have granted permissions to the site user profile, you also need to assign a license for Apttus Contract Management to the guest user for the site.

1. From the Site Details page, click on **Public Access Settings**.
2. From the Site Profile page click **View Users**.
3. Click on the **Full Name** link for the guest user.



4. Under Managed Packages, click on **Assign Licenses**,
5. On the next page, choose **Apttus Contract Management** and click **Add**.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

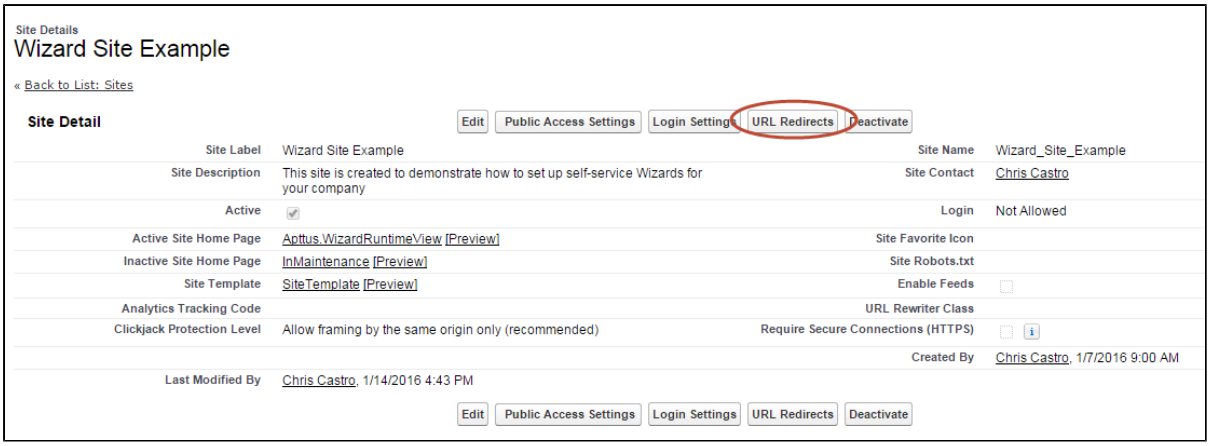
Package Access is now granted to the guest user and the Site is configured for guest access.

Configuring Sites for a Specific Runtime Wizard

When you configure your site you have the option to choose any Visualforce page as the Active Site Home page. However, a case may exist in which you would prefer for the site to take the user directly to a runtime wizard, rather than giving the user the option to choose it from Wizard tab home page. In this case you will have to configure a **URL Redirect** for the site.

To set up a URL redirect:

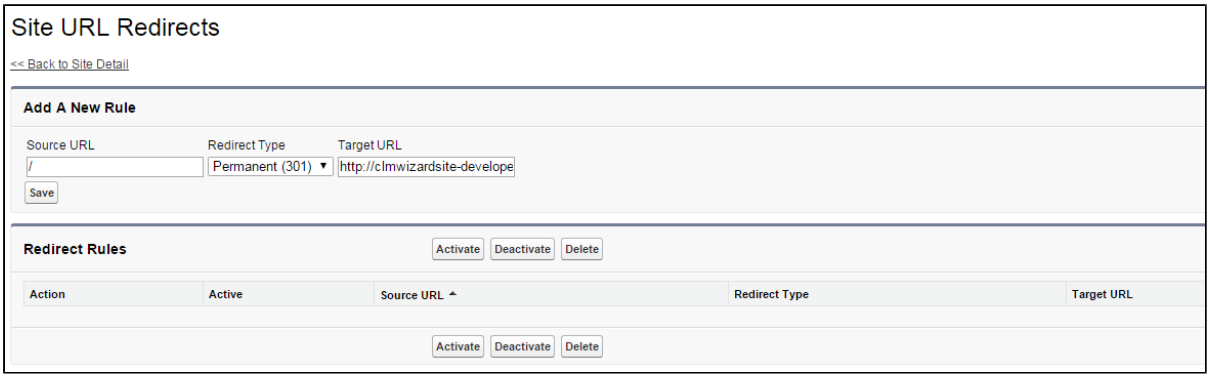
1. Go to the Site Details page.
2. Click on **URL Redirects**.



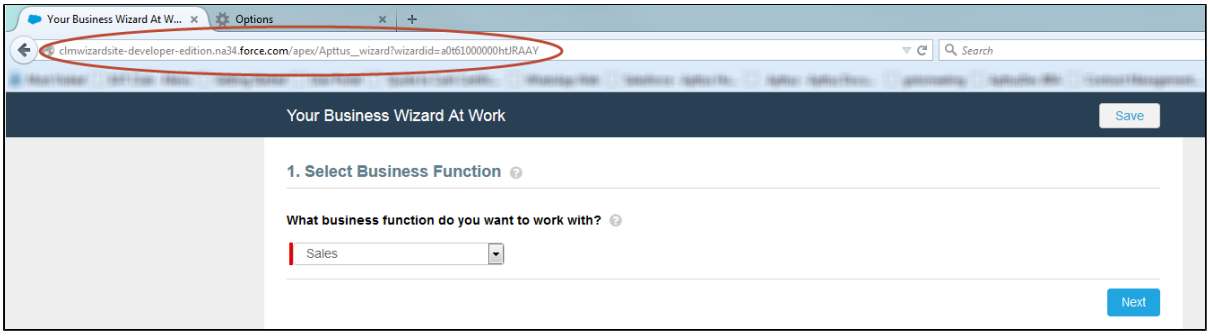
3. Enter the following to add a new redirect rule:
   - **Source URL** – This is the relative URL of the original source page. Enter "/" here.
   - **Redirect Type** – Choose "Permanent (301)."
   - **Target URL** – Enter "http://{siteurl}/apex/Apttus_wizard?wizardid={wizardid}" where {siteurl} is the actual site URL and {wizardid} is the ID of the desired runtime wizard. For example, if your Site URL is **http://clmwizardsite-developer-edition.na34.force.**

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

com/ and the runtime Wizard id is **a0p610000019mTIAAY**, you would enter your target URL as **http://clmwizardsite-developer-edition.na34.force.com/apex/Apttus__wizard?wizardid=a0p610000019mTIAAY**



4. Click **Save.**
5. Select the rule you just created and click **Activate** to activate the URL redirect. Now when a user visits your site home page they will be redirected to begin the runtime wizard.



Configuring Self-Service Wizards for Communities

Use Salesforce Communities for your Self-Service Wizards to require authentication for customers and external users when they execute run-time wizards. This section provides instructions for:

- creating a Community portal for licensed Community users to access Self-Service Wizards.
- configuring your Community to allow unlicensed external (guest) users to self-register for accounts.

In Spring 2013, Salesforce introduced Communities, which replaced the Customer and Partner portals. Communities combined the functionality of customer and partner portals with a way to allow customers and employees to collaborate in the same space. Using Communities to provide Self-Service Wizards, you can provide the same functionality but give your Wizard experience a completely unique look and feel. When you create a Community, you are still creating a Force.com

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

site, but the site is wrapped in the Community, providing authentication options, branding, collaboration and other benefits. The most important consideration to use Communities over Customer/Partner portals is that Customer/Partner portals are ***no longer available for new Salesforce organizations***.

For more information on Salesforce Communities, refer to Salesforce documentation on Getting Started With Communities.

> The following pages and sections provide instructions for enabling Self-Service Wizards by creating a new community and assigning members to the Community. While you can create communities for both customers and partners, the instructions provided use customer members as an example. The process for partners is almost identical, but differs slightly. Where the process differs the documentation will provide guidance.

To properly set up Self-Service Wizards using Communities, perform the following steps:

1. Enable Communities in your org and choose a domain.
2. Create a Community for Self-Service Wizards.
3. Create/Modify User Profile(s) to be used in the Community.
    a. Add custom object permissions to Wizard-related objects.
    b. Add field-level security privileges for Wizard-related objects.
4. Create Contacts and Enable as Customer or Partner Users.
5. Add Members to the Community.
6. Add Wizard tab to the Community.
7. Activate the Community.

Create Your Community

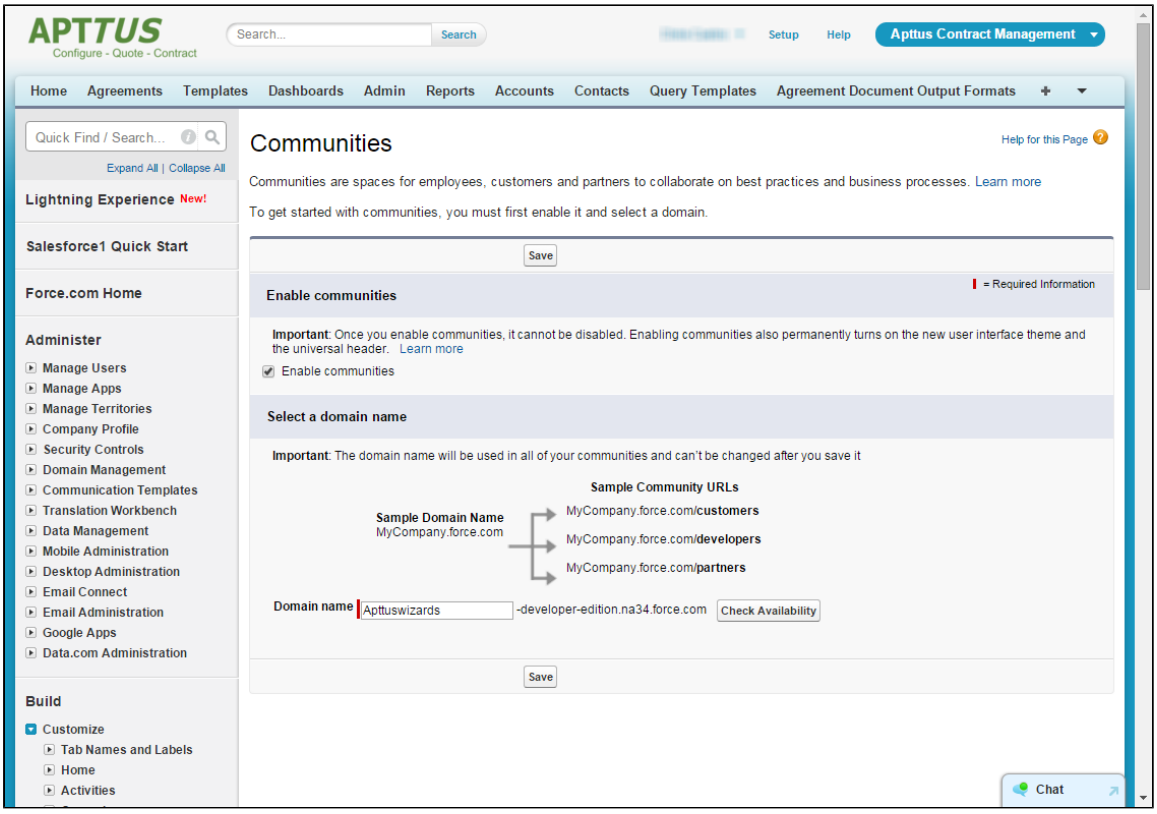
> Hint: Click an image on this page to enlarge the view.

Enable Communities

> *If Communities is already enabled for your org, skip this step.*

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

1. Go to **Setup > Customize > Communities > Community Settings.**
2. Select the **Enable Communities** checkbox.



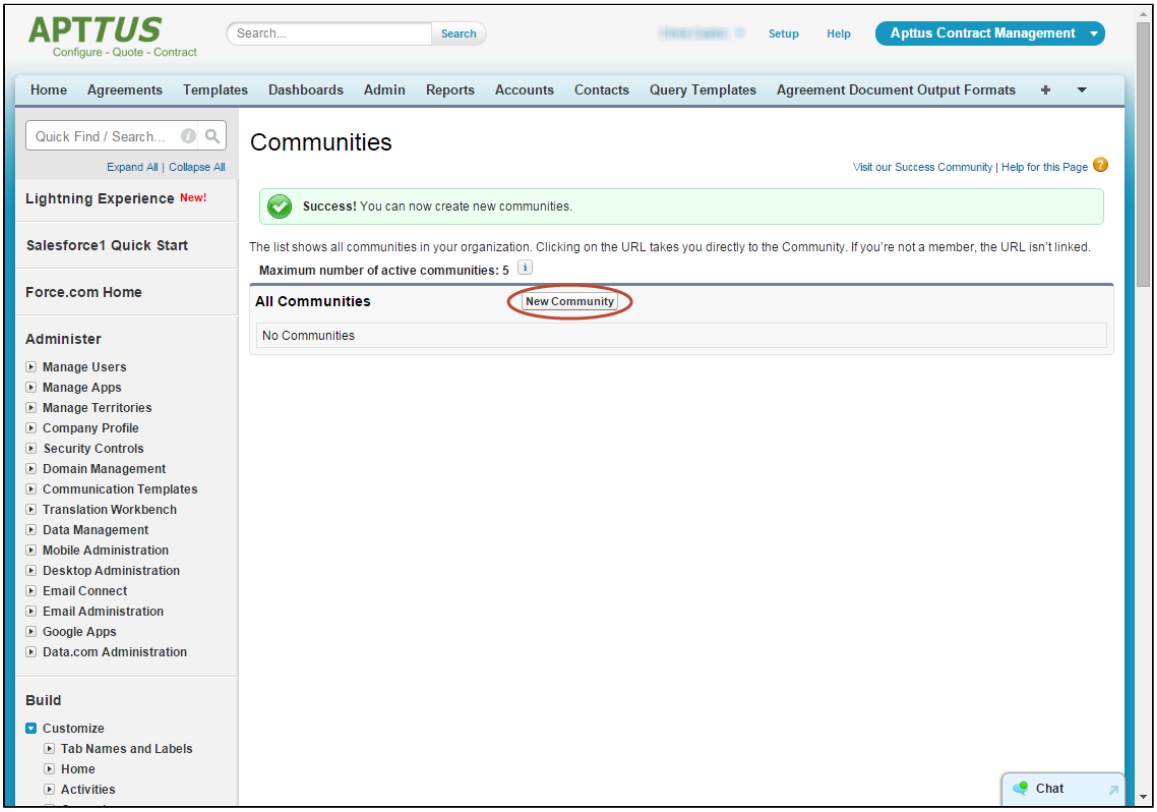
3. Enter a unique **Domain Name**. This domain name will be used in all of your communities for this org.
4. Click **Check Availability** to confirm that your chosen domain is available.
5. Click **Save**.

Create a Community for Self-Service Wizards

With Communities enabled, you can create a Community for your partners and customers to run Wizards.

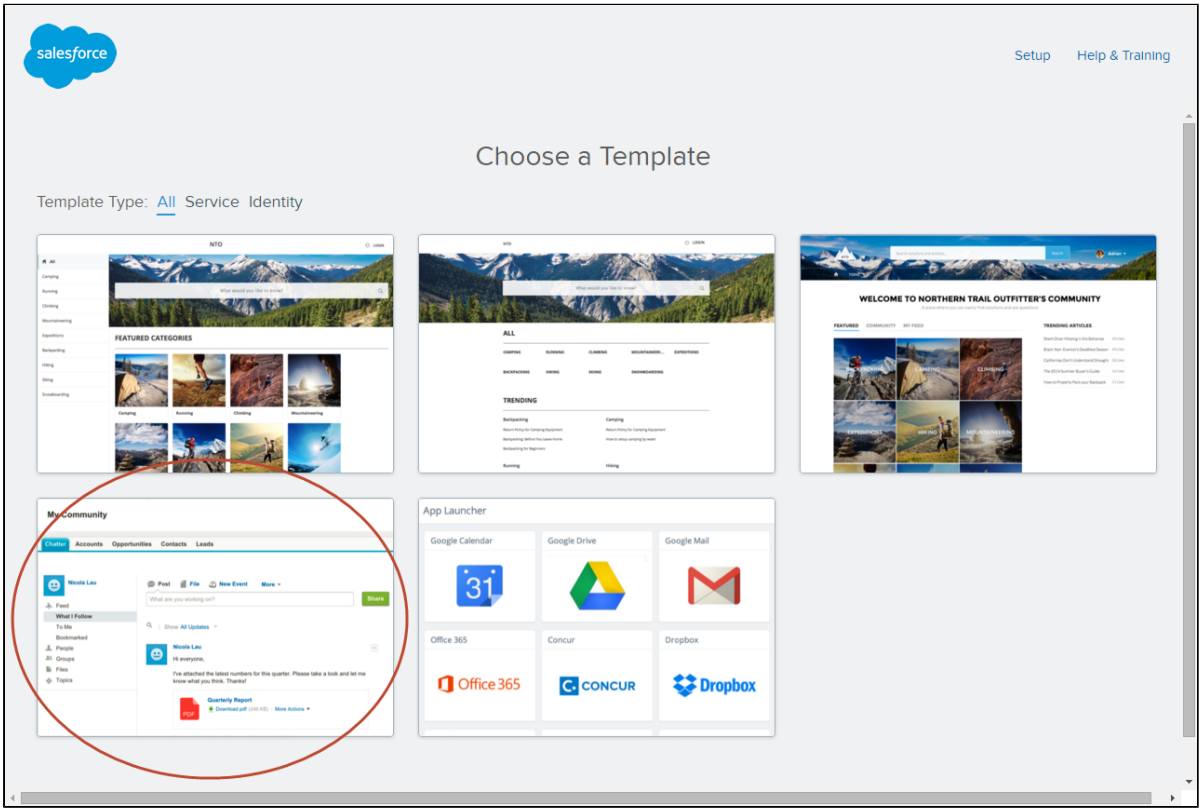
1. Go to **Setup > Customize > Communities > All Communities**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



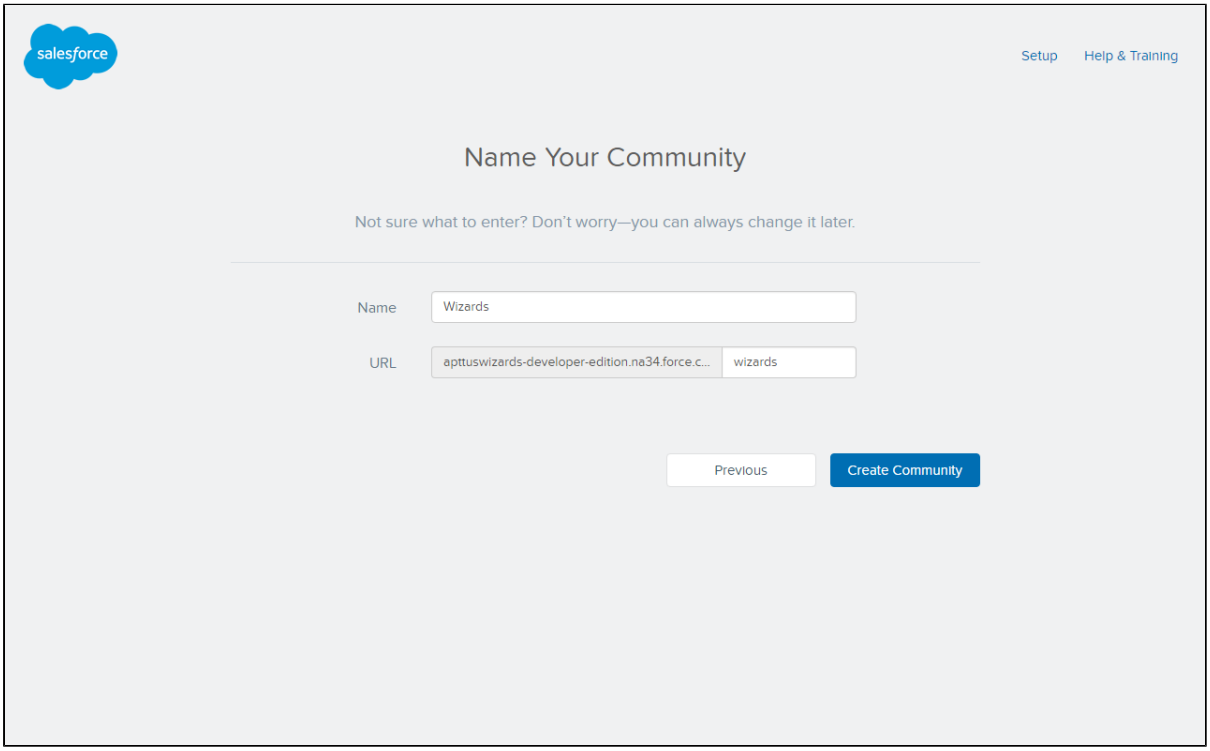
2. Click **New Community** to choose a template for your new community. The Community Builder page is displayed.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



3. Choose the **Salesforce Tabs + Visualforce** template. This is required for communities which expose custom Visualforce pages (like the Contract Wizard).
4. Choose a **Name** for your Community and an optional prefix for the **URL** (in this example, "wizards" is used as a prefix).

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



5. Click **Create Community**. Your community has been created and is now ready to be configured for Self-Service Wizards.

Configure Users for your Community

In order for users to have access to both your community and Wizards, you must complete the following steps:

1. Create a user profile for your community OR modify an existing user profile
2. Add custom object permissions to the profile(s) for Wizard-related objects
3. Add field-level security permissions to the profile(s) for Wizard-related objects
4. Create customer/partner users as contacts and enable as community users
5. Add members to your Community

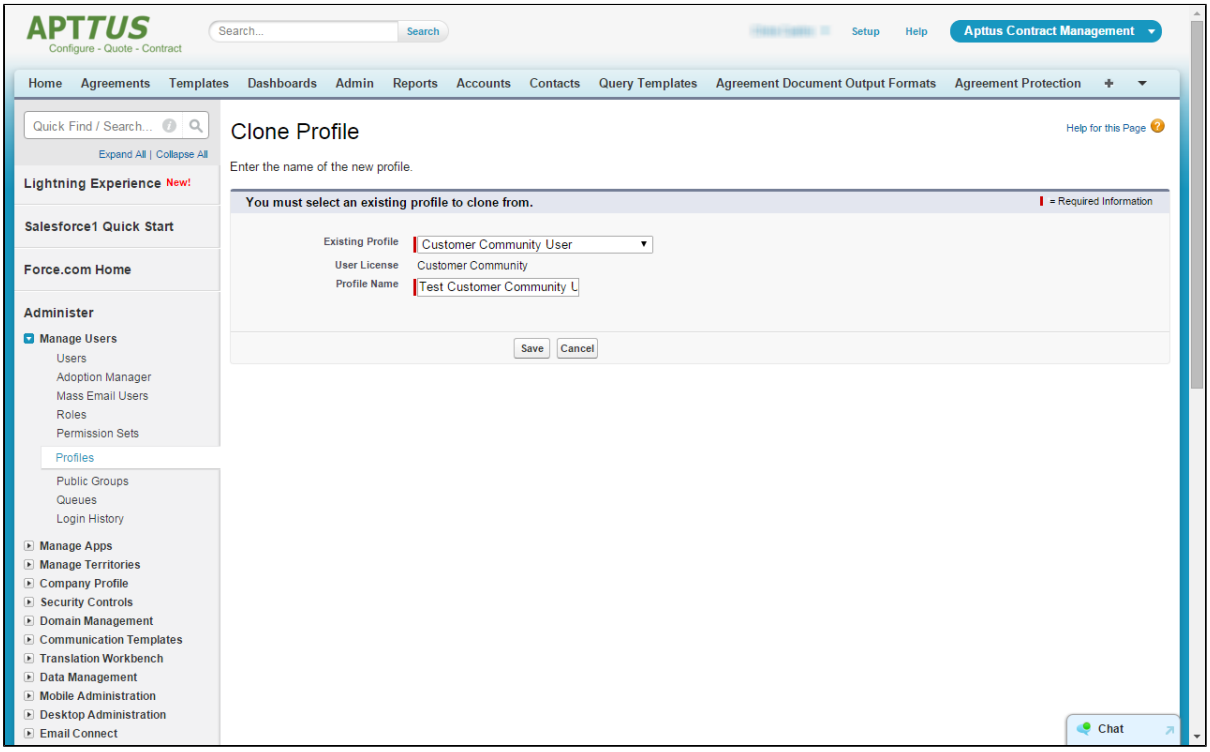
The following sections use a Customer Community profile as an example, but you can also create a Partner Community profile. The only major differences are the type of *license* chosen when creating the profile and any users created for the profile must be associated with *partner accounts*.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Create a User Profile

The following section provides instructions for creating a user profile for use with your Community specifically for the use of running Wizards. If you decide you want to clone and /or modify an existing user profile for use with your Community, you can skip this step, but make sure the user profile you have chosen is assigned a Partner or Community license.

1. Go to **Setup > Manage Users > Profiles**.
2. Click **New Profile.** The Clone Profile page is displayed.
3. Choose an Existing Profile enabled for Salesforce Communities: **Customer Community User** or **Partner Community User** (Customer Community User is used in the examples on this page).

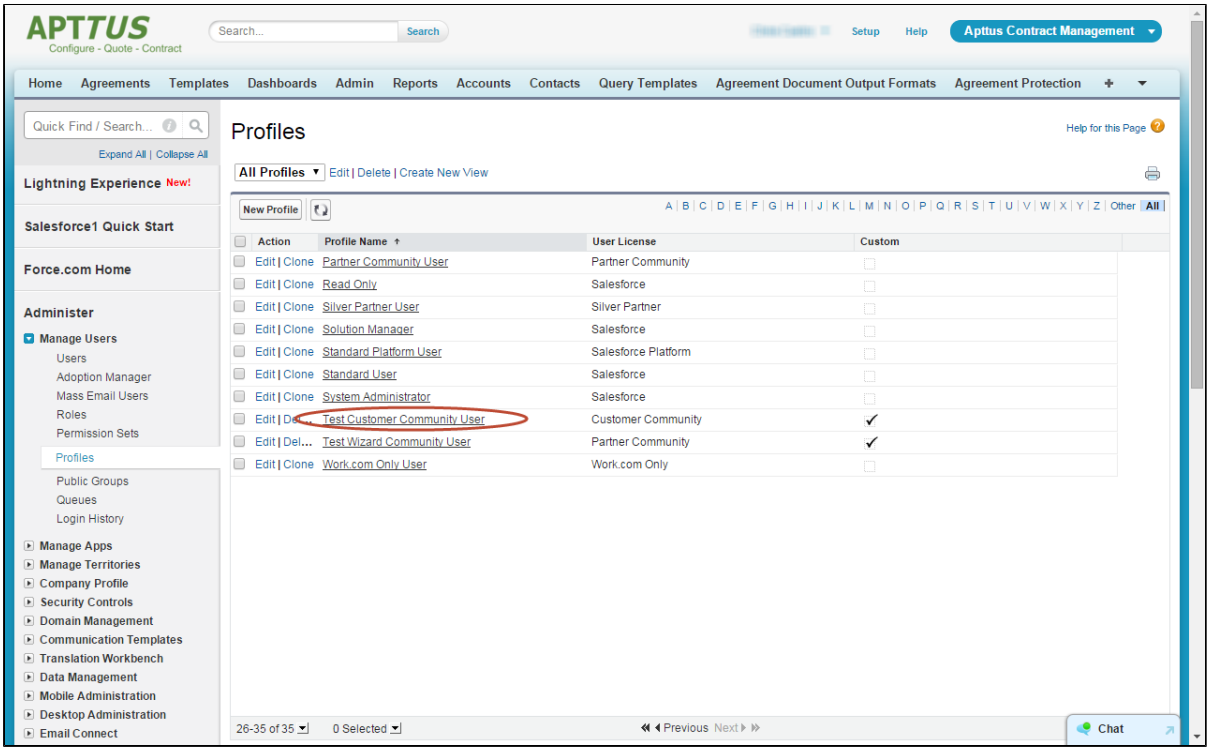


4. Enter the name for the user profile you want to create and click **Save**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

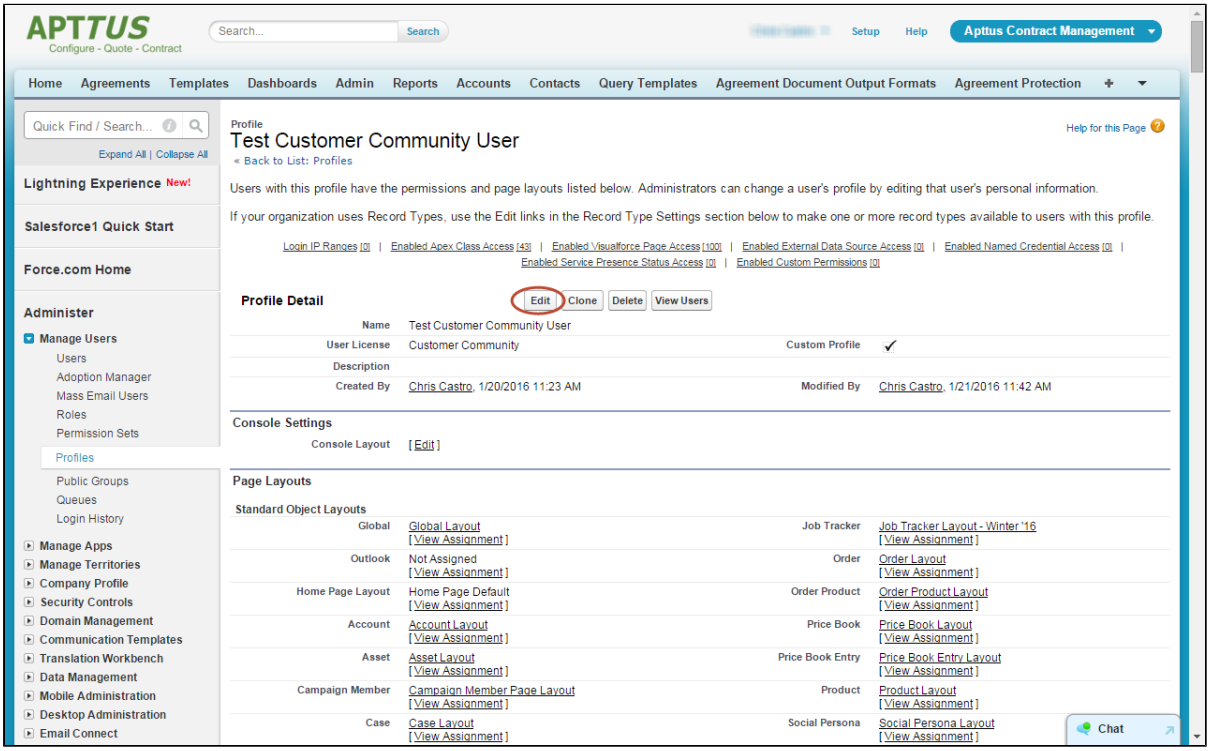
Add Custom Object Permissions for Wizard-Related Objects

1. Go to **Setup > Manage Users > Profiles** and click on the profile you just created.

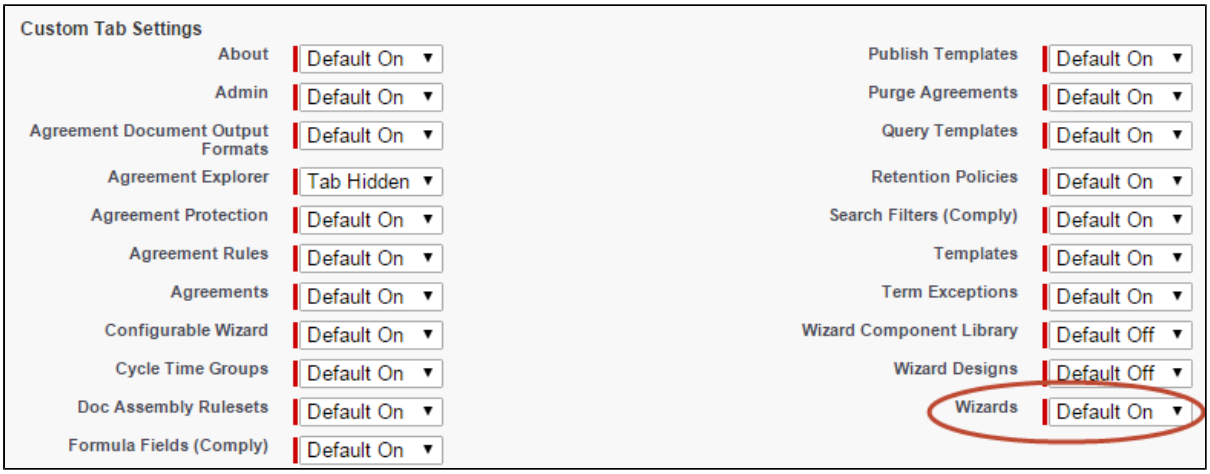


2. Click **Edit** on the Profile Details page.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

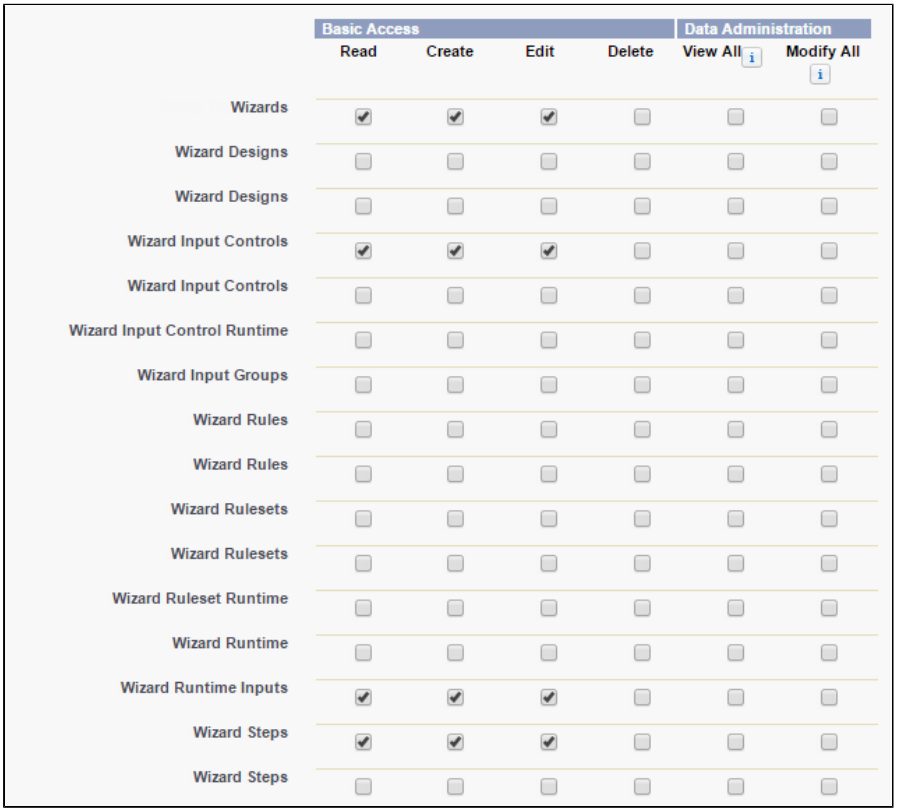


3. Under **Custom Tab Settings**, change the Wizards tab to **Default On**.



4. Under **Custom Object Permissions** grant Read, Create and Edit permissions to the following objects: *Wizards, Wizard Input Controls, Wizard Runtime Inputs,* and *Wizard Steps* .

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



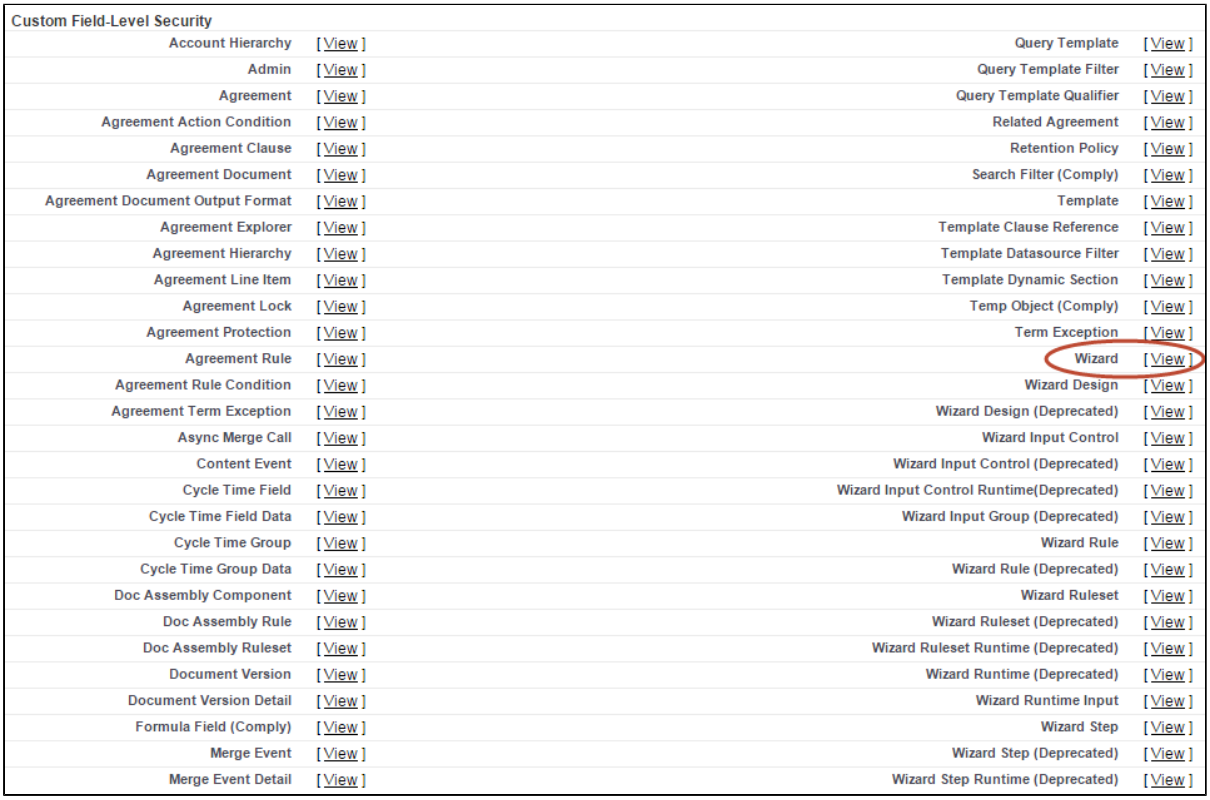
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Wizards	☑	☑	☑	☐	☐	☐
Wizard Designs	☐	☐	☐	☐	☐	☐
Wizard Designs	☐	☐	☐	☐	☐	☐
Wizard Input Controls	☑	☑	☑	☐	☐	☐
Wizard Input Controls	☐	☐	☐	☐	☐	☐
Wizard Input Control Runtime	☐	☐	☐	☐	☐	☐
Wizard Input Groups	☐	☐	☐	☐	☐	☐
Wizard Rules	☐	☐	☐	☐	☐	☐
Wizard Rules	☐	☐	☐	☐	☐	☐
Wizard Rulesets	☐	☐	☐	☐	☐	☐
Wizard Rulesets	☐	☐	☐	☐	☐	☐
Wizard Ruleset Runtime	☐	☐	☐	☐	☐	☐
Wizard Runtime	☐	☐	☐	☐	☐	☐
Wizard Runtime Inputs	☑	☑	☑	☐	☐	☐
Wizard Steps	☑	☑	☑	☐	☐	☐
Wizard Steps	☐	☐	☐	☐	☐	☐

5. Click **Save** to return to the Profile Details page.

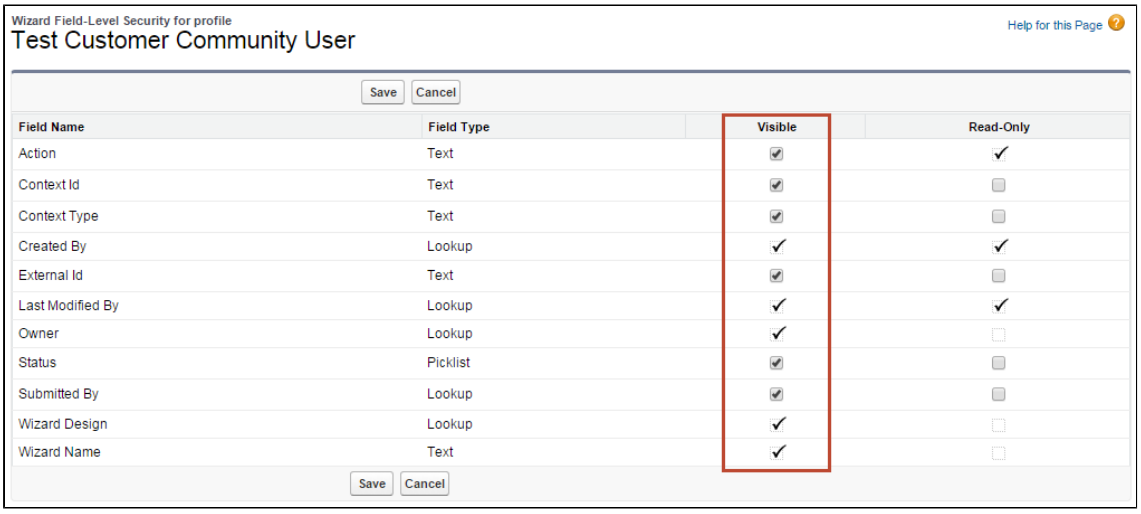
Add Field-Level Security for Wizard-related Objects

1. Go to **Setup > Manage Users > Profiles** and click on the profile you just created.
2. Under **Field-Level Security > Custom Field-Level Security** click the View link for the *Wizard* object.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



3. Click on each checkbox under the **Visible** column to enable visibility for all fields in the list.



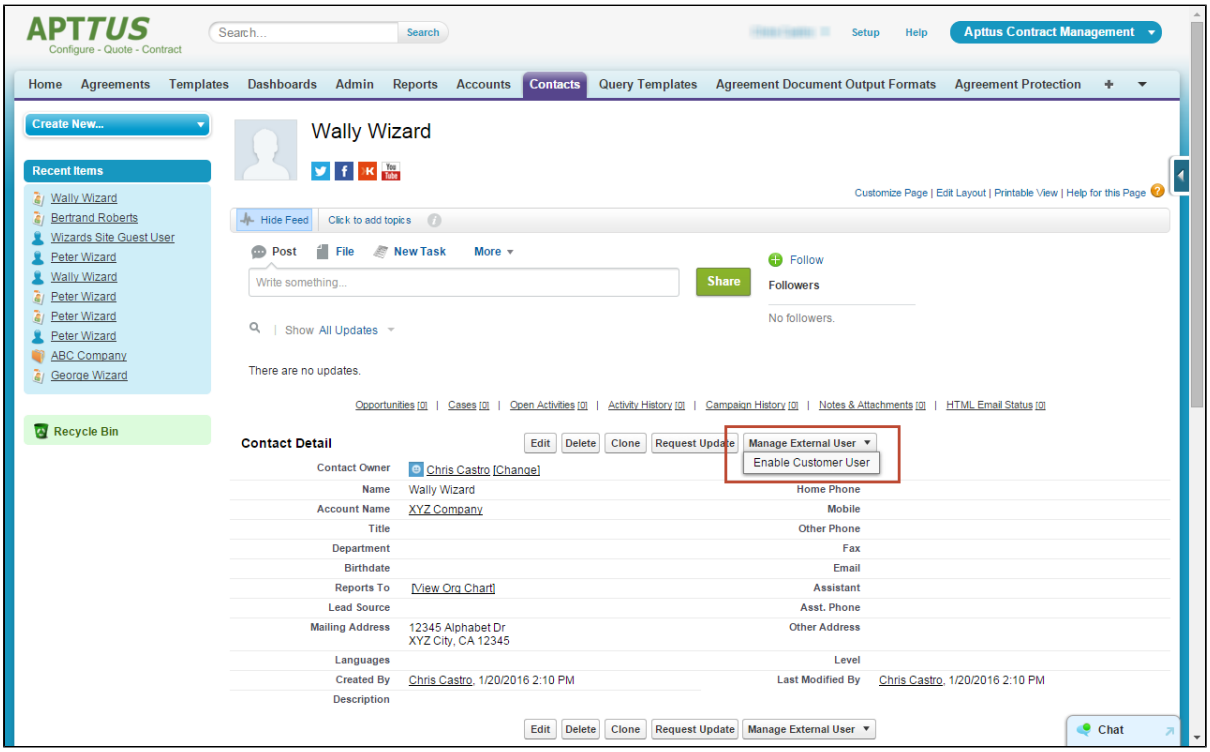
4. Click **Save** to return to the Profile Details page.
5. Repeat Steps 2 – 4 for the following objects: *Wizard Input Control, Wizard Runtime Input, Wizard Step*.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Create Community Users from Contacts

Assuming the customers or partners who will be using Self-Service wizards are customers of your organization, you must create or use existing contacts in your org and enable them as customer or partner users. Follow these step-by-step instructions to create a new user for your community and assign it a Community profile.

1. Create a new business contact and assign it an account or go to **Contacts** and choose an existing contact.
2. Click on **Manage External User** and choose **Enable Customer User**.

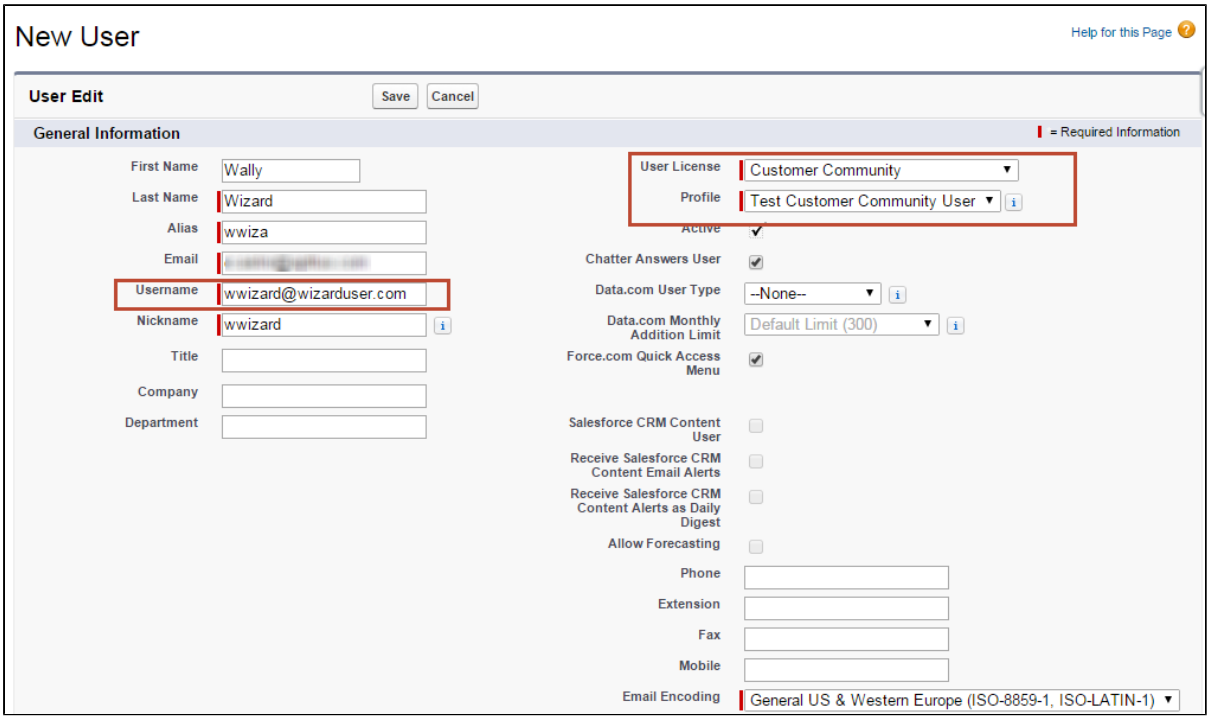


The New User form is displayed.

> You can choose the enable the contact as a Partner User only if the account assigned to the contact has been enabled as a Partner Account. Also keep in mind that when you assign a profile to the user it must use be a Partner profile (using a Partner Community license) instead of a Customer profile.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

3. Enter all required information for your new Community user, including:
    - **Email**– the actual email of the user who will logging in to your community (if you have not yet activated the community, choose an email address controlled by your organization–see below)
    - **Username** – the Username for this user will be what they use to log in to your Community portal (e.g., "wwizard@wizarduser.com").
    - **User License** – the "Customer Community" user license (or "Partner Community" if you are creating a Partner User).
    - **Profile** – he User Profile you created in the previous section.

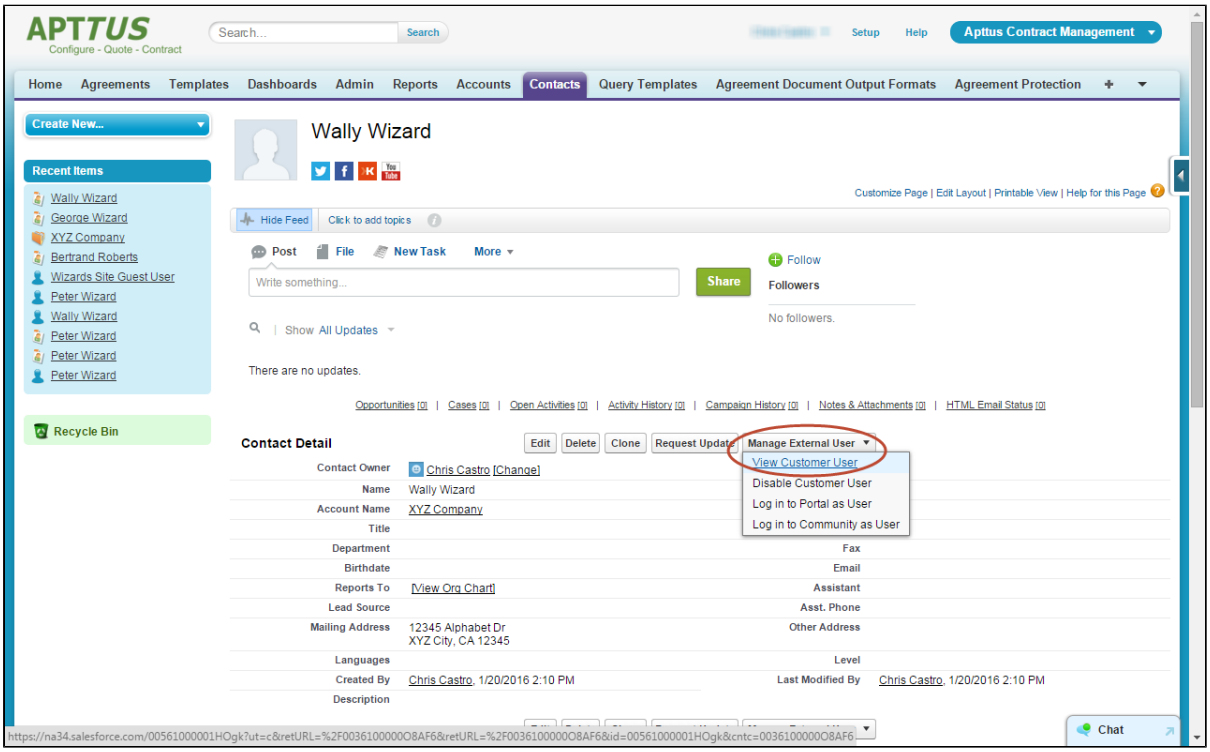


4. Click **Save** to create the new user. An email notification is sent to the email address provided in the New User form to complete registration for their account.

> During initial setup of your community before it is activated, it is recommended to create a user password from an email address controlled by you or your administrator. After the community has been activated, any new users created in this way can complete the registration process from their own email address.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

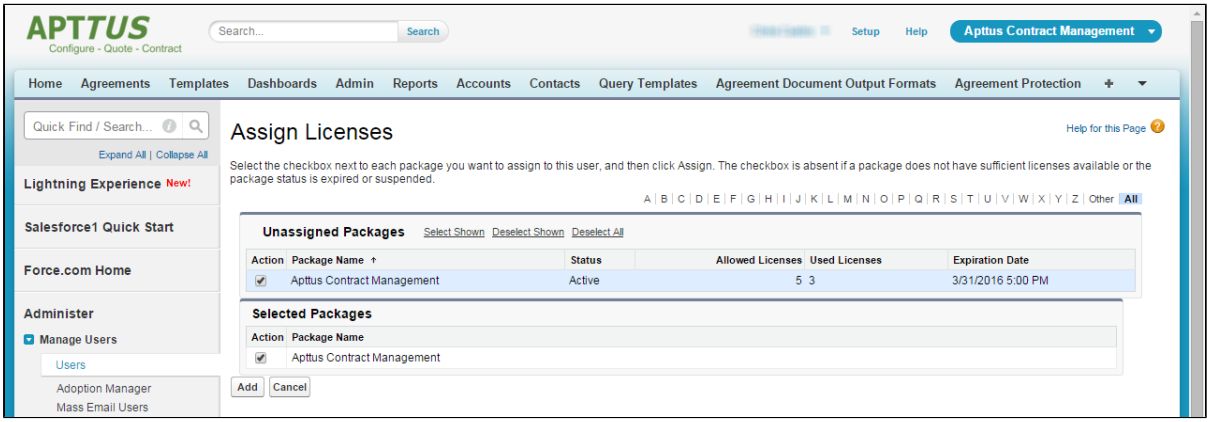
5. Return to the detail page for your contact. Click on **Manage External User** and choose **View Customer User**.



6. Scroll to the **Managed Packages** section and click on **Assign Licenses**.

7. Under **Unassigned Packages** select the checkbox next to Apttus Contract Management package and click **Add** to assign a license for that package to the user (this is required of every customer/partner user).

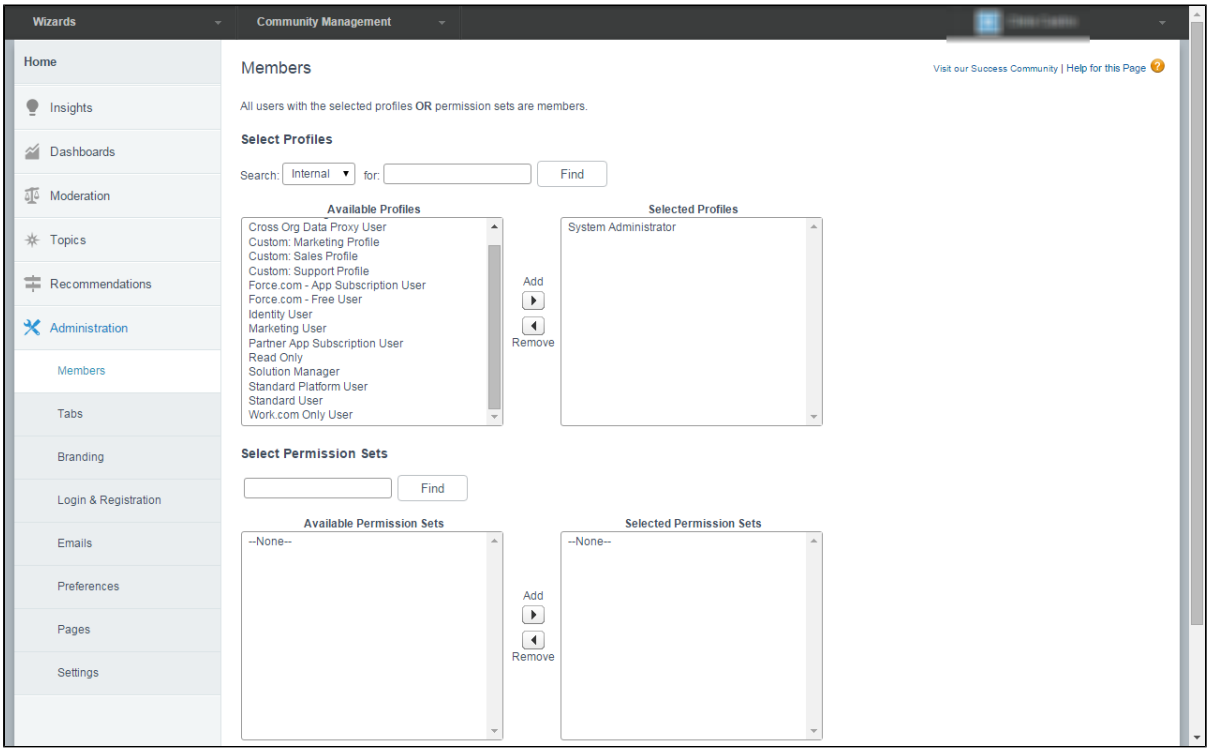
Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Add Members to Your Community

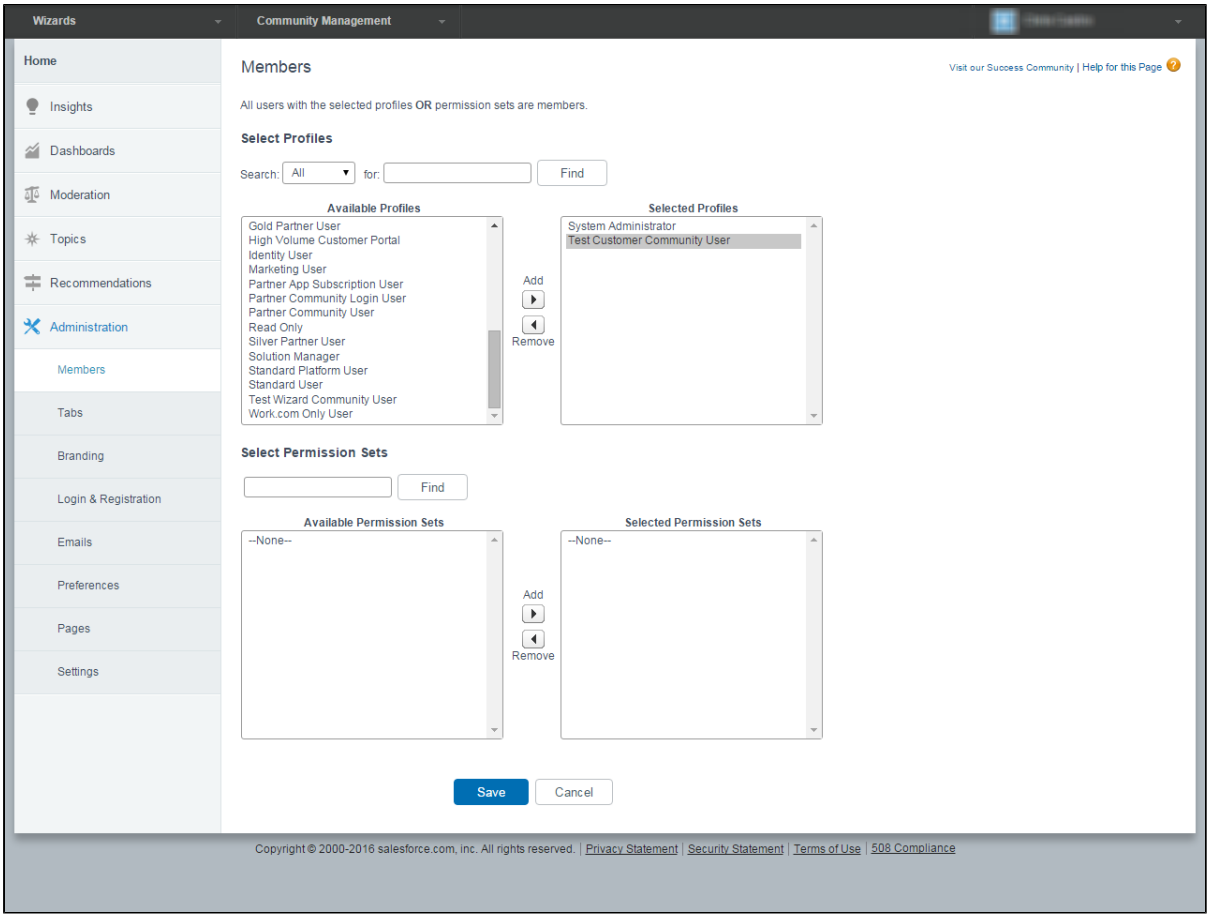
Now that you have created/modified user profiles and created users to access your Community, you must add those user profiles to the Community itself to allow access. To add members to your community:

1. Go to **Setup > Customize > Communities > All Communities.**
2. Click **Manage** next to your Community.
3. Go to **Administration > Members**.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

4. Search for and select the user profile(s) to add to the Community. In the example below, the user profile **Test Customer Community User** is added to the Community. All users with this profile can log in to your community with the proper credentials.



5. Click **Save.** Users with the selected profile(s) can now access your community.

Configure and Activate your Community

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

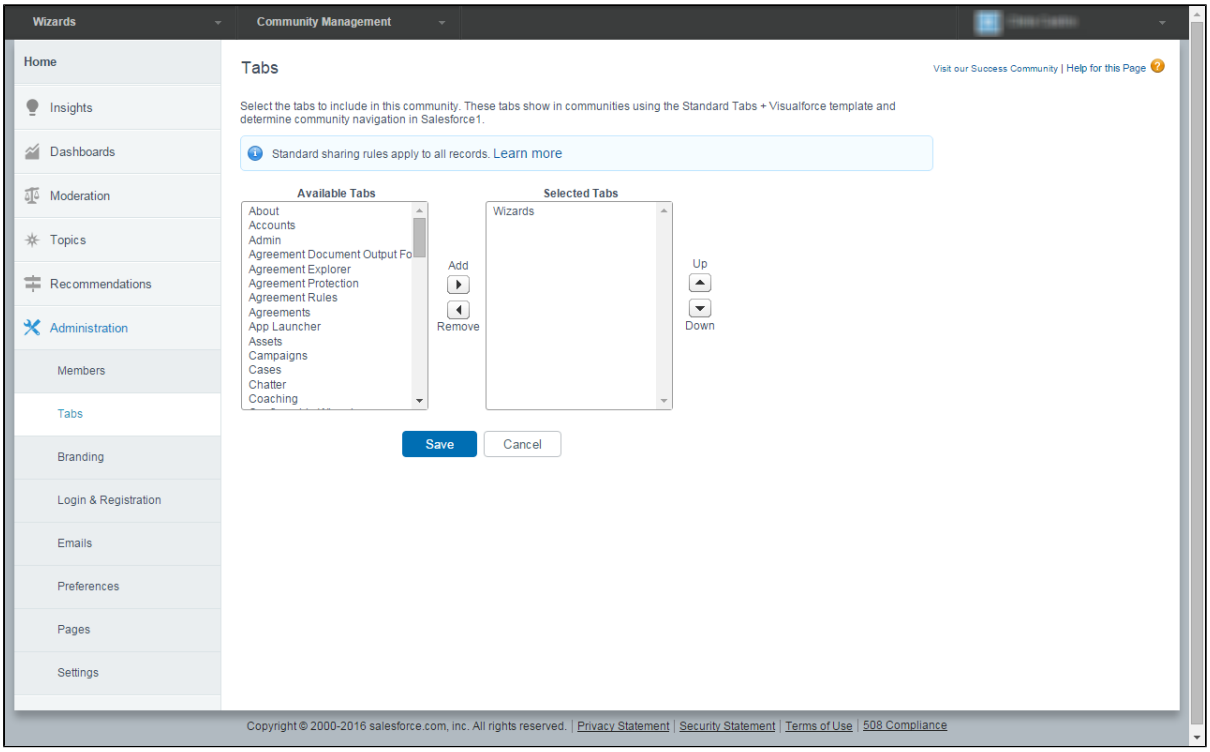
To complete the process of enabling Self-Service Wizards as a Community, you need to complete Community configuration and activate the Community itself. Much of Community Management is left up to your organization–how you customize, which Dashboards and Reports you expose, how you brand your site, is all handled as part of Community Management.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Add Tabs to Your Community

To allow users to choose from available Wizard designs and execute a runtime Wizard you must add the **Wizards** tab to your Community.

1. Go to **Setup > Customize > Communities > All Communities.**
2. Click **Manage** to manage your Community.
3. Go to **Administration > Tabs**.
4. Add the **Wizards** tab from the list of Available Tabs to Selected Tabs.



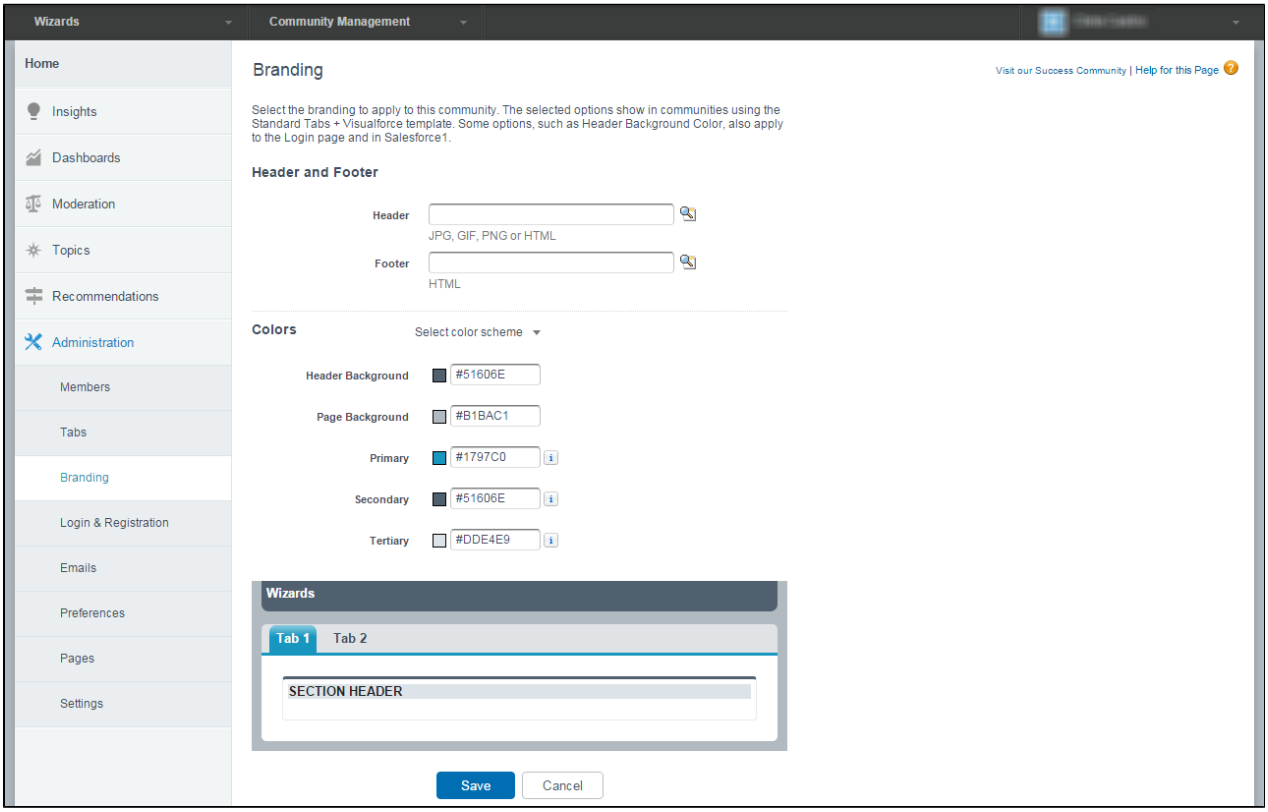
5. Click **Save**.

Branding Your Community

Although not required, you can add branding to your Community, including making changes to the following:

- Use HTML or image files to change the header and footer of your Community site.
- Change the color scheme for your Community, including the header and page background.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



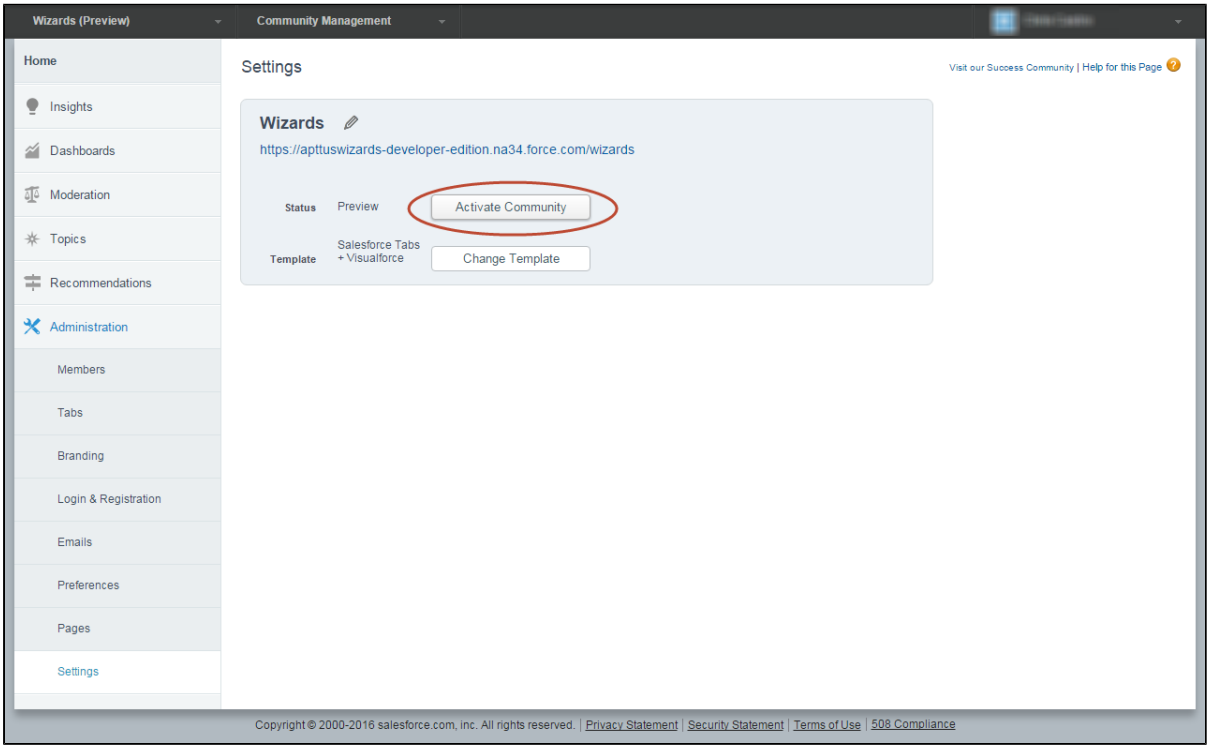
Note that the branding offered in Community Management differs from branding added to Wizard designs when they are created. With the Wizard Designer, you can add branding to both the Wizard banner and individual Steps of your runtime Wizards. For more information on adding branding and logos to your Wizards, refer to Creating a New Wizard Design.

Activate Your Community

When you have completed configuration and are satisfied with customizations to your Community, you can Activate the Community to make it live, allowing your users to access Self-Service Wizards.

1. Go to **Administration > Settings**.
2. Click **Activate Community** to change the status of your Community from Preview to Active.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Your Self-Service Wizards Community is now ready for registered users!

Configure Guest Access to your Community

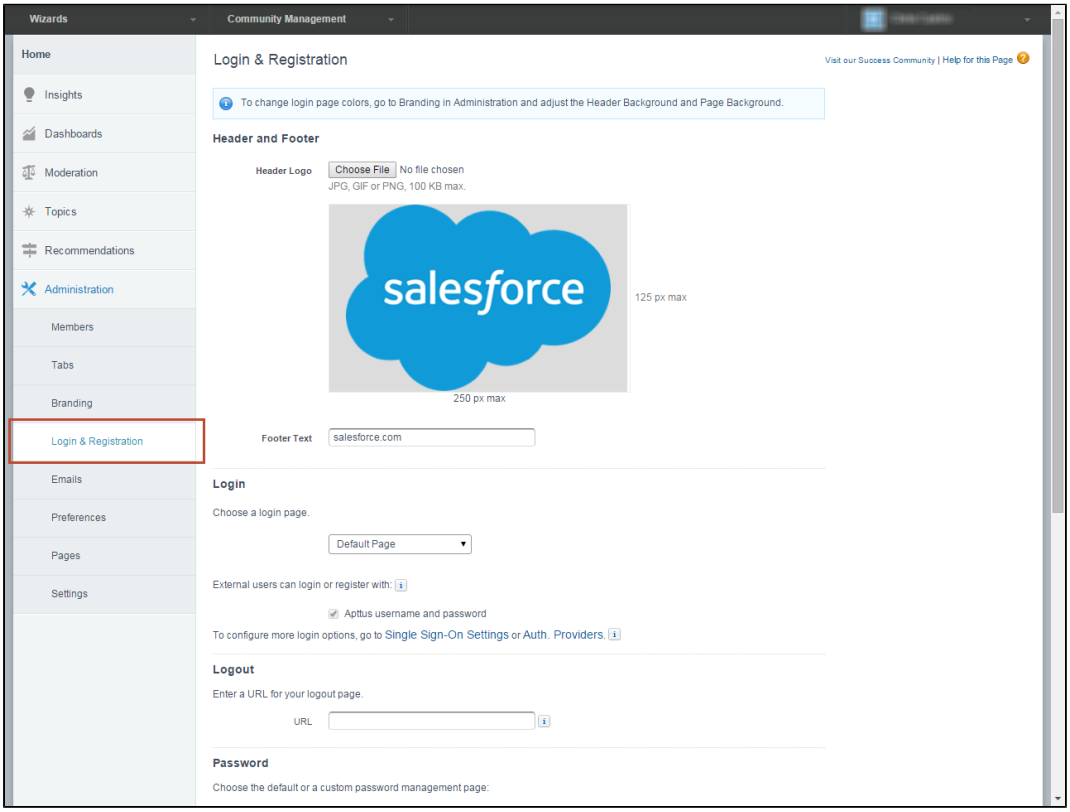
You can enable self-registration for your Community to allow unlicensed guest users to join the community. Guest users who register this way are saved:

- as contacts under a business account OR
- as a person account in your organization (if person accounts are enabled)

To enable self-registration for your Community:

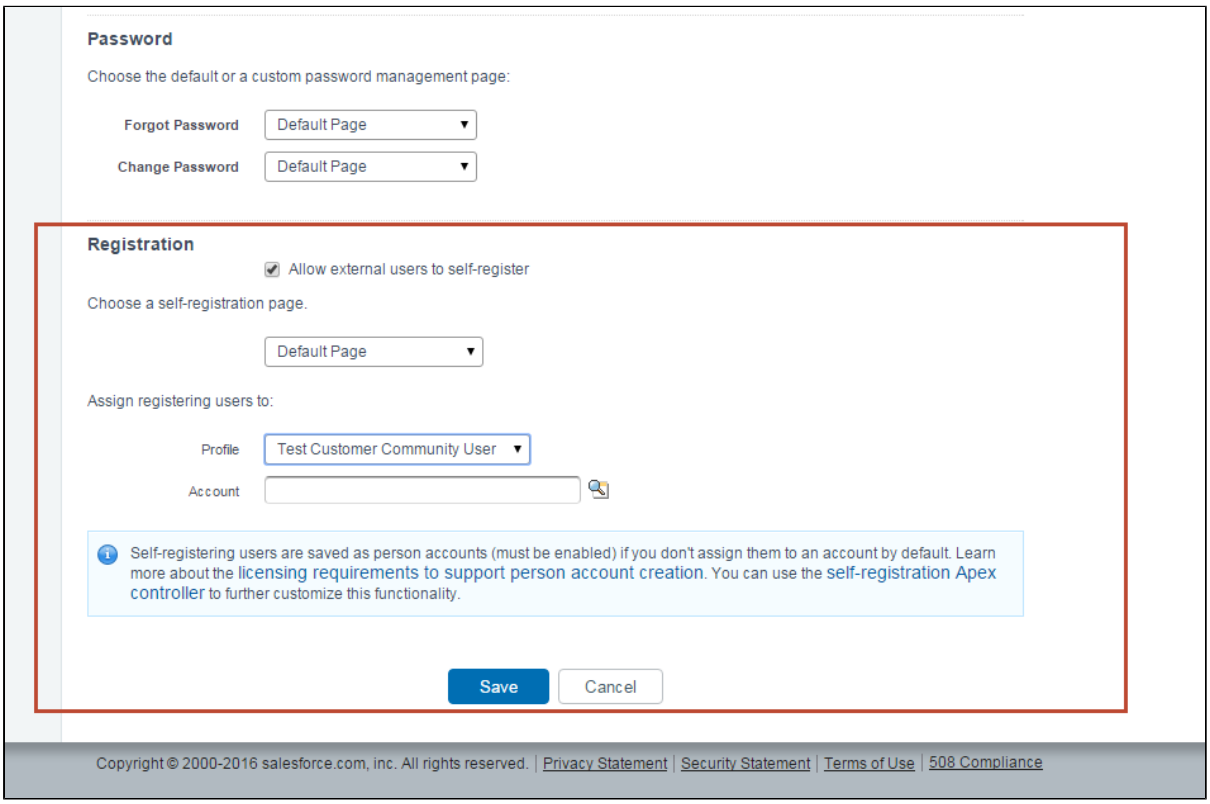
1. Go to **Setup > Customize > Communities > All Communities**.
2. Click **Manage** next to the community name.
3. Go to **Administration > Login & Registration**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



4. Under Registration, select **Allow external users to self-register**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

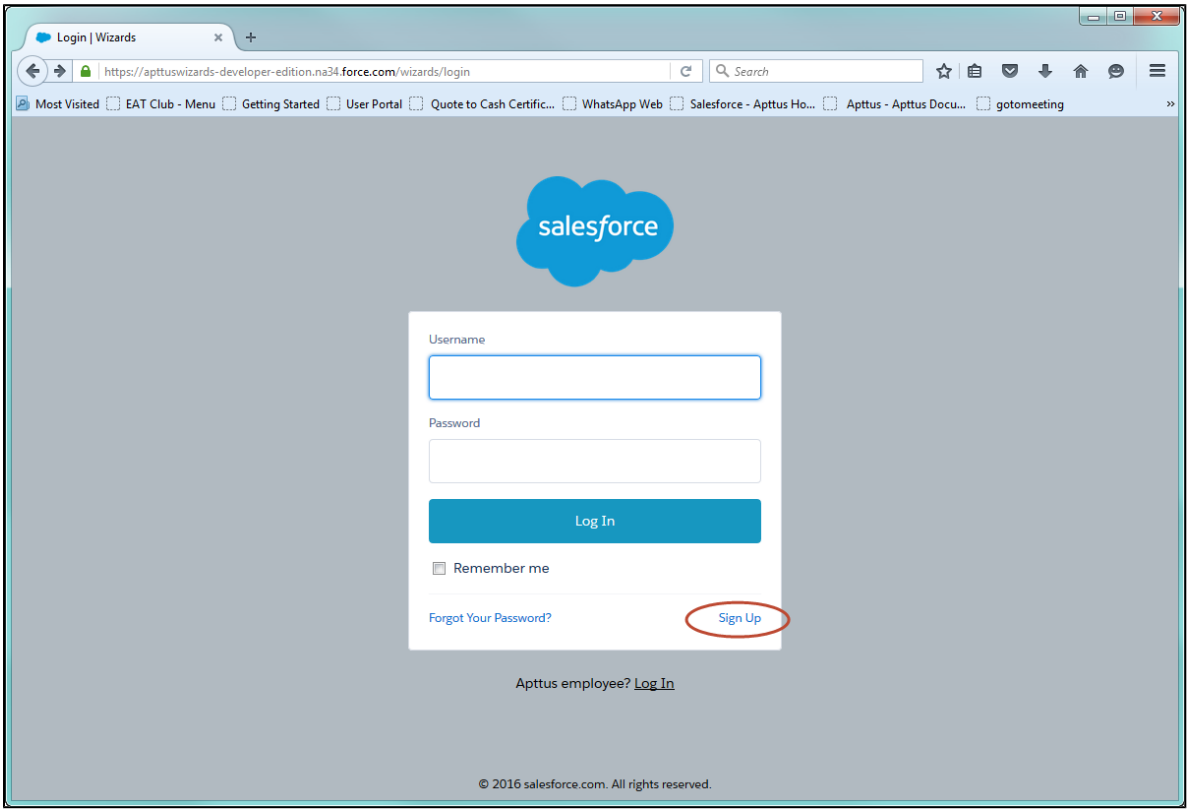


5. Choose the Default self-registration page, or a Community Builder or Visualforce page developed by your organization.
6. Choose the **User Profile** to assign guests when they self-register for an account. This can be the profile you created or modified when you created the Community, or a different Community-enabled profile.
7. Choose the **Account** to assign to the guest user when they self-register. Only Partner Accounts can be chosen with this option. Refer to Salesforce documentation on how to enable an account as a partner. If you want to create a Person account for the guest instead, leave the field blank.
8. Click **Save**.

It is important to consider licensing when allowing guests to your Community self-register, as each registered guest will consume a Communities license. If you would prefer to allow access to runtime Wizards publicly but do not want to use licenses, consider the option set up Self-Service Wizards as a Salesforce Site.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

When unlicensed guest users navigate to your Community, they will encounter the login page and can click on **Sign Up** to create an account.



Integrating the Contract Wizard with Other Applications

When you integrate your own Salesforce applications with the Contract Wizard embedded in an iframe container, you can make use of several Javascript **event** notifications to have your container application enable/disable or show/hide items.

The following table shows a list of these events and the parameters passed to them, and the Wizard runtime action associated with each event. Events provide a response in the form in JSON format; examples are provided below for each event.

Event	Action	Parameters
onwizardnext	Next	`wizardDesignId, wizardDesignName, wizardId, stepDesignId,`

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Event	Action	Parameters
onwizardback	Back	`wizardDesignId, wizardDesignName, wizardId, stepDesignId,`
onwizardsubmit	Submit	`wizardDesignId, wizardDesignName, wizardId`
onwizardabort	Abort	`wizardDesignId, wizardDesignName, wizardId`
onwizardstart	Start	`wizardDesignId, wizardDesignName, wizardId`

Use the event notification data from your embedded Wizards to drive functionality in your application. For example, each "Next" event in the Wizard could trigger your application to add or display a new tab to the user.

Configuring Meta Property Field Sets for Set Custom Value Rules

The "Set Custom Value" step input rule in the Wizard Designer allows you to set the value for special purpose custom fields to permit more conditional logic and date to be captured by the Wizard. These custom fields are added to the Wizard using a MetaProperty Fieldset on the Wizard Runtime Input object. While other rules created in the designer rely on the context object for the agreement or step (e.g., Agreement, Account, Quote/Proposal, etc.), meta properties can be considered and evaluated for any step in the Wizard design, determined specifically by implementation of the Set Custom Value input rule, allowing Wizards to capture additional information at runtime that can be used for a purpose beyond manipulating or using Salesforce data.
Packages which use the wizard typically create the custom fields and implement them as these meta properties to be used by the Wizard objects. You can also manually add custom fields to the Meta Property Field Set.

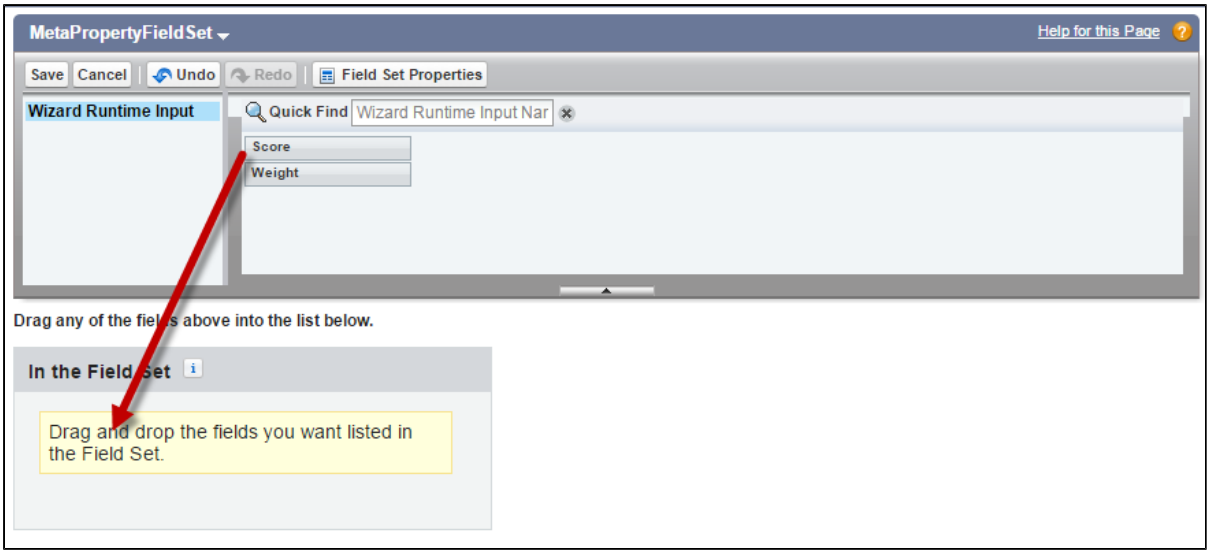
Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Prerequisites

Before you can configure the MetaPropertyFieldSet you must define custom fields on the Wizard Runtime Input object to add to the field set. In the steps below, two custom fields, Score (Score__c) and Weight (Weight__c) were created to be used as meta properties.

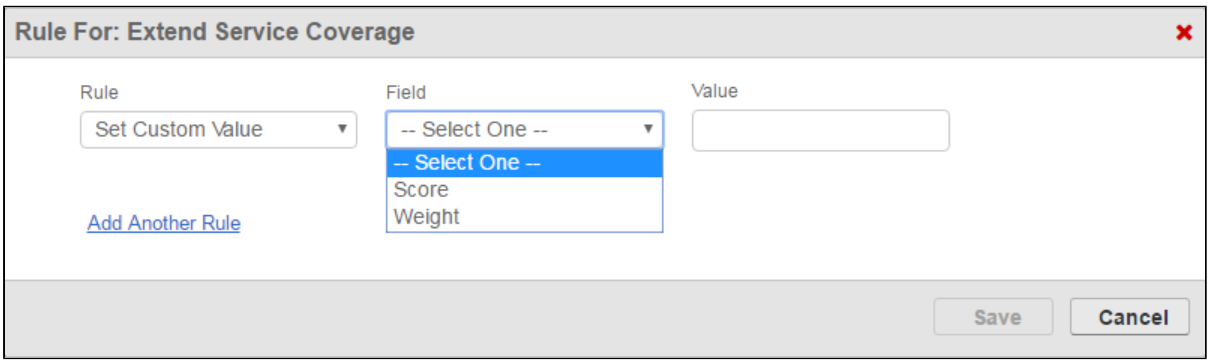
To configure Meta Properties

1. Go to **Setup > Create > Objects > Wizard Runtime Input**.
2. Hover over the Field Sets link and click **Edit** next to the *MetaPropertyFieldSet* record.
3. Drag and drop the fields you want to use in the Wizard into the list below the field set pane. You can add the fields to the list in any order.



4. After adding all fields to the Field Set, click **Save** in the MetaPropertyFieldSet pane. The custom fields in the Field Set are now available to Wizard Designers as Fields on the **Set Custom Value** Wizard Step Input Rule.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



Only one MetaPropertyFieldSet is available for all Wizard designs. Add as many meta properties as needed to the field set and use only the ones you want for specific input rules. All other fields will be ignored during wizard runtime.

Auto-Populating Wizard Fields at Runtime

Occasionally business requirements may require responses in Wizards to be auto-populated when the Wizard is first launched. Circumstances may dictate that fields for a particular Wizard are always populated for reasons such as the following:

- Object field values for the Wizard should always be the same (e.g., an Agreement-creation Wizard that will always have the same Account and Opportunity names filled in for certain steps).
- Wizard Input or Object Field values should always match every new Wizard of the same design (e.g., multiple surveys/questionnaires for each line item in a Cart line that should share the same responses based on a previously completed survey).

There are two primary methods provided in Wizard Design for auto-populating fields during Wizard runtime:

- passing record IDs as parameters when the Wizard launches to auto-populate Object fields.
- implementing a special DataSource callback class that fetches data from one runtime Wizard to populate other Wizards of the same design.

Note that while the above functionality exists out-of-the-box, use of this feature requires a custom implementation for initiating auto-populated Wizards. Also note that compound and read-only fields cannot be auto-populated at this time.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Auto-populating Wizard Fields using Record ID

To auto-populate fields based on record ID(s) every time a new instance of the Wizard is launched, you need to pass Object record Ids as parameters when the Wizard is launched. In most cases, this implementation will use something like a formula field, which captures the desired record IDs and includes them in the URL when the Wizard is first launched.

Consider a simple agreement creation Wizard. Your requirement include auto-populating the initial steps of the Wizard with details from the associated Account and Opportunity, which will be the same for every instance of the Wizard. Rather than having the Wizard user enter these values every time the Wizard is run, you want them to be automatically filled when the Wizard is launched.

- To use this method, the inputs you want to be auto-populated must be Object fields that match the types of records you are passing as parameters. In this example, the designer creates an input for Account > Account Name.
- In the next step, the designer creates an input for Opportunity > Name.
- As these are pre-existing objects in the same org, it's easy to retrieve record IDs to pass to the Wizard when it is launched. How the record IDs are passed to the Wizard depends on your integration with Apttus Wizard. Record IDs could be passed as parameters using a formula field, for instance.

When the Wizard is first launched through your integration, the URL is constructed in this fashion:

https://apttus-wizard.na34.visual.force.com/apex/apttus_wizard__wizard?wizardid=a11610000016K6fAAE

where "**wizardid=a11610000016K6fAAE**" is passing the Id of the runtime wizard. Your solution should append recordIDs corresponding to the Object where the fields reside and which match the Object of the fields you want to auto-populate.

Returning to the above example, you can auto-populate fields in the Wizard using specific Account and Opportunity record IDs. To see this in action:

1. Go to the **Wizards** tab and launch the Wizard you want to auto-populate. Note the Wizard runtime URL.
2. Open another tab and go to the Account which contains the data you want to capture. Copy the Account Record ID from the URL.
3. Return to the Wizard runtime and append the URL with the Account Record ID, using proper syntax to pass it as a parameter (e.g. "&recordIds={Account_Id}).
4. Repeat steps 2-3 for the Account Opportunity. Comma-separate multiple record IDs.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

5. Press Enter. Fields which have values on the Objects corresponding to the record IDs you passed will be automatically populated with data across multiple steps, wherever they appear in the Wizard.
6. Follow this format for your integrations. Using this method, you can easily construct a formula field to pass these parameters from your Wizard launch point and auto-populate data for your users.

Auto-populating Wizard Fields using a Datasource Callback

When you need to build the ability to auto-populate fields in Wizards based on previously entered responses for your integration, you should use the Datasource Callback method. This method also requires passing data to the Wizard as in the previous section, but in this case it is retrieving data from one completed Wizard and using that data to populate newly-invoked Wizards that use the same design.

Wizard Runtime JSON Structure

To properly understand the format of the data returned by the callback to auto-populate a Wizard, let's take a look at a sample JSON structure created from a Wizard step with 2 responses:

Sample JSON: Auto-Populate


```
{
	"UserResponses": [{
		"Question": "sample question - 1",
		"ObjectName": null,
		"Notes": [],
		"metaPropertyFields": null,
		"inputRepeatSequence": 0,
		"inputControlId": "a0236000002LNlDAAW",
		"FieldName": null,
		"FieldClass": null,
		"Comments": "",
		"Attachments": [],
		"Answer": "sample answer - 1"
	}, {
		"Question": "sample question - 2",
		"ObjectName": null,
		"Notes": [],
		"metaPropertyFields": null,
		"inputRepeatSequence": 0,
		"inputControlId": "a0236000002LNlEAAW",
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

```
                "FieldName": null,
                "FieldClass": null,
                "Comments": "",
                "Attachments": [],
                "Answer": "sample answer - 2"
        }],
        "Parameters": null
}
```

When using the callback method to auto-populate fields in a runtime Wizard, the method should return a string using a similar JSON structure as shown in the example above. The values in the JSON string auto-populate the fields when the Wizard is invoked.

The parameters described in the following table are relevant for Callback implementations to auto-populate questions/responses in the Wizard:

Parameter	Value	Description
Question	Object /Wizard Input field name	Provide the name of the field in the Input Control as defined (e.g., "AccountName" or "OppName")
inputControlId	Id string of Input Control	Provide the Id string of the input control to be auto-populated (e.g., "a1561000001dXHf")
Answer	Field or Response value	Provide the value to auto-populated as in the Wizard field /response (e.g. "Tier One Systems")
inputRepeatSequence	Numeric sequence for repeatable Wizard Input Controls	If the Wizard step uses a "Repeatable" layout for an input, Provide a numeric value to represent each occurrence (e.g., first occurrence is "inputRepeatSequence:" 0, next occurrence is "InputRepeatSequence:"1, etc.)

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Implementing a Datasource Callback

The data captured from the previously completed wizard can be from Wizard Input Fields or Object fields. For your integration, you must create a DataSource Callback class that passes this retrieved data to the new Wizard runtime instance. The process works as follows:

- A custom Data Source callback class is created to implement the DataSource Callback interface *WizardCustomClass.IDataSourceCallback*.
- The DataSource Callback class calls a custom getData() method that takes the Wizard Design ID as the primary parameter and a map of parameters passed to the Wizard design.
- The getData() method is used to define values for specific runtime input controls in the Wizard design (questions, answers and values) and creates and returns a JSON string using the same structure interpreted by the Wizard.
- The Wizard Design using the DataSource Callback must have the class name defined in the Wizard Settings section of the Wizard Design.
- When a new Wizard is invoked, fields specified by the Callback method are auto-populated.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Appendices

Use these appendices to find the following information:

- Admin Objects
- Comply System Properties
- Document Version Properties
- Apttus Contract Management Package Objects
- Profile Settings and Security
- Agreement Web Service
- Merge Web Service
- Apttus Status Categories and Statuses
- Agreement Actions
- Agreement Fields
- Apttus Retention Policy Schema
- Translatable Customizations
- List of Objects supporting Document Generation
- Document Search
- Temporary Email Template Cleanup
- Using Contract Management with Salesforce Lightning

Admin Objects

The table depicts Admin objects name, values and their purpose.

Name	Values	Purpose
APTS_AutoContentSearchable	True	This automatically enables Content Search on an activated agreement. By setting the flag to true, the system

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Name	Values	Purpose
		skips the prompt to select attachments for content search. The attachment already selected as part of the activation process will be automatically enabled for content search.
APTS_DefaultEmailContactName	<Name of the user>	This specifies the name of the default contact to resolve merge fields in an email template. To specify the name of a contact to send emails to, if a contact is not defined for the agreement. If this property is not defined and the agreement does not have a primary contact, the merge fields in the email would not be resolved to their values.
APTS_MS_EnableNameSort	True	This specifies whether the related list should be sorted by the name field in the generated agreement document. When enabled the related lists will be printed in the agreement's merge documents in the order of the name field of the related list.
APTS_EnableTermExceptionsInAuthor	True	This entry associates the Agreement Term Exception related list to the Agreement record after you have associated your Term Exception with the clause and the clause is inserted in your agreement template.
APTS_Password		

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Name	Values	Purpose
	<your own password>	This creates a password for protecting Microsoft Word agreements that are generated by the application. Allows the application to password protect generated Microsoft Word documents.Note: This password will be used for password protecting Microsoft Word agreements generated by the application. Please provide this password to all power users who will be using the Apttus Author to negotiate contracts.
APTS_Protection	Enter **1** to turn document protection on or **0** to turn it off.	This specifies whether protection for Microsoft Word agreements that are generated by the application should be on or off. Allows the application to specify protection for generated MS-Word documents.Note: If final agreements are generated when this setting is on, they will be password protected with the password stored in the APTS_Password object even if this value is changed to false later. In other words, this setting applies to new agreements generated after the setting has taken effect.
APTS_UseWorkflow	True	This disables the creation of default set of tasks when agreement is generated. In some cases the default tasks created to ensure Signing, Scanning and Attaching the scanned image to the agreement record is

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Name	Values	Purpose
		redundant or is taken care of by a different work-flow process. In such cases the default behavior of the system needs to be modified to ensure those tasks are not created.
• APTS_AsyncMergeCall • APTS_AsyncMergeEmail	True	Publishing a template takes the text from any referenced clauses and enters it inline as part of the template text. This functionality allows the clause template changes to be reflected in the agreement template and creates a new published version document in the Notes and Attachment section of the Template. Whenever the agreement document generation exceeds 60 seconds, users get timeout message and this is NOT an error message. To make sure the status changes during this scenario, add these Admin entries.
APTS_EmailTemplateForReview	Email Template Name or Template Unique Name	A text property to hold the name of the email template for Send for Review action. Note: this property can only specify values for Email Templates with the "Available for Use" flag set to true.
APTS_EmailTemplateForSignatures	Email Template Name or Template Unique Name	A text property to hold the name of the email template for Send for Signatures action. Note: this property can only specify values for Email Templates with the "Available for Use" flag set to true.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

APTS_SkipEmailTemplateSelection		A boolean property to indicate whether the email template selection step should be skipped.
APTS_DefaultEmailTemplateFolder		A text property to hold the name of the default email template folder.
APTS_EmailTemplateForReviewSignatures	Email Template Name or Template Unique Name	A text property to hold the name of the email template to use for Send for Review and Send for Signatures actions. *This property is only used if* APTS_EmailTemplateForReview *and* APTS_EmailTemplateForSignatures *are not specified.* Note: this property can only specify values for Email Templates with the "Available for Use" flag set to true.
APTS_ContentRecordTypeName	<content type name>	This property is used to indicate the content type to associate the published documents with. If this property is not specified, no content type will be used.
APTS_UseWizardServer	True	Apttus merge web service endpoint
APTS_UIPageConfig	XML	This property is used to indicate the visualforce page to perform the publish action. The integration module provides the *Visualforce page* *Apttus_Content__PublishContent*.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Name	Values	Purpose
APTS_MergeCallTimeOut	True	Whenever the agreement document generation exceeds 60 seconds, the timeout message is displayed. This is NOT an error message. To make sure the status changes during this scenario, add these Admin entries
APTS_DefaultContentWorkspaceName	<default workspace name>	This property is used to indicate the default content workspace to publish the documents selected by the user during the agreement activation process. The user activating the agreement must be a member of the default content workspace.
APTS_CycleTimeReportingEnabled	True	To Track the time spent in between two statuses or status Categories. Entry for the specified status changes under Cycle Time Group tab must be created
APTS_ContentRepositoryType	content	This property is used to indicate in which repository the searchable documents should be published. During the agreement activation process, you may choose to publish one or more documents. If the document repository is chosen, the selected documents will be published to the Documents folder. This is the default behavior in the Comply module. If the content repository is chosen, the selected documents will be published to a content workspace. The workspace

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Name	Values	Purpose
		(like the document folder) can be inferred by querying agreement rules. If the rules do not specify a workspace, the default workspace will be chosen. The user activating the agreement must be a member of the content workspace. If the external repository is chosen, an entry will be written to the content event table. A trigger can be written for the event table to handle the event.
APTS_NoNameFieldObjects	Value: XML Code: <Object API name>	Use this property to add support for custom object generation for Objects that do not have a Name field. (e.g., "EventRelation," "Task," "TaskRelation") Separate Object names using a comma or new line.
APTS_NoISOCurrencyFieldObjects	Value: XML Code: <Object API name>	Use this property to add support for custom object generation for objects that do not have a CurrencyIsoCode field (e.g., "EventRelation," "Task," "TaskRelation"). Separate Object names using a comma or new line. This property is only applicable to templates in *multi-currency orgs*.

Comply System Properties

You can enter one or more of the following property details.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Setting	Description
Admin User	The admin user is the default owner of activities created by a user who is not allowed to be the owner (for example, customer portal user).
Auto Enable PDF For Final Docs	Select this and the Create PDF Attachment check box is always selected when you choose to save as Final - to be signed from the check-in dialog. You may use this field when you want to finalize an agreement document.
Auto Enable Reconciliation	Select this and the Reconcile Document option is always selected when you go to check-in an agreement document.
Agreement Number Field For Imported Docs	In this field, specify the API name of the field you want to use. For example, useApttus__Agreement_Number__c. When a new document is imported into the system, it will include the agreement number in the top right corner of the header on each page, using the field selected above. For more information about when to use this field, refer Agreement Number/Header Configuration.
Allow PDF Select Override	This is only applicable when *Auto Enable PDF For Final Docs* is selected.
Allow Reconcile Selection Override	This is only applicable when *Auto Enable Reconciliation* is selected.
Auto Enable Private Indicator	Select this checkbox if you want to auto enable private indicator for documents. If you select this checkbox, the Make this document private checkbox for any agreement document is auto selected.
Auto Insert Header Footer Data	Select this field to automatically insert the Agreement Number Field For Imported Docs field value to the header and the latest timestamp to the footer of an agreement document. This field is available for Generate, Import and Offline actions. For more information about when to use this field, refer Agreement Number/Header Configuration.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Setting	Description
	The value of the latest timestamp for the footer is taken from the **User Account Timezone** field on Salesforce.
Allow Private Selection Override	Select this checkbox if you want to allow the user to override the private document selection. This setting is applicable only when **Auto Enable Private Indicator** is selected for documents.
Auto Sync With Opportunity	Indicates whether the agreement will be automatically synchronized with the opportunity when the agreement is accepted.
Bypass Sharing	Indicates whether apex code can bypass record sharing during selective operations such as clone and deleting draft attachments.
Contract Summary Template	This field contains the name of the contract summary template. You may have to define a separate template to contain the contract summary details and mention the name of the template here.
Default Opportunity Agreement Owner	The default owner for the agreement created from an opportunity. The valid values for this field are *Opportunity Owner* and *Current User*. If not set, the Opportunity Owner will become the owner of the new agreement. If you want to make the current logged in user as the Agreement Owner, type *Current User* in this field.
Default Document Tags	Enter a comma-separated list of tags to make available for any agreement document as it is checked in from X-Author Contracts. Use of these tags requires Contract Document Versioning to be enabled. The **Document Finder** feature must also be configured in your org. For more information, refer to Configuring Document Finder.
Document Naming Convention	Specify a value to apply a custom naming convention for all agreement documents at generation, check-in and signature events. The following attributes permitted when formulating a document naming convention are:

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Setting	Description
	• %checkintype% • %action% • %templatename% • %user% • %timestamp% • %version% • Agreement attributes such as %:Name%. Note: any variable prefixed by ':' represents a field on the Agreement object. If the property contains a null value (i.e., if left blank), the current default naming convention will be used: %:Name%_%action%_%templatename%_%timestamp% Example agreement document name using the default naming convention: *SOW_Regenerated_SOW ABC_2015-08-07* For more information on using document version in document naming convention, refer to Enabling Contract Document Versioning.
Document Structure FX2 For Imported Docs	Check this box to make document structure FX2 format for all Offline documents (created or imported). If not checked, all offline documents are created in the "pre-existing" format. ⓘ This property only applies to Offline agreements created from the Agreement or user Home page links in Salesforce. The format of Offline agreements created using X-Author for Contracts will still depend on user-input from X-Author.
Email Template For Checkin Notification	The email template for sending check-in notifications.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Setting	Description
Enable Clause Approvals	This check box allows you to set up approval processes on clauses used in your document.
Enable Document Versioning	Check this box to enable Document Versioning. ***All new agreement records created in your org will use Document Versioning after this setting is enabled***. Enable Version Control must be enabled for Document Versioning to work properly. Enabling Document Versioning changes the value of the **Version Aware** Agreement field to TRUE for all new agreements after the property is activated. The **Version Aware** field is a flag that tells Apttus Contract Management to use Document Versioning for a specific record. **Important Note**: It is recommended that once a record is flagged as Version Aware, you do not disable this field, as versioning wil become undefined for the agreement record in question. Instead, ensure that records which should not use Document Versioning do not have the field enabled when they are created. For more information on how you can configure Document Versioning for your org, refer to Enabling Contract Document Versioning.
Enable Merge Call Debug	Enable Merge Service debugging.
Enable Multiple Checkout	This feature will be functional in later releases. Indicates whether multiple checkout is allowed. Only applicable when version control is in effect.
Enable PDF Security	Enabling PDF security lets users apply security settings to PDF documents and protect them with a password. See Enabling PDF Security for Agreement Documents for more information.
Enable Submit Merge Call	Enable to submit merge calls for processing. When enabled, the "Submit" button is displayed as a document generation option.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Setting	Description
Enable Template Versioning	Check this box to enable Template Versioning. *All new Templates created in your org will use Template Versioning after this setting is enabled.* For more information, refer to Template Versioning.
Enable Version Control	Check this box to enforce a check-in/check-out policy for agreement documents. This setting must be enabled when "Enable Document Versioning" is checked. Note: This property existed in CLM versions prior to 8, so this property may already be enabled.
Footer Datetime Format For Imported Docs	Specify the format in which date and time will be shown in the generated agreement. When a new document is imported into the system, it will include the Date in the bottom left corner of the footer on each page, in the format selected above. For a list of supported date and time formats, refer to Setting date and time format for footer. ⓘ The value of the latest timestamp for the footer is taken from the **User Account Timezone** field on Salesforce.
Hide Content Control Border	Check this box to hide smart boundaries (for smart fields and clauses) in generated documents. Refer to the *X-Author Contracts User Guide* for more information on showing/hiding boundaries as an admin user in the add-in.
Instance URL	The Salesforce instance url for redirecting to custom pages.
Max Child Level	The maximum level of lookups and child objects available from the parent object to generate the merge data for. For example, **Agreement** is the parent object, **Agreement Fee** is the child object of **Agreement** and **Agreement Fee Adjustment** is the child of **Agreement Fee** and grandchild of **Agreement**.
Merge Call Timeout Millis	The timeout in milliseconds for the merge request. Default value = 120000 milliseconds.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Setting	Description
Merge Webservice Endpoint	Type the Apttus merge web service endpoint. For example https://mergews.apttus.net/cgi-bin/MergeServer/Bin/MMCGI.exe
PDF Owner Password	The password required to change the permissions of the PDF document like printing or editing. Note: If this password is not specified, the password configured for the Admin object "APTS_Password" is used instead. See Admin Objects.
Publish Author Events	Indicates whether merge events that occur in X-Author, such as check-in or check-out, should be published. If enabled, a record is inserted in the Merge Event table on the Agreement record.
Publish Merge Events	Indicates whether merge events, such as generating an agreement document or creating offline document should be published. If enabled, a record is inserted in the Merge Event table on the Agreement record. For more information about when to use this field, refer To get a template ID for generating an agreement document as an example.
Sync Bundle Using Line Items	Indicates whether agreement line items should be used to synchronize bundle products. The default uses agreement summary objects.
Sync Option Products	Indicates whether the option products should be synchronized along with the bundle. The default is 'synchronize bundle' only.
Temp Email Template Inactive Hours	Use this property to set the orphan period of temporary email templates to use in conjunction with the **CleanupJobScheduler** APEX class. The default value of this property is set to 4 hours. For more information, refer to Temporary Email Template Cleanup.
	Check this box to use Agreement locks for versioning instead of document-level locking:

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Setting	Description
Use Agreement Locks for Versioning	• If enabled, all agreement documents are locked (by the user checking out) when ***any one of them*** is checked out. • If disabled, only checked out documents are locked (by the user checking out)–any other agreement documents which have not yet been checked out can be checked out for editing.

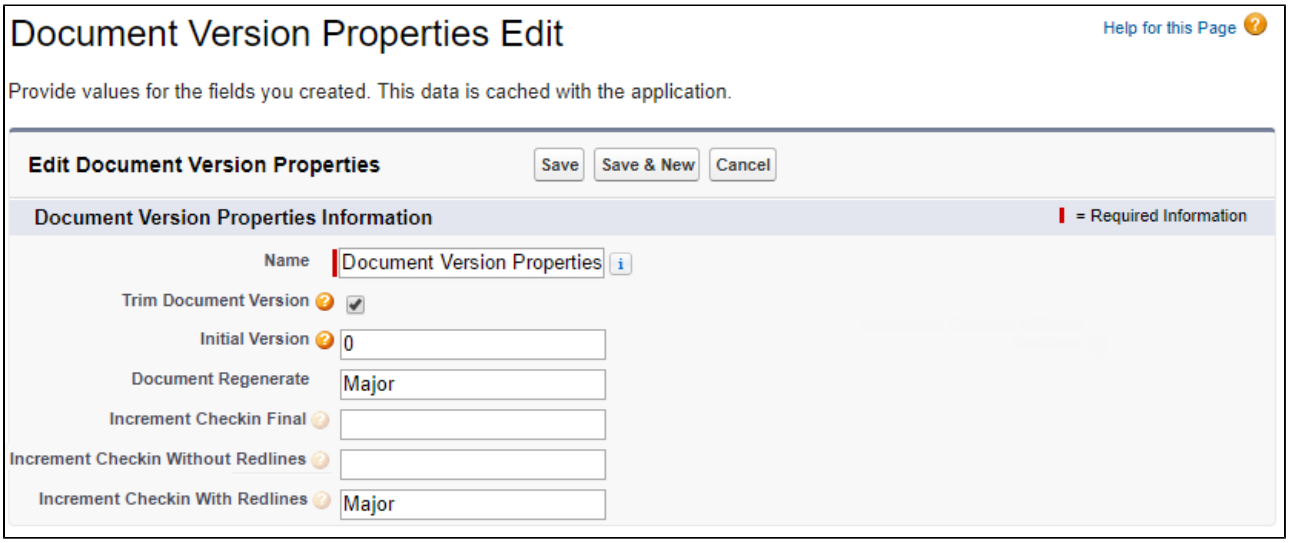
Document Version Properties

For agreement documents, Apttus follows the X.Y.Z pattern of document versioning where X denotes the major document version, Y denotes the minor document version and Z denotes the revision version. The Document Version Properties let you set the version increment factor and set the initial version number for your agreement documents.

Configuring document version properties

To use and configure Document Version Properties in your org:

1. Navigate to Setup > Develop > Custom Settings.
2. Click the **Manage** link next to Document Version Properties. Click **Edit** to edit Document Version Properties. The Document Version Properties form is displayed.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

You can enter following property details in Document Version Properties:

Setting	Description
Initial Version	This property specifies the initial version number of a newly generated or uploaded document. If you want the document versioning to start from 0.0.0, specify **0** and if you want to start the document versioning to start from 1.0.0, specify **1.** Default value of this field (if left blank) is 1.
Document Regenerate	This property specifies the document version increment factor when the document is regenerated with the same template as of the original agreement, from Contract Management. Specify **Major** if you want to increment the major version of the document and specify **Minor** if you want to increment the minor version of the document. Default value of this field (if left blank) is Major. **Note** Regenerating an agreement document with a different template than the one used for generating the original agreement, restarts the version numbering of the document.
Increment Checkin Final	This property specifies the document version increment factor when the document is checked in as Final- to be signed from X-Author Contracts for Microsoft Word. Specify **Major** if you want to increment the major version number of the document and specify **Minor** if you want to increment the minor version number of the document. Default value of this field (if left blank) is Major.
Increment Checkin with Redlines	This property specifies the document version increment factor when the document is checked in using the option **With Redlines** from X-Author Contracts for Microsoft Word. Specify **Major** if you want to increment the major version number of the document and specify **Minor** if you want to increment the minor version number of the document. Default value of this field (if left blank) is Minor.
Increment Checkin without Redlines	

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Setting	Description
	This property specifies the document version increment factor when the document is checked in using the option **Without Redlines** from X-Author Contracts for Microsoft Word. Specify **Major** if you want to increment the major version number of the document and specify **Minor** if you want to increment the minor version number of the document. Default value of this field (if left blank) is Major.
Trim Document Version	This property specifies whether the document version number in the Document Naming Convention would of 3 digits or 2 digits. Selecting this property, trims the last decimal and number from the document version number in the Document Naming Convention. For example, version 1.2.0 would become 1.2 in the name of the document. By default, this property is not selected.

Apttus Contract Management Package Objects

Apttus Contract Management package objects contain fields that are maintained in the corresponding tables for the objects.

> **Note**
>
> Check organization-wide defaults set for the objects. This table is intended for guidance purpose only.

Apttus Object	Purpose of the Object
Account Hierarchy	This defines a single instance of an account hierarchy relationship. It contains the leaf Id, the parent Id, the root Id, and the level.
Agreement Action Condition	Represents conditions to enable agreement actions
	A reusable, unique combination of Field Sets and Filter Sets.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Apttus Object	Purpose of the Object
Agreement Explorer	
Agreement Hierarchy	This defines a single instance of an agreement hierarchy relationship. It contains the leaf Id, the parent Id, the root Id, and the level.
Agreement Line Item	Represents a product or service line item associated with an agreement
Agreement Lock	Represents a lock on the agreement
Agreement Clause	Represents a clause associated with an agreement
Agreement Document	Links to agreement documents that are not stored in Apttus
Agreement Protection	Specifies protection settings for agreements generated by the Apttus Contract Wizard and maintained by the Apttus Contract Author
Agreement Rule Condition	Specifies a condition used to evaluate an agreement rule
Agreement Rule	Specifies a rule used to evaluate various agreement actions such as submit request
Agreement Term Exception	Term Exceptions associated with a given Agreement
Admin	Store admin preferences and metadata

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Apttus Object	Purpose of the Object
Agreement	Represents an agreement in the system
Related Agreement	To identify the different types of relationships between agreements
Template	Contract language templates available in the system. These templates specify guidance, language, local setitngs, and include Word attachment templates representing the bulk of actual contracts that can be used when creating a first draft . Templates can include standard and non-standard language.
Async Merge Call	Holds asynchronous merge calls
Content Event	Holds content events for subscribers to handle
Cycle Time Field Data	Holds the data captured on fields for cycle time reporting
Cycle Time Field	Holds the fields monitored for cycle time data capture
Cycle Time Group Data	Holds the data captured on groups for cycle time reporting
Cycle Time Group	Holds the groups monitored for cycle time data capture
Doc Assembly Component	Represents a single component in a document assembly rule

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Apttus Object	Purpose of the Object
Doc Assembly Ruleset	Represents a rule set that contains a list of rules to determine the sections to include in a dynamic template.
Doc Assembly Rule	Represents a single rule in a document assembly ruleset
Document Agreement Clause	Agreement clauses in an agreement document
Document Version Detail	Holds the version details of a document
Document Version	Represents a document version
Agreement Document Output Format	Holds default output format preferences by user profile and agreement type for use in the agreement document generation process.
Formula Field (Comply)	Represents a formula field used in agreement rules
Merge Event Detail	Holds document merge event details
Merge Event	Holds document merge events for subscribers to handle

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Apttus Object	Purpose of the Object
Query Template Filter	Filter expression used in a query
Query Template Qualifier	Filter used to select a query template
Query Template	Query Template for bulding soql queries and filters
Retention Policy	Holds object retention policies
Search Filter (Comply)	Represents a search filter
Template Clause Reference Version	Holds Template Clause References for this version
Template Clause Reference	Represents a clause reference in a template or a library
Template Datasource Filter	Represents a datasource filter associated with a template
Template Dynamic Section Version	Holds the template dynamic section details for a given template version

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Template Dynamic Section	Represents a dynamic section in a template
Template Version	Holds various versions of this template and is a Master-detail to Template
Temp Object (Comply)	A container for temporary objects and attachments
Term Exception	Term Exceptions master table
Wizard	A runtime instance of the wizard design
Wizard Design	Holds all the wizard design records
Wizard Input Control	The individual question, instruction statements and associated field attributes
Wizard Input Control Runtime (Deprecated)	Input Control instance within a runtime wizard
Wizard Input Control (Deprecated)	The individual question, instruction statements and associated field attributes
Wizard Input Group (Deprecated)	Groups input controls within a step

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Apttus Object	Purpose of the Object
Wizard Rule	Individual rules which are applied within a ruleset.
Wizard Ruleset	A collection of rules that are applied to input control and steps. The system determines a ruleset at the level of input control expression formula, determine focus objects, record type and step navigation rules.
Wizard Ruleset Runtime (Deprecated)	A runtime instance of the ruleset provided by the wizard design
Wizard Ruleset (Deprecated)	A collection of rules that are applied to input control and steps. The system determines a ruleset at the level of input control expression formula, determine focus objects, record type and step navigation rules.
Wizard Rule (Deprecated)	Individual rules which are applied within a ruleset.
Wizard Runtime Input	Input Control instance within a runtime wizard
Wizard Runtime (Deprecated)	A runtime instance of the wizard design
Wizard Step	The step that is designed and used in Wizard designs.
Wizard Step Runtime (Deprecated)	A runtime instance of a wizard step design.
	The step that is designed and used in Wizard designs.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Apttus Object	Purpose of the Object
Wizard Step (Deprecated)	
Wizard Design (Deprecated)	Main Wizard Object, each record represents a Wizard design

Profile Settings and Security

Use the following settings to ensure the profile settings correspond to the Apttus custom profile.

See also Sharing Security.

> Apttus recommends to check **field level security** for corresponding objects when configuring profiles.

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager /Template Admin	Apttus Administrator
Custom App Settings					
Apttus Contract Management	Yes	Yes	Yes	Yes	Yes
Enabled Apex Class Access					
Apttus.*	Yes	Yes	Yes	Yes	Yes

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager /Template Admin	Apttus Administrator
Enabled Visualforce Page Access					
Apttus.*	Yes	Yes	Yes	Yes	Yes
Standard Tab Settings					
Accounts	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Contacts	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Dashboards	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Reports	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Apttus Custom Tab Settings					

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager /Template Admin	Apttus Administrator
Admin	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreement Protection	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreement Rules	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreements	Tab Hidden	Default On	Default On	Default On	Default On
Agreement Document Output Formats	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Configurable Wizard	Tab Hidden	Tab Hidden	Tab Hidden	Default On	Default On
Cycle Time Groups	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Doc Assembly Rulesets	Tab Hidden	Tab Hidden	Tab Hidden	Default On	Default On
Query Templates	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Retention Policies	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Search Filters (Comply)		Tab Hidden			Default On

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager /Template Admin	Apttus Administrator
	Tab Hidden		Tab Hidden	Tab Hidden	
Publish Templates	Tab Hidden	Tab Hidden	Tab Hidden	Default On	Default On
Purge Agreements	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default On
Templates	Tab Hidden	Tab Hidden	Tab Hidden	Default On	Default On
Term Exceptions	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Administrative Permissions					
Manage Users	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
Customize Application	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
View Setup & Configuration	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
Manage Public Reports					Yes

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager /Template Admin	Apttus Administrator
	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	
Manage Dashboards	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
Edit HTML Templates	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
General User Permissions					
Create and Customize Reports	Use Existing Setting	Use Existing Setting	Use Existing Setting	Yes	Yes
Edit Events	Use Existing Setting	Yes	Yes	Yes	Yes
Edit Tasks	Use Existing Setting	Yes	Yes	Yes	Yes
Export Reports	Use Existing Setting	Use Existing Setting	Use Existing Setting	Yes	Yes
Run Reports				Yes	Yes

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager /Template Admin	Apttus Administrator
	Use Existing Setting	Use Existing Setting	Use Existing Setting		
Send email	Use Existing Setting	Use Existing Setting	Yes	Yes	Yes
Folder Permissions					
See Folder Security					
Custom Object Permissions					
Admin	Read	Read	Read	Read	Read, Create, Edit, Delete
Agreement	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Agreement Clause	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Document	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete	Read, Create, Edit, Delete

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager /Template Admin	Apttus Administrator
Agreement Document Output Format	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Agreement Line Item	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Lock	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Protection	Read	Read	Read	Read	Read, Create, Edit, Delete
Agreement Rule	Read	Read	Read	Read	Read, Create, Edit, Delete
Agreement Rule Condition	Read	Read	Read	Read	Read, Create, Edit, Delete
Agreement Term Exception	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
AsyncMergeCall	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Content Event	Read				

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager /Template Admin	Apttus Administrator
		Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Field	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Field Data	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Group	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Group Data	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Doc Assembly Component	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Doc Assembly Rule	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Doc Assembly Ruleset	Read	Read	Read		Read, Create, Edit, Delete

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager /Template Admin	Apttus Administrator
				Read, Create, Edit, Delete	
Document Version	Read	Read, Create	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Document Version Detail	Read	Read, Create	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Formula Field (Comply)	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Merge Event	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Merge Event Detail	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Query Template	Read	Read	Read	Read	Read, Create, Edit, Delete
Query Template Filter	Read	Read	Read		

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager /Template Admin	Apttus Administrator
				Read, Create, Edit	Read, Create, Edit, Delete
Query Template Qualifier	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Related Agreement	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Retention Policy	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Search Filter (Comply)	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Temp Object (Comply)	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Template	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Template Clause Reference	Read	Read	Read		

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager /Template Admin	Apttus Administrator
				Read, Create, Edit	Read, Create, Edit, Delete
Template Datasource Filter	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Template Dynamic Section	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Term Exception	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Wizard Design	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Wizard Input Control	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Wizard Ruleset	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Wizard	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit	Read, Create, Edit, Delete

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Wizard Step	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Custom Record Type Settings for Agreements					
Record Types (Create Permission) Permission for the Record Types needs to be provided.	No	Yes	Yes	Yes	Yes

Folder Security and Sharing Permissions

This reference goes into more detail regarding typical permission settings for Folders used by Apttus Contract Management and provides guidelines for enforcing Sharing settings within your organization.

Folder Security

The following table represents typical Profile-based permission settings for folders used by Apttus Contract Management. Security of any folder should be set according to the needs of your business and is independent of Agreement record security. Read further on this page for more discussion on security considerations for your folders, content repositories and records.

Profile	Requestor /Approver	Contract Creator /Negotiator	Contract Manager	Apttus Administrator
Apttus Documents	Read	Read	Read	Read, Create, Edit, Delete
Apttus Images	Read	Read	Read	

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

				Read, Create, Edit, Delete
Apttus Email Templates	Read	Read	Read	Read, Create, Edit, Delete
Apttus Temporary Email Templates	Read	Read	Read	Read, Create, Edit, Delete
Agreement Report	Read	Read	Read	Read, Create, Edit, Delete
Agreement Dashboard	Read	Read	Read	Read, Create, Edit, Delete

Content Repositories

Following activation of an agreement, documents designated for content search are routed to a content repository. The default content repository for Apttus agreement documents is the Documents folder, but you can also configure the system to route these documents to any of the following:

- Content Libraries
- Chatter Feed (File Feed data store)

See Routing Documents to Content Libraries for more information on setting up alternate content repositories for your activated agreement documents.

Email Folders

Email templates and temporary email templates with Agreement attachments are stored in the Apttus Email Templates and Apttus Temporary Email templates folders. If you have integrated electronic signature functionality into your Apttus solution, the respective custom objects store the request and response information which might contain the contract documents. Because of this, access should be restricted to specified users and user groups, and external portal users should be explicitly restricted from accessing these folders.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Sharing Security

Permissions associated with User Profiles are not always sufficient when determining access to specific records. Profile security is granted at the Object level. If a particular User Profile has Read /Edit permissions for an Object, by default they have the same permissions at the record level. Sharing security allows you to enforce permissions at the **Record** level.

Creating Your Private Sharing Model

The default Sharing setting (controlled by Organization-Wide Defaults) is always Public Read/Write for all Apttus custom objects. You can restrict any of these defaults by changing settings to Private or Public Read Only. Then use **Sharing Rules** to allow specific users or groups of users additional access. Rules are typically based on the record owner or Field values on the records in the Object (e.g. for Agreements, "Agreement Type"). You can also decide to grant access using Role hierarchies, meaning access is automatically given to users above the record owner in your organization's hierarchy.

For more information on determining Organization-Wide Defaults and creating Sharing Rules, please refer to Salesforce Documentation here.

Agreement Web Service

The Agreement Web Service APIs are used for activating, selecting and publishing agreements. Once an agreement has been activated and associated with a template it can be published to Salesforce.com – either to Chatter files or Documents - or published to an external repository.

The APIs enable you to do the following:

- **Activating an Agreement**
  This activates an agreement and can also be used to delete related draft versions. Once activated an agreement document can be published to multiple channels.
- **Selecting a Template for the Agreement Document**
  This associates a template with the agreement, enabling the agreement document to be published.
- **Publishing the Document to Chatter**
  This publishes the agreement document for the activated agreement to *Chatter > Files* for the Salesforce object the agreement is associated with.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- **Publishing the Document to Files and Attachments**
  This publishes the agreement document for the activated agreement to *Files and Attachments* for the Salesforce object the agreement is associated with.
- **Publishing Document Outside of Salesforce**
  This publishes the agreement document for the activated agreement to an external location. This method will write the data into an integration object. A trigger should be written to send the document to the external location.

Activating an Agreement

This activates an agreement and can also be used to delete related draft versions. Once activated an agreement document can be published to multiple channels.

activateAgreement

Parameters		
Name	**Type**	**Description**
agreementId	ID	The id of the agreement
selectedDocIds	List<ID>	List of fully signed document ids
removableDocIds	List<ID>	List of draft document ids that can be deleted

Response		
Name	**Type**	**Description**
result	Boolean	Indicates whether the agreement was activated successfully.

Code Sample

```
Id agreementId = agreement.Id;
String[] activateDocIds = new String[1];
String[] remDocIds = new String[]{};
Boolean response = Apttus.AgreementWebService.activateAgreement(agreementId, acti
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Selecting a Template for the Agreement Document

This associates a template with the agreement, enabling the agreement document to be published.

selectFirstTemplateIdForAgreement

Parameters		
Name	**Type**	**Description**
agreementId	ID	The id of the agreement

Response		
Name	**Type**	**Description**
result	ID	The id of the template that is used to generate the agreement document

Publishing the Document to Chatter

This publishes the agreement document for the activated agreement to *Chatter > Files* for the Salesforce object the agreement is associated with.

publishToChatterRepository

Parameters		
Name	**Type**	**Description**
agreementId	ID	The id of the agreement
attachmentId	ID	The id of the document that is to be published and uploaded to Chatter > Files.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Response		
Name	**Type**	**Description**
result	Boolean	Indicates whether the document was published to Chatter successfully.

Code Sample

```
Id agreementId = agreement.Id;
Id publishDocId= AttachmentId;
Boolean response = Apttus.AgreementWebService.publishToChatterRepository (agreeme
```

Publishing the Document to Files and Attachments

This publishes the agreement document for the activated agreement to *Files and Attachments* for the Salesforce object the agreement is associated with.

publishToDocumentRepository

Parameters		
Name	**Type**	**Description**
agreementId	ID	The id of the agreement
attachmentId	ID	The id of the document that is to be published and uploaded to Files and Attachments.

Response		
Name	**Type**	**Description**
result	Boolean	Indicates whether the document was published to Files and Attachments successfully.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Publishing Document Outside of Salesforce

This publishes the agreement document for the activated agreement to an external location. This method will write the data into an integration object. A trigger should be written to send the document to the external location.**publishToExternalRepository**

Parameters		
Name	**Type**	**Description**
agreementId	ID	The id of the agreement
attachmentId	ID	The id of the document that is to be published.

Response		
Name	**Type**	**Description**
result	Boolean	Indicates whether the document was published successfully.

Merge Web Service

The Merge Web Service APIs are used for generating and manipulating documents. Both agreements and supporting documents can be generated, while text can be added to document headers and footers. Word documents can be converted into PDF documents and security rules can be applied to PDF documents.

The APIs enable you to do the following:

- Generating a Document
  Generates a Word agreement document by using the template specified by the *templateId* parameter and the agreement indicated by the *agreementId*. The document is added to the Files and Attachments section for the Agreement object.
- Generating a Document for a Standard Object
  Generates a Word agreement document for a standard object, using the template selected by the *templateId* parameter and the object indicated by the *sObjectId* and *sObjectType*.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- Generating a Supporting Document
  Generates a supporting document, such as Contract Summary, Renewal Letter, and Termination Letter, using the template specified by the *templateId* and is associated with the agreement record represented by the *agreementId*.
- Adding Text to a Header and Footer
  Appends the given text to the header and footer for a given document.
- Converting a Word Document into a given output format
  This API converts an agreement Word document, specified in *docFileName* into a specific output format using the parameters, such as *agreementId* and *docFormat*. This API internally checks if the header and footer are added to the generated document.
- Converting a Word Document into a given output format for Standard Object **(Deprecated)**
  For any standard object, this API converts a generated Word document into a specific output format, specified in *docFormat* using the parameters, such as, *docId*, *docFileName*. This API is deprecated.
- Converting a Word Document into a given output format **(Deprecated)**
  This API converts an agreement Word document into a specific output format using the parameters, such as *agreementId* and *docFormat*. This API is deprecated.
- Converting a Word Document into a PDF
  This converts a Word document into a PDF document. It can be any Word document and does not have to be created using *generateDoc* or *generateSupportingDoc*. The protection level applicable on the Word document is not applicable to the PDF document.
- Converting a Word Document into a PDF for Standard Objects
  This converts a Word document into a PDF document for a standard object. It can be any Word document and does not have to be created using *generateDoc* or *generateSupportingDoc*. The protection level applicable on the Word document is not applicable to the PDF document.
- Applying Security Parameters to a PDF
  This applies Adobe PDF security parameters to the PDF document. Ensure that you have set an admin entry with the PDFSecurityDefaulttags. For more information, refer *Contract Management Administrator Guide*.
- Enabling Authoring for Agreement Documents
  This API enables redlining capability for a list of documents, specified in the *docIds*, by using the parameters, such as *sObjectID* and *pLevel*.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- Generating a Document on Submit Request
  This API submits the generate document action using the given template from *templateId* and agreement from *agreementId*. The output format of the generated document is of the type specified in the *docFormat* parameter.
- Generating a Document on Submit Request for a Standard Object
  For a standard object, this API submits the generate document action using the given template from *templateId* and for a sObject from *sObjectId* and *sObjectType*. The output format of the generated document is of the type specified in the *docFormat* parameter.
- Generating a Supporting Document on Submit Request
  This API submits the generate supporting document action using the given template from *templateId* and for an agreement from *agreementId*. The output format of the generated supporting document is of the type specified in the *docFormat* parameter.
- Packaging Multiple Documents
  This API packages multiple documents (such as a Quote and Agreement document) together into a single merged DOCX document. Implementation requires creating a custom Visualforce page to use the API for document packaging purposes.
- Merging Multiple Documents to a PDF
  Apttus provides three APIs to assist you in merging multiple documents into a single PDF. Choose the API that best suits your needs.
- Merging Proposal Documents into a single PDF Document
  This API packages multiple proposal documents together into a single merged PDF document. Implementation requires creating a custom Visualforce page to use the API for document packaging purposes.

Generating a Document

Generates a Word agreement document by using the template specified by the templateId parameter and the agreement indicated by the agreementId. The document is added to the Files and Attachments section for the Agreement object.

The document can subsequently be converted to a PDF, using convertWordDocToPDF.

`generateDoc`

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters			
Name	**Type**	**Description**	**Required?**
templateId	ID	The id of the template used to generate the word document.	Yes
agreementId	ID	The id of the agreement providing the content for the document.	Yes
pLevel	String	The protection level to apply to the document. Valid values are: • *Full access* • *Insert comments only* • *Insert comments and tracked changes only* • *Read only* • *Fill in form fields only*	Yes
docFormat	String	Indicates whether the document will be: • *DOC* • *DOCX* • *PDF* • *RTF*	Yes
sessionId	String	The Salesforce session id.	Yes
serverUrl	String	The Salesforce server id.	Yes

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Response		
Name	**Type**	**Description**
generatedDocId	ID	The id of the generated document.

Code Sample

```
ID templateId= 'a036F00000urlTX';
Id agreementId = 'a016F00001V5HZA';
String pLevel = 'Read only';
String docFormat = 'DOC';
String apiServerURL = System.Url.getSalesforceBaseUrl().
toExternalForm() + '/services/Soap/u/14.0/' + UserInfo.
getOrganizationId();
String SessionId = UserInfo.getSessionId();  //This is the session
Id.
String generatedDocId = Apttus.MergeWebService.generateDoc
(templateId, agreementId, pLevel, docFormat, SessionId,
apiServerURL);
```

`generateDoc2`

This API is the same as the **generateDoc** API and additionally enables you to add a draft watermark to the generated document.

Parameters			
Name	**Type**	**Description**	**Required?**
templateId	ID	The id of the template used to generate the word doc.	Yes
agreementId	ID	The id of the agreement providing the content for the document.	Yes
pLevel	String	The protection level to apply to the document. Valid values are: • *Full access*	Yes

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters			
Name	**Type**	**Description**	**Required?**
		• *Insert comments only* • *Insert comments and tracked changes only* • *Read only* • *Fill in form fields only*	
docFormat	String	Indicates whether the document will be: • *DOC* • *DOCX* • *PDF* • *RTF*	Yes
isDraft	Boolean	Indicates whether a draft watermark should be added to the document.	Yes
sessionId	String	The Salesforce session id.	Yes
serverUrl	String	The Salesforce server id.	Yes

Response		
Name	**Type**	**Description**
generatedDocId	ID	The id of the generated document.

Code Sample

```
ID templateId= 'a036F00000urlTX';
Id agreementId = 'a016F00001V5K6C';
String pLevel = 'Read only';
String docFormat = 'DOC';
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

```
Boolean isDraft = true;
String apiServerURL = System.Url.getSalesforceBaseUrl().
toExternalForm() + '/services/Soap/u/14.0/' + UserInfo.
getOrganizationId();
String SessionId = UserInfo.getSessionId();  //This is the session
Id.
String generatedDocId = Apttus.MergeWebService.generateDoc2
(templateId, agreementId, pLevel, docFormat, isDraft, SessionId,
apiServerURL);
```

Generating a Document for a Standard Object

Generates a Word agreement document for a standard object, using the template selected by the *templateId* parameter and the object indicated by *sObjectId* and *sObjectType*.

`generateCustomDoc`

Parameters		
Name	**Type**	**Description**
templateId	ID	The id of the template used to generate the word doc.
sObjectId	ID	The id of the sObject holding the data for the merge fields.
sObjectType	String	The type of the sObject.
pLevel	String	The protection level to apply to the document. Valid values are: • *Full access* • *Insert comments only* • *Insert comments and tracked changes only* • *Read only* • *Fill in form fields only*
docFormat	String	Indicates whether the document will be: • *DOC* • *DOCX*

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters		
Name	**Type**	**Description**
		• *PDF* • *RTF*
isDraft	Boolean	Indicates whether a draft watermark should be added to the document.
sessionId	String	The Salesforce session id.
serverUrl	String	The Salesforce server id.

Response		
Name	**Type**	**Description**
result	ID	The id of the generated document.

Generating a Supporting Document

Generates a supporting document, such as Contract Summary, Renewal Letter, and Termination Letter, using the template specified by the *templateId* and is associated with the agreement record represented by the *agreementId*.

generateSupportingDoc

Parameters		
Name	**Type**	**Description**
templateId	ID	The id of the template used to generate the word document.
agreementId	ID	The id of the agreement providing the content for the document.
pLevel	String	The protection level to apply to the document. Valid values are:

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters		
Name	**Type**	**Description**
		• *Full access* • *Insert comments only* • *Insert comments and tracked changes only* • *Read only* • *Fill in form fields only*
docFormat	String	Indicates whether the document will be: • *DOC* • *DOCX* • *PDF* • *RTF*
sessionId	String	The Salesforce session id.
serverUrl	String	The Salesforce server id.

Response		
Name	**Type**	**Description**
result	ID	The id of the generated document.

Code Sample

```
ID templateId= templateId;
Id proposalId = proposalSO.id;
String pLevel = 'Read only';
String docFormat = 'DOC';
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

```
String apiServerURL = System.Url.getSalesforceBaseUrl().
toExternalForm() + '/services/Soap/u/14.0/' + UserInfo.
getOrganizationId();
String SessionId = sessionId;  //This is the session Id.String
generatedDocId = Apttus_Proposal.MergeWebService.
generateSupportingDoc(templateId, proposalId, pLevel, docFormat,
apiSessionId, apiServerURL);
```

generateSupportingDoc2

This API is the same as the **generateSupportingDoc** API and additionally enables you to add a draft watermark to the generated document.

Parameters		
Name	**Type**	**Description**
templateId	ID	The id of the template used to generate the word doc.
agreementId	ID	The id of the agreement providing the content for the document.
pLevel	String	The protection level to apply to the document. Valid values are: 'Full access', 'Insert comments only', 'Insert comments and tracked changes only', 'Read only', and 'Fill in form fields only'.
docFormat	String	Indicates whether the document will be 'DOC', 'DOCX', 'PDF', or 'RTF'.
isDraft	Boolean	Indicates whether a draft watermark should be added to the document.
sessionId	String	The Salesforce session id.
serverUrl	String	The Salesforce server id.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Response		
Name	**Type**	**Description**
result	ID	The id of the generated document.

Adding Text to a Header and Footer

Append the given text to the header and footer for a given document.

appendToHeaderFooter

Parameters		
Name	**Type**	**Description**
docId	ID	The id of the document which will have header and footer content added to it.
headerText	String	The header text to be appended to the document.
footerText	String	The footer text to be appended to the document.
sessionId	String	The Salesforce session id.
serverUrl	String	The Salesforce server Url.

Response		
Name	**Type**	**Description**
result	Boolean	Indicates whether the header and footer is added successfully.

Code Sample

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

```
ID docId= AttachmentId;
String headerText = 'This is Header';
String footerText = 'This is Footer';
String apiServerURL = System.Url.getSalesforceBaseUrl().
toExternalForm() + '/services/Soap/u/14.0/' +
UserInfo.getOrganizationId();
String SessionId = sessionId;  //This is the session Id.
String generatedDocId = Apttus_Proposal.MergeWebService.
appendToHeaderFooter(docId, headerText, footerText, sessionId,
serverUrl);
```

appendToHeaderFooter does not support protection levels for FX1 documents (FX2 documents do support document protection). Document protection levels are reset when header and footer are added. To retain protection levels for FX1 documents, use **appendToHeaderFooter2** instead.

appendToHeaderFooter2

Parameters		
Name	**Type**	**Description**
docId	ID	The id of the document which will have header and/or footer content add to it.
headerText	String	The header text to append to the document.
footerText	String	The footer text to append to the document.
pLevel	String	The protection level to apply to the document. Valid values are: • *Full access* • *Insert comments only* • *Insert comments and tracked changes only* • *Read only*

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters		
Name	**Type**	**Description**
		• *Fill in form fields only*
sessionId	String	The Salesforce session id.
serverUrl	String	The Salesforce server Url.

Response		
Name	**Type**	**Description**
result	Boolean	Indicates whether the header and footer were added successfully.

Converting a Word Document into a given output format

This API converts an agreement Word document, specified in *docFileName* into a specific output format using the parameters, such as *agreementId* and *docFormat*. This API internally checks if the header and footer are added to the generated document.

- If the output document format is DOC or DOCX, the Id returned is that of the updated input document.
- If the output document format is PDF, the Id returned is that of the newly created document.

convertWordDocForAgreement

Parameters			
Name	**Type**	**Description**	**Required?**
agreementId	ID		Yes

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters			
Name	**Type**	**Description**	**Required?**
		The id of the agreement providing the content of the document.	
docId	ID	The id of the agreement document to convert in a different output format.	Yes
docFileName	String	The file name for the Word document.	Yes
docFormat	String	Indicates whether the document will be: • *DOC* • *DOCX* • *RTF* • *PDF*	Yes
pLevel	String	The protection level to apply to the document. Valid values are: • *Full access* • *Insert comments only* • *Insert comments and tracked changes only* • *Read only* • *Fill in form fields only*	Yes
addWatermark	Boolean	Indicates whether a draft watermark should be added to the output document.	Yes
removeWatermark	Boolean	Indicates whether a draft watermark on the source word document should be removed from the resulting document.	Yes

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters			
Name	**Type**	**Description**	**Required?**
sessionId	String	The Salesforce session id.	Yes
serverUrl	String	The Salesforce server URL.	Yes

Response		
Name	**Type**	**Description**
docId	ID	The id of the converted document.

Code Sample

```
String apiServerURL = System.Url.getSalesforceBaseUrl().
toExternalForm() + '/services/Soap/u/14.0/' + UserInfo.
getOrganizationId();
ID attachmentID = 'a036F00000urlTX';
Id agreementId = 'a016F00001V5HZA';
String pLevel = 'Read only';
String docFormat = 'PDF';
Boolean addWatermark = true;
Boolean removeWatermark = true;
ID docId = Apttus.MergeWebService.convertWordDocForAgreement
(agreementId,attachmentID,null,docFormat,pLevel,addWatermark,
removeWatermark,ServerInfo.getSessionId(),apiServerURL);
```

Converting a Word Document into a given output format for Standard Object (Deprecated)

For any standard object, this API converts a generated Word document into a specific output format, specified in *docFormat* using the parameters, such as, *docId*, *docFileName*. This API is deprecated.

convertWordDoc

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters		
Name	**Type**	**Description**
docId	ID	The id of the agreement document to be converted in a different output format.
docFileName	String	The file name for the Word document.
docFormat	String	Indicates whether the document will be: • *DOC* • *DOCX* • *RTF*
sObjectId	ID	The sObject id for which you want to update the document.
pLevel	String	The protection level to apply to the document. Valid values are: • *Full access* • *Insert comments only* • *Insert comments and tracked changes only* • *Read only* • *Fill in form fields only*
addWatermark	Boolean	Indicates whether a draft watermark should be added to the output document.
removeWatermark	Boolean	Indicates whether a draft watermark on the source word document should be removed from the resulting document.
headerText	String	The header text to be appended to the document.
footerText	String	The footer text to be appended to the document.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters		
Name	**Type**	**Description**
sessionId	String	The Salesforce session id.
serverUrl	String	The Salesforce server URL.

Response		
Name	**Type**	**Description**
result	ID	The id of the converted document.

Converting a Word Document into a given output format (Deprecated)

This API converts an agreement Word document into a specific output format using the parameters, such as *agreementId* and *docFormat*. This API is deprecated.

convertAgreementWordDoc

Parameters		
Name	**Type**	**Description**
agreementId	ID	The id of the agreement providing the content for the document.
docId	ID	The id of the agreement document to convert in a different output format.
docFileName	String	The file name for the Word document.
docFormat	String	Indicates whether the document will be: • *DOC*

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters		
Name	**Type**	**Description**
		• *DOCX* • *RTF*
pLevel	String	The protection level to apply to the document. Valid values are: • *Full access* • *Insert comments only* • *Insert comments and tracked changes only* • *Read only* • *Fill in form fields only*
addWatermark	Boolean	Indicates whether a draft watermark should be added to the output document.
removeWatermark	Boolean	Indicates whether a draft watermark on the source word document should be removed from the resulting document.
agreementNbr	String	The agreement number of the document, upserted in the header.
dateFormat	String	The date format for the footer of the document.
sessionId	String	The Salesforce session id.
serverUrl	String	The Salesforce server URL.

Response		
Name	**Type**	**Description**
result	ID	The id of the converted document.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Converting a Word Document into a PDF

This converts a Word document into a PDF document. It can be any Word document and does not have to be created using *generateDoc* or *generateSupportingDoc*. The protection level applicable on the Word document is not applicable to the PDF document.

convertWordDocToPDF

Parameters		
Name	**Type**	**Description**
docId	ID	The id of the word document to be converted to PDF.
docFileName	String	The filename for the newly created PDF.
addWatermark	Boolean	Indicates whether a draft watermark should be added to the PDF.
removeWatermark	Boolean	Indicates whether a draft watermark on the source word document should be removed from the resulting PDF.
headerText	String	The header text to append to the document.
footerText	String	The footer text to append to the document.
sessionId	String	The Salesforce session id.
serverUrl	String	The Salesforce server URL.

Response		
Name	**Type**	**Description**
result	ID	The id of the generated document.

Code Sample

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

```
Id docId = attachmentId;
String filename = 'newPDFFile.pdf';
Boolean addWatermark = 'true';
Boolean removeWatermark = 'false';
String headerText = 'This is Header';
String footerText = 'This is Footer';
String apiServerURL = System.Url.getSalesforceBaseUrl().
toExternalForm() + '/services/Soap/u/14.0/' + UserInfo.
getOrganizationId();
String SessionId = sessionId;  //This is the session Id.
Id convertedDocId = Apttus.MergeWebService.convertWordDocToPDF
(docId, fileName,
addWatermark, removeWatermark, headerText, footerText, apiSessionId,
apiServerURL);
```

Converting a Word Document into a PDF for Standard Objects

This converts a Word document into a PDF document for a standard object. It can be any Word document and does not have to be created using *generateDoc* or *generateSupportingDoc*. The protection level applicable on the Word document is not applicable to the PDF document.

convertWordDocToPDF2

Parameters		
Name	**Type**	**Description**
docId	ID	The id of the word document to be converted to PDF.
docFileName	String	The filename for the newly created PDF.
sObjectId	Id	The id of the standard object.
pLevel	String	The protection level to apply to the document. Valid values are: • *Full access* • *Insert comments only*

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters		
Name	**Type**	**Description**
		• *Insert comments and tracked changes only* • *Read only* • *Fill in form fields only*
addWatermark	Boolean	Indicates whether a draft watermark should be added to the PDF.
removeWatermark	Boolean	Indicates whether a draft watermark on the source word document should be removed from the resulting PDF.
headerText	String	The header text to append to the document.
footerText	String	The footer text to append to the document.
sessionId	String	The Salesforce session id.
serverUrl	String	The Salesforce server URL.

Response		
Name	**Type**	**Description**
result	ID	The id of the generated document.

Applying Security Parameters to a PDF

This applies Adobe PDF security parameters to the PDF document. Ensure that you have set an admin entry with the **PDFSecurityDefault** tags. For more information, refer *Contract Management Admin Guide*.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

TheapplyPDFSecurity()function provides a great way to handle document security. Using this function is fairly complex, and what we want is a simple way to quickly apply security. The function provides us with just such an option. The actual parameters in the policy could bedocId,session Id, serverUrland so on. This API controls the security properties of a PDF document, such as, Content Copying, Filling of form fields, and Printing.

applyPDFSecurity

Parameters		
Name	**Type**	**Description**
docId	ID	The id of the PDF document to apply security parameters to.
session Id	String	The Salesforce session id.
serverUrl	String	The Salesforce server Url.

Response		
Name	**Type**	**Description**
result	Boolean	Indicates if the security parameters were applied successfully to the PDF.

Code Sample

```
Id docId = attachmentId;
String apiServerURL = System.Url.getSalesforceBaseUrl().
toExternalForm() + '/services/Soap/u/14.0/' + UserInfo.
getOrganizationId();
String SessionId = sessionId;  //This is the session Id.
Boolean securityApplied = Apttus.MergeWebService.applyPDFSecurity
(docId,
apiSessionId, apiServerURL);
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Enabling Authoring for Agreement Documents

This API enables redlining capability for a list of documents, specified in the *docIds*, by using the parameters, such as *sObjectID* and *pLevel*.

enableAuthoring

Parameters		
Name	**Type**	**Description**
sObjectId	ID	The ID of the standard object for which authoring is to be enabled.
pLevel	String	The protection level to apply to the document. Valid values are • Full access • Insert comments only • Insert comments and tracked changes only • Read only • Fill in form fields only
docIds	List	The ids of the documents for which you want to enable authoring. If the value is null, all the documents associated with the sObject are enabled.
sessionId	String	The Salesforce session id.
serverUrl	String	The Salesforce server id.

Generating a Document on Submit Request

This API submits the generate document action using the given template from *templateId* and agreement from *agreementId*. The output format of the generated document is of the type specified in the *docFormat* parameter.

submitGenerateDoc

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters		
Name	**Type**	**Description**
templateId	ID	The id of the template used to generate the word doc.
agreementId	ID	The id of the agreement providing the content for the document.
pLevel	String	The protection level to apply to the document. Valid values are: • *Full access* • *Insert comments only* • *Insert comments and tracked changes only* • *Read only* • *Fill in form fields only*
docFormat	String	Indicates whether the document will be: • *DOC* • *DOCX* • *PDF* • *RTF*
isDraft	Boolean	Indicates whether a draft watermark should be added to the document.
sessionId	String	The Salesforce session id.
serverUrl	String	The Salesforce server id.

Response		
Name	**Type**	**Description**
result	ID	The id of the generated document.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Generating a Document on Submit Request for a Standard Object

For a standard object, this API submits the generate document action using the given template from *templateId* and for a sObject from *sObjectId* and *sObjectType*. The output format of the generated document is of the type specified in the *docFormat* parameter.

submitGenerateCustomDoc

Parameters		
Name	**Type**	**Description**
templateId	ID	The id of the template used to generate the word doc.
sObjectId	ID	The sObject id which comprises the data for the merge fields.
sObjectType	String	The type of the sObject.
pLevel	String	The protection level to apply to the document. Valid values are: • *Full access* • *Insert comments only* • *Insert comments and tracked changes only* • *Read only* • *Fill in form fields only*
docFormat	String	Indicates whether the document will be: • *DOC* • *DOCX* • *PDF* • *RTF*
isDraft	Boolean	Indicates whether a draft watermark should be added to the document.
sessionId	String	The Salesforce session id.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters		
Name	**Type**	**Description**
serverUrl	String	The Salesforce server id.

Response		
Name	**Type**	**Description**
result	ID	The id of the generated document.

Generating a Supporting Document on Submit Request

This API submits the generate supporting document action using the given template from *templateId* and for an agreement from *agreementId*. The output format of the generated supporting document is of the type specified in the *docFormat* parameter.

submitGenerateSupportingDoc

Parameters		
Name	**Type**	**Description**
templateId	ID	The id of the template used to generate the word document.
agreementId	ID	The id of the agreement providing the content for the document.
pLevel	String	The protection level to apply to the document. Valid values are: • *Full access* • *Insert comments only* • *Insert comments and tracked changes only* • *Read only* • *Fill in form fields only*

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters		
Name	**Type**	**Description**
docFormat	String	Indicates whether the document will be: • *DOC* • *DOCX* • *PDF* • *RTF*
isDraft	Boolean	Indicates whether a draft watermark should be added to the document.
sessionId	String	The Salesforce session id.
serverUrl	String	The Salesforce server id.

Response		
Name	**Type**	**Description**
result	ID	The id of the generated document.

Package Multiple Documents

This API can be used to package multiple documents (such as a Quote and Agreement document) together into a single merged DOCX document. Implementation requires creation of a custom Visualforce page to make use of the API for document packing purposes.

createWordPackage

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters		
Name	**Type**	**Description**
ParentId	ID	The ID of the parent object associated with the result.
Attachments	List<Apttus.CustomClass.AttachmentInfo>	List of all documents in the order to be packaged.
ExternalLinks	List<Apttus.CustomClass.ExternalLink>	List of external links to be embedded in document. ***(not currently supported)***
DocFileName	String	Name of the packaged document file (.doc or .docx).
ProtectionLevel	String	Protection level of the document generated.
AddWatermark	Boolean	Indicates whether to add a watermark to the document.
RemoveWatermark	Boolean	Indicates whether to remove a watermark from the document.
AddAutoHeaderFooter	Boolean	Indicates whether to use the configured header and footer format located in Comply System Properties. If AddAutoHeaderFooter=true, the API uses the Comply System Properties defined for header and footer data. If AddAutoHeaderFooter=false, the API uses values from the *headerText* and *footerText* parameters.
HeaderText	String	Text to include in the document header.
FooterText	String	Text to include in the document footer.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

PreserveRedlines	Boolean	Indicates whether the redlines in the input document will be preserved/ accepted in the packaged document. The default value is false.
SessionId	ID	The Session ID to use for callback.
SessionUrl	String	The Server URL to use for callback.

Note: header text will always be right-aligned and footer text will always be left-aligned by default. Also, any page numbers in the input documents will not be present in the final combined document.

Response		
Name	**Type**	**Description**
result	ID	Returns the ID of the merged DOCX document.

Code Sample

```
// attachments
List<Apttus.CustomClass.AttachmentInfo> attachments = new
List<Apttus.CustomClass.AttachmentInfo>();
Apttus.CustomClass.AttachmentInfo attInfo = new Apttus.CustomClass.
AttachmentInfo();
attInfo.Title = 'Agreement-1';
attInfo.RecordId = attSO.Id;

attachments.add(attInfo);

Apttus.CustomClass.AttachmentInfo attInfo2 = new Apttus.CustomClass.
AttachmentInfo();
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

```
attInfo2.Title = 'Agreement-2';
attInfo2.RecordId = attSO2.Id;

attachments.add(attInfo);

// external links (not supported)
List<Apttus.CustomClass.ExternalLink> links = new List<Apttus.
CustomClass.ExternalLink>();

Apttus.CustomClass.ExternalLink linkInfo = new Apttus.CustomClass.
ExternalLink();
linkInfo.Title = 'Drawing-1';
linkInfo.Url = 'https://drive.google.com/doc1.docx';

links.add(linkInfo);

Apttus.CustomClass.ExternalLink linkInfo2 = new Apttus.CustomClass.
ExternalLink();
linkInfo2.Title = 'Drawing-2';
linkInfo2.Url = 'https://drive.google.com/doc2.docx';

links.add(linkInfo2);

// create action parameters
Apttus.CustomClass.ActionParams  params = new Apttus.CustomClass.
ActionParams();

params.ParentId = agreementSO.Id;
params.Attachments = attachments;
params.ExternalLinks = links;
params.AddAutoHeaderFooter = true;
params.ProtectionLevel = AgreementProtection.LEVEL_FULL_ACCESS;
params.DocFileName = 'Agreement-Merged.docx';
params.AddWatermark = true;
params.RemoveWatermark = false;
params.HeaderText = 'Agreement Id: 0123456789';
params.FooterText = 'Date Created: 11/27/2011 7:23:15 PM';
params.PreserveRedlines = true;
params.SessionId = ServerInfo.getSessionId();
params.SessionUrl = ServerInfo.getServerUrl();

ID docId = Apttus.MergeWebService.createWordPackage(params);

System.debug('Merged Doc ID=' + docId);
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Merging Multiple Documents to a PDF

You can use any of the three following Merge Webservice APIs to merge multiple documents into a single PDF. Choose the API that best suits your needs (note limitations for each):

- mergeDocsToPDF
- mergeDocsToPDF2
- createPDF

`mergeDocsToPDF`

This API merges multiple documents using the values specified in the *docIds* parameter into a single PDF document with the name *docFileName.*

Parameters			
Name	**Type**	**Description**	**Required?**
parentId	ID	The id of the parent object to associate with the result document.	Yes
docIds	List	A collection of the ids of the documents to merge into a PDF document.	Yes
docFileName	String	The file name for the PDF document.	Yes
sessionId	String	The Salesforce session id.	Yes
serverUrl	String	The Salesforce server id.	Yes

> **Note**
>
> You cannot use Apttus-generated PDFs with document protection enabled as input documents.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Response		
Name	**Type**	**Description**
result	ID	The id of the generated document.

> **Note**
>
> Footers in the final PDF will always list the original filename of the input document for the collated page.

`mergeDocsToPDF2`

The API introduced in this release is an enhancement of the existing Merge Webservice API mergeDocsToPDF. mergeDocsToPDF2 merges multiple documents using the values specified in the docIds parameter into a single PDF document with the name docFileName and adds a flag to specify whether PDF document protection should be carried over to the collated PDF.

Before invoking this API, **CustomClass.ActionParams** must be instantiated by passing the parameters described below. The parameters are then passed to the API when it is invoked.

Parameters			
Name	**Type**	**Description**	**Required?**
parentId	Id	The Id of the parent object to associate with the result (merged) document.	Yes
docIds	List	A collection of the Ids of the documents to merge into a PDF document.	Yes
docFileName	String	The file name for the PDF document.	Yes
sessionId	String	The Salesforce session Id.	Yes
sessionUrl	String	The Salesforce server Id.	Yes

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters			
Name	**Type**	**Description**	**Required?**
ProtectOutputDoc	Boolean	If true, protect the output document with PDF security as defined in Comply properties.	Yes

Response		
Name	**Type**	**Description**
docId	ID	The id of the generated PDF document.

Code Sample

```
// create action parameters

Apttus.CustomClass.ActionParams params = new Apttus.CustomClass.
ActionParams();

// create attSO and attSO2 attachments to be merged

params.ParentId=  'a016F00001V5HZA';
params.DocIds= new ID[] {attSO.Id, attSO2.Id};
params.DocFileName= 'Agreement-Merged.pdf';
params.ProtectOutputDoc= true;
params.SessionId= UserInfo.getSessionId();
String apiServerURL = System.Url.getSalesforceBaseUrl().
toExternalForm() + '/services/Soap/u/14.0/' + UserInfo.
getOrganizationId();
params.SessionUrl= apiServerURL;


//mergedocs to PDF

ID docId = Apttus.MergeWebService.mergeDocsToPDF2(params);
```

Note

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- *ProtectOutputDoc* only enforces document protection in the target PDF when Enable PDF Security was properly configured at the time of PDF generated in the Org corresponding to the input document. Refer to Enabling PDF Security for Agreement Documents in *Contract Management Administrator Guide* for more information.
- All redlines that are present in input documents are accepted prior to collation.

`createPDF`

This API merges multiple documents using the values specified in the docIds parameter into a single PDF document with the name docFileName. This API enhances mergeDocsToPDF by providing the ability to automatically display or hide the footer in the merged PDF.

Before invoking this API, **CustomClass.ActionParams** must be instantiated by passing the parameters described below. The parameters are then passed to the API when it is invoked.

Parameters		
Name	**Type**	**Description**
parentId	Id	The Id of the parent object to associate with the result (merged) document.
docIds	List	A collection of the Ids of the documents to merge into a PDF document.
docFileName	String	The file name for the PDF document.
sessionId	String	The Salesforce session Id.
sessionUrl	String	The Salesforce server Id.
addFooter	Boolean	Display/hide the footer in the merged PDF.

Note

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

- Footers in the final PDF will always list the original filename of the input document for the collated page.
- All redlines that are present in input documents are accepted prior to collation.

Response		
Name	**Type**	**Description**
result	Id	The Id of the generated (merged) PDF.

```
CustomClass.ActionParams objParam = new CustomClass.ActionParams();
objParam.SessionId = ServerInfo.getSessionId();
objParam.SessionUrl = ServerInfo.getServerUrl();
objParam.ParentId = '{parentID}';
objParam.DocIds = new ID[]{ID.valueOf('{docId}'),
ID.valueOf('{docId}')};
objParam.DocFileName = 'My_Merged_PDF.pdf';
objParam.AddFooter = true;

ID mergedPDF = MergeWebService.createPDF(objParam);
```

Values inside '{}' in the above code sample denote an Id is required.

Merging Proposal Documents into a single PDF Document

createPDFPackage

Use this API to package multiple proposal documents together into a singled merged PDF document. I mplementation requires creation of a custom Visualforce page to make use of the API for document packaging purposes.

Parameters		
Name	**Type**	**Description**
parentId	ID	The ID of the parent object associated with the result.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Parameters		
Name	**Type**	**Description**
attachments	List<Apttus.CustomClass.AttachmentInfo>	List of all documents in the order to be packaged.
externalLinks	List<Apttus.CustomClass.ExternalLink>	List of external links to be embedded in document.
docFileName	String	Name of the packaged document file (PDF).
sessionId	ID	The Session ID to use for callback.
sessionURL	String	The Server URL to use for callback.

Response		
Name	**Type**	**Description**
result	ID	Returns the ID of the merged PDF document.

Code Sample

```
   // Attachments
         //
         List<Apttus_Proposal.CustomClass.AttachmentInfo>
attachmentsInfoList = new List<Apttus_Proposal.CustomClass.
AttachmentInfo>();
         // Attachment: Primary
         Apttus_Proposal.CustomClass.AttachmentInfo attachmentInfo = n
ew Apttus_Proposal.CustomClass.AttachmentInfo();
         ...
         ...
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

```
        attachmentInfo.Title            = attachmentDetails.Name;
        attachmentInfo.RecordId         = attachmentDetails.Id;
        attachmentsInfoList.add(attachmentInfo);

        // Attachments: Docx
        for (selectoption so :
listOfDocxAttachmentsRelated2Proposal_Selected) {

            Apttus_Proposal.CustomClass.AttachmentInfo
attachmentInfo = new Apttus_Proposal.CustomClass.AttachmentInfo();
            ...
            ...
            attachmentInfo.Title            = attachmentDetails.Name;
            attachmentInfo.RecordId         = attachmentDetails.Id;
            attachmentsInfoList.add(attachmentInfo);

        }
        // Attachments: PDFs
        for (selectoption so :
listOfPDFAttachmentsRelated2Proposal_Selected) {

            Apttus_Proposal.CustomClass.AttachmentInfo
attachmentInfo = new Apttus_Proposal.CustomClass.AttachmentInfo();
            ...
            ...
            attachmentInfo.Title            = attachmentDetails.Name;
            attachmentInfo.RecordId         = attachmentDetails.Id;
            attachmentsInfoList.add(attachmentInfo);

        }
        //
        // External Links
        //
        List<Apttus_Proposal.CustomClass.ExternalLink>
externalLinksInfoList = new List<Apttus_Proposal.CustomClass.
ExternalLink>();
        if ( !string.isBlank(externalLinks) ) {

            String[] arrayOfURLs = parseURLsCSV(externalLinks);

            for (String str : arrayOfURLs) {

                String url      = str.trim();
                String filename = getFilenameFromURL(url);

                Apttus_Proposal.CustomClass.ExternalLink
externalLinkInfo = new Apttus_Proposal.CustomClass.ExternalLink();
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

```
                externalLinkInfo.Title  = filename;
                externalLinkInfo.Url    = url;
                externalLinksInfoList.add(externalLinkInfo);
            }
        }
        // API Parameters
        Apttus_Proposal.CustomClass.ActionParams apiParameters  = new
 Apttus_Proposal.CustomClass.ActionParams();
        apiParameters.ParentId          = myProposal.Id;
        apiParameters.Attachments       = attachmentsInfoList;
        apiParameters.ExternalLinks     = externalLinksInfoList;
        apiParameters.DocFileName       = 'outputCollatedPDFFilename.
pdf';
        apiParameters.SessionId         = sessionId;
        apiParameters.SessionUrl        = apiServerURL;
        try {

            //submit request
            Id myDocId = Apttus_Proposal.MergeWebService.
createPDFPackage(apiParameters);

        } catch (Exception ex) {

            System.debug('Apttus.MergeWebService.createPDFPackage:
Oops!!! Caught an Exception: ' + ex);
        }
```

Apttus Status Categories and Statuses

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

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

Stage	Description
Request	New request
Request Approval	Request being approved
Submitted Request	Request submitted

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Stage	Description
Approved Request	Request approved
Cancelled Request	Contract request cancelled
In Amendment	Contract being amended

2. **In Authoring**: This Status Category indicates that the contract is in the Authoring stage.

Stage	Description
Author Contract	Contract being authored
Language Approval	Language being approved
Language Approved	Language approved
Internal Review	Contract in an internal review
Other Party Review	Contract in an other party review
Signature Declined	Signature is declined

3. **In Signatures**: This Status Category indicates that the contract is in the Signatures stage.

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Stage	Description
Signature Declined	Signature is declined
Ready for Signatures	Contract ready for internal or other party signatures
Fully Signed	Contract fully signed and ready for activation.

4. **In Filing**: This Status Category indicates that the contract is in the Filing stage.

Stage	Description
In Reconciliation	Terms are being reconciled
Reconciled	Terms reconciliation completed

5. **In Effect**: This Status Category indicates that the contract is in the Effect stage.

Stage	Description
Activated	Active Contract
Being Amended	Contract is in the amendment process
Being Renewed	Contract is in the renewal process
Superseded	Contract is superseded.
Being Terminated	Contract is in the termination process

6. **Expired**: This Status Category indicates that the contract is in the Expired stage.

Stage	Description
Expired	Contract expired

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

7. **Terminated**: This Status Category indicates that the contract is in the Terminated stage.

Stage	Description
Terminated	Contract terminated

8. **Amended**: This Status Category indicates that the contract is in the Amended stage.
9. **Cancelled**: This Status Category indicates that the contract is in the Cancelled stage.

Apttus Status Category Map

The Status Category and Status combination determines the actions available for a particular agreement.

Status category map provides an idea of various agreement status categories during the contract lifecycle.

The following tables describes the purpose of Apttus status category maps:

Status Category	Request	In Authoring	In Signatures	In Filing	In Effect	Expired	Terminated	A
Status								
Request	√							
Request Approval	√							
Submitted Request	√							
Approved Request	√							
Cancelled Request	√							

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

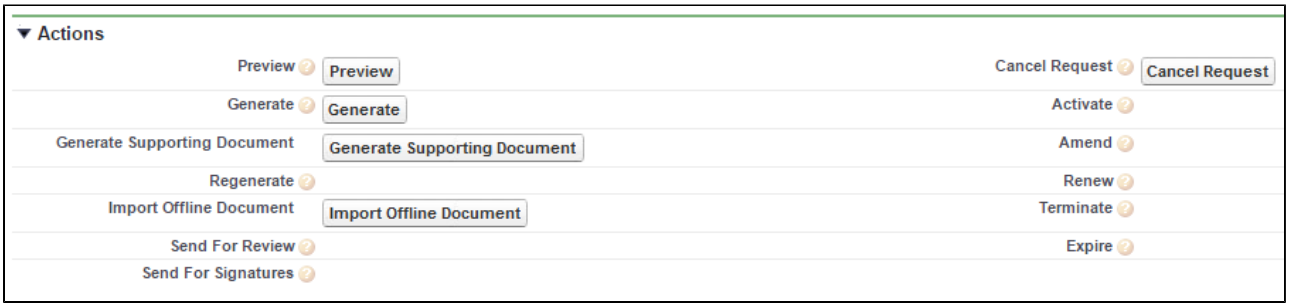
Status Category	Request	In Authoring	In Signatures	In Filing	In Effect	Expired	Terminated	A
In Amendment	√							
Author Contract		√						
Language Approval		√						
Language Approved		√						
Internal Review		√						
Other Party Review		√						
Internal Signatures			√					
Other Party Signatures			√					
Activated					√			
Being Amended					√			
Being Renewed					√			
Superseded					√			

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Status Category	Request	In Authoring	In Signatures	In Filing	In Effect	Expired	Terminated	A
Being Terminated					√			
Terminated							√	
Expired						√		
In Reconciliation			√	√				
Reconciled			√	√				
Signature Declined		√	√					
Ready for Signatures			√					
Fully Signed			√					

Agreement Actions

The Type and the actions vary according to the agreement status.



Copyright ©2011-2017 Apttus Corporation. All rights reserved.

The following table describes the Actions available at various stages of the Agreement and their significance:

1. **Preview Agreement**

Action	Preview Agreement
Description	Generates a *Draft* version of an agreement document based on the template set up for the agreement type. The draft agreement is rendered in the Microsoft Word format. If more than one agreement template is setup, you would be prompted to pick a specific template.
Availability	If Status Category = Request
Task	A task, Previewed Agreement in completed status is, added to the Activity History related list.
Post Status	N/A
Comments	

2. **Generate Agreement**

Action	Generate Agreement
Description	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 the document output format for your agreement record. Supported document output formats are .DOC, .DOCX, .RTF, and .PDF. Additionally, if document protection has been enabled for you, you can generate a document with the appropriate protection options.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

	The first draft version of the agreement is generated and attached to the system in the Notes & Attachment or Document Versions (if the document is Version Aware) related list of the agreement details page.You can: • Save it to the desktop, close the Microsoft Word application, and come back to the agreement record later. • Access the agreement document from the Notes & Attachments section (click on the View link corresponding to the document).
Availability	If Status Category = Request
Task	A task, Generated Agreement in completed status, is added to the Activity History related list. Also, three tasks with Not Started status are added to the Open Activities related list. These tasks are Get Internal Signatures, Get External Signatures, and Scan & Attach Agreement.
Post Status	Ready for Signatures
Comments	

3. **Regenerate Agreement**

Action	Regenerate Agreement
Description	Regenerates a new version of the agreement document from a selected template based on values from the agreement record. The regenerated agreement document is attached to the Notes & Attachments or Document Versions (if the document is Version Aware) related list. Since it is regenerated from template, any red lines made in previous version would not be carried into this version and must be manually applied.
Availability	If Status Category = In Authoring or In Signatures
Task	A task, Regenerated Agreement, in completed status is added to the Activity History related list.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Post Status	N/A
Comments	

4. **Generate Supporting Document**

Action	Generate Supporting Document
Description	Generates a document from a template of type “Supporting Document” and attaches the same to Agreement Record. Can be used for Contract Summary, Renewal Letter, Termination Letter, etc.
Availability	N/A
Task	A task, Generated Supporting Document in completed status, is added to the Activity History related list.
Post Status	N/A
Comments	This can be used to generate contract summary

5. **Send for Review**

Action	Send for Review
Description	Allows you to select one or more attachments from the Agreement record and from related parent/child agreements, select an email template, address the same, and send it out.
Availability	If Status Category = In Signatures or In Authoring
Task	Two tasks- Email: *emailSubject* task in completed status and Sent For Review task in completed status, are added to the Activity History related list.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Post Status	Other Party Review
Comments	

6. **Send for Signatures**

Action	Send for Signatures
Description	Allows user to select one or more attachments from the Agreement record and from related parent / child agreements, select an email template, address the same, and send the agreement document as a final copy for Signatures.
Availability	If Status Category = In Signatures or In Authoring
Task	Two tasks- Email: *emailSubject* task in completed status and Sent For Signatures task in completed status, are added to the Activity History related list.
Post Status	Other Party Signatures
Comments	

7. **Import Offline Document**

Action	Import Offline Document
Description	• Imports a third party contract and attaches it to the agreement record in the Agreement Documents related list. • Allows the user to use the attached document in the Apttus Author process
Availability	If Status Category = Request or In Authoring or In Filing

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Task	A task, Imported Offline Document in completed status, is added to the Activity History related list.
Post Status	N/A
Comments	

8. **Activate**

Action	Activate
Description	• Marks the agreement as a finalized, executed contract • Prompts the user to select which attachment is the signed copy and records the same in activity history
Availability	If Status Category = In Signatures
Task	A task, Activated Agreement in completed status, is added to the Activity History related list.
Post Status	Sets Status Category = In Effect, Status = Activated. If an Amendment or Renewal is being Activated, sets Status Category of Original Agreement to Amended or Renewed and Status to Superseded
Comments	

9. **Amend**

Action	Amend
Description	Creates a new dot version of the Agreement (*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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Task	A task, Amended Agreement in completed status, is added to the Activity History related list.
Post Status	Sets Status of Original Agreement to Being Amended, and Status Category of New Agreement to Request and Status to In Amendment
Comments	

10. **Renew**

Action	Renew
Description	Creates a new minor version of the Agreement (*nnnn.1, nnnn.2, and so on*) after doing a deep copy of the agreement fields and related objects. To know more about the number of fields cloned in the renewal process, refer Clearing Cloned Agreement Fields.
Availability	If Status Category = In Effect
Task	A task, Renewed Agreement in completed status, is added to the Activity History related list.
Post Status	Sets Status of Original Agreement to Being Renewed, and Status Category of New Agreement to Request and Status to In Renewal
Comments	Agreement End Date must be in the past

11. **Expire**

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

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Task	A task, Expired Agreement in completed status, is added to the Activity History related list.
Post Status	Sets Status Category = Expired, Status = Expired
Comments	

12. **Terminate**

Action	Terminate
Description	Sets the Agreement to a Terminated state.
Availability	If Status Category = In Effect
Task	A task, Terminated Agreement in completed status, is added to the Activity History related list.
Post Status	Sets Status Category = Terminated, Status = Terminated
Comments	

13. **Cancel Request**

Action	Cancel Request
Description	Voids an Agreement Request.
Availability	If Status Category = Request or In Authoring or In Signatures and Status <> Cancelled Request
Task	A task, Cancelled Request in completed status, is added to the Activity History related list.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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	

Agreement Fields

Field Label	Description	Data Type	Required	Default Value	Reserved
Agreement Name	Unique identifier for the agreement record. This name appears in page layouts, related lists, lookup dialogs, search results, and key lists on tab home pages. By default, this field is added to the custom object page layout as a required field	Text(80)	Yes		Yes
Created By	User who created the record	Lookup (User)	Yes – System assigned		Yes
Last Modified By	User who most recently changed the record	Lookup (User)	Yes – System assigned		Yes
Owner	Assigned owner of the agreement record	Lookup (User)		Login User	Yes

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Field Label	Description	Data Type	Required	Default Value	Reserved
			Yes – System assigned, changeable by user		
Record Type	The agreement type for this record	Record Type	Yes	Agreement Type from selection screen	Yes
Account	The link to the account record to identify the external party to this agreement.	Lookup (Account)	Yes		Yes
Activated By	Auto-populated with the user who activates the agreement in the system. Read-only	Lookup (user)			
Activated Date	Auto-populated with the date on which the agreement was activated in the system. Read-only.	Date			
Agreement Category	Used to categorize agreement types. This can be agreement type specific (add appropriate	Picklist			

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Field Label	Description	Data Type	Required	Default Value	Reserved
	values for each agreement type) and can also be used for template filtering.				
Agreement End Date	The end date for this agreement. A required field on activation, if the agreement is not perpetual.	12 months from billing activation	yes		Yes
Agreement Number	The system assigned unique agreement number. Identifies the agreement number, including the version number. Use this field to display on screens, reports, dashboards, search filters and columns, etc.	Auto Number	Yes		Yes. Not changeable by user.
Agreement Start Date	The effective date of the agreement. A required field on activation.	Date	yes		Yes
Amendment Effective Date	Auto populated with the date on which amendment is effective.	Date			
Auto Renew	Indicates whether the agreement will auto renew	Check box			

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

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 behalf of Company	Text(80)			
Contract Duration (Days)	The duration from Start Date to End Date in days. Shown when agreement is 'In Effect'.	Formula (number)	yes		
Contracted Days	Days from Contract Start Date to Current Date if the contract is In Effect and Start Date is set.	Formula (number)	yes		
Description	Detailed description of this agreement	Long Text Area(32000)	yes		
		Date			

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Field Label	Description	Data Type	Required	Default Value	Reserved
Executed Copy Mailed Out Date	Date the final, executed copy was mailed out to the external party				
Initiation Type	To indicate whether this record is being filed as an executed agreement or is being negotiated in the system	Picklist (Negotiate Contract, Store Executed Contract)	Yes		Yes. Not changeable by user.
Internal Renewal Notification Days	Notification period prior to Renewal Notice Date when notification is sent out internally that renewal is approaching. Email alert needs to be setup, if needed.	Number	yes		
Internal Renewal Start Date	Auto populated with Date by which internal notice of internal renewal is approaching. Issue Renewal Notice Date less internal renewal notification days.	Date	Yes – System assigned, changeable by user		
Non Standard Legal Language?	To indicate whether this agreement contains non-standard language	Checkbox			
		Date			

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Field Label	Description	Data Type	Required	Default Value	Reserved
Other Party Returned Date	The date on which other party returned signed agreement				
Other Party Sent Date	Auto populated with the Date on which agreement was first sent to other party for review /signatures	Date			
Other Party Signed By	Link to contact record to identify external signatory	Lookup (Contact)			
Other Party Signed By (Unlisted)	External Signatory identifier (when signatory is not maintained as contact (record) in the system).	Text Area			
Other Party Signed Date	Date when external signatory signed	Date			
Other Party Signed Title	Title of person signing on bahalf of Other Party	Text			
Outstanding Days	Shows the number of days between date agreement was today, if not returned as yet. Else number of days between returned and sent.	Formula (number)			

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Field Label	Description	Data Type	Required	Default Value	Reserved
Owner Expiration Notice	To indicate the number of days prior to expiration date that a notification needs to be sent to the owner	Picklist(60-45-15-1)		90 Days	
Parent Agreement	Reference to parent agreement if current agreement was created as child or assigned manually.	Lookup (Agreement)			
Perpetual	Identifies whether the agreement has a specified end date or if it is open ended	Checkbox			
Primary Contact	Primary external contact for the agreement.	Lookup (Contact)			
Related Opportunity	Identifies the opportunity related to the agreement	Lookup (opportunity)			
Remaining Contracted Days	If the agreement is In Effect, this value is calculated as Contract Duration Days less Contracted Days.	Formula (number)			
Renewal Consent	Indicates whether consent is required to extend / renew this agreement	Checkbox			

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Field Label	Description	Data Type	Required	Default Value	Reserved
Renewal Notice Date	Issue Renewal Notice Date = End Date - Renewal Notice Days	Formula (Date)			
Renewal Notice Days	The number of days before end date when renewal notice is due	Number			
Renewal Term (Months)	The number of months to extend the agreement	Number			
Renewal Terms	Specifies any terms for renewal	Text Area			
Request Date	The date the agreement was requested	Date			
Requestor	Agreement Requestor (user).	Lookup (user)			
Risk Rating	This field allows users to track agreement risk rating	Number(5, 2)			
Source	Source of this contract – internal paper or third party contract	Picklist			Yes. Not changeable by user.
Special Terms	Identifies any special terms related to contract	Text Area			
Status		Picklist			

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Field Label	Description	Data Type	Required	Default Value	Reserved
	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				
Status Category	The higher level state of the agreement – In Authoring, In Effect, Expired, etc. These are Apttus reserved values	Picklist (Request , In Authoring, In Signatures, In Filing, In Effect, Expired, Terminated, Amended, Cancelled)	Yes – System Assigned		Yes. Not changeable by user.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Field Label	Description	Data Type	Required	Default Value	Reserved
Submit Request Mode		Picklist			
Subtype	The subtype of the agreement for a given agreement type. Please specify values based on your agreement types	Picklist (Default)			
Term (Months)	Identifies the term, in months, of an agreement from the agreement start date	Number			
Termination Date	Date contract terminated	Date			
Termination Notice Days	Notice period prior to termination	Number			
Termination Notice Issue Date	Date termination notice was sent / received	Date			
Total Agreement Value	Total value of agreement	Currency (16, 2)			
Version	The version number of the agreement that is incremented each time an agreement is amended	Number (3,0)	Yes – System Assigned		Yes

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Version Aware	Indicates whether the Agreement record is Version Aware. If checked, versioning is enabled for all documents belonging to the agreement record. This field is checked by default for all new agreements when Document Versioning is enabled (Comply System Properties *Enable Version Control* and *Enable Document Versioning*).	Checkbox			
Activate	Link to activate the agreement; Shown only in desired statuses.	Action			
Amend	Link to amend the agreement; Shown only for active agreements.	Action			
Cancel Request					
Expire	Link to expire the agreement; Shown only for active agreements.	Action			
Generate		Action			

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Field Label	Description	Data Type	Required	Default Value	Reserved
	Link to generate agreement document using one of the templates in library. Shown only is appropriate agreement statuses. Attaches generated doc under Notes & Attachment and creates 3 tasks. Write activity history. Changes status from "Request" to "In Signatures/Ready for signatures"				
Generate Supporting Document	Link to generate supporting document using one of the templates in library. Shown only is approriate agreement statuses.	Action			
Insert Offline Document	Link to add an external /offline document to the agreement record. Shown only is appropriate agreement statuses.	Action			
Preview		Action			
Regenerate	Regenerate a new agreement doc using one of the templte in the	Action			

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Field Label	Description	Data Type	Required	Default Value	Reserved
	library. The new version will not have redlines (if any) from the earlier versions.				
Renew	Start Renewal of an active agreement.	Action			
Return To Requestor	Return the agreement to Requestor.	Action			
Send For eSignature	Send document to external party using EcoSign/Docusign integration. Status changes to "In Signatures /Other party Signatures"	Action			
Send For Review	Send agreement for other party review. Status changes to "In Authoring/Other Party Review"	Action			
Send For Signatures	Send document for Signatures. Status changes to "In Signatures /Other party Signatures"	Action			
Submit Request		Action			
Terminate		Action			

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Apttus Retention Policy Schema

An XML schema describing the policy specification is provided as a static resource named *RetentionPolicySchema*.

The policy specification contains filters and retention rules. The filters are used to constrain the set of agreements to which the policy applies. The retention rule specifies how to compute the retention date based on existing date fields in the agreement. The sequence field may be used to establish the order in which the policies should be applied.

Here is the schema for the Apttus retention policy:

```
<-- Description:
    Defines schema RetentionPolicy
-->
<xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema"
elementFormDefault="unqualified" attributeFormDefault="unqualified">
    <xs:element name="RetentionPolicy" type="RetentionPolicyType">
        <xs:annotation>
            <xs:documentation>Retention Policy</xs:documentation>
        </xs:annotation>
    </xs:element>
    <!-- retention policy -->
    <xs:complexType name="RetentionPolicyType">
        <xs:sequence>
            <xs:element name="Filter" type="FilterType" minOccurs="0"
>
                <xs:annotation>
                    <xs:documentation>The record filter</xs:
documentation>
                </xs:annotation>
            </xs:element>
            <xs:element name="Rule" type="RuleType" minOccurs="0">
                <xs:annotation>
                    <xs:documentation>The retention rule</xs:
documentation>
                </xs:annotation>
            </xs:element>
        </xs:sequence>
    </xs:complexType>
    <!-- filter -->
    <xs:complexType name="FilterType">
        <xs:sequence>
            <xs:element name="Predicates" type="PredicateCollType">
                <xs:annotation>
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

```
                    <xs:documentation>The filter predicates</xs:
documentation>
                </xs:annotation>
            </xs:element>
            <xs:element name="ConditionExpr" type="xs:string">
                <xs:annotation>
                    <xs:documentation>The filter expression</xs:
documentation>
                </xs:annotation>
            </xs:element>
        </xs:sequence>
    </xs:complexType>
    <!-- rule type -->
    <xs:complexType name="RuleType">
        <xs:sequence>
            <xs:element name="RetainForever" type="xs:boolean">
                <xs:annotation>
                    <xs:documentation>Retain forever indicator</xs:
documentation>
                </xs:annotation>
            </xs:element>
            <xs:element name="RetainFor" type="RetainForType"
minOccurs="0">
                <xs:annotation>
                    <xs:documentation>Retain for</xs:documentation>
                </xs:annotation>
            </xs:element>
        </xs:sequence>
    </xs:complexType>
    <!-- retain for -->
    <xs:complexType name="RetainForType">
        <xs:sequence>
            <xs:element name="Period" type="RetentionPeriodType">
                <xs:annotation>
                    <xs:documentation>The retention period</xs:
documentation>
                </xs:annotation>
            </xs:element>
            <xs:element name="AfterDate" type="AfterDateType">
                <xs:annotation>
                    <xs:documentation>The after date</xs:
documentation>
                </xs:annotation>
            </xs:element>
        </xs:sequence>
    </xs:complexType>
    <!-- retention period -->
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

```
    <xs:complexType name="RetentionPeriodType">
        <xs:simpleContent>
            <xs:extension base="xs:nonNegativeInteger">
                <xs:attribute name="uom" type="PeriodUOMType">
                    <xs:annotation>
                        <xs:documentation>Retention period</xs:
documentation>
                    </xs:annotation>
                </xs:attribute>
            </xs:extension>
        </xs:simpleContent>
    </xs:complexType>
    <!-- after date -->
    <xs:complexType name="AfterDateType">
        <xs:sequence>
            <xs:element name="FieldName" type="xs:string">
                <xs:annotation>
                    <xs:documentation>Field name</xs:documentation>
                </xs:annotation>
            </xs:element>
            <xs:element name="FieldLabel" type="xs:string">
                <xs:annotation>
                    <xs:documentation>Field label</xs:documentation>
                </xs:annotation>
            </xs:element>
        </xs:sequence>
    </xs:complexType>
    <!-- predicate collection -->
    <xs:complexType name="PredicateCollType">
        <xs:sequence>
            <xs:element name="Predicate" type="PredicateType"
maxOccurs="unbounded">
                <xs:annotation>
                    <xs:documentation>The predicate</xs:
documentation>
                </xs:annotation>
            </xs:element>
        </xs:sequence>
    </xs:complexType>
    <!-- predicate -->
    <xs:complexType name="PredicateType">
        <xs:sequence>
            <xs:element name="RowNum" type="xs:positiveInteger">
                <xs:annotation>
                    <xs:documentation>Row number</xs:documentation>
                </xs:annotation>
            </xs:element>
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

```
            <xs:element name="FieldName" type="xs:string">
                <xs:annotation>
                    <xs:documentation>Field name</xs:documentation>
                </xs:annotation>
            </xs:element>
            <xs:element name="FieldLabel" type="xs:string">
                <xs:annotation>
                    <xs:documentation>Field label</xs:documentation>
                </xs:annotation>
            </xs:element>
            <xs:element name="FieldType" type="xs:string">
                <xs:annotation>
                    <xs:documentation>Field type</xs:documentation>
                </xs:annotation>
            </xs:element>
            <xs:element name="CompOper" type="xs:string">
                <xs:annotation>
                    <xs:documentation>Comparison operator</xs:
documentation>
                </xs:annotation>
            </xs:element>
            <xs:element name="FieldValue" type="xs:string">
                <xs:annotation>
                    <xs:documentation>Field value</xs:documentation>
                </xs:annotation>
            </xs:element>
            <xs:element name="BoolOper" type="xs:string">
                <xs:annotation>
                    <xs:documentation>Boolean operator</xs:
documentation>
                </xs:annotation>
            </xs:element>
        </xs:sequence>
    </xs:complexType>
    <!-- period uom -->
    <xs:simpleType name="PeriodUOMType">
        <xs:restriction base="xs:string">
            <xs:enumeration value="Days"/>
            <xs:enumeration value="Months"/>
            <xs:enumeration value="Years"/>
        </xs:restriction>
    </xs:simpleType>
</xs:schema>
```


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Translatable Customizations

To view the translatable customizations, click **Translation Workbench > Translate**. If needed, select the **Setup Component**.

You can translate the following components:

- Apex Sharing Reasons
- Button and Link Labels
- Custom App Labels
- Custom Field Help
- Custom Fields
- Custom Report Types
- Data Categories
- Data Category Groups
- Divisions
- Layout Sections
- Lookup Filters
- Picklist Values
- Record Types
- Related List Labels
- S-Controls
- Solution Categories
- Standard Field Help
- Validation Error Messages
- Web Tabs
- Workflow Tasks

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

List of Objects supporting Document Generation

The following table contains the summary of whether Document Generation feature is supported for the specific objects or not:

Note

Kindly note that for any object to support Document Generation, there can be 2 options.

- For any object, if the value is *Yes*, system supports Document Generation for that object but certain setup needs to be done.
- The value *No* indicates that Document Generation is not supported for that object.

Feature Descirption	Agreement Object	Quote /Proposal Object	Standard Salesforce Objects	Other Custom Objects
Merge service endpoint	Yes	Yes	Yes	Yes
Controlling Merge Call Time out (default 60sec)	Yes	Yes	Yes	Yes
Publish Merge Events	Yes	No	No	No
Generate Document from Record	Yes	Yes	Yes	Yes
PDF security on generated document	Yes	Yes	Yes	Yes
Protection on generated Word document	Yes	No	No	No
Versioning. Word document protection	Yes	Yes	Yes	**SR**
Async mode of Merge	Yes	Yes		
	Yes	Yes	Yes	Yes

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Feature Descirption	Agreement Object	Quote /Proposal Object	Standard Salesforce Objects	Other Custom Objects
Template setup for default system filtering on generate and other Template functionality from X-Author				
Auto Enabling Checking In for Final version in PDF format	Yes	Yes	Yes	Yes
Auto Enable Reconciliation	Yes	Yes	Yes	Yes
Header / Footer Stamp	Yes	No	No	No
Enabling Term Exceptions In Author	Yes	No	No	No
Create New TemplateCheck-in Template	Yes	Yes	Yes	Yes
Check-out Template	Yes	Yes	Yes	Yes
Clone Template	Yes	Yes	Yes	Yes
Template Playbook: default Search, Select, Insert Clause inline / as reference	Yes	Yes	Yes	Yes
Insert Merge Fields for corresponding Objects • Header • Lookups • Related - In Section • Related - In Table	Yes	Yes	Yes	Yes
Insert Smart Merge Fields for corresponding Objects	Yes	Yes	Yes	Yes

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Feature Descirption	Agreement Object	Quote /Proposal Object	Standard Salesforce Objects	Other Custom Objects
• Header • Lookups • Related - In Section • Related - In Table				
Document Assembly Rules	Yes	No	No	No
Filtered Rows	Yes	Yes	Yes	Yes
Conditional content	Yes	Yes	Yes	Yes
Auto-publish	Yes	Yes	Yes	Yes
Output Format (Doc, Docx, RTF, PDF) and add Watermark Support for generated document	Yes	Yes	Yes	Yes
Support Controlled Preferences for Output Format and Watermark *pairs: Record Type / User Profile	Yes	Yes	No	No
Check-in third party document. Import Offline – Create record and attach	Yes	No	No	No
Check-In third party document. Import Offline – Attach to existing record	Yes	No	No	No
Check-In document, attachment of the record. Versioning of the Documents, such as • With Redlines	Yes	Yes	Yes	Yes

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Feature Descirption	Agreement Object	Quote /Proposal Object	Standard Salesforce Objects	Other Custom Objects
• Without Redlines • Final to be Signed • Watermark • Naming Override				
Check-out document, attachment of the record	Yes	No	No	No
Compare documents, attachments of the record	Yes	Yes	Yes	Yes
Locking: Refresh Lock	Yes	No	No	No
Create Section: Save selection as agreement clause	Yes	No	No	No
Playbook: Insert Clause into the Document on the records	Yes	No	No	No
Reconcile documents • Highlight Smart Fields • Reconciliation of the values	Yes	Yes	Yes	Yes
Tag Smart Fields	Yes	Yes	Yes	Yes
Update Document from Salesforce	Yes	No	No	No
Multicurrency support by the products of the system: 1. Merge-Comply-Proposals	1. Yes 2. Yes	1. No 2. Yes	1. No 2. Yes	1. No 2. Yes

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Feature Descirption	Agreement Object	Quote /Proposal Object	Standard Salesforce Objects	Other Custom Objects
2. X-Author				
Chatter with Record	Yes	Yes	Yes	Yes

Document Search

Use the Find Document button on the documents home page to find specific documents.

The Find Document action searches the following fields:

- Document Name
- Keywords
- Description

To search a document

1. Click the **Documents** tab.
2. Enter your search terms and click **Find Document**.

The search returns a list of documents that match all your search terms. The search results are listed in order of the closest matches. The Keywords and Document Name fields are used to determine the closest matches. The fields you see are predefined and cannot be changed.

Temporary Email Template Cleanup

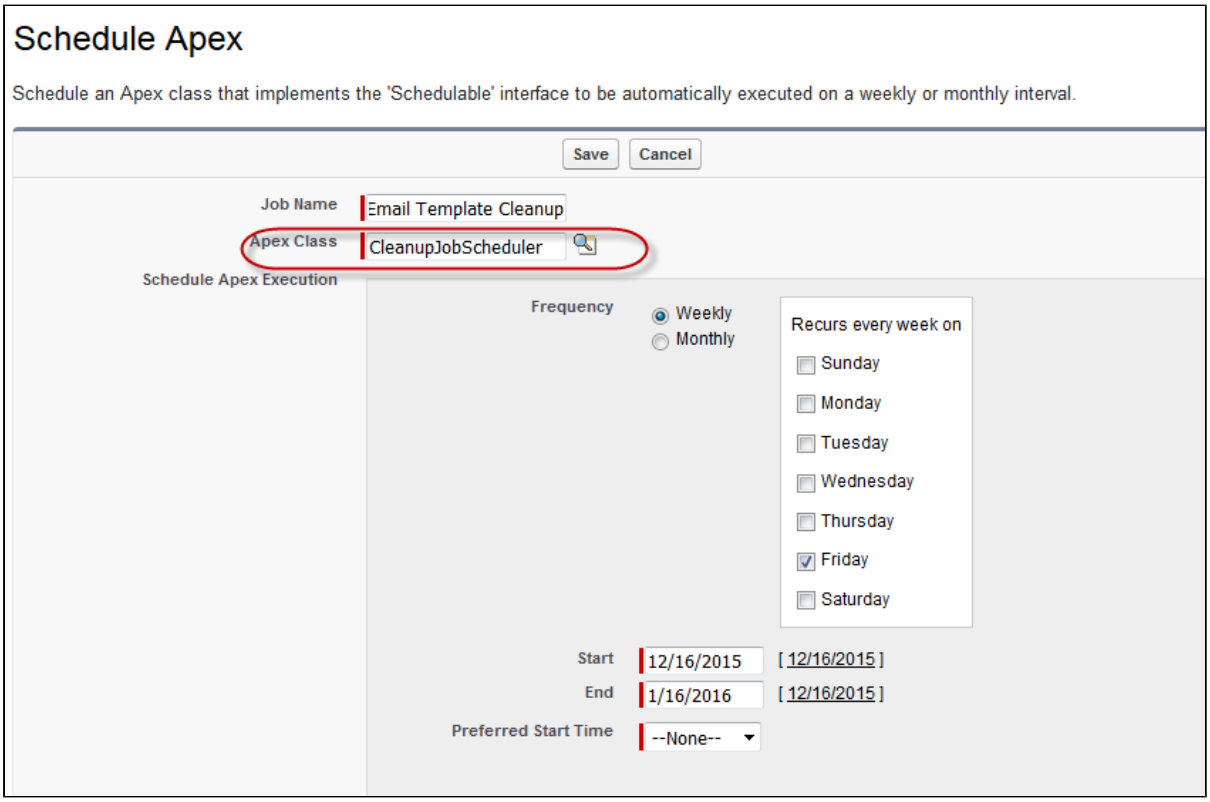
You may find in some cases that contents in your **Apttus Temporary Email Templates** folder contain sensitive contractual data as attachments to offline agreements. To remedy this, you can use the following APEX job and associated Comply System Property to clean up temporary email templates that are older than a configured period. When this job runs it checks for all temporary email templates older than the period configured by the new Comply System Property and deletes them.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Step 1: Configure APEX Scheduler Job

Schedule a new job using the Apex Scheduler using the standard Salesforce process.

1. From Setup, enter "Apex Classes" into the Quick Find box, select Apex classes, and click the **Schedule Apex** button.
2. Enter a **Job Name** and click the lookup button to choose **CleanupJobScheduler** as the Apex Class.



3. Choose the job **Frequency** and other execution options for the class.
4. Click **Save**.

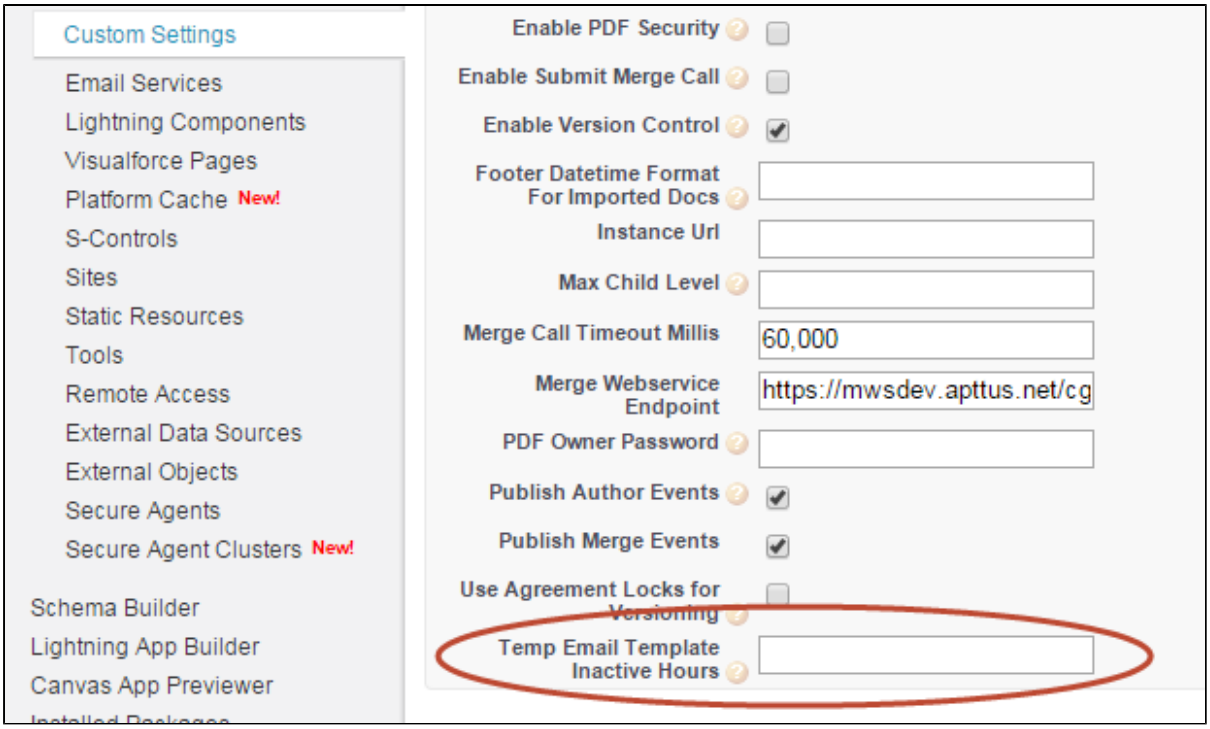
Step 2: Configure Comply System Property

Use the **Temp Email Template Inactive Hours** Comply System Property to set the orphan period of temporary email templates to use in conjunction with the **CleanupJobScheduler** APEX class. The default value of this property is set to 4 hours.

1. Navigate to Setup > Develop > Custom Settings.
2. Click **Manage** next to Comply System Properties.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

3. Click **Edit**.
4. Specify a value for the property **Temp Email Template Inactive Hours**. This sets the number of hours after which a temporary email template is considered inactive. When the **CleanupJobScheduler** job runs (Step 1), any temporary email templates which are older will be deleted.



5. Click **Save**.

> Note: You cannot set this property value to zero (0) as it will interfere with the execution of your email templates. Please set the property to 1 or higher if you intend to configure temporary email cleanup.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Using Contract Management with Salesforce Lightning

You can use Apttus Contract Management with the Salesforce Lightning Experience and still accomplish the same tasks with the same features. The only thing that changes is how you access the features, and the process for creating an agreement is slightly different. Follow the instructions on this page to get started when you have the Lightning Experience enabled. Beyond a few different steps, the flows for most CLM tasks remain the same.

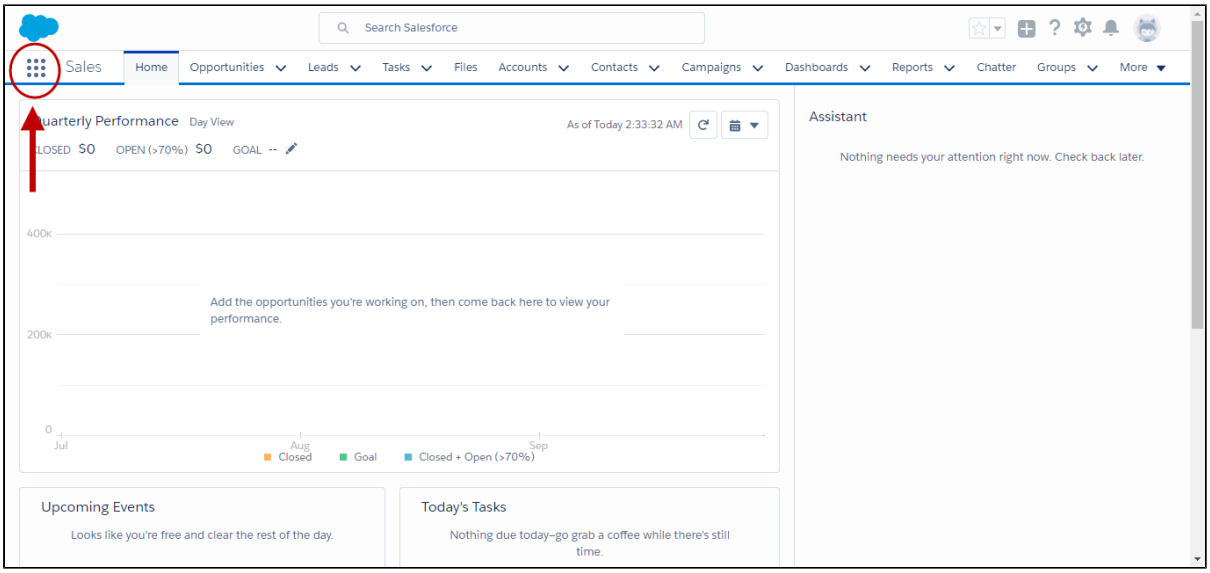
Enabling the Lightning Experience in Salesforce

Enabling the Lightning Experience in your Salesforce org is a very simple process, but requires some consideration of your company's needs before you make the switch. Please refer to Salesforce's documentation on enabling the Lightning Experience. The topics on this page assume that you have already enabled Lightning in your org.

To access Contract Management features in Lightning

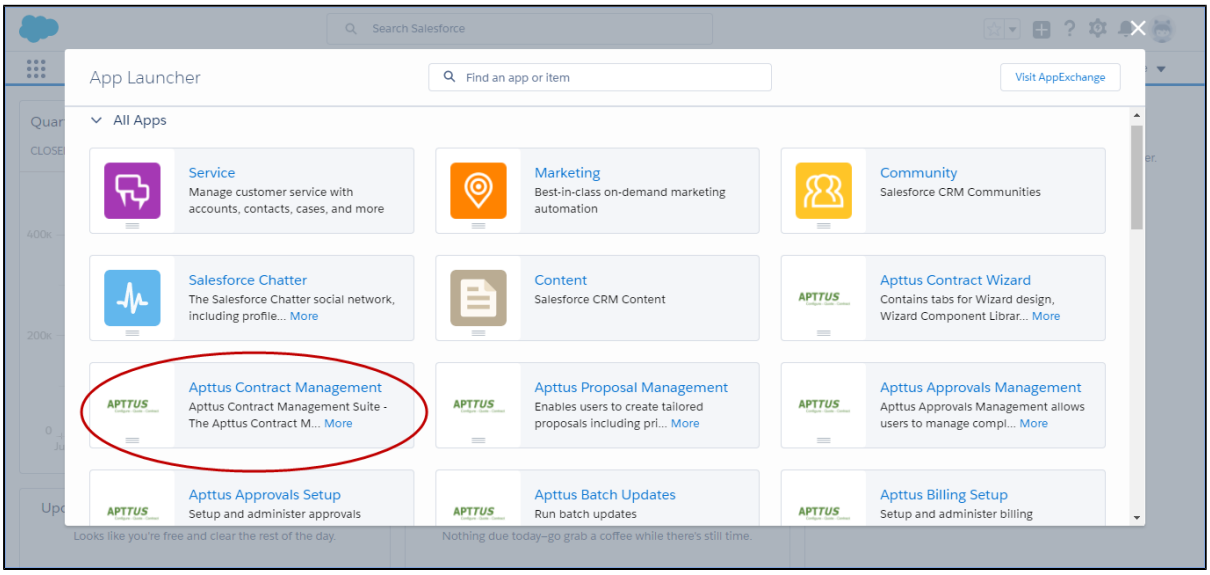
One of the main differences you will find when you switch to Lightning is how your apps are accessed, like Apttus Contract Management. In Lightning, there is no Force.com app menu, and you cannot customize the default Tabs to include Custom Objects or Visualforce tabs. Instead, you access all Contract Management features using the App Launcher.

1. Log in to Salesforce with Lightning enabled.
2. Click the **App Launcher** button in the upper left-hand corner of the Home screen.

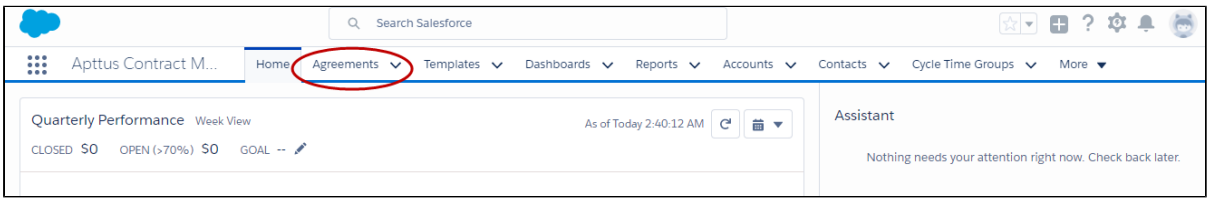


Copyright ©2011-2017 Apttus Corporation. All rights reserved.

3. From the App Launcher, click **Apttus Contract Management**.



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

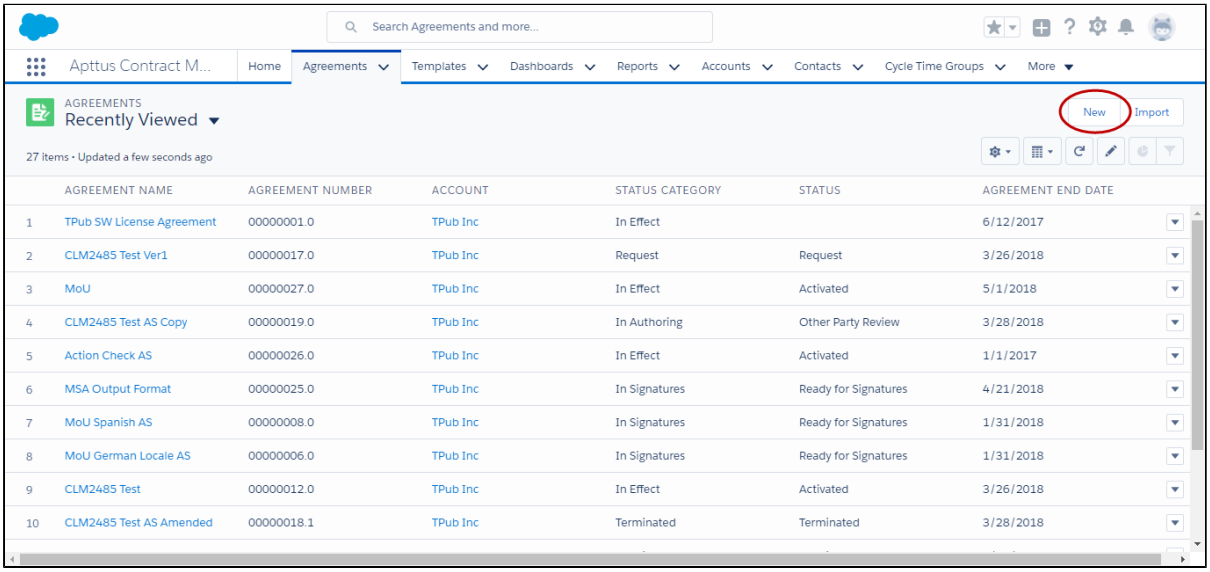


To create an Agreement

The process for creating new agreements is slightly different when you have Lightning enabled. There are two ways to create a new agreement.

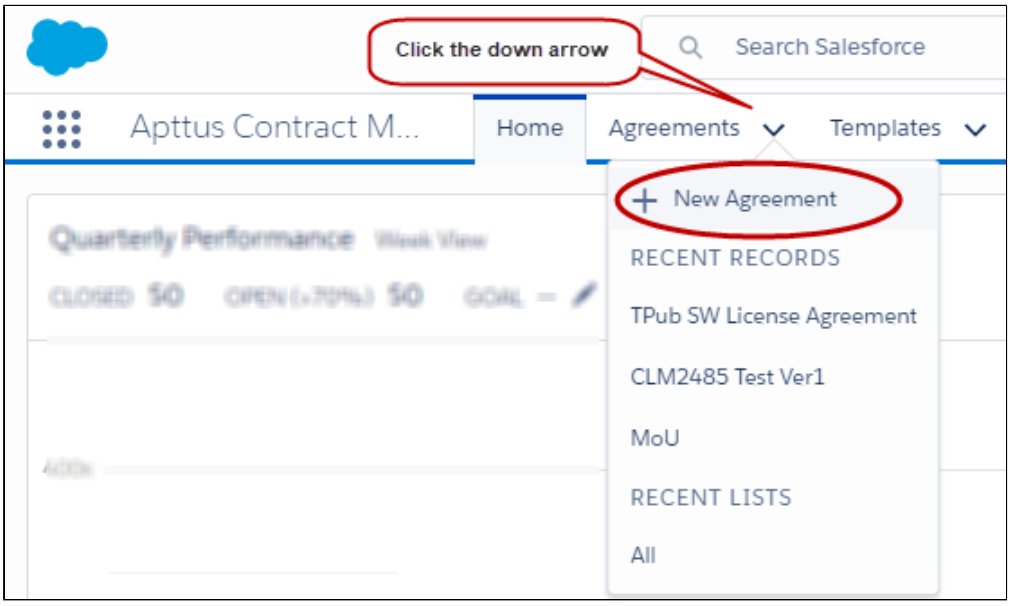
1. Go to **App Launcher > Apttus Contract Management**.
2. Click **Agreements**.
3. From the Agreements List, click **New**.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



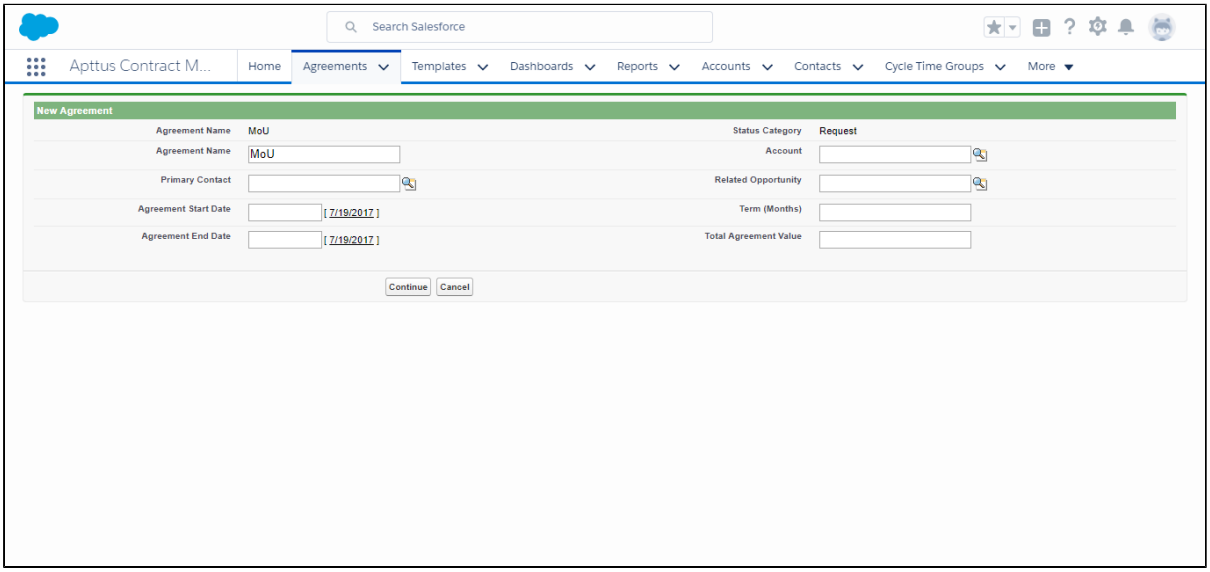
OR

Click the down arrow next to Agreements tab and click **+New Agreement** from the drop-down menu.



4. Select an Agreement Record Type and click **Continue**.
5. On the New Agreement page, enter values for required fields and any optional fields that are available and click **Continue**.

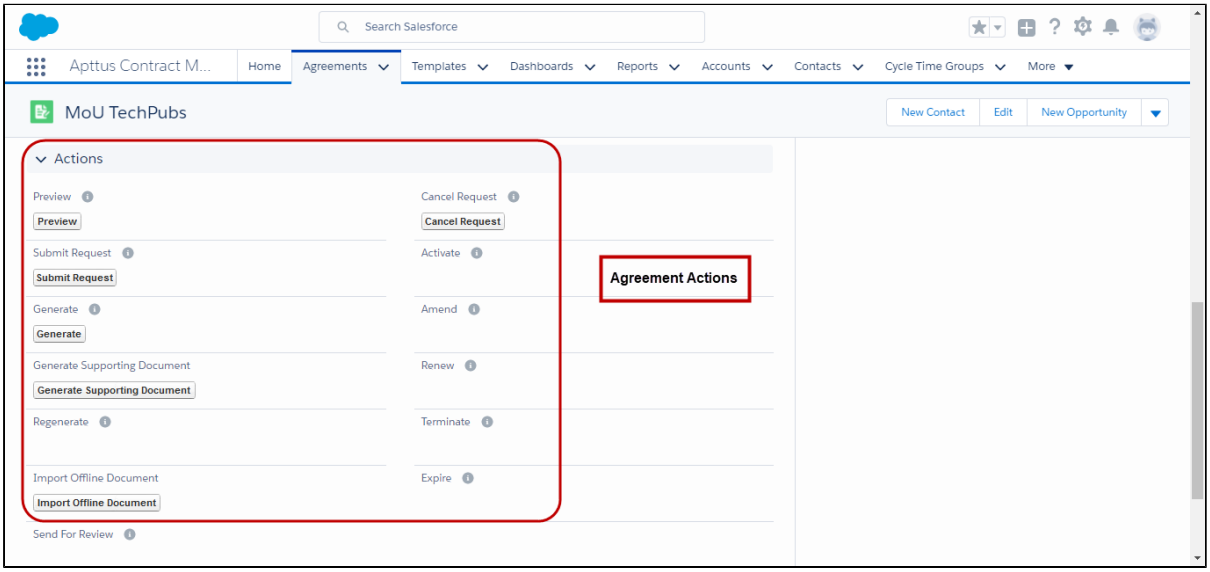
Copyright ©2011-2017 Apttus Corporation. All rights reserved.



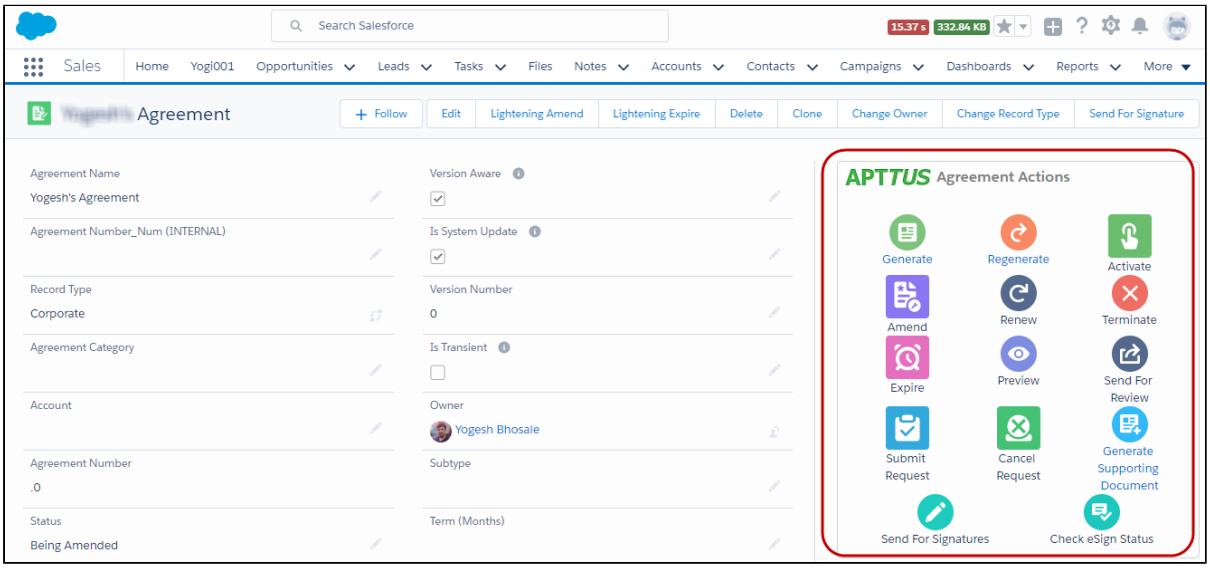
> ⚠ It is recommended when using the Lightning Experience to configure the above page to contain as many fields as you want specified prior moving to the next step. You can configure which Agreement fields are available on this page by editing the **Agreement New Field Set**. For more information, refer to the *Contract Management Administrator Guide* section "To draft an agreement."

6. Click **Edit** to make more changes to your agreement record, or the pencil icon to make changes to any editable field. Note that all the field values you had entered on the previous page, have already been saved to the record.
7. Scroll down the page to find Agreement Actions such as **Preview, Generate,** and **Import Offline Agreement**. Any Visualforce pages you have added to the page layout, such as **Document Finder** or **Master Agreement Clauses** are also displayed on this page and should work normally.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



The Agreement Actions can also be accessed from the action panel in the right hand side navigation. The Actions panel shows all the Agreement Actions.

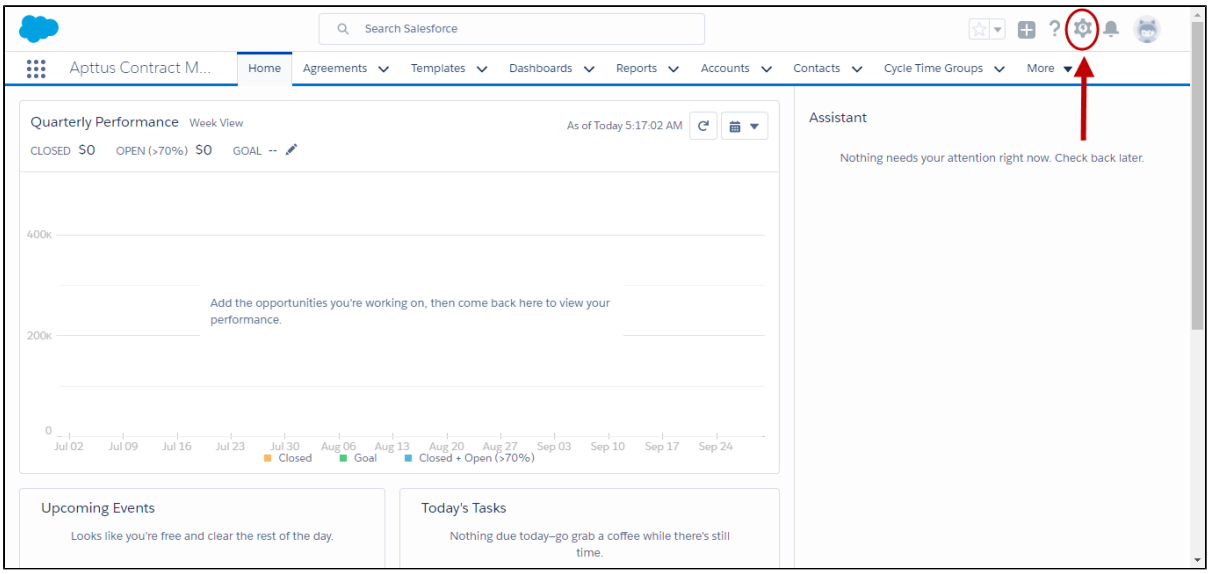


If the Action Panel is enabled and you access Action buttons from the **Agreement Actions** panel, the subsequent pages corresponding to the selected action are the new Lightning Experience pages based on Lightning Design. However, accessing the same actions from the **Actions** related list takes you to the pages with Salesforce Classic design.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

To manage Comply System Properties

1. From the Lightning Home page, click the **Setup** icon in the upper right-hand corner and select **Setup Home**.



2. From the Setup navigation menu, go to **Custom Code > Custom Settings**.
3. Click **Manage** next to Comply System Properties.

To Manage CLM Admin Properties

1. Go to the **App Launcher**.
2. Click **Apttus Contract Management**.
3. Click **Admin**. Create new admin properties or edit existing properties as needed.

Enabling and Customizing Action Panel

The Action Panel is a collection of agreement action buttons which could be enabled for the Agreement Record page in the Lightning Experience mode in Salesforce. Each button in the action panel can be customized to meet your design requirements. The Action Panel is created as a Visualforce Page component and you can include it in your page layout from the Lightning App Builder.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

For enabling the Action Panel in your org, we assume that you have already enabled My Domain in your organization. This step is mandatory for using Lightning Experience in your Salesforce org. To know how to enable My Domain in your org, refer to Salesforce Help page Enable My Domain.

Adding Action Panel to Lightning Record Page

You can add the Action Panel in your Agreement Record page in two ways:

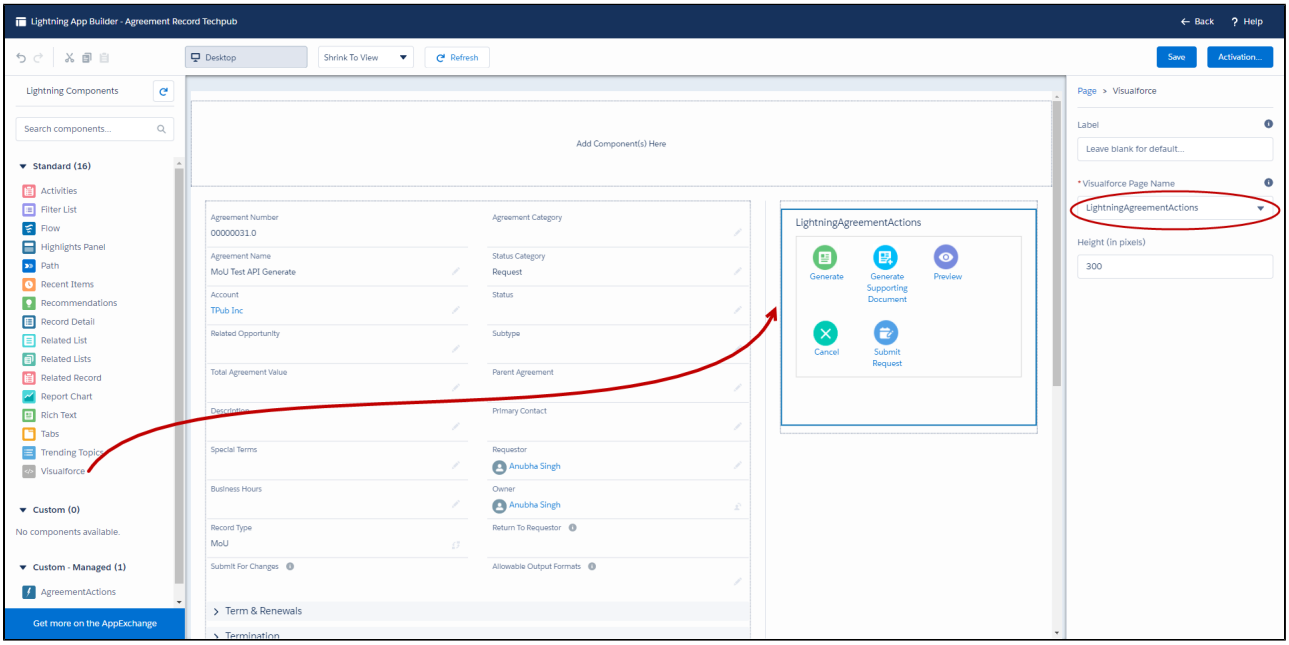
1. from the Salesforce Classic Agreement Record page, and
2. from the Lightning App Builder

Adding Action Panel Using Lightning App Builder

To use the Lightning App Builder for configuring Action Panel in your page layout, you have to create a Lightning Record Page. To create this;

1. Go to **Setup**> **Objects and Fields**> **Object Manager.**
2. In the **Object Manager** page click **Agreement** object.
3. In the **Details** page, click **Lightning Record Pages** from the left hand navigation.
4. In the **Lightning Record Pages**, click **New** and select **Record Page**.
5. Complete the steps in the new page creation wizard.
6. In the Lightning App Builder, from the left hand navigation, drag and drop **Visualforce** component on your layout. You can reorder the components in the page layout, to your liking.
7. From the right hand navigation pane**,** go to **Visualforce Page Name** field and select **LightningAgreementActions** from the picklist. You will now see the action panel in your layout
8. Click **Save** and then **Activate** your page, to make the record page available.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.



For more details on how to customize a Lightning Record Page, refer to Salesforce Help section Configure Lightning Experience Record Pages.

Adding Action Panel from Salesforce Classic

The Action Panel can also be added to the Agreement Record page by editing the page layout in Classic Salesforce. To do this:

1. Go to **Agreements** and select an agreement record.
2. In the Agreement Record Details page click **Edit Layout**.
3. From the Layout Designer menu, choose Visualforce Pages.
4. Drag and drop the LightningAgreementActions visualforce component on to the Agreement Layout.
5. Click **Save**.

If you now switch to the Lightning Experience, the Action Panel would be part of the Agreement Record layout.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

It is recommended that you enable the Action Panel from the Lightning App Builder for better user experience, as the Action Panel is not designed according to the Salesforce Classic design. Using the Action Panel with Salesforce Classic mode may lead to inconsistent user experience.

Customizing Action Buttons

All the action buttons which are part of the Action Panel can be customized and configured to suit your needs. For using your own customized buttons in the action panel, you will have to create custom formula fields with required logic and add them to the agreement layout. To create a custom formula field for an action, follow the naming convention outlined as under:

1. Go to **Setup> Object Manager> Agreement** object.
2. Click **Fields and Relationships** from the left navigation panel.
3. Click **New** to create a new custom field.
4. Select **Formula** data type and click **Next**.
5. For **Field Label**, enter *<action_name>_Custom*. For example, to create a Generate button, enter Generate_Custom
6. The value in field label is automatically copied as **Field Name** when you click anywhere outside the field.
7. Select the **Formula Return Type** as Text and click Next.
8. Enter the formula for your action button.

   ⚠ To display an action button in the Action Panel, make sure that the formula entered for the custom formula field returns a non-null value. If the formula returns Null value, the action button or field would be hidden in the Action Panel.

9. Apply the field's access setting and page layout and click **Save**. Your action button is created.

To learn how to create custom fields, refer to Salesforce Help Custom Fields | Salesforce.

The following table gives list of actions which are supported in and can be customized for, the Action Panel in the Lightning Mode.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Action Name	Field Name
Generate	Generate_Custom
Regenerate	Regenerate_Custom
Preview	Preview_Custom
Generate Supporting Documents	Generate_SupportingDocument_Custom
Amend	Amend_Custom
Terminate	Terminate_Custom
Expire	Expire_Custom
Renew	Renew_Custom
Activate	Activate_Custom
Submit Request	SubmitRequest_Custom
Cancel Request	CancelRequest_Custom
Send For Review	SendForReview_Custom
Send For Signature	SendForSignatures_Custom

Thus, you can create customized links or buttons and then add them to the action panel.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

Apttus Copyright Disclaimer

Copyright © 2017 Apttus Corporation (“Apttus”) and/or its affiliates. All rights reserved.

No part of this document, or any information linked to or referenced herein, may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written consent of Apttus. All information contained herein is subject to change without notice and is not warranted to be error free.

This document may describe certain features and functionality of software that Apttus makes available for use under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not, in any form, or by any means, use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part of the software. Reverse engineering, disassembly, decompilation of, or the creation of derivative work(s) from, the software is strictly prohibited. Additionally, this document may contain descriptions of software modules that are optional and for which you may not have purchased a license. As a result, your specific software solution and/or implementation may differ from those described in this document.

U.S. GOVERNMENT END USERS: Apttus software, including any operating system(s), integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are “commercial computer software” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

Neither the software nor the documentation were developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Apttus and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Apttus and X-Author are registered trademarks of Apttus and/or its affiliates.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.

The documentation and/or software may provide links to Web sites and access to content, products, and services from third parties. Apttus is not responsible for the availability of, or any content provided by third parties. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Apttus is not responsible for: (a) the 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://apttusportal.force.com/community.

Copyright ©2011-2017 Apttus Corporation. All rights reserved.